

# Building Capability

## ARE WE HAVING FUN YET?

### Greetings!

#### Leveraging Know-How for Performance

Our corporate intent is based on a few assumptions. We assume our clients will always know more about the various industries in which they compete than we do. We assume that we have more experience designing systems and tools that support performance than they do. Together, we can leverage what we both know to solve their business problems.

We also believe that most organizations have more know-how than they are using. It is sort of like the idea that we only use about 10% of our mental capacity. If you can find and harness the know-how that is already out there, you can make tremendous gains in performance.

*What can you do to leverage know-how?*



1. **Figure out *where* you need the know-how.** Your organization has a lot of know-how but to really make an impact on the business, you need to identify the biggest opportunities and focus your efforts there.

2. **Figure out where the know-how *is*.** Chances are, people doing the real work in the organization have more know-how than you think. There may be a field office somewhere that has figured out a better way. Sometimes, it resides with a small group of home office experts. You may even need to actually *generate* the know-how.

3. **Capture the know-how.** There are ways to do this quickly without sacrificing detail or accuracy. The trick is to know how to capture it so the data is useful. (We know how—this may be the subject of a future article.)

4. **Figure out how to leverage the know-how.** Leveraging is all about transferring the

know-how to other people. Putting it into tools and processes. Growing it through intentional learning processes. There are lots of ways to get it done—you need to consider the culture, the leadership, and the nature of the work itself.

If you successfully execute the above, your people and organization will perform more competitively.

The tricky part is that know-how is dynamic. It can have a short shelf life. It often maintains its freshness only when used. Yet you have to protect it from getting to your competitors. We partner with clients to leverage know-how for performance. Please call if you would like to talk over some ideas.

*Pete*

Peter R. Hybert  
Principal Consultant

### Are We Having Fun Yet?

#### I Wonder...

We have never been entirely comfortable with “having fun” used as a measure of an effective training program. Still, in many cases training evaluation is simply a rating of how much fun the trainees had.

On the other hand, there is a great deal of corporate training that is really nothing more than conveying uninteresting information using the means of someone talking at “learners.” Certainly nobody is having fun in that situation and they probably aren’t learning much either.

There is nothing magic about creating effective training. First you need something that people need to know that they don’t already know. The learners then need to know what they are supposed to learn and they need a good reason for trying to learn it. Then they will pay attention and invest the effort needed to learn the new information and/or skills. Learning requires the learners to actually *use* the new stuff, though—if you don’t try the new thing, you can’t learn it. (And if you try it but don’t get any feedback or coaching, you

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## Are We Having Fun Yet?, continued

will learn only inefficiently if at all.)

It can be very rewarding to try a new skill, see yourself improve, and then imagine how it will make your job go better, easier, faster, etc. Maybe even kind of fun. But most of the time, the term “the learning curve” seems more like the necessary “pain before the gain.” The payoff is later. Real learning is usually more like work than fun.

Why do so many people think training should be fun? Lots of reasons. People like to have fun, so trainers do get positive feedback for entertainment. Fun is a way to keep people paying attention. It can be a way to sneak in some application of the new learning. But if it is just activity for the sake of activity, it is probably missing the point.

### A Closer Look at Activities

So what are we to do? We advocate approaching training like an engineer approaches a design problem. Define the results that you want, create a process for getting those results, then execute that process, measuring results as you go. (If you are thinking this sounds like Instructional Design, it is!)

Since we are focusing on activities, we will skip a description of instructional design, other than to say that all training design decisions, especially activities, need to link to the job performance.

**“Activities should be opportunities for the learner to try out what they have learned and get feedback and coaching so they can improve”**

Previously, we asserted that the learner has to try out the new learning (i.e., knowledge, skill, task) in order to really learn it. That is where the activities should come in.

They are opportunities for the

learner to try some or all of what they are learning and get feedback and coaching so they can improve.

The table shows a list of fundamental types of activities used in training programs based on the learning purpose.

It is interesting to note that all the activity types, except for concept illus-

tration activities, can be used as pretests, examples or demonstrations, practice exercises, or tests. We suggest developing them to be semi-standalone so they can be re-used as needed in other settings.

### Design Guidelines

Of course, there is no one way to design training. Hard and fast rules (such as “every objective needs to have an exercise and test question”) just don’t work. For example, a smart designer

