Peter R. Hybert
Principal Consultant, PRH Consulting

Pete has been in the training and performance improvement field since 1984 and has worked as a consultant since 1989. His clients include several Fortune 500 firms, as well as small- and mid-sized organizations. He has analyzed, designed, and developed training and performance systems and programs for almost every type of business function and process. He is the author of more than 20 articles and has presented more than ten times at international conferences and local chapters of ISPI and ASTD. He has also served as the chairperson for ISPI's Awards of Excellence Committee, ISPI Nominations Committee, and as Chicago Chapter President. Pete is a Certified Performance Technologist (CPT).

Key Areas of Expertise

- Performance Analysis

  Since 1984, Pete has conducted more than 100 group process performance analysis sessions to define jobs, processes, -roles, and functions and the knowledge/skills needed for performance.

- Training System, Competency Modeling, and Curriculum Architecture Design

  He has conducted over 30 performance-based large-scope projects since 1988 to define performance requirements and solutions (including competency models, assessment tools, and modular/object-based curriculum designs) for a wide range of industries and business functions/processes. He was a key contributor to the development of CADDI's *lean*-**ISD**℠ methodology for curriculum architecture design.

- Training Program Development

  Pete has developed at least 50 performance-based training programs since 1984 for a wide range of industries and business functions/processes. He was a key contributor to the development of CADDI's *lean*-**ISD** methodology for modular curriculum development.

- Simulation and Qualification System Design and Development

  He has designed and developed more than 260 performance-based simulation exercises for performances covering labor relations, high-tech product management, sales, customer service, collections, ISD, and many others. He has designed and developed more than 150 performance tests. He was the co-author of CADDI's *lean*-**ISD** methodology for instructional activity development.

- Training and KMS Project Planning and Management

  Pete has managed over 100 projects and developed several project planning, team, and work management tools.

- Group/Team Process and Facilitation

  He routinely facilitates group planning and problem-solving meetings within projects to accomplish both human performance and business process improvement goals.

Work Experience

PRH Consulting (2002 – Current)
Pete founded PRH Consulting in 2002 to focus on leveraging know-how for performance. PRH Consulting core competencies are in the areas of designing systems that provide the necessary skills, knowledge, and information to the business and providing client staff with the capability to operate and maintain these systems over their life cycle. PRH Consulting approaches each situation from the perspective of the immediate and long-term customer situation and tailors an effective approach composed of training programs, documents, work processes, and performance support tools, along with qualification/certification and knowledge management systems.

The way the above is accomplished is by partnering with top performers to leverage their *business* know-how with PRH Consulting *training and performance system design* know-how. Pete has gained a great deal of experience since starting out in the field in 1984—a detailed list of his numerous projects is provided on subsequent pages.

CADDI, Inc. (1997 – 2002)
Pete was one of the two founding partners of CADDI, Inc. (Curriculum Architecture Design & Development Institute, Inc.). CADDI's mission was to advance the use of a *lean*-**ISD** methodology via its proprietary PACT Processes for T&D.

Pete was one of the lead authors and practitioners of CADDI's *lean*-**ISD** processes and methodologies known as the PACT Processes for T&D. CADDI published a quarterly newsletter/journal advocating and explaining systematic instructional design and content management practices. (The newsletter was a 2002 ISPI Award winner.)

The experience at CADDI involved both client consulting projects and managing CADDI's various business functions. Pete led several qualification system projects, which resulted in the definition of qualification/certification as a separate service offering. In addition, he sponsored a number of technology improvements to in-house data management tools to enable small instructional objects to be stored in an inventory and to reduce the labor and improve quality of key project outputs.

SWI • Svenson & Wallace, Inc. (1989 – 1997)
Pete conducted more than 50 projects with SWI since 1989. He consulted to clients in the telecommunications, oil and chemical, controls systems, contracting, equipment manufacturing, pharmaceuticals, and service industries. He worked with audiences ranging from the manufacturing floor to the executive suite in order to analyze work performance and design curriculum architectures, training materials, simulations, and qualification systems using the PACT Processes.

Some of the most challenging and interesting projects were those that required designing and supporting a strategic business process, such as combinatorial chemistry, new product introduction, or even the re-engineering of an entire business across 53 processes. He has found the Performance Modeling and Knowledge/Skill Analysis methodology useful in identifying general business or process improvement opportunities quickly and in a way that clients can relate to.

