**Shadowmatch Implementation: Project Plan**

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| **Project Outcome:** Successful implementation of Shadowmatch | |
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| **Phase 1** | **Person responsible** |
| 1. Get the client to sign the contract | Consultant |
| 1. Create the company on Shadowmatch. In order to keep the contracting process clean, please make sure the client approves the account and not the consultant. | Consultant |
| 1. Identify individuals who should be doing the Shadowmatch training 2. Send the names, surnames and e-mail addresses of these individuals to charmaine@shadowmatch.co.za. 3. Upon completion of the training, schedule a two-hour debrief session to ensure that the trained individuals are comfortable to start using the system. During this session it is important to work through all the basic Shadowmatch applications and test the understanding of everyone that will be given access to the system. 4. Create usernames and passwords for all individuals who have successfully completed the training. | Consultant |
| 1. Identify and appoint a Shadowmatch custodian: This should be someone internally in the business that will take ownership of the roll-out and management of Shadowmatch. Knowledge and skills need to be transferred to this individual. | Consultant and management |
| 1. Decide on the necessary benchmarks that need to be created on the system. The benchmarks are for all areas where top performers will be identified. This could either be for different roles, functions, divisions or departments in the company. Create the departments. | Consultant, Shadowmatch custodian & Management |
| 1. Obtain an organogram with names, surnames and e-mail addresses of all employees for each of the areas within the business. This assists in setting up the correct departments / benchmarks on the system. It also assists in knowing which benchmark/s to discuss with which manager and ensures that Shadowmatch codes are allocated correctly to all employees. | Shadowmatch custodian & Management |
| 1. Identify the top performers in each of the areas where a department / benchmark has been created. (A minimum of 3 top performers per area). Remember to keep the criteria for top performers in mind when identifying them. | Consultant, Shadowmatch custodian & Management |
| 1. Draft a communication that will be sent to all people who will be receiving a Shadowmatch code. This is a welcome message with an explanation of what Shadowmatch is and the process to be followed as well as what the individual can expect from the process. | Shadowmatch custodian and consultant |
| 1. Send the communication to all people concerned. | Shadowmatch custodian |
| 1. Start by sending the benchmark codes to the top performers in each department before sending codes to all. | Shadowmatch custodian |
| 1. Monitor the completion rate. Once all the top performers have completed the worksheet, the following needs to happen: 2. Check each benchmark for validity and reliability. Ensure that the status of each benchmark is either orange or green. Ensure that the Shadowmatch custodian is part of this benchmark clean-up process. 3. Schedule a feedback session with each of the respective managers. The purpose of this feedback session is to give feedback to the managers on the benchmark. | Consultant, Shadowmatch custodian & Management |
| 1. Following the above process, send “applicant / employee” codes to all other employees in each department. | Shadowmatch custodian |
| 1. Set a deadline to all for completion of the Shadowmatch worksheet. | Shadowmatch custodian |
| 1. Monitor the completion rate and continuously follow-up. | Consultant |
| 1. At this point the Shadowmatch custodian should be comfortable enough to follow-up and manage the basic Shadowmatch process. | Shadowmatch custodian |
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| **Phase 2** | **Person responsible** |
| Once all employees are on the Shadowmatch system, the following can be done with the data. |  |
| **Personal Development Programs** |  |
| 1. Each employee needs to be matched to the benchmark of top performers in his/ her department and a Personal Development Program needs to be identified. | Consultant, Shadowmatch custodian & Management |
| 1. Company needs to identify mentors that will guide employees in the Personal Development process. Mentors don’t need to be strong in the respective habits, they need to be good mentors. | Consultant, Shadowmatch custodian & Management |
| 1. Schedule a briefing session with the identified mentors in order to inform them of the Personal Development Programs and process to be followed. Use the Mentor’s guide attached to the mentor’s copy of the PDP to inform the mentors of their role and what is expected of them. | Consultant, Shadowmatch custodian & Management |