Activity Type	Description	For Example...
Concept Illustration	A brief activity to demonstrate a concept or impress on the learners the importance of an upcoming point.	<ul style="list-style-type: none"> <li>• “Telephone” game to illustrate how communication can get garbled</li> <li>• Have participants solve a brainteaser to illustrate “out of the box” thinking</li> </ul>
Recall check	Providing the learner with a stimulus and asking them to provide a response	<ul style="list-style-type: none"> <li>• Label a diagram</li> <li>• Jeopardy-style game</li> <li>• Classical quiz questions (e.g., matching, true-false, etc.)</li> </ul>
Skill practice	Providing the learner with a situation and asking them to try out the skill they just learned	<ul style="list-style-type: none"> <li>• Giving typing students a letter to type</li> <li>• Giving a database design student the assignment to create a series of reports</li> <li>• Word problems in a math class</li> <li>• Role play to practice asking “closed probe” questions</li> </ul>
Application (Case)	Providing the learner with a situation and asking them to describe how they would approach it—this requires a combination of recall and strategy	<ul style="list-style-type: none"> <li>• Case studies in an MBA class</li> <li>• Scenario in which they have to create a strategy</li> </ul>
Application (Simulation)	Providing the learner with a situation in an environment that emulates the real job	<ul style="list-style-type: none"> <li>• Breaking a database design class into teams to first role play a client meeting to determine requirements and then design and present a prototype database by a deadline</li> </ul>

may come up with a way to test a number of objectives in a single exercise. (Simulations always test multiple objectives.) Or one objective may be subordinate to another—meaning you may only need to practice or test the primary.

A key design principle is targeting the use of activities to where they will be of most benefit. Clearly, activities use more time than lecture or reading. But where they are necessary, they ensure learning really happens. And simulations help ensure that learning transfers to the job.

In general, we tend to use simulations as culminating activities in which a range of prior learning is integrated. We first teach the underlying knowledge and skills, using skill practices where needed to build key or difficult parts of the performance before putting it all together in a simulation.

**Do you think re-use of content is a good idea but haven’t figured out a practical way to do it?**

*Give us a call...we have some ideas.*



leveraging know-how for performance!

### Conclusion

There is a much more that could be said about creating effective activities. Just because you decide to use a simulation doesn’t mean it will work well—there is some art to it. And fun still matters—most learners expect to be engaged during the learning process.

With simulations, we suggest adding the fun by building in challenges from the real world, such as conflicting data or disagreement between roles. With a recall check, you may have to force the fun, maybe by turning it into a competitive game. Concept illustration activities are usually fun to begin with...but be

careful that they aren’t really much ado about nothing. Using a lot of learning time to make an obvious point takes time you may need for a more valuable activity.

Ultimately, if you start from performance requirements, use activities strategically, and have a logical sequence building to capability, you can make a strong case for keeping the activities you need for learning purposes from being cut from the training as a time saver.

But occasionally, the business will need to put the squeeze on training time. Since activities will be the first thing on the chopping block, prepare your responses in advance. If this were a class, this would be a good place for a skill practice!

*For more detail, please check out the extended version of this article in “the library” on our website!*



## Top 5 aka “The List”—Project Communication Ideas

Here are our favorite five tips on how to make a complex collaborative process

(training development) work better. Let us know if we missed your’s!

✔ **Team Planning Session**— In Project Planning, understanding and alignment are better than detail. We like to get the team in a room and map out the key activities and milestones on a calendar at the start of every project. We use a combination PERT and Gantt chart so that we can see where key deadlines fall and the steps needed to get to them.

✔ **Posted Project Status**—There is always a need to check on where things are. By posting status information on a shared location (e.g., website) you can make it available to sponsors, team members, and other interested (authorized) parties.

✔ **Pdf Outputs for Reviews**—Even with the tools Microsoft offers for tracking edits, we have found that it is very difficult to maintain version control if multiple authors are working on files in parallel. And maybe we are old-fashioned but we still like the “paper trail” of handwritten (or typed) notes on a document.

✔ **Group Work Space**— Notwithstanding the previous, there are times when the project team needs to share files. We use a (really basic) website that allows us to up- and download files so we can see what others on the team have already done, reuse or improve on ideas, make sure things integrate, etc. We have a simple set of version control procedures to keep things orderly.

✔ **Follow-up**—There is no magic to follow-up except the will to do it. Still, this is the most important and least valued ingredient of effective projects. The Project Manager has to be talking to the project team members individually and as a group periodically. We automate as much as possible (for example, we have standard action items lists, meeting notes forms, “punch lists” for deliverables, etc.) to minimize the amount of work, but it still requires discipline to keep up with it.

## Project Profile: Performance Measurement System

### *What is a Performance Measurement System?*

Our client wanted a way to monitor the productivity and quality of a team of internal consultants that coach product development teams. The plan was to leverage a work analysis we had done for them previously (with a team of master performers) to identify the key elements of performance and then develop a means of tracking them so both the performers and their management would be able to tell how they were doing.

The system included the following:

- **Measures:** The dimension of the performance to be tracked. (An easy example would be cost.)
- **Baseline and Target:** The current and desired value of the measure.
- **Instrumentation:** Means of collecting the data needed to generate the measure.
- **Supporting Processes:** Process descriptions for operating the measurement system once it was built. For example, an information process was defined for how data would be collected, consolidated, and communicated.
- **Project Plan:** Steps for building, testing, and rolling-out the system

What happened? Well, we used a slick process (including a QFD-like matrix) to design the system. But, we didn’t build it—instead, we built a planning tool. They discovered that they weren’t comfortable counting performance and acting on those numbers. But going through the design process was clarified performance requirements and created a starting point for collecting baseline numbers.

