
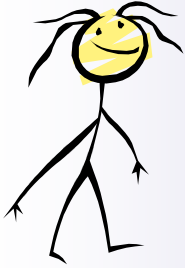


Performance Technology: Going Beyond Documentation & Training



Jane L. Smith, CPT

Me




- Certified Performance Technologist
- Several awards: STC and Brandon Hall
- Instructional design – over 19 years
- Worked with:
 - Doc, ILT
 - Audio
 - CBT, IMT, WBT, e-Learning
- Facilitator of instructional design and e-Learning courses
- Over 25 years in teaching

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Agenda

- Introduction to PA
- PA Process
- PA Strategies
- PA Resources
- Case Study



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What Are the Responses?

You've been asked to develop training for training facilitators whose ratings on student evaluations are low. The Training Director feels that these facilitators lack the facilitation skills necessary to do the job.

- What is the typical response?
- What is the PT response?
- What are some other possible solutions?

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What Are the Responses?

The auto mechanic industry indicates that a mechanic should be able to change a tire in 15 minutes, but the mechanics at the local Tires R Us store change them in 25 minutes. The Manager of the store wants to train his mechanics in order to speed up their time.

- What is the typical response?
- What is the PT response?
- What are some other possible solutions?

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What Are the Responses?

Company F is installing a new software system in four months. The technical department has contacted the training department to develop training for all employees.

- What is the typical response?
- What is the PT response?
- What are some other possible solutions?

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Performance Technology (PT)

- A way of looking at performance issues
- A new response to training and documentation requests



**Certified
Performance
Technologist**

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Performance Analysis

- Determines most effective solution to performance issue
 - Training alone
 - Training combined with other solutions
 - Other solutions without training
- Solution is based on analysis not on what is always done
- Considers all options
- Looks from several perspectives
- Analyzes drivers and barriers
- Ensures solutions result in measurable performance improvement

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Training Needs Assessment

- Performed after the Performance Analysis
- Identifies gaps in skills and knowledge
- Identifies skills to train
- Ensures training results in measurable performance improvement

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Conducting the PA

- The PA Process
- Strategies to use
- Resources to use

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The PA Process

Triggering Event

- Identify the triggering event

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The PA Process

Triggering Event

Define Organization Goal & Measurements

- Identify the triggering event
- Identify the organizational goals and their actual and optimal measurements

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The PA Process



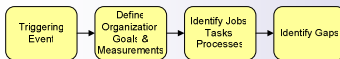
- Identify the triggering event
- Identify the organizational goals and their actual and optimal measurements
- Identify the jobs, tasks, and processes associated with the issue along with their actual and optimal measurements

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The PA Process



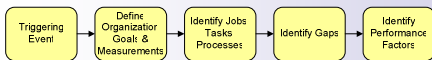
- Identify the triggering event
- Identify the organizational goals and their actual and optimal measurements
- Identify the jobs, tasks, and processes associated with the issue along with their actual and optimal measurements
- Identify gaps

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The PA Process



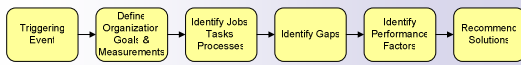
- Identify the triggering event
- Identify the organizational goals and their actual and optimal measurements
- Identify the jobs, tasks, and processes associated with the issue along with their actual and optimal measurements
- Identify gaps
- Identify performance factors impacting the situation

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The PA Process



- Identify the triggering event
- Identify the organizational goals and their actual and optimal measurements
- Identify the jobs, tasks, and processes associated with the issue along with their actual and optimal measurements
- Identify gaps
- Identify performance factors impacting the situation
- Recommend solutions that are in alignment with company goals

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Strategies

- Individual interviews
- Group interviews
- Product/output observations
- Work observations
- Surveys and questionnaires
- Simulation



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Resources: People

- Directors and managers
- Supervisors
- Business SMEs
- Technical SMEs
- Star performers
- Neophytes



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Resources: Documentation

- Job descriptions
- Technical documentation
- User documentation
- Policy and procedure manuals
- Company memos
- Existing training materials for related jobs
- What other documentation resources do you use?