| 1. Schedule a one-on-one session with each employee/ group session with all employees to discuss the Personal Development Program process. During these sessions the list of mentors need to be made available to everyone. Each individual should be allowed to choose a mentor that he/she is comfortable with, it should not be a directive process. | Consultant, Shadowmatch custodian & Management |
| 1. Allow each employee to choose a Personal Development Program. This could be the one that was identified in Step 1 above, however buy-in from the individual is critical. If the individual chooses to start with another program, allow him/ her to do so and negotiate that the next program will be the one as indicated by the system in Step 1. | Consultant, Shadowmatch custodian & Management |
| 1. Continuously monitor the progress of the Personal Development Programs. Mentors should be required to give a monthly progress report. It is important to keep close tabs on the PDP process in order to ensure completion of the programs. It can easily happen that programs are requested however not followed through to completion. | Shadowmatch custodian & Management |
| 1. Upon completion of the Personal Development Programs, individuals should receive their certificate of completion. | Shadowmatch custodian |
| **Different system applications** | |
| **Recruitment:** *The system is successfully used to precision recruit candidates. A benchmark needs to be created of the top performers doing the same job in the same environment as where the vacancy is. Potential candidates needs to complete Shadowmatch and the system will automatically match potential candidates to the benchmark and present the user with a recommendation.* |  |
| 1. Introduce the use of Shadowmatch for recruitment purposes. Ensure that the necessary benchmarks are created. | Consultant |
| 1. Demonstrate the creation of a recruitment specification. This can be requested once the benchmark has been created. | Consultant |
| 1. Educate the business on how Shadowmatch should be used to create a shortlist. (All candidates to complete Shadowmatch and the best matches to be invited for interviews) | Consultant |
| 1. Demonstrate the use of the interview pack and the capturing of the interview scores. | Consultant |
| **Multimatch for Career planning, Redeployment and Succession planning:** *The system has the capability to match an individual against multiple benchmarks as well as use an existing benchmark to search for individuals who matches this benchmark.* |  |
| 1. Train the business on how the Shadowmatch multimatch option can be used to assist an individual in his/ her career planning within the organisation. An individual could design his / her career path within the organisation by looking at which benchmarks he / she matches. The individual could start with Personal Development Programs in order to learn the necessary habits for success in these new jobs / roles. | Consultant |
| 1. Demonstrate that by Multimatching an individual against all available benchmarks could also assist in redeploying an individual to where he/she is more likely to be successful. This is specifically useful for individuals that are not successful or struggling to perform in their current environment. | Consultant |
| 1. Explain the reverse multimatch option in order to assist the company in finding internal resources that are fit for a specific role. | Consultant |
| 1. The reverse multimatch (matching people from different departments to a benchmark) is also perfect for succession planning and leadership identification. Educate the business on this application. | Consultant |
| **Leadership identification:** *The system enables the user to find people with the same behavioural patterns as the already successful leaders in the business.* |  |
| 1. Train the business on how a leadership benchmark could assist in finding potential leaders in the business. A benchmark of the successful leaders in the business can be created. The reverse multimatch could then find individuals with similar habits to that of the successful leaders. This will assist the business in spending money on leadership development on individuals with a propensity to become successful future leaders. | Consultant |
| **Conflict facilitation and Relationships:** *Shadowmatch enables the user to match two individuals. This functionality enables the user to request a relationship report that could assist in guiding a working relationship as well as facilitate possible conflict in the workplace.* |  |
| 1. Educate the business on how the relationship reports can facilitate the work relationship between two individuals. This report will highlight the similarities between two individuals, their differences as well as their challenges and will give short guidance on what to address in order to work on the relationship. | Consultant |
| 1. Also explain how these relationship reports could assist in facilitating conflict between two individuals. The match between two individuals will highlight their differences in behaviour patterns and would thus give the user information regarding possible areas of conflict. | Consultant |
