

Spring 2001



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lean-Instructional Systems Design via the PACTSM Processes for T&D

THE CADDI NEWSLETTER

Spring 2001

Volume IV, Issue 1

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The PACT Processes include

PACT Analysis

CAD Curriculum Architecture DesignSM

MCD Modular Curriculum DevelopmentSM

IAD Instructional Activity DevelopmentSM

PACT Project Planning & Management

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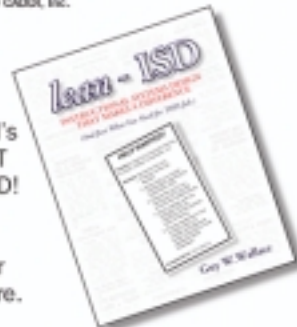


CURRICULUM ARCHITECTURE
DESIGN & DEVELOPMENT INSTITUTE, INC.

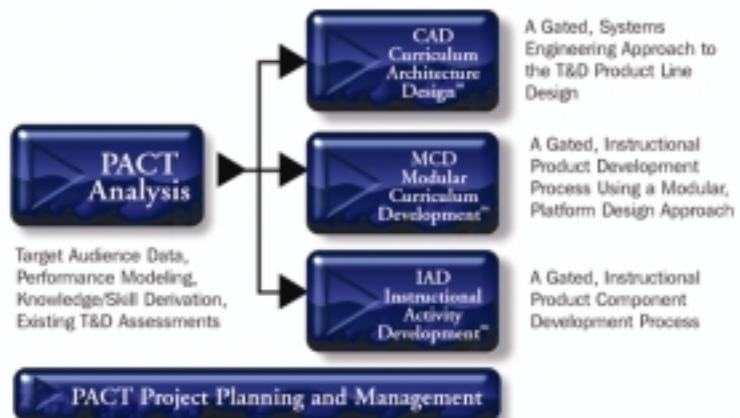
CADDI does performance-based **ISD**
via the PACTSM Processes for T&D

Performance-based
Accelerated
Customer-/Stakeholder-driven
Training & DevelopmentSM

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*Learn-ISD*SM, CADDI's book on the PACT Processes for T&D! Available for \$125.00 (+S/H) through CADDI or the ISPI Bookstore.



Target Audience Data, Performance Modeling, Knowledge/Skill Derivation, Existing T&D Assessments

Set of Tools and Templates to Facilitate Project Planning and Management by Both the ISD Supplier and ISD Customer

Since 1982, our consultants have improved performance for...

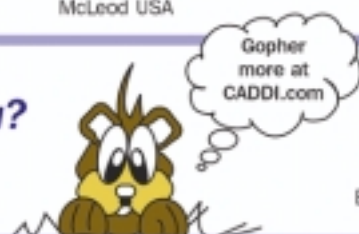
PROJECT TARGETS

Management R&D Marketing Engineering	Manufacturing Merchandising Sales Service	Finance Information Technology Human Resources	Regulatory Affairs Administrative Miscellaneous
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PROJECT CLIENTS

Abbott Laboratories ALCOA Alyeska Pipeline Company Ameritech Amoco ARCO Alaska AT&T Bandag, Inc. BankAmerica Corporation Baxter Healthcare Bellcore Tech British Petroleum Burroughs CCH, Inc. Data General Digital Equipment Corporation Discover Card Services, Inc.	Dow Chemical Eli Lilly and Company Exxon ExxonMobil Ford Design Institute General Dynamics General Motors GTE Service Corporation Hewlett Packard H&R Block Illinois Bell Imperial Bondware Imperial Oil Interactive Media Corporation Invetech KeyBank Corporation McLeod USA	Motorola NALCO NASA NOVA Northern Trust Bank Occidental Chemical Corporation Old Kent Bank Quaker Rockwell Collins Siemens Building Technologies, Inc. Spartan Stores Sphinx Pharmaceuticals Square D Company Tenneco Verizon Westinghouse Defense Electronics Whirlpool Corporation
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CADDI Happenings

by Deb Smits

This past quarter has kept our crew very busy with some exciting client work and preparing for upcoming activities.

- ▶ As of January 1, 2001, CADDI became an Advocate member of ISPI. Brian Blecke, senior consultant, is serving as our Advocate representative.
- ▶ CADDI is busy getting ready for the ISPI 2001 Conference “Raising the Bar” April 8–12, 2001 in San Francisco, California. Our consultants have eight presentations among them. See page 10 for a full listing of our involvement in this year’s conference. CADDI will have a table in this year’s Expo. Visit us at **Table #A7** in the Grand Assembly. We hope to see you there!
- ▶ We would like to welcome a number of new production staff members to the CADDI crew. Since our last issue, four new production specialists have joined our team: Danita R. Westbrooke, Cindy L. McKnight, Josephine D. Salud, and Jennifer L. Shugrue. Welcome aboard!
- ▶ Guy Wallace presented a 90-minute presentation on Curriculum Architecture Design to the Golden Circle Chapter of ISPI in Des Moines, Iowa on Thursday, February 15, 2001.
- ▶ Guy and Brian facilitated a group from ISPI’s Golden Circle chapter in Des Moines, Iowa through a one-day workshop on PACT Performance Modeling and Knowledge/Skill Analysis on Friday, February 16, 2001. Out of a high score of 10 points, an overall feedback score of 8.40 was received. See page 6 for some participant comments.
- ▶ We are awaiting the return of partner Kelly Smith. Kelly will return April 2, 2001 following a maternity leave. She and husband, Steve, had a son, Kaden Patrick on December 27, 2000. Kaden is shown at the right in “his own private resort” on vacation in Florida earlier in March.
- ▶ We have completed a project for a Call Center for a leading telecommunications company. Next issue, Pete Hybert will tell you the story!
- ▶ We are happy to announce that our book, *lean-ISD*, is now available on Amazon.com and will also be sold at the ISPI Conference Bookstore. During the conference, Guy will also participate in a book signing session. Of course, you can also buy it directly through CADDI for \$125.00 (plus shipping, handling, and Illinois tax, when applicable) by calling us at (630) 355-9800.

As the springtime weather approaches, the CADDI crew hopes that you can stay healthy by keeping away from the flu bug that has been going around. It would probably be better to catch Spring Fever! ▶▶▶▶



Kaden says, “My mommy will see you soon!”



Brian Blecke, Alaina Dyer, and Pete Hybert (pictured in back center) pose with a customer’s Analysis Team after a productive day of Performance Modeling!



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From the Bridge—For the Good Ship Enterprise

by Peter R. Hybert

Catch the Wave

Trends are always interesting. As a new technology or discipline evolves, its practitioners are on a learning curve. There is a core idea (such as “reusable learning objects”) for which the time seems right. It addresses a business need that is recognized or felt by a subset of executives and professionals but not yet widely known or articulated. The key enablers (such as the information infrastructure, work or organizational processes) are in place or very close. The situation is ripe for the development of products/processes/services to capitalize on the idea.

It is like stored potential energy waiting to be released. Opportunists are constantly scanning the horizon for situations like this and, when they see them, they rush to get there first and stake a claim on some portion of this domain with dreams of personal reward (usually financial).

There are some interesting facets to this. One is that we have developed a culture of “be an entrepreneur, do a start-up, IPO” where everyone is looking for the big hit and thinks it should happen overnight or it isn’t worth bothering. Another is that we tend to ignore the fundamentals to pursue the latest trend (and then swing back to the fundamentals as the new trend is integrated into the general discipline).¹

So, trends are very interesting because they really reveal the current state of development or evolution of a technology or discipline—they tell you

¹ As a T&D professional, I have noticed that people in general really like inventing new things and new ways of doing things, even though they create and suffer through painful learning curves to do it! Then as the new item or process evolves and grows, they trip over new problems. People complain about how things are crazy and “out of control” and “chaotic”—but you know they actually enjoy it (almost as much as they like telling you about it!).

We T&D folks spend our careers trying to minimize the impact of the learning curve (i.e., teach people stuff so they don’t learn the hard way), but there are a lot of people who, once things are defined and organized and “proceduralized,” lose interest in doing that work!

what everyone is trying to figure out. Those that know are trying to get the mindshare of those who are learning (and don’t realize that others may have already figured out solutions).

Performance Improvement

Apparently (over 20 years since Tom Gilbert’s book) performance improvement is approaching “trend status.” Rather than using training to solve every problem, more T&D organizations are talking about consulting to management about general human performance issues.

I think this is a good trend in general—too often training is developed and conducted that isn’t targeted at anything that would generate a sufficient return to pay for its cost. Or at the very least, there are other ways to spend that time/money that would generate a greater return.

But I see two potential problems with this trend. One is that organizations do have legitimate training needs, and if everyone swarms to the performance improvement side of the boat, it could capsize the training function. Internal clients requesting training for a legitimate need would have to swim upstream against an unproductive current of questions such as “what makes you think this is a training problem?” or “have you considered any other solutions?”

Another problem is that often personnel in training organizations don’t have enough business experience (e.g., the work processes, organizational politics, business finance, marketplace) to really offer valuable consultation to their clients outside the training area.

“Blended” e-Learning

If you missed the e-learning trend, you must have been *really* concentrating on the presidential campaign! E-learning is used to refer to many different things, depending on who is using the word. E-learning is usually sold as a way to reduce training time, materials costs, and distribution costs; increase training effectiveness, learner interest and attention, and consistency of content; and flex to

(Continued on page 5)

Trends are very interesting because they really reveal the current state of development or evolution of a technology or discipline.

(Continued from page 4)

all kinds of learner wants and needs. Even better, you can track all the data anyone would want and then some.

Anything with that amount of benefit is going to get a lot of management attention, and anything getting that much management attention sounds like an opportunity for consultants (internal and external). So there has been a lot of press, products, and services hitting the market about e-learning.

So much, in fact, that many people went too far. Some thought *everything* should be delivered over the Web. Unfortunately, there is no magic bullet, and the Web is no exception. People began later to realize that the Web can offer some benefits over traditional training but, an effective instructor or coach offers different benefits. Again, some were very quick to jump on this opportunity and declare that a “blended” approach is the answer.

I agree that a blended approach makes more sense. But, training designers have been using blended approaches for years! In the old days, when I was in high school, our teachers used a “blended approach” of blackboard, textbook, occasional movies, and even physical models and “realia” (i.e., projects and field trips). Instead of focusing on the delivery media, we should really be focusing on the desired performance, the enabling knowledge and skills, and the instructional process needed to get there.

Knowledge Management

Knowledge management is a generally useful direction, but it seems like a bad label. It is too narrow and it also gives the concept too much of an academic flavor. The goal should be to manage the distribution of information, knowledge, *and* skills (even experience) so that you can manage the productivity of your human assets—so you can be sure you have the human capacity to handle your business’ demands.

It almost seems like this trend has lost some of its shine recently. However, with the advances in information technology that make it easier to share data between various systems (such as XML), the promise of a warehouse of content delivered to the audience through job aids, reference manuals, and training (but stored in one place for maintenance) has a much better shot at becoming a reality. At CADDI, we believe our T&D Module Inventory Framework (used with Curriculum Archi-

ture Design) would make a very effective organizing scheme, not only for training, but for the various information and knowledge objects used within a corporation.

Corporate Universities

The corporate university is one development that seems to have died out—we can hope. A university is an *education* model that rewards a focus on a *subject* rather than on a capability to *do* something. Universities are great for many things, but a business needs to target its training investments toward enabling people to perform their jobs—a university is just the wrong model.

There were some good things that resulted from this movement. One is the realization that people don’t walk into the job knowing how to perform it. Training is necessary, and the corporation needs to be proactive about both ongoing development and initial “spin-up” training. Corporate universities raised this issue and got top executives talking about these investments.

In my experience, though, there was just too much “education school” and not enough “engineering school” thinking to make these functions really deliver. Too often they were divided into colleges based on subject matter without considering how the complete system would work. For example, if an engineer wanted to learn about quality methods and there were separate colleges for quality and engineering, it was unclear as to where the training should reside. Another common problem was that no mechanism was implemented for allocating corporate resources appropriately across the various colleges (or constituencies) to ensure not that everyone got their fair share, but that the enterprise addressed the opportunities with the greatest potential return.

One-Offs

“One-offs” isn’t really a trend—it is more like a pet peeve. A one-off is doing a project or creating a program and delivering it once and then abandoning it and moving on to something else.

Because everything today is moving quickly, it might seem that one-off projects make sense—if we can’t plan for the future we might as well take everything on a case-by-case basis. But, though we can’t plan in *detail* everything that will happen in the future, we can plan on a number of general things. In the T&D business, you can plan on an approximate number of new employees—they

(Continued on page 6)

Performance improvement is approaching “trend status”... more T&D organizations are talking about consulting to management about general human performance issues.

Though we can't plan in detail everything that will happen in the future, we can plan on a number of general things.

(Continued from page 5)

will need to be trained. You can plan on some new products being introduced—they will need to be introduced to the existing population and incorporated into training for new people. The same is true for new processes and tools.

But, since we still don't know what those new products, processes, or tools will be, we still can't plan on what the training will be. So wouldn't one-offs still make sense?

Not really. Of course, the reusable learning object approach makes it easier to create one-offs from stock components or by starting from stock components and making minor modifications. (In manufacturing this has been referred to as "mass customization.") But that is not really a one-off—it takes planning and design work to architect an inventory of objects that can be found and reused later *effectively*.

Time to Go Back to Work

It has been fun to "rant" about the business we are in. It is a real challenge to emphasize substance over buzzwords—especially when you can get more opportunities by chucking buzzwords around than getting specific about performance details. One of the reasons CADDI supports ISPI so heavily is that the focus is on substance, and there are a lot of practitioners doing good work there, even if they aren't getting as much press as the fads.

Of course, there is always more than one perspective on any issue. To quote Dennis Miller, "It's just my opinion—I could be wrong." Feel free to E-mail me and let me know what you think at pete.hybert@caddi.com. ▶▶▶▶



Golden Circle Chapter of ISPI PACT Performance Modeling and Knowledge/Skill Analysis Workshop Participant Feedback

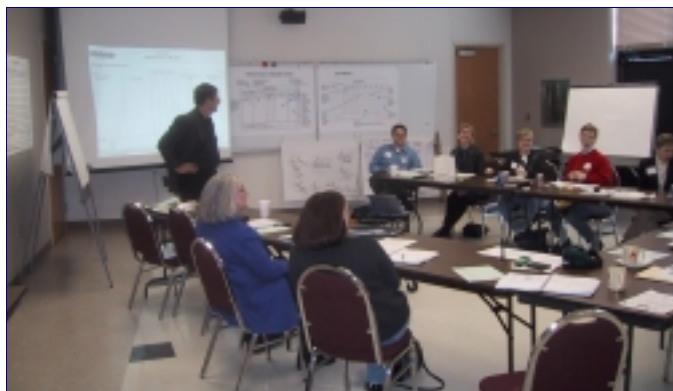
On February 16, 2001 Guy and Brian conducted CADDI's one-day *PACT Performance Modeling and Knowledge/Skill Analysis Workshop* for the Golden Circle Chapter of ISPI in Des Moines, Iowa. Here are a couple of the comments we received.

"The workshop focused on additional, 'new-to-me' techniques rather than spending time on common knowledge ISD professionals already know. One of the ideas from your workshop that really caught my attention is treating my training and information resources as an inventory, and managing that inventory like other companies manage their nuts and bolts."

—Mary Meier, The Principal Group

"I like the idea of putting master performers together in a meeting to document analysis data. I have used the traditional interview, document, review, update cycle and it takes longer."

—Melinda Toomey, Seabury & Smith



Thank you for your comments, Mary and Melinda!

Guy Wallace (standing) and Brian Blecke (sitting at top) facilitate members of the Des Moines, Iowa Golden Circle Chapter of ISPI through a Performance Modeling workshop (picture compliments of Dan Topf).