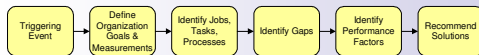


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PA Process & Case Study



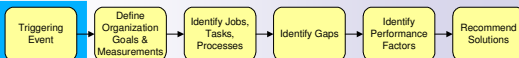
- Take each stage and look at details
- Illustrate with a case study

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Triggering Events



- Reactive
 - Sales numbers off the mark
 - Customer service complaints increase
 - Other productivity numbers are down
 - Revenue numbers decrease
- Proactive
 - New technology implementation
 - Empowerment efforts
 - Strategic planning for future growth or change
- How do you find out about the triggering event?

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The Triggering Event

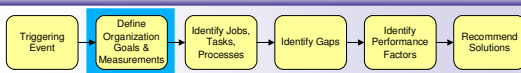
- Case example: Rosarita Café
 - Restaurant in Desertville, AZ
 - Event: report from concerned friend regarding reputation for bad service
 - Additional data: profits not as expected
 - (Note: Case study is simplified for purposes of instruction)

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Determine Organizational Goals



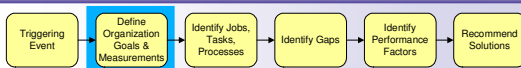
- What are the goals?
- What are the measurements of those goals?
- What resources will give you the best information?
- What strategies will be most helpful?

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Determine Organizational Goals



- Rosarita Café
 - Reduce the number of customer complaints
 - Increase revenue & profits
 - Increase dollar value of sales per month and per customer
 - Increase average monthly bottom line

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Measures of Goals

- Determine the measures associated with the goals
 - Current actuals
 - Targeted optimals
- Rosarita Café

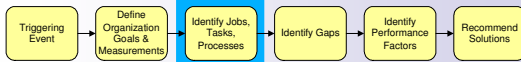
Measure	Actual	Target
Customer complaints	2 per day	0 per day
Sales amounts – per month	\$81,000	\$150,000
Sales amounts – per person	\$10.00	\$15.00

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Identify Jobs, Tasks, & Processes



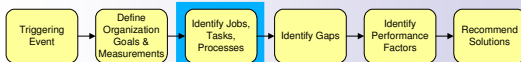
- What jobs are associated with the goals?
- What tasks are associated with those jobs?
- What processes are associated with the jobs and tasks?
- What measures do we have for the jobs, tasks, and processes?
- What resources and strategies can you use to find out?
- Rosarita Café?

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Identify Jobs, Tasks, & Processes



- Rosarita Café
 - Jobs
 - Servers
 - Server assistants
 - Tasks of servers
 - Take orders
 - Communicate orders to kitchen
 - Serve food to customer
 - Attend to customer's needs
 - Tasks of assistants
 - Serve water and chips

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Identify Measures of Jobs/Tasks

➤ What would be some measures of the servers' jobs & tasks?

- Take orders
- Communicate order to kitchen
- Serve food to customer's table
- Attend to customer's needs

Server Tasks	Measures
Take orders	<ul style="list-style-type: none"> ▪ Number of errors in order ▪ Amount of time it takes for server to get to table to take order
Communicate order to kitchen	Number of errors in the kitchen based on communication failures of servers
Serve food to customer's table	Amount of time food stays in kitchen prior to being picked up by server
Attend to customer's needs in other ways	<ul style="list-style-type: none"> ▪ Number of customer complaints ▪ Percent that the server tip is of the order total

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Data from Measurement

➤ Where to find it
➤ Rosarita Café

Job	Task	Measure	Actual	Optimal
Server	Take order	Error rate	4%	.5%
Server	Take order	Time to get to the table	4.82 min.	2 min.
Server	Serve food	Time food sits in kitchen	3 min.	1 min.

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Processes

➤ What is a process?

- Has stages
- Is how something happens or works
- Often carried out by multiple people or pieces of equipment

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Processes

- Rosarita Café
 - Serving the customer from the moment of entry into the restaurant
 - Preparing the food
 - Taking the order and serving the food
 - Others?

