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  - “Why Employees Need to Know Why”

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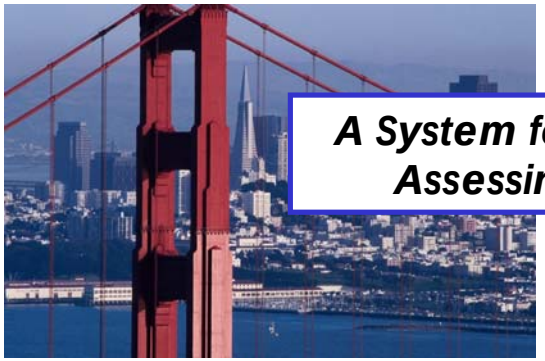

International Society for Performance Improvement
WHERE KNOWLEDGE BECOMES KNOW-HOW

A System for Developing and Assessing Performance

April 21, 2010 San Francisco

Presented by

Peter R. Hybert **Dottie A. Soelke**

Overview

We might not like it, but employees often “fly solo” before they are really ready. For critical performances, especially in regulated industries, you may need objective verification that employees are capable of performing their jobs. This is not business as usual.

This session will walk participants through a reality-based project scenario. They will make decisions and discuss potential solutions as we go through the scenario before learning what the project teams actually did—and the results.

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Situation

Business Context

- Need for qualification was driven by federal regulators and by the corporation itself.
- Regulators had identified a performance gap—specifically, the Operators knew *what* to do, but not *why*.
- Standard Operating Procedures (SOPs) used by the Operators were not "duty-aligned;" multiple SOPs governed each duty.

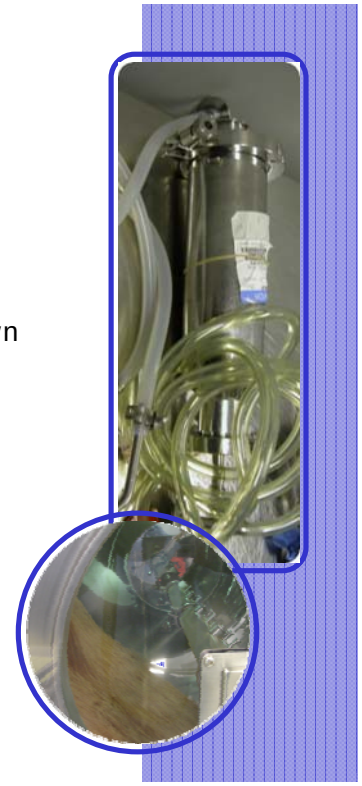
Business Requirements and Limitations

- The plant would be shut down for a specific period of time.
- Shutdown and re-open dates were "set in stone."
- Training and qualification needed to coincide with the opening of a newly-built corporate manufacturing training facility.
- Existing SOPs were to be used in their current state, i.e., no new SOPs were to be written and no changes to existing SOPs were to be made.

Results

Return on Investment (ROI)

- ROI was calculated by an internal client finance team over a five-year period (based on 13% cost of capital).
  - Cost reduction and quality improvement = 44%
  - Including loss avoidance = 191%



Other Benefits

- Completed on time for shutdown (approximately 6 weeks of training).
- Clarified the development path for Operators; made the logic visible.
- Flexible format (usable for instructor-led/ group-paced, small-group, or one-on-one delivery).
- Incorporated "why" questions, hands-on skills training, performance assessment, and existing SOPs.
- Media assets library and object inventory transferred to client team.
- Positive visibility for team members.

Other Issues, Challenges, and Lessons Learned

Issue/ Challenge	Needs	Solutions
Materials Format	▸ Suitable for print and projector display ▸ Space for diagrams and notes ▸ Ease of use/ readability ▸ (Optional) Re-usability	▸ Landscaping orientation with 2-page spreads ▸ Spiral-bound ▸ One primary concept per page ▸ Icons for emphasis ▸ Liberal use of photos and diagrams ▸ Object labeling for reuse
Rapid Development	▸ Very short timeframe from design approval to rollout ▸ Finite (set-in-stone) timeframe for training	▸ Tools and practices for project management ▸ Development of objects and key graphics first to accelerate output ▸ User testing done with assembled deliverables ▸ Development of components tracked using a database
Content Library	▸ Future use for other target audiences	▸ Objects labeled by descriptive name ▸ PowerPoint used for diagrams for ease of maintenance
Transition to Client	▸ Development of selected components by internal staff ▸ Maintenance of materials over time	▸ Orientation to the design ▸ Maintenance/ update steps ▸ PowerPoint workshop ▸ Support for implementation

Approach

What We Know

- The business need for qualification was based on a mandate to provide "objective evidence of capability to perform."
- The client decided to focus on a multi-product area.
- Operators were experienced , but not all had done all jobs; also, many were nearing retirement age.
- The Operator role and much of the know-how was undocumented.

Address these Issues about the Approach

- What qualification strategy should we use?
- Should we worry about the "why" questions (and why or why not)?
- How do we build skills without letting unqualified Operators perform the job?
- Who should we engage on the project?

What Would You Do?

5 minutes

Content

What We Know

- The current training/ performance support system is based on SOPs taught by reading and by rote, on-the-job training.
- Existing SOPs are inconsistent; some cover general skills, some cover specific, step-by-step instructions, and some cover a combination of both.
- There was no single source of information.
- For some duties, the actual tasks are directed by a manufacturing ticket.

Address these Issues about the Content

- Where should we look for the content, particularly answers to the "why" questions?
- How do we address gaps in the SOPs without rewriting them?

What Would You Do?

5 minutes

Design

What We Know

Scale

- There were fifteen different duties, each with an average of ten unique tasks/ "things to learn" and a given Operator may need to be able to perform one or many of them.
- The qualification path had to be manageable—too many qualifications would be difficult to administer but too few would reduce flexibility.

Timetable

- The new training center was to be opened by plant shutdown (approximately 80 days from project start*).
- All Operators must be trained/ qualified by the time the plant re-opened.

Address these Issues about the Design

- What logic should we use for grouping performance qualifications per role?
- Can we define a somewhat standard sequence/ flow for training and performance qualification for each "chunk?"

What Would You Do?

5 minutes

** This time period spanned from late fall to early spring—a significant amount of time was lost to holidays and year-end distractions.*