Employee “Bill of Rights”

by Geary A. Rummler and Matthew E. Rummler,
Performance Design Lab

A year ago, an acquaintance of ours left the security of a major accounting firm to join an exciting “start-up” company, founded by several former employees of that same accounting firm. The founders had a valid enough service idea, it having been successfully executed by their former employer. Further validation of the idea came in the form of a pledge of more than \$60 million of funding by a venture capitalist. Our friend was in the second wave of hiring, and the company had been in business for about ten months. One of the appealing aspects of working with this new firm was the work environment, which was purposely in contrast to that of the former employer-accounting firm. One of the features of the new organization was the proudly stated Company Values (see Figure 1), which were posted everywhere in the offices and pitched heavily as part of the recruiting effort. During the past year, the company opened offices in three major cities and expanded the payroll to more than 400 employees by luring many new employees from established firms and secure jobs with 20 percent salary increases and stock options.

Figure 1: The Company Values



Several weeks ago, the company announced

- ▶ A layoff of 20 percent of its workforce
- ▶ That the venture capitalist, who had already committed 60 percent of the promised funding, was not going to invest any more based on the performance of the firm to date
- ▶ They were looking for a buyer for the firm

Following that announcement, more layoffs have taken place, no buyers have come forth, and the founders are “bailing”—taking care of themselves first. The company is clearly in its final death throes. And during these past several months, the founders and senior management of this firm

have violated every espoused company “value” other than “simplicity.”

What Happened?

This new company did some wonderful “new-age” things, including the value statement, generous benefits, oval meeting rooms with cushions rather than chairs, business cards in three colors for everyone, frequent company social gatherings and an informal work atmosphere (e.g., everyone is called by their first name), no organization chart, and no titles.

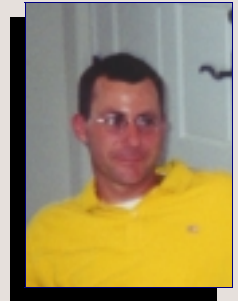
But from the point of view of a couple of performance analysts, there were several “old-age” things that the new company did not do; for example, they did not have

- ▶ A business plan and subsequent performance goals
- ▶ A strategy for achieving the goals that were never set
- ▶ Clear definition of management roles, responsibilities, and accountabilities (The founders “didn’t believe in organization charts,” and there were none until the investors asked to see one as part of evaluating the request for additional funds. The subsequent distribution of this document in the company lead to a major hullabaloo as the employee’s typical response was “. . . but I thought he/she worked for me, not the other way around.”)
- ▶ A management system including the fundamentals of goal setting, performance monitoring, and corrective action, if required

Unfortunately, the predicament of our friend is not unique. As noted in the February 6, 2001, *Business 2.0* article titled “Return of the Crummy Job,” this is becoming an all-too-familiar scenario. There are a lot of factors that contribute to a start-up business failing, but to us an all-too-frequent component is incompetent management.

- ▶ People who are clueless as to what basic systems (“systems” as in operating and management systems, not in the information technology sense of the word) are required for a business to be successful.

(Continued on page 8)



There are a lot of factors that contribute to a start-up business failing but to us an all-too-frequent component is incompetent management.

Mission statements and value statements are fine, but they are not a substitute for sound underlying business models, business plans, strategies, and operating systems.

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► Founders and executives that substitute mission statements for sound strategy and value statements for sound operating systems. (“Rather than go to the aggravation of establishing and communicating an organization chart that would help clarify roles and accountabilities, let’s just make “accountability” a company value. That should do the job!” Note to venture capitalists: mission statements and value statements are fine, but they are not a substitute for sound underlying business models, business plans, strategies, and operating systems.)

An Employee Bill of Rights?

As we have followed the travails of our friend and her employer over the past year, one of the most annoying things (in addition to the criminal incompetence of the founders and executives) has been the oft-ballyhooed company values. They have been used to seduce/recruit new employees and to rally the troops during operating crises. And in the final analysis, when push came to shove, they were systematically violated or ignored by senior management in their rush to the “lifeboats.” Assuming for the moment that value statements have value (we won’t go there in this

paper), what can/could be done to them to add value? Minimally, it seems “*competence*” (executive, in particular) should be added as a value. But our suggestion is to replace the company value statement with an employee bill of rights. An example of such a bill of rights appears on the facing page in Figure 2. Important features of such a document include

- Explicitly addressing the reality that the “bottom line” is the bottom line (Part A). There should be no attempt to kid employees or delude management that this is not the case.
- Recognizing the importance of competent management and sound operating and management systems and making the commitment to provide both. (Part B)
- Making it clear that both parties (the employee and the employing institution) have rights and expectations of the other.

Will our bill of rights make a difference in this sea of management incompetence, as fools rush in, in search of investment dollars and quick returns? Doubtful. But to the degree that mere words and “value statements” can make a difference, getting the right words on paper could be a start. ►►►►

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 Geary A. Rummler
 Matthew E. Rummler
 Source: PerformanceDesignLab.com

Geary and Matthew Rummler are partners in the Performance Design Lab, located in Tucson, Arizona

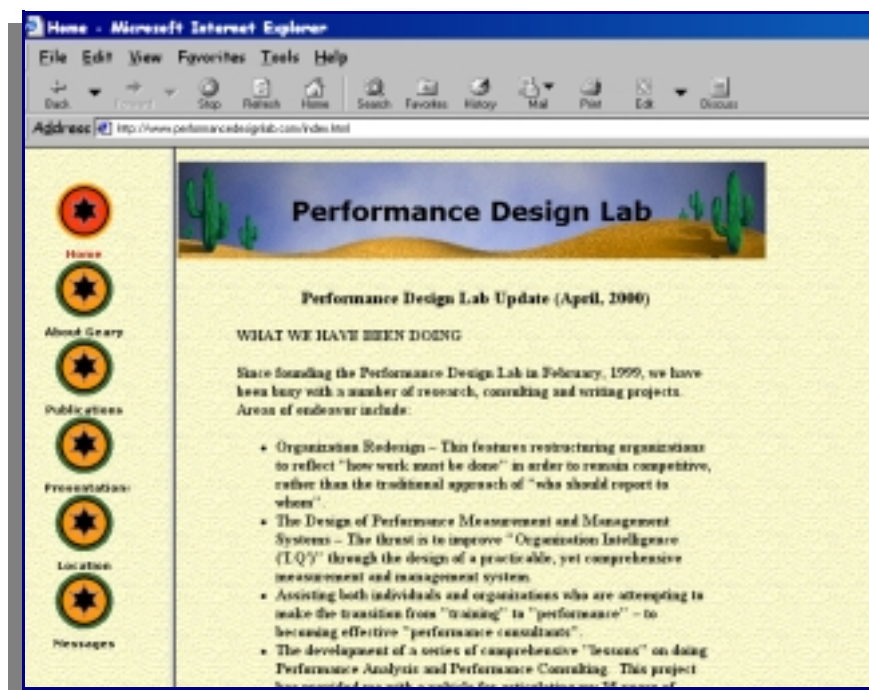


Figure 2:

The “Employee Bill of Rights”

A. THIS IS OUR REALITY

1. We are in BUSINESS. As a *business* we MUST
 - a. Provide something of value for our customers or we will lose them.
 - b. Provide a return to those who have provided us with the capital funding to get this business started, or we will lose them and their investment.
2. If we are smart and hope to deliver the above over the long-haul, we will also
 - a. Treat our suppliers well.
 - b. Treat our employees (us, you) well.

B. THESE ARE OUR EXPECTATIONS FOR OPERATING EFFECTIVELY WITHIN OUR REALITY

1. Our *executives* will
 - a. Set and communicate necessary goals (\$, customer, supplier, employees).
 - b. Set and communicate an appropriate strategy for achieving those goals.
 - c. Develop a feasible business plan for implementing the strategy and achieving the goals.
 - d. Design an organization that will *work*, including
 - An effective value chain for meeting customer needs
 - An organization structure/reporting relationships that supports the requirements of the value chain
 - Clear and appropriate roles and responsibilities
 - An effective management system
 - e. See that the necessary resources (funding and competent staff) are acquired to implement the business plan.
 - f. Monitor performance against goals set for the organization, functions, processes and individuals. And manage the “white space” between those elements.
 - g. Monitor the business environment and make the necessary changes in the above to keep us on track.
2. Our *managers* will
 - a. Make inputs into the plan and will execute the plan.
 - b. *Know their business* (be technically competent and effective managers).
 - c. See that
 - Processes are in place and are effective, meeting their stated goals.
 - Individual performers have clear goals, clear responsibilities, necessary resources, and feedback on their performance so that they can continue to improve.
 - d. Build and sustain a work environment free of racial and sexual discrimination and harassment and free of counterproductive interdepartmental competition.
3. Our *employees* will
 - a. Have accurate, up-to-date information on the goals, strategy, and progress of the business (to the degree practical).
 - b. Be clear on their roles and responsibilities.
 - c. Be clear on their goals and the consequences of achieving and not achieving them.
 - d. Be accountable for achieving their assignments and goals.
 - e. Receive specific, objective, and timely information on their performance.
 - f. Receive the necessary training, resources, and management support to be competent performers of their job.

- #### C. We feel you have a RIGHT to expect the above. If you feel you are not getting any of the above, let me know. In return for the above, the business has the RIGHT to expect that you will be honest, innovative, accountable, and compassionate in how you carry out your responsibilities.

To the degree that mere words and “value statements” can make a difference, getting the right words on paper could be a start.



ISPI

**International
Society
for
Performance
Improvement**

www.ISPI.org

*Guy has been attending
this conference since
1980.*

*Pete has been attending
since 1984.*

*Kelly has been attending
since 1994.*

*Brian will attend his
first.*

*Dottie has been
attending since 1994.*

*Melissa has been
attending since 1989.*

*Alaina will attend her
first.*

SEE YOU IN SAN FRANCISCO!

CADDI at ISPI 2001

On January 1, 2001, CADDI “upped” our affiliation with ISPI from a Patron member to an Advocate. Senior consultant Brian D. Blecke acts as CADDI’s representative and joins representatives from ISPI Advocates at Arthur Andersen Performance and Learning, AT&T Education and Training, Georgia-Pacific Corp. Corporate Human Resources, Hewlett-Packard Company, IBM Learning Services, Maritz, Microsoft Corporation, Sun Microsystems, Inc., and Wells Fargo Bank.

CADDI will be in strong attendance at ISPI’s 39th Annual International Conference & Exposition April 8–12, 2000 in San Francisco, CA. Our presence at the conference includes the following presentations—stop by and see us!

Monday, April 9, 2001 5:30 – 6:30 p.m.

Opening Session: 99 Seconds Presentations

“Performance Modeling”

Presented by Guy W. Wallace

“Performance-based Qualification—It Only Counts if You Can Do the Job!”

Presented by Peter R. Hybert

Tuesday, April 10, 2001 11:00 a.m. – 12:30 p.m.

“Push-Pull Knowledge Management Systems”

Presented by Guy W. Wallace

Tuesday, April 10, 2001 6:00 – 7:30 p.m.

Cracker-barrel — “Performance Modeling”

Presented by Guy W. Wallace

Wednesday, April 11, 2001 8:30 – 9:30 a.m.

The Masters Series — “lean-ISD”

Presented by Guy W. Wallace

Wednesday, April 11, 2001 10:00 – 11:30 a.m.

“Build the Business Case Before Building the Project”

Presented by Peter R. Hybert

Wednesday, April 11, 2001 1:30 – 3:00 p.m.

“Managing Your T&D Portfolio”

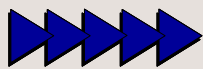
Presented by Dottie A. Soelke

Thursday, April 12, 2001 11:00 a.m. – 12:30 p.m.

“Web-based Call Center Simulation”

*Presented by Peter R. Hybert (lead presenter), Jeff Carpenter (InterKinetic),
and Rob Koehler (Ameritech)*

We hope to see you at the conference! Stop by our Expo “table” – **Table #A7** (no booths in 2001!) located in the Grand Assembly.



CADDI
*is proud to be an
ISPI
Advocate*

The 2001 Conference: Raising the Bar



**April 8–12, 2001
San Francisco, CA**
*For more information, visit ISPI’s Web site
www.ISPI.org*



Staying Ahead of the Winds of Change

by Melissa A. Joiner

The 2000 ASTD Trends Report: Staying Ahead of the Winds of Change

Mark Van Buren

William Woodwell, Jr.

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According to the authors of the 2000 ASTD Trends Report: *Staying Ahead of the Winds of Change*, the forces of globalization, technology, and changing demographics are converging in new and unpredictable ways and gaining strength from one another. Globalization and demographic changes are driving changes in technology; technological advances are driving globalization and changes in how people work. The latest report in ASTD's annual Trend series looks at the implications of these changes for organizations, as well as for the professionals who manage workplace learning.

To thrive in the face of these changes means improving your organization's performance and creating a central role for learning, which the authors maintain is one of the most important factors in an organization's future success.

The Big Picture: How the Winds of Change Are Affecting Organizations

Virtually every change that is under way has important implications for workplace learning and performance.

First, there has been an unprecedented wave of consolidation in a wide variety of industries. The accelerated pace of merger activity has created growing uncertainty about executives' commitment to training in the face of company reorganizations. It has also increased the pressure to improve short-term financial performance. There is also an increased tendency among businesses to create partnerships, joint ventures, and other collaborative initiatives.

Second, new technologies have increased the rise of new kinds of organizations, especially dot-com companies that seek to profit from the use of the Internet.

Third, new technologies and telecommuting have created new systems for organizing work. A recent study by Bell Atlantic (now Verizon) estimated that 2 million American businesses support some type of telecommuting program. Employers are also adopting a variety of work practices to boost employee and organizational performance such as task forces, problem-solving teams, and other group-based activities.

Fourth, there is a growing emphasis on speed, flexibility, and innovation. The primacy of speed in the economy means that continuous improvement and innovation have to be priorities. An organization's flexibility and the ability to adapt products, services, and work systems virtually overnight are keys to its success.

Finally, globalization and new technologies have helped companies expand their products and services throughout the world.

The Bottom Line for Learning: How the Winds of Change Are Affecting the Provision of Training

The forces of globalization, technological change, and shifting demographics are also impacting training departments around the world.

More Investment by Employers in Human Capital

The *2000 ASTD State of the Industry Report* identified a continuing increase in employer-provided training at U.S. firms. The authors contend that the continued rise in spending on training is a clear reflection that organizations are viewing training as a strategic investment. With technology and the economy changing so fast, investment in learning becomes necessary just to keep an organization and its employees up to speed. As more companies become learning organizations, they are beginning to understand that learning can play an essential role in increasing individual and organizational performance.

(Continued on page 12)



ASTD's annual Trend series looks at the implications of changes for organizations.

Twenty-four percent of the average internal training staff's time was spent on management and administrative tasks such as planning, organizing and scheduling

(Continued from page 11)

Increasing Skill Requirements

The *ASTD 1996 Trends Report* identified increasing skill requirements as one of the top-10 trends most likely to affect workplace learning and the performance community in the future. Since that report was written, the need for more sophisticated skills has become even more pronounced. The continued lack of necessary skills creates challenges for organizations and for workplace learning and performance initiatives. Learning professionals will need to provide more remedial training and devote more time to making sure that employees have full command of the changing technologies that play such a prominent role in improving organizational performance.

New Jobs, New Skills

Our economy today is dominated by high-tech and service industries that emphasize flexible production, innovation, and office work. With new ways of organizing work and a premium on speed and innovation, skills such as communications, creative problem solving, and working in teams are becoming more important. Employees also need to have the ability to learn.

Continued Growth in Technology-delivered Learning

Organizations are increasingly turning to technologies that use the Internet, E-mail, CD-ROMs, DVDs, and satellite and cable TV to deliver training. According to *The 2000 ASTD U.S. Training Market Report*, organizations participating in the Benchmarking Service project an 11 percent increase in the use of learning technologies between 1998 and 2001; organizations with more than 2,000 employees projected an even higher increase of 12.8 percent.