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Processes

- Measures of Processes
- Rosarita Café

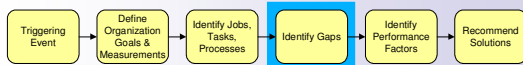
Process	Measurement	Actual	Optimal
Serving Customer	Amount of tip	11.5%	17%
Food preparation	Customer wait time	17.7 min	15 min.
Food preparation	Number of errors	5%	1%

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Identify Gaps



- Identify gaps from performance data; how the data differ from the goals – actual vs. target
- Rosarita Café
 - Where do we have gaps?

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Performance Factors

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    graph LR
      A[Triggering Event] --> B[Define Organization Goals & Measurements]
      B --> C[Identify Jobs, Tasks, Processes]
      C --> D[Identify Gaps]
      D --> E[Identify Performance Factors]
      E --> F[Recommend Solutions]
  
```

- Factors outside the jobs and individuals that affect performance
- Drivers and Barriers

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Performance Factors

- Typical factors
 - Operational goals
 - Quality of work inputs
 - Process flows optimal
 - Communication optimal for work
 - Aptitude and prerequisite skills
 - Work standards
 - Feedback
 - Incentives
 - Motivation
 - Job procedures
 - Factual information available
 - Procedural information available
 - Resources, tools, and environment support work needs
 - Knowledge and skills
- Which might be factors at Rosarita Café?

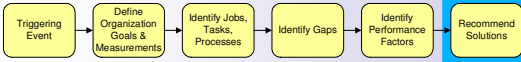
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Performance Factors

- A few factors we found at Rosarita Café
 - Host fails to inform server of new customer
 - Lack of clear role responsibility between server and assistant
 - Spanish speaking assistants with English speaking servers
 - Servers ignored by kitchen staff when turning in order
 - Inadequate kitchen staff
 - Assistants work well as team
 - Incentives for servers based on lack of customer complaints
- Which are drivers? Which are barriers?

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Solution Options & Recommendations



- Interventions must match performance factors.

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Solution Options & Recommendations

- Which of these are possible solutions or interventions for the Café?

- Operational goals
- Quality of work inputs
- Process flows optimal
- Communication optimal for work
- Aptitude and prerequisite skills
- Work standards
- Feedback
- Incentives
- Motivation
- Job procedures
- Factual information available
- Procedural information available
- Resources, tools, and environment support work needs
- Knowledge and skills

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Solution Options & Recommendations

- Interventions we came up with for Rosarita Café?

- Motivation through involving staff in solutions
- Process flows revised and optimized
- Role plays between assistants and servers to optimize communications
- Work standards consistent and communicated
- Incentives modified
- Resources, tools, and environment support provided where missing
- More consistent training for new hires

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Report of Findings

- Planning – What do you want the sponsor to do as a result of your analysis?
- Guidelines
 - Come from perspective of client's goals
 - Determine content areas and format prior to starting study
 - Report and discuss findings regularly during study – no surprises at end
 - Keep it simple
 - Use charts and graphs where possible
 - Provide recommendations with reasons
 - Involve your client in report

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Report of Findings

- Sequence guidelines
 - Purpose
 - Identification of needs
 - Analysis methods
 - Indications of analysis
 - Recommended solutions
 - Evaluation plan
 - Proposal request

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Summary

- What questions do you have?



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Thank You!!



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99.9% Accuracy Examples

- A 99.9% perfect operation could result in:
 - 1 hour of unsafe drinking water per month
 - 2 unsafe landings at O'Hare International Airport each day
 - 16,000 lost pieces of mail per hour
 - 20,000 incorrect drug prescriptions each year
 - 500 incorrect surgical operations performed each week
 - 50 newborn babies dropped at birth by doctors each day
 - 22,000 checks deducted from the wrong accounts each hour
 - 32,000 missed heartbeats per person each year

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- *Handbook of Human Performance Technology: A Comprehensive Guide for Analyzing and Solving Performance Problems in Organizations* by Harold D. Stolovitch, Erica J. Keeps

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