| **Team Analysis:** *The system allows the user to create a team. This team analysis functionality shows the profile of the team as well as how each individual compares to the team. It also identifies the different sub-groups within a team. This is successfully used to empower a manager / team leader with knowledge of his / her team as well as inform the entire team about the behaviour patterns of the team.* |  |
| 1. Once all the employees have completed the Shadowmatch worksheet and their results are on the system, the company can use this data to create teams and do team analysis. | Consultant |
| 1. Determine which teams need a team intervention / team building. This could typically be teams that are not performing optimally, new teams that need to work together, project teams, teams experiencing conflict, teams with a new leader / manager or just teams that work together on a daily basis. | Consultant and Shadowmatch custodian |
| 1. Create the team on Shadowmatch and schedule a team feedback session (the session could either be with the team manager or with the entire team). | Consultant and Shadowmatch custodian |
| 1. Continue to identify a need for team sessions. Create the teams and facilitate the team feedback sessions. | Consultant and Shadowmatch custodian |
| **Talent Management:** *Shadowmatch enables an employer to create a benchmark of the most talented individuals in the business. The company database of employees can now be searched for other talented individuals that could be developed for deployment into key future positions in a business.* |  |
| 1. Assist the business in identifying key talented individuals. | Consultant, Shadowmatch custodian & Management |
| 1. Create a benchmark of these talented individuals. This could be specialists in various jobs – they don’t all need to be doing the same job in the same environment. The system will guide the user in who to remove in order to ensure a valid and reliable benchmark. | Consultant and Shadowmatch custodian |
| 1. Use the reverse multimatch functionality on Shadowmatch to find individuals with similar habits to the talented individuals in the benchmark. These individuals could be in any rank in the business. | Consultant and Shadowmatch custodian |
| 1. These identified individuals could now be specially trained and upskilled in specific areas of speciality. | Management |
| **Coaching:** *The Shadowmatch full integrated feedback report provides insight into the behaviour patterns of an individual and empowers a manager / mentor / business coach to deliver accurate and meaningful coaching.* |  |
| **Retention:** *The Shadowmatch system enables a company to better retain their people.* |  |
| 1. Create benchmarks for all jobs / roles within the company. | Consultant, Shadowmatch custodian & Management |
| 1. Use the system to precision recruit for all vacancies. | Shadowmatch custodian & Management |
| 1. Match each employee against the benchmark of top performers in his / her department / job / role. Find the suggested Personal Development Program for each employee. Embark on a process of a Personal Development Program for each employee (refer to the Personal Development Program section above). Ensure that this process is properly managed. | Shadowmatch custodian & Management |
| 1. Multimatch all non-performing employees against all benchmarks and where possible redeploy people to areas where they have a better match. This will ensure better performance and retention of staff. |  |

**Important information and guidelines:**

1. During the Shadowmatch implementation process, the consultant needs to stay close to the client. It is a hand-holding process. During the first three months the consultant would need to visit the client on a weekly basis. Schedule proper weekly project meetings.
2. It is the consultant’s responsibility to ensure that he/she transfers skill and knowledge to an internal Shadowmatch resource. The aim is to get the internal resource to take full ownership of the roll-out and management of Shadowmatch in the company.
3. There is a lot of consultation possibilities where the Shadowmatch consultant could earn extra income. These are for example:
   1. Charging for the implementation process.
   2. Assisting with using Shadowmatch for recruitment. Provide feedback and advice on best candidates for the job.
   3. Facilitate conflict situations.
   4. Facilitate team feedback sessions.
   5. Act as mentor / group mentor for the Personal Development Programs.
   6. Assist in setting up leadership benchmarks and identifying leaders.
   7. Assist in multimatching for succession planning and redeployment purposes.
   8. Use Shadowmatch results wherever there is a problem with a specific employee.
4. The aim is to make Shadowmatch part of the day-to-day operations in the company.