CD-ROMs and company intranets were the two most popular distribution learning technologies among the companies surveyed by ASTD. ASTD found that the percentage of organizations using the Internet for training grew from 3 percent in 1996 to 22.5 percent in 1998. According to the report, a recent survey by International Data Corporation showed that Web-based training is expected to explode by more than 900 percent between 1999 and 2003. The growth of e-learning reflects the larger trend in the economy from a one-size-fits-all approach to mass customization in the delivery of goods and services.

Despite the popularity of e-learning, the authors conclude that few organizations have figured out how to make the most of learning technologies. The challenge for the future is for employers to realize the true potential of learning technologies in improving individual and organizational performance.

A Growing Emphasis on New Ways to Manage the Delivery of Training

The important role of outside firms in organizations' training efforts is paralleled by a growing tendency to turn to other outside partners, including educational institutions and government, to help deliver training. There is also a need for training professionals themselves to develop new capabilities and skills including contract negotiation, make-or-buy analysis, and the ability to effectively manage training suppliers. Training professionals will also need to coordinate more effectively with colleagues in related areas such as information technology and knowledge management in order to embed learning throughout the organization.

Changes in Corporate Training Departments

Training departments have changed like the rest of organizations and are likely to continue to change even more. The American Management Association (AMA), in its 1999 survey of AMA member executives and managers, found that businesses are paying less attention these days to the restructuring and re-engineering issues that dominated the organizational landscape for much of the 1990s. They are focusing on the role of employee training and development as a solution to the challenges they face in recruiting and retaining skilled professionals.

For corporate training departments, this shift in priorities will be increasing attention from senior management and new resources to get things done. The authors ask, "Are training departments ready?" They quote a recent ASTD report titled "The State of Ourselves," which found "more divergence than convergence between the allocation of time and desired outcomes," suggesting a problem of training professionals aligning their work to business goals. Twenty-four percent of the average internal training staff's time was spent on management and administrative tasks such as planning, organizing, and scheduling. Only 6 percent of staff time was spent evaluating the quality

(Continued on page 13)

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and results of learning programs. Adding to this is a continuing struggle among training departments to find and retain skilled workers.

More Attention to Learning Results

The increased attention to learning results may be the most important trend for corporate training departments. The pressure to deliver results has become even more intense the last four years. According to The 2000 ASTD *U.S. Training Market Report*, continued increases were seen in the use of performance management practices to gauge employee skills and training results. These statistics show the growing efforts to create stronger connections between training and core business strategy. As the authors state, “It is not just about delivering results; it is about delivering results that help the business achieve its goals.”

A recent edition of *ASTD’s What Works* reports – *No Respect: Bridging the Gap Between HRD Practitioners and Senior Management*, stated “All too often, HRD is not considered a part of the solution when senior management is addressing critical strategic issues. The result is that management and HRD professionals alike often ignore the potential—and real—contributions of HRD to the organization’s bottom line.”

According to *The Customer-Driven Training Organization*, an unpublished report by the Forum Corporation, senior managers believe that training professionals should be devoting more time and effort to aligning what they do to business goals and measuring the impact of learning programs on performance. According to the report, training

professionals spend the majority of their time in program design, development, delivery, and administration, with very little effort devoted to business linkage and measurement.

Conclusion

Among key issues that are the focus of increasing attention today are the performance specifications that identify the knowledge, skills, and abilities that an employee needs to perform a job. According to the International Society for Performance Improvement (ISPI): “Although training and education are critical to increasing competitiveness, meeting the educational challenge is just part of the answer. An effective human resource system needs an outstanding learning system, but it requires more: it requires a focus on performance.”

The authors conclude that perhaps the most profound transformation brought about has been the advent of the so-called “knowledge economy.” Success today, they contend, depends more than anything else on knowledge and learning—an organization’s intellectual capital. “In the knowledge-based economy of the 21st Century, organizations must do a better job accounting for the hidden value of their intellectual assets, leveraging those assets to improve organizational performance, and documenting how knowledge and learning drive success.”

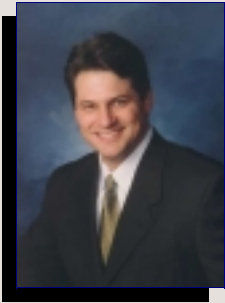
For more information or to obtain copies of the 2000 ASTD Trends Report or any of the other reports mentioned in this article, call the ASTD Customer Care Center at (703) 683-8100. ▶▶▶▶

“In the knowledge-based economy of the 21st Century, organizations must do a better job accounting for the hidden value of their intellectual assets, leveraging those assets to improve organizational performance, and documenting how knowledge and learning drive success.”

How Trends Are Affecting Organizations	How Trends Are Affecting Training
1. More connections and consolidation	1. More investment by employers in human capital
2. New types of organizations and an imperative to go online	2. Increasing skill requirements
3. New ways of organizing work	3. New jobs, new skills
4. A growing emphasis on speed, flexibility, and innovation	4. Continued growth in technology-delivered learning
5. Widely dispersed operations	5. A growing emphasis on new ways to manage the delivery of training
	6. Changes in corporate training departments
	7. More attention to learning results

High-payback ROI for Performance-based T&D

by Brian D. Blecke



Even products with great results are governed by a larger business context where other, even greater results win.

In the fall 2000 newsletter I shared a success story. The story got better and worse, so I want to share it with you. Let me back up for a moment to refresh your memory. In an effort to increase profit, capture market share, and accelerate/revitalize the development of a mature sales staff, a client launched a new financial services product. The goal of the product launch was to capture \$150 million in additional gross revenue in the first year of release. The challenge boiled down to a number and the message was clear: hit it. The goal of \$150 million was a ten-fold increase in volume from the previous year's sales of a similar product.

The total cost for the project, including product development and rollout, was just shy of \$50,000. For more on the project, see the article in the fall 2000 newsletter.

At mid-year, the sales volume reached \$55 million while \$50 million remained in the pipeline. It was

a rosy picture indeed. In December, I checked in to see how the year ended. The final tally was \$85 million in gross sales. Unfortunately, two large sales did not transact in December as expected. The total of those transactions was \$15 million.

The client was very pleased with the results. As it turns out, the \$150 million goal was a GE-like stretch goal. No one on the management team expected to hit it—just get close. I'd hate to play poker with them.

In the end, however, business is business. In December a competitor acquired our client. The bottom-line improvement was one factor among many that made our client attractive. As for the high-payback T&D product, it was found to be redundant to existing training and was scrapped. Here's the lesson: Even products with great results are governed by a larger business context where other, even greater results win. Isn't that how it should be? ▶▶▶▶



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 - Service
- ▶ ARCO of Alaska (at Prudhoe Bay)
 - 19 classes of technicians
- ▶ Alyeska Pipeline Services Company
 - Alaska pipeline technicians
- ▶ The Quaker Oats Company
 - R&D and marketing functions

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Q/CS: It only counts if you can do the job!

How the PACT Processes Can Help Align Multiple Human Resource-related Initiatives

by Peter R. Hybert

This is the fourth in a series of articles on applying SPIN® to determine the ROI of T&D in various business situations. The premise of this series of articles is that using the logic behind the SPIN selling methodology is a way to “back in” to the potential return on investment (ROI) in various training situations. The SPIN model was created by Huthwaite, Inc.

Alignment

One of the most sought-after states in the world of strategy is alignment. It is like perfection—we never quite get there but everyone (more or less) agrees that we should strive for it. It is a big enough challenge in a large organization to get a lot of people to just use the same labels for things, much less agree on where to go and how to get there. Did you ever try to get six or seven people organized to go to dinner during a business trip? Magnify that communication problem by factor of 10,000 and you see the nature of the alignment challenge.

To deal with this challenge, corporations have invented the initiative. Initiatives are most visible by their slogans or themes, but to really work there needs to be some detail underneath the slogan. (Dilbert cartoons provide plenty of examples of what can happen if there is nothing but slogan.) The reason for the slogan is that, besides real content, initiatives need focus. A well-targeted initiative brings our attention to a problem or opportunity worth addressing and frames what we should do about it. The slogan is a meme—sort of like the hook in a pop song—intended to get you humming whether you mean

to or not.

So if you are the initiative champion, you apply all the concepts from marketing and branding that you can to promote your initiative. Unfortunately, if you are in the target audience, there can be a lot of things vying for your attention. And, due to the way humans are “hardwired” mentally, there is a limit to how many things we can pay attention to¹.

Corporations today often have active initiatives to develop competency models, define career paths, institute qualification or certification programs, manage the human capital, implement knowledge management systems, and track everything with an integrated human resource information system (HRIS).

As T&D professionals, our business is human performance. We may feel that we are enjoying a real opportunity with so much attention being paid to “the people stuff” by way of HR-related initiatives.

But, you may also feel a little uneasy—that perhaps there is too much going on. Perhaps people are working at cross-purposes or redundantly. You are probably right and it is probably costing your company quite a bit in terms of energy and dollars.

Using the SPIN model described in Table 1 (on page 16), we can determine if the potential cost is worth the cost of the effort to avoid it.

(Continued on page 16)



One of the most sought-after states in the world of strategy is alignment.

SPIN is a registered trademark of Huthwaite, Inc.

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¹ As an aside, I think people have increased their ability to deal with complexity and to “multitask” but only by shortening the duration of their focus and increasing the frequency of attention shifts. For instance, the next time you are working on your computer, take a look at all the data that is presented to you and think about how much of it you ignore most of the time. Depending on how you count it (for example, is a scroll bar one item or several?), I count more than 85 icons being displayed as I work on this Microsoft® Word document, but I’m ignoring almost all of them. We’ve all gotten used to that complexity. The Word example shows complexity without much multitasking. My 16-year-old routinely plays computer simulation games with probably twice as many icons, and you have to attend to them frequently by rapid attention shifts. For example, imagine you start troops moving toward a target. Then, while they are moving, you start building more facilities or training additional soldiers, then while that is going on you may dash off a note to a teammate playing somewhere on the Web, then check the “bird’s eye view” map to see where the enemy is, then go back to redirect the troops, etc. That is a lot of stimulus! But, we still focus on one thing at a time—multitasking is simply quicker shifts in focus. And, though there is a lot going on in the simulation game, the goal is still very clear and straightforward.

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Table 1: SPIN Definition

Acronym	Definition
S: Situation	Key characteristics of your customer's environment.
P: Problems	Things that aren't working as desired (I sometimes think of the "P" as standing for "pain"—what your customer doesn't like about the situation). But, these can be "opportunities," painful if missed as well.
I: Implications	The business impact of the problems/opportunities—try to get to dollars here or an overall business impact such as loss of market share.
N: Needs Payoff	The potential value of a solution that addresses the above.

Note: There is much more to the SPIN model than this simple acronym—for more information visit www.huthwaite.com.

The Situation

The situation was introduced above—basically, numerous human resource-related initiatives are going on within large organizations. Each one, taken separately, has a clear mission and targets an area important to the business. But, they aren't in alignment. The reason? There is no visibility across the organizations for similar initiatives until you reach the executive level. Individual champions are unlikely to spend time searching out or resolving overlaps or gaps with other initiatives because they already have enough work to do.

So, the situation is: lots of initiatives tripping over each other. Table 2 (on page 17) lists some specifics.

The Problem

The issues described above are mostly technical in nature; that is, professionals in each of the areas would argue that they are the result of the initiative done poorly rather than a defect in the intent. Our concern in this context is the business impact of having all of these initiatives with related but not exactly complementary missions. For example, the competency model could form the basis for a number of the other components. It could frame the career path (where you accumulate competencies that lead to other roles/jobs). Or, the human capital management system could establish the framework. But too often they operate as "silos" leaving gaps. For example, the large general competencies typically found in

competency models don't provide enough detail to enable selection or development of individuals. And qualification instruments should add up to something—by becoming certified you should reach some performance and/or career target. But often they are just another thing on an employee's "to do" list.

All of this leads to redundant effort in the development and promotion of the various initiatives. It also leads to confusion in the target audience and lost time spent in meetings of initiative team members fumbling around with definitions or "mapping" outputs from one initiative to another (where they really don't fit together). Projects have false starts/stops as executives try to reign in the redundant efforts. Ultimately, the target audience loses interest and a sense of "program du jour" develops. Then nobody invests the necessary commitment to make any of the initiatives fully successful.

The Implications

From the business's perspective, redundancy means cost. Initiatives spinning their wheels means cost in the short term but also missed opportunity in the mid to long term. There is only so much organizational energy (represented by budget dollars) available to meet the business's goals.

► **Excess costs:** Time spent meeting and discussing abstract concepts can add up. If an initiative team had eight members and spent four hours every week for a year in unproductive effort, that could cost as much as \$80,000 instead in wasted salary dollars². Worse, they could have been working on something with a return! (And this doesn't even begin to count "pull-through" costs such as the time spent getting ready or doing follow-up from the meetings, support resource time to arrange meetings, facilities such as conference calls and meeting rooms, materials such as posters and brochures, snacks and refreshments for the meetings, etc.)

► **Missed opportunity:** Most corporations require some level of justification before starting an initiative. That means there is an expectation of return. If initiatives take too long to come to fruition (or even never come to fruition), that is a benefit that the corporation won't see. To "do the math," figure out the expected return and subtract either for delays or for falling short in meeting expectations.

Most HR-related initiatives attempt to put together people, skills/capabilities, and business process needs—in other words, get enough

(Continued on page 18)

Initiatives spinning their wheels means cost in the short term but also missed opportunity in the mid to long term.

² To make the math easy, I just used \$50 per hour as the fully loaded cost per employee. This may be low for many situations—typically, an employee's fully loaded cost (including vacation, benefits, and overhead) approaches twice their salary.

Table 2: Issues with Multiple Initiatives

Example	Description	Potential Issues
Competency modeling	<p>Defining the key enabling knowledge and skill components of various jobs/roles. Usually done at a high level (little detail). Intended to be useful for selection and development.</p>	<p>Lots of time spent analyzing jobs looking for general capabilities and commonalities across roles/jobs.</p> <p>Can get bogged down in definitions and trying to link to <i>organizational</i> competencies.</p> <p><i>(I have yet to find a generic capability that was a differentiator for top performance, but that is another story.)</i></p>
Career paths	<p>Defining recommended or typical progression of jobs and the key experiences and training needed to progress.</p> <p>Intended to be used to support succession planning and to drive development.</p>	<p>People often take widely varying routes through their careers.</p> <p>Can overlap/depend upon competency models and/or qualification systems.</p>
Human capital management	<p>Defining key components of human assets, inventorying, and managing them.</p>	<p>Pretty abstract—lots of time spent defining concepts. Often suffers from an unclear purpose.</p> <p>Overlaps with competency models.</p>
Knowledge management	<p>Defining key components of the knowledge/skills embedded in the organization. May try to inventory or extract and document the human knowledge base.</p>	<p>Potential to become a very large-scale effort. Can have an unclear mission.</p> <p>Overlaps some with competency models and more with human capital management.</p>
Integrated HRIS	<p>A master set of databases tracking “all things people.”</p>	<p>Many users for the data with different needs and priorities. Tradeoff between what is available commercially and the organization’s specific needs.</p> <p>Should support the other initiatives; however, since the underlying models for the data may not match the competency model or knowledge management model chosen, may generate rework or may “orphan” work already done.</p>
Qualification or certification programs	<p>Agreed-upon checkpoints and measurement processes to verify human capability.</p>	<p>Often focused on enabling knowledge (which doesn’t necessarily indicate capability to perform). May have unclear mission/intent.</p> <p>Overlaps with most of the above.</p>

To operate the business processes, people need to know the performance requirements and have the enabling knowledge, skills, attributes and values, as well as the right environmental support to do their jobs.

(Continued from page 16)

people to the right job/role in time to meet demand. And, because business needs and individuals change, it is a constantly moving target. These HR-related initiatives are key to staying competitive in recruiting/retention as well as delivering products and services. If they don't happen, your company is at a disadvantage against competitors that are able to make it happen.