### *The Solution*

We have always felt that measurement was the real key to performance improvement. After all, even if all you do is measure and publish the results, eventually you will improve performance.

We started with the previous project’s analysis data and held a working meeting

with a select team of master performers and leadership to design the system.

Everything went well until we came to the step of actually selecting measures and setting targets. At this point it became clear that, although we designed with the assumption that there would be different expectations for each team, those expectations were not documented or agreed upon. The team decided that the first step should be to define a plan for each team so that, later, progress against that plan could be measured.

So, instead of creating the instrumentation to collect the relevant data, our project changed to defining the elements of a standard team plan and then building a template. After prioritizing the teams, the client rolled up their sleeves and began getting plans on record.

### *Conclusion*

In this case, the leadership’s need to understand performance was met by simply documenting expectations. The analysis built a common view of the structure of the work and the measurements identified the key parameters to be defined in the plan. All this allowed the leadership to treat each team uniquely while still comparing relative performance from one team to the next. Measurements will be a logical next step.

*For more detail, please check out the extended version of this article in the Project Profile section “the library” on our website!*

Are your resources bogged down in ongoing content changes and unable to get in front of key business needs?

Give us a call...we have some ideas.



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“Even if all you do is measure performance and publish the data, eventually, performance will improve ”

## News and Events...

Once again, our primary focus for marketing and professional development has been ISPI, the International Society for Performance Improvement.

### *What's Been Happening in 2005...*

In the spring, we attended the ISPI International Conference held in Vancouver, British Columbia from April 13 to 15. Pete presented "ROI—Determining the Value of a Performance Solution" with Dottie Soelke, of Soelke Consulting Inc. He also presented "Beyond Competencies—Managing Human Capability." This presentation focuses on how to connect process requirements, role requirements, and career development paths to define and manage the capability of the organization to ensure readiness for future needs. It also connects content objects (e.g., training) to performance requirements.

Both sessions were well-attended and were a lot of fun to conduct. We hope the participants got value out of it as well!

In the fall, Pete hosted a table at the CISPI (the Chicago Chapter of ISPI) Crackerbarrel event. His topic was performance-based qualification.

In October, he was invited to present "Beyond Competencies..." in Detroit for MISPI (the Detroit chapter of ISPI). We ran into a few old friends and enjoyed a lively discussion afterward.

### *What's Coming Up in 2006?*

Pete will present an abbreviated version of "Beyond Competencies..." during CISPI's annual conference preview (3/25) and the entire presentation at ISPI's International Conference in

Dallas (4/8-11). (*Check out [www.ispi.org](http://www.ispi.org) for more information on the conference.*)

The more we present on this topic, the more the need for management of specific capabilities seems to be a key opportunity for improving human performance. It links analysis to management, strategy, tools, and individual learning. We hope to have an article to support the presentation available soon.

Other than the above, we will be focusing on getting this newsletter out four times this year—counting this as #1!

Visit "*the library*" on our website for past presentation hand-outs and related articles!

**We design and develop systems and tools  
that improve and support performance!**



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## For Fun—Check out Some “Guitar Wizards”

It seems that the guitar has replaced the piano as the musical instrument of choice nowadays. There are a lot of great players out there and you can often see these people perform without the aggravation of dealing with stadium crowds. Here are some suggestions for your iPod™!

According to the liner notes, one night jazz guitarist Pat Metheny recorded some improvised tunes and liked them so much he ended up compiling an entire album worth of solo guitar music. (Interestingly, his inspiration was a new baritone guitar

and an unusual tuning. This reinforces one of our theories about creativity—sometimes you have to put yourself in a new situation to have new ideas.) The album is called “One Quiet Night.”

Along the same vein, we recently went to a show by Milwaukee’s under-appreciated Willy Porter in which he recorded the performance and then sold the CDs immediately after the show. The sound quality and performance was fantastic. His live shows feature a unique combination of stunning guitar-playing, improvisation, and occasional attempts at comedy that are much different from his studio recordings.

Bill Frisell is another master of improvisation. He sits on the fences between jazz, country,

and electronic music (if those are even adjacent properties!) and sounds like nobody else. One to check out is where he teams up with Ginger Baker (yes, that Ginger Baker) on “Falling Off the Roof” or you can hear him with a group on “The Intercontinentals.”

For acoustic only, you could check out Michael Hedges. If there is a way to get sound out of a custom-built “harp – guitar,” (it looks like you might imagine) he has tried it. If you only check out one album, get “Beyond Boundaries”—it is sort of a “best of.”

One last tip—if this inspires you to dig out the old guitar, get some spare strings first—it’s frustrating when the old ones snap just when you are getting on a roll.

Can you connect processes to roles to capability requirements? Would it be a good way to align your HR systems?

*Give us a call...we have some ideas.*



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