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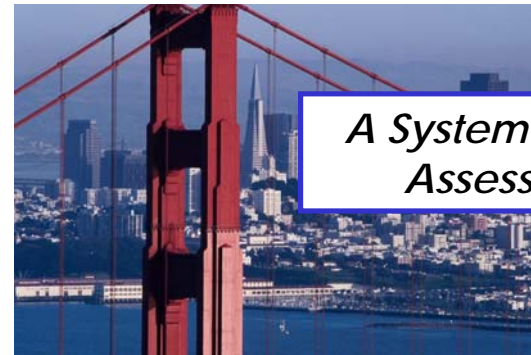
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## A System for Developing and Assessing Performance

April 21, 2010 San Francisco

*Presented by*

Peter R. Hybert

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### What We Did

This handout summarizes the highlights of what we actually did for the project.

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## Approach

### What We Did

Issues	Decision	Rationale
What qualification strategy should we use?	► Develop performance-based qualifications that are aligned with "duties"	► Provides "objective evidence of capability to perform"
	► Include supporting knowledge testing in the qualifications and as stand-alone entity	► In support of existing internal systems
Should we worry about the "why" questions?	► Incorporate "why" questions throughout ► Reinforce in qualification testing	► Prevent deviations and improve quality
How do we build skills without letting unqualified Operators perform the job?	► Use the dedicated training center for skills training	► Enable Operators to practice in a "hands on" capacity

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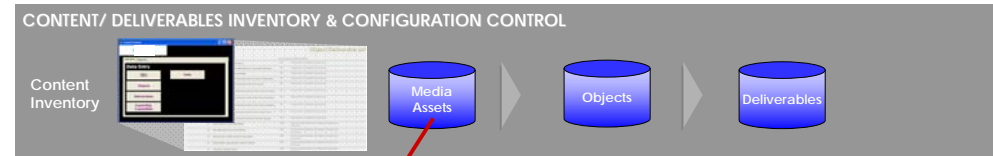
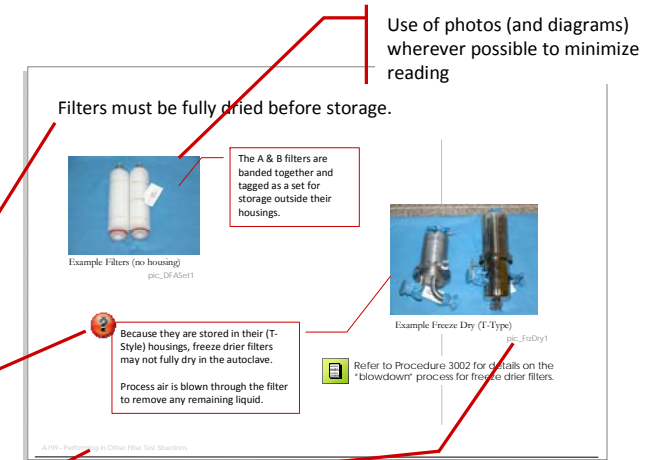
Use of "landscape" layout to allow print and projector display and to allow space for diagrams and notes

Also, allows two-page spread for large diagrams and process flows

Use of brief statements, one primary concept per page for consumability

Use of icons for emphasis (e.g., key points, warnings, etc.)

(Optional) use of object labeling for ease of reuse



#### Separate Folders

- Photos
- Diagrams
- Process Maps
- Floor Plans
- Icons and Templates

## Content

### *What We Did*

Issues	Decision	Rationale
Where should we look for the content, particularly the “why” questions?	<ul style="list-style-type: none"> <li>▶ Master performers to describe current practice, Technical Experts for “why” questions and to referee</li> </ul>	<ul style="list-style-type: none"> <li>▶ Focus on application <i>first</i></li> </ul>
	<ul style="list-style-type: none"> <li>▶ Focused the “why” questions on decisions or task performance criteria (and included in performance tests)</li> </ul>	<ul style="list-style-type: none"> <li>▶ Easier to troubleshoot</li> <li>▶ More likely to comply</li> </ul>
How do we address gaps in the SOPs without rewriting them?	<ul style="list-style-type: none"> <li>▶ Orient learners to procedures from the perspective of the process</li> <li>▶ Point to specific procedure section(s) for specific content</li> <li>▶ Use procedure quizzes</li> <li>▶ Add conceptual and skills training to task training</li> </ul>	<ul style="list-style-type: none"> <li>▶ Procedure revision process would cause the project to exceed the timeline</li> <li>▶ Place procedure information in context of the work performance</li> </ul>

## Approach

### *What We Did, continued*

Issues	Decision	Rationale
Who should we engage on the project team and in what roles?	▶ “Master Performers”	▶ Describe the work and capabilities needed to perform the work
	▶ Technical Experts	▶ Provide answers to the “why” questions and other technical information
	▶ Business Owners/ Supervision	▶ Define the business requirements – “make the call”
	▶ Client Internal Training Reps	▶ Provide knowledge of regulations and internal systems
	▶ Internal Finance Consultant	▶ Measure baseline and results
	▶ Outside Consultants	▶ Facilitate and coach the process

## Design

### What We Did

Issues	Decision	Rationale
What logic should we use for grouping performance qualifications per role?	<ul style="list-style-type: none"> <li>▶ Qualify based on "assignable chunks"</li> <li>▶ Assuming assignability was met, sequence for "learnability" and desired development path</li> </ul>	<ul style="list-style-type: none"> <li>▶ The system needs to meet the business needs <i>first</i></li> </ul>
Can we define a somewhat standard sequence/ flow for training and performance qualification?	<ul style="list-style-type: none"> <li>▶ Use standard structure for a "duty" (or group of duties)</li> <li>▶ See process graphic below</li> </ul>	<ul style="list-style-type: none"> <li>▶ Minimize training in the work area while maximizing hands-on</li> <li>▶ Needed to put the pieces in effective learning order</li> </ul>

### (In General) Per Duty ...