From the T&D perspective, we are in business to deliver useful development solutions to our audience base. "Useful" means effective (they learn what we planned for them to learn) but also necessary or beneficial to the learner and their enterprise. If they have a career path, the training should support it. If they are trying to develop a specific set of capabilities, the training should support it. Reworking the T&D to accommodate new initiatives (or new spins on old initiatives) drains resources from more important efforts. It is like continually redecorating your living room when you should be fixing the leaky roof.

The Needs Payoff

All of the above implications have serious potential impacts on the bottom line. To address each of them, we recommend our PACT Processes for T&D. There are individual components that address the intent of many of the initiatives above, or at least provide data in a format that can be used within those initiatives. But, the main benefit of the PACT Processes is that they are integrated. Gaps and redundancies have been engineered out. Organizational effort is not wasted trying to invent a system that CADDI consultants have been evolving for more than 15 years!

You can also start anywhere and go anywhere. It is more efficient to work "top-down," but if you have to start with one job/role and then expand, you can do it without having wasted earlier effort. As one example, we started with a set of job analysis data and designed a performance-based qualification system and then used the same data to design a curriculum architecture. In another company, we used the same analysis process (different data, obviously) to populate an HRIS with qualification items.

There are a number of PACT Process features that address the issues above—three are detailed below.

Analysis Data

Our analysis methodology documents performance requirements and enabling knowledge and

skill. It is at the detail level so it can support T&D and qualification system development. It can support specific selection tool development. But, it can be "rolled up" if needed to identify larger competencies³.

EPPI Model

Businesses are really collections of processes that are accumulated to create systems. The EPPI Model framework can be used to integrate and position HR-related initiatives and to target/prioritize them to ensure that the business results come first. (Stay tuned for more on EPPI in future newsletters.)

Integrated Data Platform

Since the PACT Processes are designed as a system, the data from one process can be reused in the next as it is further detailed or repurposed. Performance analysis data can feed curriculum design, qualification system design, or selection tool development. The Curriculum Architecture Design (CAD) process generates a T&D Path, which supports career path planning. The underlying modular structure of the content supports knowledge management. Data links work processes and jobs/roles.

Conclusion

Ultimately, it is all about human performance. For a business to serve its customers, it must produce outputs through its business processes. To operate the business processes, people need to know the performance requirements and have the enabling knowledge, skills, attributes and values, as well as the right environmental support to do their jobs. The initiatives mentioned above are related to this need but most often provide an incomplete solution.

CADDI consultants have been analyzing human performance for more than 20 years. We have learned that initiatives come and go but that the root need, to define and enable performance, remains. We have engineered an integrated approach to avoid redundant or overlapping efforts and to minimize time spent agonizing over abstract concepts. Instead, the PACT Processes and EPPI models support both "top down" and "bottom up" HR-related solutions. Rather than program of the month, consider how the business can benefit from targeted, performance-based solutions that can build on each other over time.

In the next issue, we'll present the SPIN on how the PACT Processes can help reduce the cost of traditional training and development. ▶▶▶▶

³ It would be interesting to examine whether competencies really deliver much benefit, but that is a subject for another time/place.



At CADDI

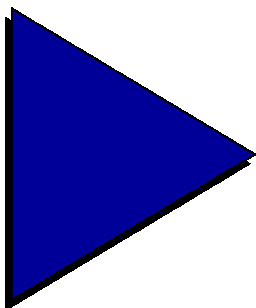
Performance-based

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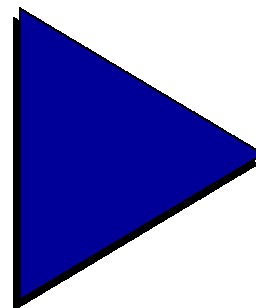
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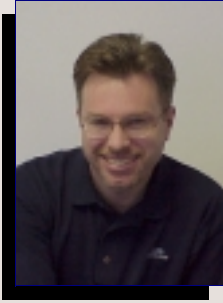
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Performance-based Training Is (a Little) Harder to Do

by Peter R. Hybert



A performance-based approach would include plenty of hands-on exercises . . . and the hands-on exercises should be as similar to the real job as possible.

Introduction

There are a lot of people that do “performance-based training.” At least, there are a lot of people that label what they do as “performance-based training.” But, if you look at actual work product (or descriptions of it), it is apparent that a wide range of criteria is being used to apply that label.

Having designed and developed performance-based training for more than 17 years, I have noticed the following problems with training that is intended (and even believed) to be performance-based.

- ▶ Mistaking learner activity for performance
- ▶ Creating performance-based application exercises that are too unlike the job performance to be effective

These two problems are serious. If the goal of training is to enable people to go back to the job and do something, failing to build training that really teaches performance is a defect—it is a product that does not do what it is intended to do.

There are good reasons that the problems above occur, but there are ways to avoid them as well. In a lot of ways, building and delivering performance-based training is more difficult than building skill- or topic-based training. But, in a lot of ways, it is actually easier to do performance-based training.

Like anything, the key is first realizing there is a problem (or a better approach) for getting up the learning curve, and then dealing with the effects of making the change. For example, going performance-based might identify that the current instructors, though expert in a subject, are not able to teach how to do the job. Or, you might need to develop more scenarios/simulations as exercises and find that your developers lack the expertise. But, with a plan, almost anything can be done as long as the rationale is sound. The rationale for performance-based training is sound.

What Is Performance-based Training?

Performance-based training teaches the job performance. If the performance is to troubleshoot a malfunctioning computer, the training should teach people the performance. The performance is not “knowing all about each part of the computer”—it is about identifying and clarifying symptoms, recognizing potential causes, diagnosing the problem to identify and verify specific causes, etc.

A performance-based approach would include plenty of hands-on exercises doing troubleshooting. And, the hands-on exercises should be as similar to the real job as possible. If part of the job includes talking with a user to clarify the symptoms before starting technical troubleshooting, then the hands-on should include a role-play element. And, the script/setup for the role-play should include “fuzzy” and even inaccurate information (i.e., use perceptions of the problem) so it is more like real life.

Analyzing Performance

The first step in designing performance-based training is figuring out what the performance is—analysis. At CADDI we use a process that “chunks” the work into Areas of Performance and then details the outputs produced and the tasks needed to produce them. In addition, we identify key performance measures for the outputs and what typically goes wrong.

For example, if it is important that the troubleshooter finds the right problem and does it quickly, some of the things that could typically go wrong might include taking too long or solving the wrong problem. Maybe sometimes the performance problems are rooted in a lack of knowledge/skills. But maybe sometimes the problems are due to poor input from the customer. All this means is that the performance is more complicated than it might seem on the surface. The training needs to reflect that and provide practice

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that is more like the real job. This is easy to figure out—you can ask the master performers.

Designing the Solution

Understanding the performance is only the first step. The next is figuring out a way to teach the performance. Sometimes a training designer can make this more difficult than it needs to be by trying too hard to “add value.” We can cut the performance into a million enabling knowledge/skills and spend a whole bunch of time developing presentation materials, exercises, and tests for each individual knowledge/skill. Unfortunately, many trainees have problems trying to put together a bunch of separate pieces of learning.

A better way to approach this is to start by targeting a simple case of the integrated performance. Continuing with the troubleshooting example, give them some basics and then give them a simple situation to troubleshoot. Then debrief and build on these basic skills by addressing things that help them solve more complex problems. For the learner, it is better to learn how to do the whole performance going from simple to complex than to learn all kinds of enabling detail and never have a chance to put it all together. Again, it is easier to design performance-based training than skill-based training—you simply have to define instances of the performance and incorporate simulation exercises around them. Then, intersperse simulation rounds with brief lessons on enabling skills.

Developing the Solution

Once you enter the development process, performance-based training can actually become more difficult than skill-based training. Detailed design and development of simulations can be difficult. The intent is to mimic the performance as closely as possible but without wasting resources trying to emulate things from the job that aren't necessary for performance. You have to make the simulations challenging enough to be realistic, but still carry clear teaching points.

Building a simulation requires time working with master performers. You have to build simulated job information and artifacts (such as customer accounts, reports, even simulated systems or equipment). On the other hand, most of this exists in the job environment (the primary exception being the equipment) so, if you have developed contacts in the master performer world during analysis and design, you can usually get samples from the real world and just modify them as

needed to fit the training design.

Delivering the Solution

Delivering performance-based training is also both easier and more difficult than skill-based training. On the easy side of the equation, as the facilitator, you don't have to be as entertaining! The intent is for each participant to get a little input and then apply it—as facilitator, your job is to set up the simulation, “facilitate” it (i.e., make it run smoothly), and debrief it. The participants do the majority of the work!

But, this can be more difficult as well—to really build skill you have to get the participants to work. They have to execute the performance more than once (otherwise, how can they improve?). You have to be able to provide useful, individualized feedback and suggestions for improvement. You have to “cheerlead” the group to get them to play along with the simulation (including looking beyond things that are not exactly like the real job and focusing on the learning intent).

Conclusions

If your goal is performance, then performance-based training is the way to go. Re-orienting the T&D toward performance starts with a subtle shift in perspective and ends up in a dramatic change in the training program. In many ways it is more difficult and it is also simpler. It is consistent with all the adult learning and instructional design principles but much different from how many of them are operationalized in practice. The key is to think about how people really learn—they learn by trying things and then figuring out why it didn't work as well as they hoped. Performance-based training gives the participants an opportunity to try out their learning and make adjustments until it works. From a reductionist perspective, you are just condensing trial and error. But, trial and error does eventually lead to performance. Too often, skill-based training does not. ▶▶▶▶

¹ As an aside, I once facilitated a simulation-based course for product managers in which the simulation consisted of cross-functional product team meetings to plan fictitious product development and introduction. During one delivery, a participant suggested that, because in the real world they spend a lot of time coordinating meetings (e.g., picking a date where everyone is available, reserving a meeting room, etc.), we should include a simulation on meeting planning. He even suggested that participants leave the classroom so they would have to physically call each other! Needless to say, we did include a brief lesson on coordinating meetings, but it would have been way too much work to build a simulation to teach this as compared to the relative training payback.

Performance-based training gives the participants an opportunity to try out their learning and make adjustments until it works.

Selecting and Managing a Project Steering Team

by Brian D. Blecke

This is the first in a five-part series discussing the management of a Project Steering Team (PST)—perhaps I should be more specific: the manipulation of a Project Steering Team.

Here, I will review the general utility of the PST. Selecting the right project and right PST is where it all begins in the PACTSM Processes for T&D.

In part two, I will discuss how to position decisions of the PST during Phase 1: Project Planning & Kick-off of the PACT Process for either Curriculum Architecture Design (CAD) or Modular Curriculum Development (MCD) efforts. In particular, we'll look at how the decisions made here affect the project downstream.

In part three, I will discuss how to get the PST to review the Analysis Team data.

In the fourth installment, I will review how to get the PST to guide, dwell on, review, modify, and approve the design—at the CAD and the MCD level.

The fifth installment will focus on the PST role during implementation planning—choosing the proper (best) ROI products to build. This is where PST members earn their keep.

Overview

We have to get rational about who does what and who owns what in an enterprise. T&D organizations have often bitten off too much to chew. In PACT, T&D owns the product design and development *process*; the PST owns the content in the T&D product line, the T&D products, the business, and the business decisions. They live with the results/impact of the choices made about T&D.

But the PST doesn't really know what decisions need to be made about T&D. That's not their fault. Our job on the T&D side is to clear up the roles/responsibilities and get the PST to make decisions about things that matter to, and protect, our projects, the learners, the enterprise, and most importantly, the shareholder.

Steering Team Utility

Let's face it, the most important part of any kind of project is the decision-making done in it and around it. Business choices affect the scope, direction, and outcome of a project.

Unfortunately in the T&D world, the typical front-end business decision is sort of like shopping in the bulk foods aisle where business leaders appear to say, "I'll take 27 pounds of training from that giant tub over there."

Next, we hear requests. Make me a class on . . . well, on whatever. After that we hear from the subject matter expert (SME) on the specific content.

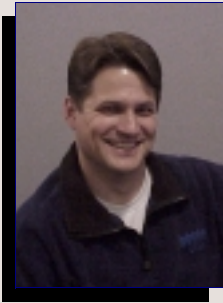
Doesn't it seem like there's a layer of decisions missing between the bulk foods aisle and the request line?

When you, the T&D professional, have the bulk foods decision, you are left with a lot of latitude and a large bag to hold. This situation is ideal for the backseat business leader and not ideal for the T&Der. We've all, at one time or another, been flattened by an angry manager who didn't like the direction of the T&D decisions.

We've all worked for the charismatic, lone-wolf customer; the one-man gang (overcommitted and desperately needing a 31-hour workday) who at just the wrong time runs out of charisma—and buy-in. We get hooked on a good—or perhaps cool—idea and let the charisma guy loose to shepherd the project. Then whammo, another, far less charismatic manager calls you on the carpet for working on the worst thing for the company. To be left there hanging is often the worst experience for a T&Der; I've been there.

We *want* a steering team so that business decisions get made about T&D issues, to blanket us for protection and to protect the business and its shareholders. We want a steering team so that we spend our time on the right stuff, get guided to worthwhile projects, and secure the right kind of

(Continued on page 23)



T&D owns the product design and development process; the PST owns the content in the T&D product line, the T&D products, the business, and the business decisions. They live with the results/impact of the choices made about T&D.

(Continued from page 22)

visibility in the enterprise. We want a steering team so that issues get resolved—in real time. We want a steering team so that roadblocks are cleared and funding issues get resolved.

There is no great science involved in identifying worthwhile projects, although many of my peers think there is. Managers know one when they see it; they don't require any algorithms. It is the job of a leader to set direction and make decisions with imperfect or incomplete data.

So the ultimate utility of a steering team is that they make important scope and direction-setting decisions. But the trick is to get a steering team to a place where they are making the kinds of decisions about T&D that you, the T&D professional, know are important to the project. No more plain bulk foods decisions.

Assembling a Steering Team

The steering team protects the enterprise, and, if well-assembled and informed, protects you. This is important. The steering team holds the bag. You are trying to arrange for profitable battles in the decision-making process. The right PST will argue plenty—challenging your facilitation/leadership skills—and make decisions.

How big should a steering team be? This is scientific, more than a couple of people, less than too many to manage. Sarcasm aside, the question isn't about how many, it's really about whom. The answer is the more about the makeup than about the number.

Early in the game, the T&D has to decide/theorize about the membership of the steering team. Think of the PST from a systems perspective. Get representation from all the necessary places. You have to craft a game plan and a sales strategy. Many of the people you are about to approach haven't been on a PST before. They'll want to know why you're asking for their valuable time; you'd better be ready with both an answer *and* a backup answer. (Trust me!)

First, locate the managers most affected by the project outcome. If you are working on a project affecting chemical engineers, get reputable line managers from that engineering organization; on a project for salespeople, get the top-performing sales managers. These are the people that will realign priorities, get you human assets like master performers, and fight with other internal

organizations on your behalf. I know this works; I have had an IS organization refuse a request as nonessential—but get the job done immediately when a line manager (or group of them) makes the request an “insistance.”

Don't be shy; find those that will be positively affected and negatively affected.

If your project has consequences for a downstream organization, put a representative on your PST. If the aforementioned chemical engineering project had a material effect on production, you'd be wise to find a well-respected (among their peers) representative and convince him/her to be on the PST. This isn't hard because downstream people are always frustrated with the changes the upstream people are making. Given the chance to influence or provide input, they'll be there.

Find those that think your project is the dumbest thing ever. Request his/her presence. No kidding. It's better to find out now than later, especially if their power can shut down your project. Couch it as an opportunity to shoot holes in the project if necessary. They have a stake and should have the opportunity to express their concerns. If you don't locate him/her/them early, they'll *certainly* find you later. Remember to keep your enemies close.

Get a finance person with detailed knowledge of the enterprise's books and where the money comes from and is going. If anyone can sniff out a boondoggle, a finance person can. If you get resistance, just tell the financier that you are about to waste a bunch of money on a lousy project with no hope of return on investment (ROI), but that you want him/her to confirm it.

Identify one or two HR/T&D participants. They should be involved *but not have a vote*. We are, after all, keeping the roles distinct. When the PST has to make a business decision, let the line managers and finance people do it. Tell the HR/T&D members to listen and learn and then “do.”

In general, find people that are hard to satisfy, set their expectations, and then exceed their expectations. Get a broad picture of the company. It's better to have representatives from all the regions than just one.

Another small point is useful here. When you mention to this group that you want to make sure the project results in reasonable ROI or economic

(Continued on page 24)

In general, find people that are hard to satisfy, set their expectations, and then exceed their expectations.

The PST, when properly assembled and informed, will make business decisions that protect the enterprise and will protect you.

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value-added (EVA), you won't have to make formulas or run some numbers. They'll see an opportunity and go for it; often they'll even re-write your scope for you on behalf of the shareholder if yours wasn't aligned enough to ROI.

If you have a lump in your throat, or feel a little queasy at the prospect of meeting with this group of people, good—you've found the right people. They should make you nervous. High-payoff projects are played at high-stakes tables.

Project Value

Is a PST required for every project? The short, tongue-and-cheek answer is of course. The real answer is only if the project requires one. The high-payoff projects require a PST. Low-hanging fruit typically does not. But why are you messing with that?

The hurdle to clear is the one many call the "so what?" hurdle; in other words, is the project meaningful? It boils down to simple terms; will the project earn more ROI than the other projects competing for the same investment dollars? Chances are, the T&D manager/professional won't know. But the line managers will—or they can find out awfully fast.

Business managers want to be associated with winning, successful projects—it's a good career

move. If you cannot, with sincere effort, secure membership for the PST, you have a clear signal about the relative value of the project. Drop back and punt.

Politics

Find people that are wired into the company and that have connections. Beware of those that tout their connectivity; they often aren't well connected. Ask around, locate the influencers to the decision-makers, and involve them.

Make sure the people you select/invite are well respected in the enterprise. Good business people know other good business people.

Marketing/Socialization

Nothing helps a T&D effort more than a cohesive band of well-respected managers touting a project. When the PST is in the driver's seat, they'll take care of marketing for you. Nothing fancy has to happen here, just solid word of mouth advertising.

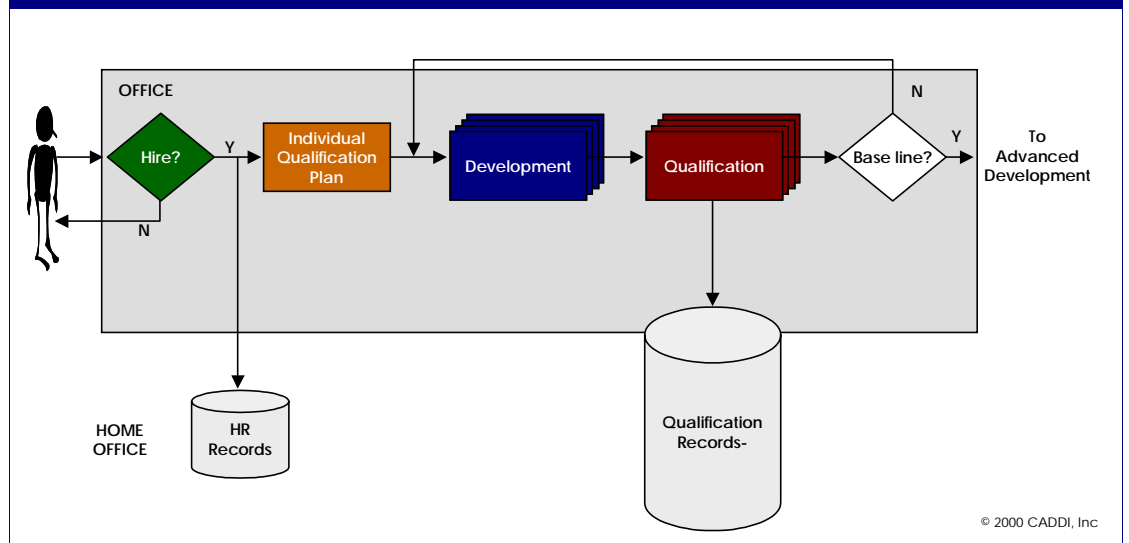
Summary

The PST, when properly assembled and informed, will make business decisions that protect the enterprise and will protect you. We've discussed, at a high level, the assembly of a PST. In future articles, we'll discuss how to inform and guide the PST to appropriate decisions. ▶▶▶▶



CADDI does performance-based Qualification/Certification Systems

Qualification/Certification Process Map



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The Essence of Managing and Leading Training Projects

by Kim Peterson

To Succeed or not to Succeed

During the last six years, I've managed approximately 30 training projects myself, and I've coached other project managers and project leads on other projects. I have seen some project management efforts succeed, while other projects have fallen short of their goals. I think I know why.

Surprisingly, the keys to effectively managing a project make up a very short list.

The Obvious Keys Include . . .

Most of us recognize that good project management for instructional development projects is rooted in solid fundamentals: following a proven process, creating a plan, using appropriate tools to generate schedules, and assigning resources prudently.

These project management methods are oriented to the framework for accomplishing a chunk of work, and a resourceful person can learn them via a class, text, or software package. But excellent project managers know there are additional, valuable competencies that provide the foundation for a truly successful project. These are the competencies that focus on the producers of the work: the people.

The Less Obvious Keys Include . . .

In talking with aspiring and experienced project managers in the training business, I find that any proven project manager can easily identify the attributes in individuals that will help them succeed in this role. These abilities are needed in many other walks of life—personal and professional—and having these abilities makes the project manager essential and highly sought after in many nontraining business areas.

For example, an effective parent, a masterful head chef, an expert builder, and a respected coach share various traits with the training project manager that will enable them to be successful. It's easy to recognize successful individuals in given fields; but it is difficult to pinpoint the keys

that led to their greatness, when you're just starting the journey yourself.

In project management, as with other pursuits, the easily taught skills do not lead directly to the desired result. Truly great project managers also have an underlying, elusive essence that is most desirable and difficult to achieve. The root of their success employs a combination of traits, abilities, and competencies that can really make a project hum despite the unpredictable obstacles that arise.

Flexibility and Creativity Are Key

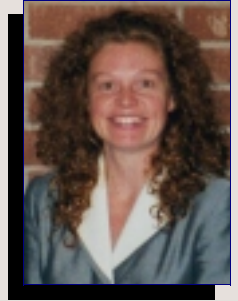
Essential to managing a project is the ability to adjust to countless changes in the plan without losing sight of the project goals. In other words, lead the project in the right direction, despite the ensuing roadblocks. This requires the opposing traits of leadership and management. Implied in the management piece is the ability to solve problems of all kinds.

Too often novice performers look at a well laid-out project plan and entertain the notion that conducting a successful project is as simple as following the steps. Of course, if it were as simple as that, we wouldn't need a project manager at all, just a great plan. Even the best plans, however, are not followed to the letter.

The real tests for a project manager come with a fork in the road or when something doesn't go as intended. Simply put, project managers may fail when they insist on following every step of the plan; but they will succeed more often by planning thoroughly and then adjusting along the way.

Actively managing a project also requires creativity mixed with an aptitude for deductive reasoning. It is part art and part science in the sense that it can be improved with creativity based on expertise; but it also necessitates the knowledge of basic principles. Manipulating the project variables continuously to get the desired result is at the heart of project management.

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Kim Peterson is an independent ISD consultant in the Detroit area. She was trained and certified by CADDI in 1996, and has conducted more than 25 PACT Process projects since that time. Kim previously has been written about in and has written for this newsletter. Kim may be reached at (248) 814-8847 or by E-mail at kfpeter-son@ameritech.net.

The hats worn by a project manager vary widely, but they often include those of a communicator, negotiator, facilitator, consensus builder, and listener.

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This process is similar to cooking by kind of following a recipe. If a desired ingredient or enough of it is unavailable, appropriate substitutions must be made based on the cook's knowledge and expertise. Often the cook adjusts flavors to suit the diners' palates, while a project manager modifies approaches based on the clients' situational needs.

Another key in both scenarios is to recognize which elements will have a direct effect on the desired results, if fudged even slightly. In cooking, it's easy to recognize the effect that not enough roasting time has on a chicken, and that the type of chicken dish requires a certain amount of cooking based on the method chosen.

There are numerous equivalents in training projects. For example, development time for a module of instructor-led training takes a certain amount of time, while creation of the same content as a video clip takes longer. It is a project manager's responsibility to match customers' expectations to products that meet their needs for timing, quality, and cost. This can be equated to assessing whether the customer requires fast food or fine dining for a particular meal.

Interpersonal Skills Are Key

Strong interpersonal skills are a must to excel as a project manager. They are especially important in training efforts where so much of the project's success hinges on the ability to synthesize information from others. The hats worn that are associated with this role of a project manager vary widely, but they often include those of a communicator, negotiator, facilitator, consensus builder, and listener.

Again, instruction is readily available for learning and honing those particular skills; but it requires experience and maturity to detect when to don each cap given sets of changing circumstances. The refined/adapted application of them in difficult situations is a constant challenge.

The value of communicative skills in project management cannot be overstated.

Communication is inherent in nearly every project management task. Better communication is always cited as a suggestion in the "lessons learned phase" of my most difficult projects, and even on some of the most successful ones.

Today, the vehicles for carrying out the

communication of messages include a wide array of media. These communication mechanisms are a project manager's most frequently used tools, and you should be adept at employing all those that have utility in a given arena. Examples include: phone calls, voice mail, E-mail, bulletin boards, Web pages, traditional correspondence, intranet, Internet, faxes, video conferencing, cell phones, face-to-face meetings, conference calls, etc.

In most cases, these are learned in "unstructured, on-the-job training," so dive right in and try them. Practice with colleagues or friends first to gain a comfort level with the ones foreign to you, especially when applying new technology. When using traditional correspondence and especially E-mail, it's always wise to have someone review letters and memos before they are sent to the intended audience, particularly in heated situations.

Communication Is Key

Application of some of the following simple communication guidelines can save much confusion and backtracking.

Respond in Kind or Notify the Sender of Your Intentions

For example, if someone calls directly on the phone, call him back. This is what he is expecting. Nothing is more frustrating than waiting by the phone for a return call only to learn later that the information has been in your E-mail inbox the whole time. Leave a message if the person cannot be reached "live" after a few tries.

You still get credit for responding as long as you don't intentionally call at a time that the receiver is known to be unavailable. Include in the message your intentions, e.g., whether you'll call back at a certain time or provide the requested information immediately, if possible. If E-mail or another mechanism will be employed to send follow-up information, tell the person how it will be sent during the return call. After returning the call, if it is discovered that additional information must be sent via another avenue, call the person back and let them know how it will arrive. This presents a courteous, coordinated response in the sea of communication media that is available today.

Utilize the Appropriate Mechanism Based on the Content and Urgency of the Message

This involves combining time management thinking with the choice of a communication

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	Urgent	Not Urgent
More Important	<ul style="list-style-type: none"> • Pager • Cell phone* • Urgent voice mail/phone message • Phone/conference call* • Impromptu face-to-face meeting* • <i>Urgent</i> E-mail without attachment 	<ul style="list-style-type: none"> • Planned face-to-face meeting* • Presentation* • E-mail with attachment • Letter, memo • Video conference*
Less Important	<ul style="list-style-type: none"> • E-Mail without attachment • Web page • Voice mail • Phone call* 	<ul style="list-style-type: none"> • Bulletin board • Files on shared drive • Mailing • Newsletter • Chat session*

* *Enables immediate, two-way communication*

vehicle. The matrix illustrates a categorization of the choices.

When deciding which vehicle to employ to send a message, keep in mind that individuals use mechanisms differently. The key to successfully communicating is accurately predicting how messages will be received. For example, we all know that pagers and cellular phones should be reserved for more important, urgent messages; but we tend to forget this when panic-stricken or just plain bored.

Try this the next time before paging a director while she's in a meeting with a vice president to ask her what time you're meeting for a casual lunch next week. Put yourself in the receiver's shoes before deciding to send something urgently, and ask yourself if you need an immediate response and whether the information exchange is urgent to the receiver as well. We've all been interrupted with messages that were not urgent to us and are much less likely to respond to a particular person in the future who interrupted us unnecessarily in the past.

Other considerations in choosing a communication vehicle include whether a two-way exchange of information is required for feedback, conversation, or consensus and weighing the effectiveness and penetration for each mechanism when communicating to groups. Make judicious use of the levels of urgency/importance flags that can be applied to messages using some mechanisms, as indicated in the matrix. Finally, keep in mind that vehicles that work well for one organization or person may not be used at all by others.

Use the Receiver's Preferred Method of Communication

Everyone has preferred methods of communication, and the timeliness and thoroughness of the receiver's response increases considerably if it is via one of their favorite mechanisms. Therefore, it is imperative to choose according to the receiver's needs.

This also illustrates the importance of being versatile in all the applicable items on the matrix plus any others that make it easy for clients to communicate with you.

To Be or Not to Be

A difficult situation for me arises when I'm counseling training personnel whose strengths don't mesh with those outlined above. I often counsel them away from this often glorified role of project manager, thereby saving them, their team members, and the clients much frustration and grief.

Unfortunately, many training staff members feel like they have to embrace this role to move up the corporate ladder, and they spend little time contemplating whether the job is right for them.

Summary

This difficult role is not for everyone, and many aspects of it cannot be trained easily. For adults that are intent on learning by doing, however, I can at least give a preview of the less obvious competencies and skills they'll need to draw on when they start to introduce themselves as the manager or leader of a project. ▶▶▶▶

Everyone has preferred methods of communication, and the timeliness and thoroughness of the receiver's response increases considerably if it is via one of their favorite mechanisms.

Individual Contributions

by Guy W. Wallace

This continues our series on Super AoPs begun in the winter 1999–2000 issue of *lean-ISD* on CADDI's Model of Areas of Performance (AoPs).

Catching Up: What Are the Super AoPs?

The Super AoPs are CADDI's approach to segmenting overall enterprise process performance for humans, both human "managerial performance" and "individual contributor performance."

We use the term "Areas of Performance" (AoP) to denote a segment of human performance, so that it can be further analyzed systematically for the enabling knowledge and skills, as well as other human attributes and values necessary for process performance. We also use it to assist in systematically deriving the environmental assets necessary for process performance.

The Super AoPs

There are five types of Super AoPs.

- ▶ Leadership
- ▶ Work Planning and Management
- ▶ Human Asset Planning and Management
- ▶ Environmental Asset Planning and Management
- ▶ Individual Contributions

Super AoP 1 – Leadership

These AoPs are the province of both managers and individual contributors, but mostly management.

Leadership involves setting the direction and communication of the vision, mission, and goals of the enterprise.

Super AoP 2 – Work Planning and Management

These AoPs are the province of managers (and individual contributors where there are self-directed work teams) responsible for planning and assigning work.

Work Planning and Management involves planning work based on the vision, mission, and goals of the enterprise, for the long term, medium term, and short term (including setting the daily goals), and then managing it all as needed to make it

happen (or readjust for the inevitable changes in most performance situations), and then making it happen.

Super AoP 3 – Human Asset Planning and Management

These AoPs are the province of managers (and individual contributors where there are self-directed work teams) responsible for hiring, training, and performance appraisal.

Human Asset Planning and Management involves determining, based on the work plans, what humans (with what knowledge/skill/attributes/value requirements) are needed within the processes to meet the work plans, and then managing them consistent with the plans and policies (among other things) to make it happen.

Super AoP 4 – Environmental Asset Planning and Management

These AoPs are the province of managers (and individual contributors where there are self-directed work teams) responsible for capital asset acquisition, data and information availability, materials and supplies, budgets, compensation, and consequences/discipline.

Environmental Asset Planning and Management involves determining, based on the work plans, what environmental assets are needed within the processes to meet the work plans, and then managing them consistent with the plans and policies (among other things) to make it happen.

Super AoP 5 – Individual Contributions

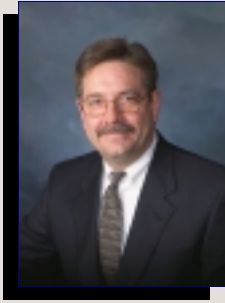
These AoPs are the province of both managers and individual contributors.

Individual Contributions involves making nonmanagerial contributions, which could be on the plates of both managers as well as nonmanager individual contributors.

AoP Definition and Examples

AoPs are the segments of the total performance. They create a framework for the performance (or the piece parts of the performance) that when all added up, represent the whole job (whether it's a job, a role, a process, or a departmental

(Continued on page 29)



We use the term "Areas of Performance" (AoP) to denote a segment of human performance, so that it can be further analyzed systematically for the enabling knowledge and skills, as well as other human attributes and values necessary for process performance.

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function—whatever scope the analysis effort is charged to address).

AoPs are more process oriented than content oriented. They reflect major output and task sets.

Some good examples of AoPs are shown in Figures 1 and 2 below. The first set is linear, and the second set is nonlinear. Both sets are appropriate given the specific performance they were intended to capture.

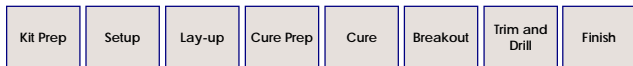
Figure 1: Examples of Linear AoPs

Linear Flow

Example 1 — FRP



Example 2 — Composite Layout



Example 3 — Video Production

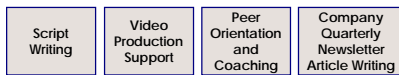


Some examples of nonlinear AoPs are illustrated in Figure 2.

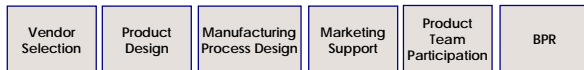
Figure 2: Examples of Nonlinear AoPs

Nonlinear Flow

Example 1 — Writer



Example 2 — Engineer



Example 3 — Clerk



AoPs need to provide a logical structure for looking at the work performance.

A set of AoPs created by one analyst guiding an Analysis Team of master performers and subject matter experts (SMEs) would certainly vary from AoPs created by another analyst for the same performance—the variation between the background and experience of the facilitator and the team members pretty much guarantees it. There are probably approximately 88 good ways to segment performance . . . and 88,000 bad ways. It's not an exact science, and it's rarely easy, but there are

ways to make this work reliably.

Individual Contribution AoPs

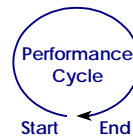
Individual contributions are at the “core” of enterprise processes.

The key to the analysis of individual contributions is in recognizing patterns—try to look for and understand the following:

- ▶ The heart of their performance
 - What is the “core” performance—what are they on the payroll for?
 - For lumberjacks and lumberjills it would be “sawing down trees”
 - For product managers it would be “managing a product through its life cycle”
 - For sales reps it would be “selling to customers”
- The prevailing cycles of performance
 - Is there a part of the job that continually repeats itself?
 - For lumberjacks and lumberjills it would be “planning and sawing down trees” and then doing it again, unless they have to drag the trees off to the sawmill.
 - For product managers it would be “managing a product through its life cycle” and then doing it with other products simultaneously, each at various stages of their life cycles.
 - For sales reps it would be “preparing for and making sales calls on customers” and then attempting to sell the next customer. Also one hopes there is the “paperwork” (“e” or not) of closing the sale portion of the job.

Figure 3: AoP Segmentations and Cycles

- AoPs can be segmented by linear flows or by cycle



- Cycles can be short or long
 - Minute
 - Hourly
 - Daily
 - Weekly
 - Monthly
 - Quarterly
 - Annually
 - Etc.

Some jobs have multiple cycles—managing a store has daily cycles like opening and closing the store, monthly cycles like closing the books, and annual cycles like taking the complete store inventory.

(Continued on page 30)

There are probably approximately 88 good ways to segment performance . . . and 88,000 bad ways.

The key to the analysis of individual contributions is in recognizing patterns.

Work performances with vastly different cycles usually need to be kept in separate AoPs.

(Continued from page 29)

Work performances with vastly different cycles usually need to be kept in separate AoPs. But sometimes it can be better to cluster performance of like kinds and separate cycles at the output level.

For example, if you were analyzing CADDI's "case company" The Most Convenient Store for the TMC store clerk role, you might have made "Inventory Management" the AoP and lumped inventory counts, reordering, and stocking (which might have different cycles) together into one AoP.

If you were analyzing the cashier's role, you would probably use separate AoPs because you would have a different level of focus and detail on these different areas.

Cycle	TMC Example
Minute	Conduct sales transaction
Hourly	Cash drawer deposit
Daily	Open and close store
Weekly	Employee work schedule
Monthly	Budget reconciliation
Quarterly	HQ report completion
Annually	Inventory adjustment

Figure 4: Examples of Cycle Tasks

Ask yourself and then interview/observe for the following:

- ▶ The prevailing linear flow details of their performance
 - Is there a dominant flow to their job performance within the chunks of the AoP?
 - For lumberjacks and lumberjills it could be something like, "find marked tree, plan tree felling, make first cuts, make secondary cuts, fell tree, saw per job order, etc."
 - For product managers it could be "develop product concept for management approval, assemble cross-functional product team, develop full-blown business case for approval, conduct marketing research, design product and manufacturing process, ramp up and implement the manufacturing process, develop sales channel and sales support system, develop service channel and system, manage product through its life cycle, prepare and plan for product discontinuance"
 - For sales reps it could be "portfolio and account planning, territory planning, sales call

preparation, sales call conduct, sales call follow-up, sales administration"

- ▶ Any cycles within cycles within each major AoP?
 - If any one (or a few) of the potential AoPs is at the heart of the performance, then there are probably output-task cycles within.
 - For sales reps it could be that "sales call preparation and sales call conduct" are the heart, repeating over and over again. We may need to break these out further.

Sometimes the physical layout of the workplace can provide clues, especially in production work. Often the work process makes its way from one end of the plant to the other with clearly defined "handoffs" designating the boundaries between potential AoPs. In the same manner, you *may* see clues in the organizational structure—separate functions, roles, titles, etc., may indicate different work.

Depending on the types of jobs you have had prior to becoming a "performance modeler," you may be able to identify similarities between the performance you are analyzing and your own experience. For example, have you ever worked in a fast food restaurant or gas station? If so, you should be able to conceptualize at least some of the customer service elements of a bank teller or customer service rep or store manager or airline counter clerk role.

One last general consideration is the overall nature of the work you are analyzing. Try to get an overall sense of the job, such as whether it is a job with many routine repetitive tasks or if it is one in which the performer has to first plan, then execute a string of complex, time-consuming tasks. Is it a job with many little miscellaneous tasks and fire fighting, or is the performer worrying about the "big picture?" What is the time frame of the job—is it managing projects that span months or managing a shift every day or managing a job every hour (like a print shop)?

What is the primary accomplishment? Do the AoPs reflect this? It will be easier for reviewers if the AoPs are in proportion to the real emphasis of the job rather than having one giant AoP that is 90 percent of the job and equal billing given to a bunch of peripheral tasks.

How do you judge the appropriateness and completeness of a set of AoPs? As almost always, it

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depends. It depends on the scope and terminal objectives of your project.

To challenge your first cut at a set of AoPs, ask yourself the following:

- ▶ Does it directly conflict with or contradict any other prevailing/established models of the process or performance? Will this politically sell? (We want it to!)
- ▶ Do all the tasks and outputs of the process/performer fit within this AoP framework? Are there any missing AoPs? (We don't want any!)
- ▶ Does this AoP framework minimize all overlaps and gaps? Will the same outputs or tasks fit into multiple AoPs? (We want it to be very clean and

Goal: minimize overlaps and gaps

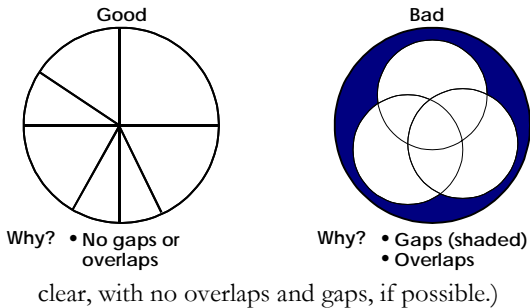


Figure 5: Good and Bad AoPs

The approach we take in our Analysis Team meetings is to ask the team numerous front-end questions as we waste a page or two of flip chart paper attempting to create some semblance of order out of the many things performers do in their jobs. That gives us “voice of the customer” (VOC).

But what about “voice of the supplier” (VOS)?

Do we get a say in the appropriateness or completeness of the AoPs? Yes, we do!

As the T&D supplier, we have to judge the set of AoPs we are to work with in terms of how well this AoP performance framework will allow us to further analyze the performance targeted by our project.

Will the AoP framework assist us in specifying ideal performance, conducting a gap analysis, and then deriving all of the enabling knowledge and skills? Or will it hinder us? And finally, will it help us later in our postanalysis efforts to configure and sequence instructional content, detail the design, develop the instruction, pilot-test and update, and then finally deploy performance-based training and development (T&D) that has process performance impact for the good? Will we end up with a positive ROI and EVA when the dust settles?

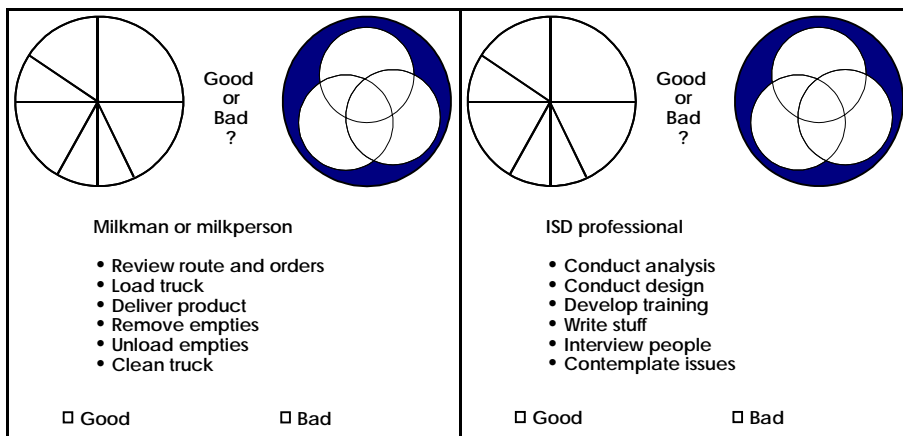
If the AoP framework will help us, cool. If it will hinder us, then start over, even if the Analysis Team loves the nonuseful AoP configuration! This may be difficult to sell, but if we ISD suppliers can't use it as a means to our ends, what good is it?

In the Next Issue

We'll wrap up this series in the next issue. I hope you're enjoying and getting something of use from this series. ▶▶▶▶

The approach we take in our Analysis Team meetings is to ask the team numerous front-end questions as we waste a page or two of flip chart paper.

Figure 6: Good or Bad AoP Examples





Our
Call Center

Experience

Year	Client	Target Audience
1997	Consolidated Communications (now known as McLeod USA)	Customer Service and Operations
1998	AT&T	Customer Interface Agents
2000	Ameritech	Covering individual divisions for Consumer Service Representatives
2000	GTE Service Operations	Wholesale Billings
2001	Verizon	Consumer Sales Representatives

CADDI has conducted Modular Curriculum Development projects for a number of Call Center operations where the intent was to *improve posttraining revenues* and/or *reduce* training and cycle times *costs*.

We work both ends of ROI.

Interested in our Call Center performance improvement?

Then give us a call!

$$ROI = \frac{R - I}{I}$$

*Interested?
Call
(630) 355-9800
and ask for
Brian Blecke*

The Design Review Team (DRT) Process

by Dottie A. Soelke

In any product development process, whether the product is a concept car, a piece of furniture, a camera body, or a curriculum architecture, the design review is crucial to the success of the product. At CADDI, the design review is a standard element or subprocess within the Design Phase of our PACT Processes: Curriculum Architecture Design (CAD), Modular Curriculum Development (MCD), and Instructional Activity Development (IAD). And the Design Review Team meeting—we call these meetings DRTs—is one of CADDI’s most powerful design review tools.

What Is a PACT Process Design Review Team Meeting?

The Design Review Team meeting is a process during which the target audience, its management (at a variety of levels), and the client Project Steering Team (PST) have the opportunity to examine the outputs of the Design Phase and then provide feedback. In some cases, we might experience requests for slight changes in the T&D Path, elimination of a module(s) containing obsolete (or soon to be obsolete) content, inclusion of content that has been overlooked, and so on. Although it hasn’t happened to us yet, we imagine that on rare occasion, a review of the design could identify gaping holes in the content or completely redirect the project. Better sooner than later. That is to say, it’s

Better and much less expensive to uncover design issues **Sooner** in the Design Phase where the issues can be addressed with less rework **Than** would be necessary had the issues been discovered **Later** in the Development Phase.

Figure 1 represents the elements of the DRT process and their flow, as well as the DRT’s placement within the Design Phase.

Preparing for and Conducting the DRT

The primary element in the design review process is the Design Review Team meeting. The DRT process includes three major chunks: preparing for the DRT, conducting the DRT, then acting on the results of the DRT.

In preparing for and conducting a successful DRT, we need to answer some pertinent questions.

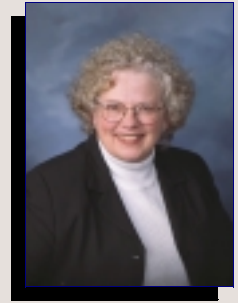
- ▶ **Why** conduct a DRT?
- ▶ **Who** needs to attend the DRT, and who will play a role in preparing for and conducting it?
- ▶ **When** should the DRT be held?
- ▶ **Where** should the DRT be held?
- ▶ **How** are we going to get this done effectively and on time?

Why Conduct a DRT?

Now that we know *what* a design review is, why would we use the DRT process/technique? While there will be valid reasons to conduct a DRT that are specific to a given project, in general, DRTs are useful because they

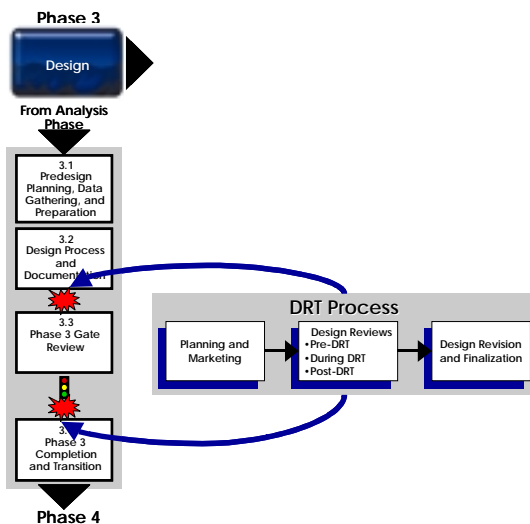
- ▶ Validate the structure/flow of the design.
- ▶ Confirm and elicit endorsement for the content, which is particularly important when the Analysis and/or Design Teams don’t have **exactly** the right people on them (as sometimes happens).
- ▶ Provide a mechanism for identifying content that is
 - Different from location to location
 - Exactly the same for more than one location
 - Inaccurate

(Continued on page 34)



The Design Review Team meeting is a process during which the target audience, its management (at a variety of levels), and the client Project Steering Team (PST) have the opportunity to examine the outputs of the Design Phase and then provide feedback.

Figure 1: The DRT Process



Our experience has been that DRTs are worth the time and effort, and our clients have agreed that DRTs have been valuable.

(Continued from page 33)

- Incomplete
- Obsolete
- Missing altogether
- ▶ Broaden the “buy-in” base—once target audience members have seen the design, heard the background and rationale for it, and offered their own feedback, they’re more likely to become a strong proponent of the effort.
- ▶ Make the project and its progress visible and to some extent, demystified.
- ▶ Help boost the credibility of the customer’s T&D function.
- ▶ Generate enthusiasm for the project’s outcome, whether it’s a CAD, MCD, or IAD.

For instance, by the end of the first of three location-specific DRTs for a recently conducted large-scale MCD, the target audience members let it be known that they were looking forward to the training with great anticipation. In addition to significantly reducing the delivery length of the curriculum, the target audience is so enamored with the design, it would be hard for their management to delay developing the materials.

The downside is that DRTs take calendar time, and in a world where all of our projects need to have been done yesterday, that’s sometimes a little hard to sell. Not only that, but DRTs add cost to the project—not just in terms of time and materials to support the meeting, but also in terms of travel expense. Nevertheless, our experience has been that DRTs are worth the time, effort, and expense, and our clients have agreed that when necessary, DRTs have been valuable. (Back to determining “when” they are necessary in a moment.)

Who Participates in the Design Review Team Efforts?

The Design Review Team is composed of several people who play integral roles in the design review process: the project sponsor, the client-side project manager, members of the target audience (from subject matter experts and master performers to novices) and their management, the designer-side project manager and designers, and perhaps some of the members of the Project Steering Team (PST) members.

Project Sponsor Responsibilities

- ▶ Kicks off the DRT meeting by overviewing the project and its background and rationale, and introducing the designers
- ▶ Reviews the draft design

- ▶ Provides feedback
- ▶ Participates as a member of the PST (optional)

Client-side Project Manager Responsibilities

- ▶ Coordinates meeting logistics
 - Makes arrangements for the date, time, and facility in which the meeting is to be held
 - Makes arrangements for refreshments, if necessary
 - Receives meeting support materials that are shipped to the meeting location prior to the DRT
- ▶ Helps to publicize the DRT meeting
- ▶ Attends the DRT meeting and reviews the draft design (optional)
- ▶ Acts as or arranges for a point of contact for reviews of the draft design that take place after completion of the DRT meeting
- ▶ Helps coordinate collection of the feedback and forwards it to the designers, if necessary

Target Audience Members Responsibilities

- ▶ Attend the DRT meeting.
- ▶ Review the draft design during and/or after the meeting.
- ▶ Provide feedback on the draft design.

Designer-side Project Manager and Designers Responsibilities

- ▶ If necessary, help the client-side project manager coordinate DRT meeting logistics.
- ▶ Develop the draft Design Document and other materials.
- ▶ Develop DRT meeting marketing materials.
- ▶ Conduct the DRT meeting.
- ▶ Collect, organize, and review the feedback.
- ▶ Develop revision recommendations and submit them to the PST for approval.
- ▶ Revise/finalize the draft design as directed by the PST.

PST Members Responsibilities

We have, on occasion, invited PST members to the DRT meeting, particularly if we can’t work in an official Gate 3 review meeting—or if the project is on an extremely tight schedule (aren’t they all?). In general, with regard to the DRT process, the PST members

- ▶ Review the draft design.
- ▶ Provide feedback and direction.
- ▶ Review design revision recommendations and approve/reject.

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When Does the DRT Take Place?

Whether it's part of a CAD project, an MCD project, or an IAD project, the DRT is a Phase 3 activity. Exactly when it should occur depends on your motives for holding the DRT in the first place. The DRT can be effective if conducted ***before*** the Project Steering Team reviews the design, ***after*** the Project Steering Team reviews the design, or ***before and after*** the Project Steering Team reviews the design.

Conduct the DRT ***before the PST reviews the design*** if

- ▶ The PST is fairly far removed from the content and the target audience and wouldn't be able to provide insight or recommendations for revision.
- ▶ The target audience is widely distributed and there is more than one version of the T&D Path based on target audience location.
- ▶ The target audience is very large and you want more eyes on the design to ensure there are no content gaps.
- ▶ You're not convinced that the Design Team is composed of the right people and you want to verify the quality of the content before the PST reviews the design.
- ▶ You need to maintain project momentum. In fact, if momentum is an issue, the DRT meeting should take place as soon after completion of the draft Design Document as is reasonable.
- ▶ In the interest of time, you could even conduct the PST Gate 3 review meeting during the last couple of hours of the DRT. The advantage here is that the Design Team members attending the DRT can be present to defend/support the design if the PST has reservations about its validity.

Conduct the DRT ***after the PST reviews the design*** if

- ▶ Your primary intention for the DRT is to use it as a marketing/communication vehicle to make the project visible, gain acceptance, and keep the target audience and its management current on the project's status.
- ▶ The PST members ***are*** close to the content and/or the target audience and are able to ensure quality before the Design Review Team examines the design.
- ▶ The PST has insight to business-related issues that might have an impact on the design.

Conduct the DRT ***before and after the PST reviews the design*** if

- ▶ The PST is able to adequately review content but wants another group of qualified individuals to verify content before they make business decisions that will impact the design.

- ▶ The target audience is very large and you want more eyes on the design to ensure there are no content gaps.
- ▶ You intend to use the DRT as a marketing/communication vehicle to make the project visible, gain acceptance, and keep the target audience and its management current on the project's status.

You could also opt to omit the DRT altogether if conditions are right, namely

- ▶ The schedule is extremely tight.
- ▶ The right master performers have had input during the Analysis and Design Phases.
- ▶ The PST agrees that the DRT can be omitted with little risk and that they are "close enough" to the work and/or trust their appointed Analysis and Design Team members.

Our rule is that regardless of when the design is formally reviewed, we take feedback at any time because we want our client to stop us before we do something inappropriate with the design—like develop incomplete T&D.

In support of the DRT meeting, a few other tasks need to be completed before it takes place.

- ▶ At least two weeks before the DRT meeting (even before the Design Team meetings are complete, if necessary), start the marketing campaign. Have the client-side project manager distribute formal invitations to the meeting. The invitations should note the goals of the meeting as well as the time and place. The invitation should also ask the invitees to RSVP to the client-side project manager so that we know approximately how many people will be attending and can produce a sufficient number of materials.
- ▶ One to two weeks before the DRT is to take place, have the client-side project manager hang posters in the hallways that are frequented by the target audience and their management. The posters should advertise the DRT meeting, its goals, the time and place of the meeting, and whom they should contact if they have questions.

After completion of the DRT, act on its results by

- ▶ Collecting and compiling feedback from DRT attendees
- ▶ Developing a set of recommendations for revision based on the feedback
- ▶ Presenting your recommendations to the PST for approval
- ▶ Implementing approved/appropriate revisions and finalizing the design

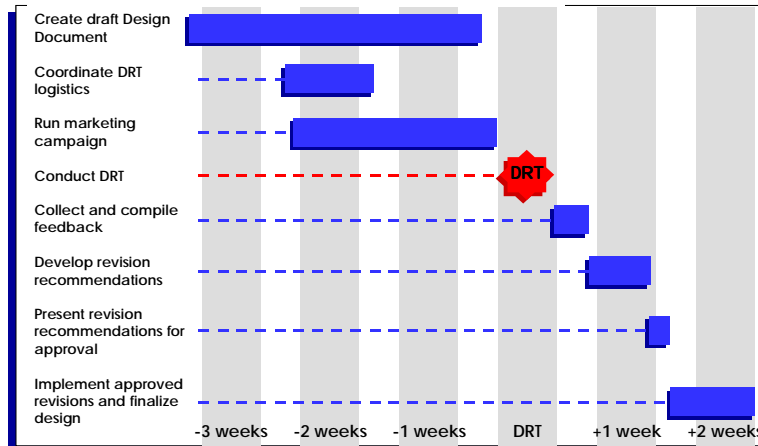
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The DRT can be effective if conducted before the Project Steering Team reviews the design, after the Project Steering Team reviews the design, or before and after the Project Steering Team reviews the design.

A "go fast" alternative is to conduct the DRT meeting when the rough, rough, handwritten draft design is still posted on the walls and spread out on tables at the end of a design meeting.

(Continued from page 35)

Figure 2: DRT Process Timeline



Go Fast Approach

A *go fast* alternative is to conduct the DRT meeting when the rough, rough, handwritten draft design is still posted on the walls and spread out on tables at the end of a design meeting. In one such case, we brought together a DRT on the last day of a CAD design meeting. The intent was to review the draft design without taking the time to enter the data into the database and make it look pretty. This alternative works well when the conditions are right—namely, the PST wants to go fast *and* have broad buy-in to the design prior to moving forward.

“Go Fast” Advantages

The advantages of using this *go fast* approach are pretty significant and can have considerable impact on the success of the project.

- ▶ It’s more obvious to the DRT that the design came from something messy and took tremendous effort.
- ▶ If invited to arrive early enough, the DRT can see some of the design creation/process in action—proving that it’s not all smoke and mirrors.
- ▶ The DRT can see the logic of the design and how it evolved.
- ▶ The master performers can defend their logic more readily—they just finished the design moments earlier.

“Go Fast” Risks

There are risks, of course, and the PST has to manage/choose their steps wisely. Doing a DRT meeting on *draft* data opens plenty of downside possibilities.

- ▶ The draft isn’t complete enough for review. This wastes not only time but also a great marketing opportunity.

- ▶ The facilitator hasn’t spent enough thoughtful time on the design to surface all the relevant issues/concerns.

- ▶ The draft isn’t presentable enough and hurts the marketing/buy-in efforts.
- ▶ The master performers aren’t strong enough to defend the design on the fly.

If one or more of the above conditions exist, consider conducting the traditional DRT meeting and avoiding the *go fast* approach.

Where Should the DRT Take Place?

- ▶ Conduct the DRT meeting at the target audience’s home base. If the DRT meeting is in the heart of the workplace, more target audience members will be able to take a look.
- ▶ If the target audience is large in numbers, you may have to conduct more than a single session in each location.
- ▶ If the target audience is geographically diverse and they can’t all travel to the DRT meeting, you might want to conduct a DRT at more than one location.
- ▶ Have the client-side project manager book a conference-type room with
 - Plenty of wall space for hanging posters
 - A screen or blank wall for projecting the presentation
 - Sufficient seating

How Can You Ensure an Effective DRT?

- ▶ Invite the project’s biggest adversary/opponent. One of your goals should be to turn opponents (and there usually are some) into proponents.
- ▶ If this DRT is part of an MCD that has followed a CAD, be sure to note any changes that have occurred or issues that have popped up post-CAD, e.g.,
 - Company, logo, business unit, or department name changes (these changes sound unlikely, but have happened on several CADDI projects)
 - Changes in team membership
 - New/changes to processes or procedures in the target audience world that may impact the work done to date
 - Changes in terminology
 - Changes in the structure of an event or content of a module as the design evolves

(Continued on page 37)

Invite the project’s biggest adversary/opponent. One of your goals should be to turn opponents (and there usually are some) into proponents.

(Continued from page 36)

- ▶ Depending on the situation, it may be a good idea to send preview copies of the design to the formal reviewers (or at least to the SME or master performer you trust the most with the content), particularly if the scope of the project is very large or if you have to combine the DRT meeting with an implementation planning meeting or a PST gate review.
- ▶ Market/advertise the DRT—send out flyers, make posters for the client to post in areas where the target audience will see them.
- ▶ Use posters for a *walk-the-wall* session during the DRT meeting.
 - Poster – T&D Path
 - Poster – T&D Module Inventory Framework
 - Poster – Individual T&D Planning Guide
 - Poster – Event Definition
 - Poster – Annotated graphic of the forms used in the design (e.g., Event/Module Specifications, Lesson Map, etc.)
- ▶ Create a design review package that includes all of the Design Phase outputs.
- ▶ Use feedback forms on which the reviewers can record their comments and then submit to the design-side project manager.
- ▶ Provide *subsets* of the Design Document for all DRT attendees to take away from the meeting.

- ▶ Use sign-out lists for the *complete* copies of the Design Document (if you have extras) for the target audience members to examine at length, so you know who has them.
- ▶ After the DRT meeting, have someone at the client site act as a point of contact for those who have questions and/or wish to submit feedback on the design.

In Conclusion

As stated at the beginning of this article, design reviews are not just important, they're crucial to the success of the project and the quality of its outputs and outcomes. When selling the design review/DRT process, follow the *better sooner than later* rule.

Better and much less expensive to uncover design issues **Sooner** in the Design Phase where the issues can be addressed with less rework **Than** would be necessary had the issues been discovered **Later** in the Development Phase.

The benefits far outweigh the costs. ▶▶▶▶

Design reviews are not just important, they're crucial to the success of the project.





CADDI

Targets

EPPI

Enterprise Process Performance Improvement

because targeted EPPI provides

ROI

▶ Recently, a client of ours got a 360:1 ROI using our Performance Modeling, K/S Analysis, and CAD methodologies

- Especially cool is the "1" was worth \$500,000. Do the math!

▶ We recently used a CAD and MCD to redesign T&D for one audience, reducing training time from 57 to 28 days, for a projected, first-year revenue acceleration of \$20 million.

▶ A banking client used an MCD to create product launch training, which earned an 850:1 ROI.

▶ A CAD project and an MCD were used to implement dealership training that improved production by 30 percent and reduced costs by 20 percent—on the first day!

Can We Help You Achieve These Levels of ROI?

*CADDI
does . . .*

▶ EPPI

▶ PACT
- CAD
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and ask for
Brian Blecke*

Building the Business Case for “Push-Pull KMS”

by Guy W. Wallace

This article is the third in a series on CADDI’s view of knowledge management systems (KMS), which is targeted versus all-inclusive. We call our view of KMS push-pull. In this issue, we’re covering Stage 1 of a four-stage approach to implementing push-pull KMS.

Catching Up: What’s “Push-Pull KMS”?

We started this article series in fall 2000 taking issue with what we had been reading about KMS in journals and popular magazines and hearing about at conferences. The nature of some of the KMS efforts worries us in that it seems out of control. It feels like TQM all over again, where we went prematurely after continuous improvements everywhere, without regard to return on investment (ROI).

KMS is typically defined as something along the lines of knowledge objects captured/maintained/administered to leverage the enterprise’s explicit and tacit knowledge. One scary thing is that there is a lot of press about how to better enable subject matter experts (SMEs) to create these knowledge objects that will be stored in a knowledge repository (an “e” warehouse of sorts).

Our view of KMS is that the only content to be placed in any knowledge repository should be deliberately aimed at key target audiences, but then stored in such a manner to enable other target audiences to access and utilize it.

We label this push-pull KMS.

Push-KMS is when enterprise leaders deliberately target certain processes and target audiences for KMS treatment. Then their needs are addressed, and knowledge products are produced (using good ISD methods) and deployed (*pushed*) to them. These knowledge products can include

- ▶ Best practices
- ▶ Lessons learned
- ▶ Procedures
- ▶ Job aids/EPSS
- ▶ Templates
- ▶ *Example* plans

▶ *Example* documents

The goal for providing the knowledge products is to help performers avoid/eliminate/reduce “reinventing the wheel” or “starting from ground zero” for each new performance effort. That makes business sense to us!

Pull-KMS is when other, nonkey target audiences tap into the knowledge repository and pull the content to meet their needs. Note that not all of their needs will be met, because they weren’t “targeted” by the enterprise leadership.

KMS should ultimately serve the shareholders, or why bother? If it doesn’t positively affect ROI, economic value-added (EVA), and the bottom line, then don’t do it.

One way to positively affect the ROI and EVA equations is to better target the KMS efforts to ensure an ROI for every component resourced, developed or acquired and then administered and deployed, and then maintained, in a forever cycle, until someone pulls the plug—on the one piece of knowledge or on the whole system.

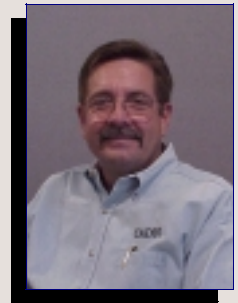
And that might happen if and when it is determined that the KMS doesn’t have a sufficient return or enough economic value-added to warrant continuing. It either pays its way, or it’s stopped.

Overview of “Building the Business Case”

The business case is a sales document. Depending on the ultimate reviewers’ propensity for reading deep narratives, or tables of data, or looking at pretty charts and diagrams, you need to get across a credible story about how KMS can return more than it takes and that the costs for not doing anything/something are also significant.

The goal of KMS has to be to protect and improve the enterprise, or why bother? Why should the enterprise leadership want to bother? If you can’t answer that, you won’t get anywhere . . . hopefully, for the sake of the shareholders.

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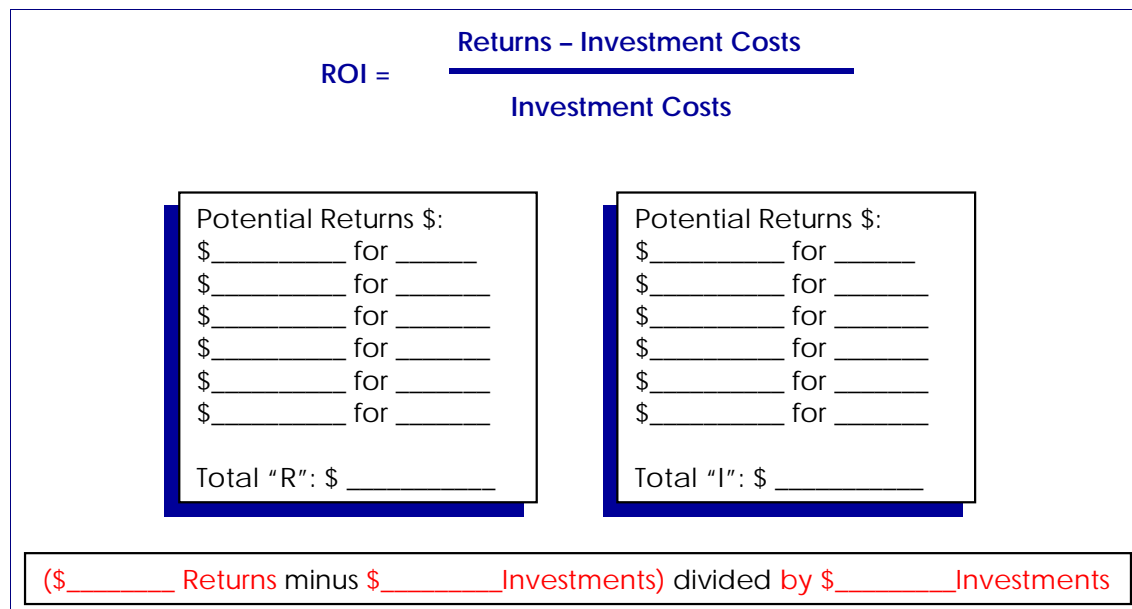
KMS should ultimately serve the shareholders, or why bother? If it doesn’t positively affect ROI, economic value-added (EVA), and the bottom line, then don’t do it.

(Continued from page 39)

Bottom-line Considerations

We'll start with a review of the bottom-line considerations for KMS: financial returns on investments and economic value-added.

Figure 1: Financial Returns on Investments and Economic Value-Added



If you gave them the COC first, that would probably scare them! But then if you can show them an even scarier CONC, they'll have no choice but to protect the business. They'll have to go for the gold ring. But you don't get gold by chasing every KMS topic, template, and performance aid possible. You get the ROI by targeting short- and long-term ROI and EVA where you consider both first costs and life-cycle costs.

The costs of non-conformance (CONC) are the costs for being screwed up, or for not being as perfect as your competitors are currently or will be in the future.

After all, you wouldn't spend your own money on a bad investment, one with little or no return. Nor would you spend it for "reasonable returns" forecasted that just require way too many stars to align perfectly, or that have too many uncontrollable facets that could end up being quite problematic.

So how do you talk to the people who represent the owners whose money we are talking about? You talk to them in the common language of business. How to "spend a buck and make 12 back." That's what they want to hear. If you don't tell them that, then you must expect that they'll just have to trust you.

If you can, talk first about the costs of nonconformance (CONC). These are the costs for being screwed up, or for not being as perfect as your competitors are currently or will be in the future. What kinds of costs could be saved? What kinds of revenues would be enhanced? How much for each?

Then present the costs of conformance (COC). These are the costs to get straightened up, or more perfect (in a world statistically devoid of zero-defects) than your competitors—either now or later.

Enterprise Politics and the KMS Governance Board

The old saw is "if you can't beat 'em, join 'em."

Like many TQM efforts, we suppose many KMS efforts won't get too far off the drawing board before being quashed by reasonable people protecting themselves and their organizations from runaway programs that have much promise but little punch. Wise business people have reason for hesitancy, even fear. Promising programs have turned well-operating functions into poor performers due to distraction from the real goal.

Getting all of your key decision-makers and stakeholders (enterprise executives and other leaders from IT/HR/Operations/etc.) into one forum to get them to consensus is necessary. If you don't get them to consensus early enough, you'll live in ReWork City with your KMS plans. Or you'll be run out of town on a rail when they discover what's really involved and what the costs will be/are.

Round 'em up and head off their issues at the pass.

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The KMS Governance Board

This group of executives and leaders of the enterprise need to take charge of KMS to protect and improve the enterprise, on behalf of the owners (the shareholders). They should target mission-critical and strategic endeavors for KMS treatment and not let the KMS effort run amuck or run aground. They should keep the IT and HR leaders from subscribing to the notion of “build it and they will come.” That might be true, but who then will keep it all up-to-date, or doesn’t that matter? What happens when best practices no longer are? Who pays for the administration and the maintenance/clean-up? The shareholders do.

If you don’t get consensus on the needs and returns for KMS, you’ll battle this issue forever. Getting everyone on the same page is important (or in this case, on the same pages as your business case).

A business case is necessary to document all the words/thoughts/numbers that are easily misconstrued if left to verbal discussions. Documenting the KMS plan and rationalizing it all in a business case makes for fact-based decision-making versus opinion-based decision-making.

Gathering Inputs for the Business Case

The data you need to gather includes the following:

- ▶ The forecasted “returns” to be gained from the KMS effort in terms of financial gains and strategic gains

- ▶ The probable costs for infrastructure implementation
- ▶ The probable first costs for content capture (analysis, design, and development in ISD terms)
- ▶ The life-cycle costs for both content and infrastructure
- ▶ The risks and potential costs of not doing anything at all

The KMS Business Case Outline

There are many structures and depths for business cases. The trick is finding one that will work for you in your situation. (See Figure 2.)

The best one for you would be one that resembles any formerly acceptable, pre-existing, previously used “structure and depth” at your enterprise. Get a copy of recent business plans and business cases and try to mimic the format, content flow, and level of depth that works where you work.

Stage 1 Gate Review/Kick-off Meeting

After the business case has been finished, you need to review it with your Governing Board. One suggestion is to preview the case with each member (or at least the key decision-makers and influencers on your board) prior to the formal review. Allow *no* surprises, for yourself or others.

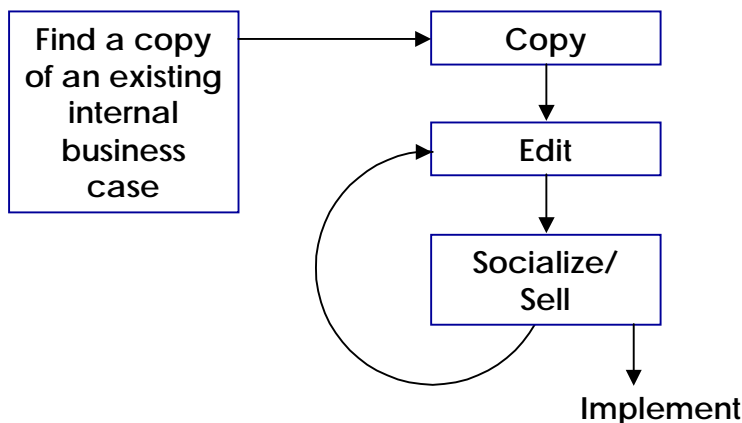
See Brian Blecke’s article “Selecting and Managing a Project Steering Team” on page 22 regarding the Project Steering Team. It’s just like the Governing Board needed here.

Next Issue

In our next issue, we’ll look at Stage 2. ▶▶▶▶

Preview the case with each member (or at least the key decision-makers and influencers on your board) prior to the formal review. Allow no surprises.

Figure 2: Existing Case as a Template



ReadyGo Web Course Builder Review

by Melissa A. Joiner



Overall, this is a very simplistic tool for deploying content on the Web. It is relatively easy to use but unsophisticated in terms of ISD and its authoring interface.

To begin my review, I downloaded ReadyGo™, Inc.'s trial version of Web Course Builder™ (WCB) v1.20 and reviewed the template for creating/building a course. I also reviewed the ReadyGo Web Course Builder tutorial. Overall, this is a very simplistic tool for deploying content on the Web. It is relatively easy to use but unsophisticated in terms of ISD and its authoring interface. The intended audience for this tool seems to be mostly subject matter experts who want to convert an existing topic-based course or PowerPoint® presentation, or "develop" a "course" for the sole purpose of delivery on the Web.

The tutorial claims that pedagogy and instructional design are built into Web Course Builder. It also states that "by using all the elements found in WCB, you can create *simple to use* and *effective to take* Web-based courses." The problem with this is that all of the elements provided wouldn't necessarily be appropriate to use in every instance. What does *effective to take* mean? What about learning? (Or, dare I ask, performance?) We call it e-learning for a reason. If the emphasis is on the "e" and not the learning, a red flag pops up. The tutorial instructs the user that "good e-learning does not consist of repurposed CBT. The Web is a different medium and requires different techniques." It's true that the Web is a different medium and, as such, requires different techniques. But what techniques are they talking about? Do they mean instructional design techniques or Web design techniques? Another red flag pops up.

The Web Course Builder is structured to accommodate content being converted to a topic-based course. The course design is built around a basic outline format using book metaphors. Subject matter is converted to chapters, and topics are converted to bullet pages. At a high level, it follows a hierarchical presentation of information with built-in features that enable the user to easily include interactive elements such as additional articles, links to resources, quizzes, visual diagrams, and exercises. It also has a basic testing capability. Users can create multiple-choice and true-false tests with a maximum of five questions per test.

A user of the tool can jump right in and populate the template to create and publish a course, or go through the tutorial that covers how to actually "design" a course. The tutorial contained some interesting instructions in the section about designing a course. For example, "repetition is the basis of good learning," "have the learner perform the *concept*," "include a quiz every two to four pages," you get the idea. The terms "corporate goals," "student goals," "course goals," and "objectives" seem to be used interchangeably. The tutorial instructs the user to identify objectives, and then identify the audience. (How does that work? Upon completion of this course, the (fill-in-the-blank) will land the plane in zero visibility on the first try?)

A Server-Side Testing module can be purchased separately and provides a way to save student results to a central location. Interestingly, the test capability doesn't provide feedback if the learner answered incorrectly nor does it instruct the learner to try again. The test is graded, and the learner is given a percentage correct and a reassuring statement like, "unfortunately you missed 3, 4, 5 . . ."

So, what's good about the tool? It's relatively simple to use and would enable the user to quickly put together a topic-based course for the Web. It utilizes a standard format. Courses are built in HTML and Javascript so they can be downloaded easily and accessed with any Web browser. Multimedia elements like Macromedia® Flash™ and video can be incorporated into courses.

The best part about the design of the tool is it does a good job of helping the user to chunk content and limit screen text by breaking the information apart into different chapters and elaborating with the use of hyperlinks, etc. (Of course, the problem with this is what method someone might use to decide which content is need-to-know versus nice-to-know, but that's a different issue.)

ReadyGo's Web Course Builder competes with tools like Click2Learn's Toolbook Assistant.

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Toolbook Assistant has a more mature authoring interface and a longer history than ReadyGo Web Course Builder.

In summary, the design of the tool drives the design of the content. For a novice who wants to quickly put something on the Web, this may be a useful tool because it provides some structure and several interactive elements that are easily included. For most other users, or when truly robust learning experiences are required, ReadyGo Web Course Builder is too limited. ▶▶▶▶

ReadyGo and ReadyGo Course Builder are trademarks of ReadyGo, Inc.

Macromedia is a registered trademark and Flash is a trademark of Macromedia, Inc.

PowerPoint is a registered trademark of Microsoft Corporation.

Sidebar

Beware vendors who send us mailings (“e” or otherwise) who ask us to take a test drive. We just might take your product for a “full destructive test” offroad and assess its robustness. Bring it on!

For a novice who wants to quickly put something on the Web, this may be a useful tool because it provides some structure and several interactive elements that are easily included.



Articles on CADDI's Web Site: CADDI.com

Category	Article Titles	
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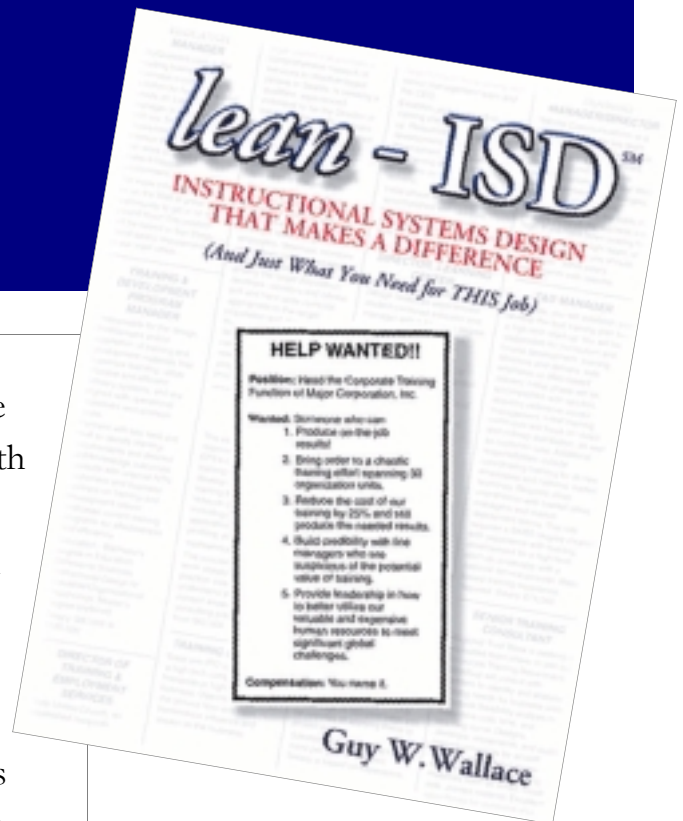
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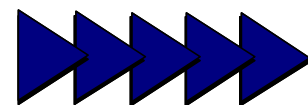
“I’ve found **lean-*ISD*** to be a very useful reference tool and resource. After having been involved with CADDI consultants on a large-scale application of the methodology at my last firm, I’ve taken on several recent projects in my new company using many of the methods, tools, and templates of CADDI’s PACT Processes for Training & Development. The book is designed so that I was able to quickly access the information I needed to provide my clients with practical, timely, and quality approaches to tackling their business issues. I highly recommend this book as a guide for business professionals challenged by either training and development, learning, knowledge management, or human competence development projects.”

Randy Kohout

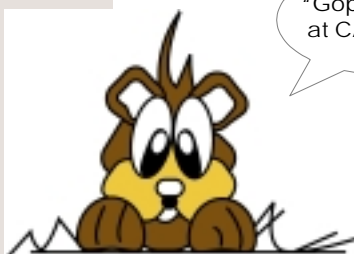
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