The Landis Division of Siemens Building Technologies, Inc. (formerly Landis & Staefa) (1984 – 1989)
Pete started with Siemens (then MCC Powers) in 1984 as a technical training specialist. He began as a course developer, creating in-branch training for sales, field engineer, systems specialist, and service account engineer audiences. He then began to focus more on performance analysis, training design, and project management with succeeding projects, including an advanced system-troubleshooting course.

One of the most rewarding experiences was his role in managing training development for the introduction and support of several new products, four of which were electronic controls and three of which were software. This enabled him to learn how team-based product development works (and can be improved) and how to minimize the cycle time and rework for training and documentation development. It also allowed him to introduce Performance Modeling into the product design process (although still not as early in the process as he would have preferred).

When Pete left Landis & Staefa in 1989, he was a senior training design specialist and had designed two modular curriculum architectures for the systems and service sides of the business. He also developed and introduced the first two courses in the service curriculum.

Educational Background and Credentials

Certified Performance Technologist (CPT)
International Society for Performance and Instruction, 2003

Master of Science in Education, Emphasis in Instructional Design
Northern Illinois University, 1984

Bachelor of Music, Emphasis in Composition
Northern Illinois University, 1979

Professional Memberships and Affiliations

- ISPI – International Society for Performance Improvement
- CISPI – Chicago Chapter of ISPI (2001 chapter president)
- ASQ – American Society for Quality

Professional References

Siemens Building Technologies, Inc.
Dennis Smith
Manager of Curriculum and Qualification
(847) 215-1050, ext. 5683

DaimlerChrysler Services, Inc.
Connie Langlois
Project Manager
(248) 948-3903

ExxonMobil (formerly Imperial Oil)
Louise Leone
National Training Manager, Retail Auto Business Unit
(416) 968-5857

Eli Lilly and Company
Steve Harbin
Director, School of Manufacturing and Quality
(317) 651-9430

Hewitt Associates LLC
Sheila Burden
Learning & Development
(847) 771-7514

Teams Work Enterprises
Gerry Kaufhold
Partner
(973) 448-9494

McLeodUSA
Cindy Witto
Senior Manager, Customer Service
(217) 258-2909

Ellen Foster
Independent Contractor
(416) 658-9293

Additional references are available upon request.

Project/Client History

2005

- Valuation Training Development

This project consisted of working with the SMEs through a rapid design and development process for a two-day group-paced training program (including a "pre-read" and simulation).

- Sourcing Methodology Training Revision

This project consists of a revision to a three-day existing program that teaches new analysts to perform their role in the client's strategic sourcing consulting practice. Our role was to create pre-course materials to help prepare learners for the group-paced program, help standardize the way the methodology is depicted, and to incorporate additional interactivity into the program while keeping the program deliverable by internal SMEs.

Huron Consulting Group

- Competency Definitions for Science and Technology Functions

Definition of competency areas and specific behavioral descriptors for Science and Technology roles involved in research, commercialization, and regulatory functions.

Cadbury-Schweppes *Project work performed through a contract with Quid Pro Quo Consulting.*

- Performance-Based Qualification and Knowledge Test Development for Pharma Market Systems

Development of a series of qualification tests (eight based on performance, one based on knowledge) for sales and technical staff working in the regulated environment business.

Siemens Building Technologies

- Job Analysis of Customer Service Associate and Setup Configuration Analyst Roles

Group-process analysis of the job tasks and enabling knowledge/skills/required attributes and development of role profiles for above roles. In addition, we provided coaching to enable members of the client team to learn the process and perform the analysis of four additional roles.

Hewitt Associates

2005, continued

- Overviews for Key PDS and Apollo Product-Related Duties

Creation of a series of over twenty instructor-led and self-paced programs providing the "big picture" concepts and "why's" for selected duties and content.

- Training and Qualification for Detailed Investigation of Complaints, Lot Release, and FMEA

This project consisted of analyzing performance and creating performance-based qualification instruments and instructor-led training for the above duties.

Eli Lilly and Company—Global Devices Division

- Parenteral Operations Analysis and Macro-Curriculum and Qualification Design

This project consisted of analyzing eight different operating areas to define operator duties and qualification requirements. Following the analysis, we defined training and qualification paths for each area. Instructional designers from the client organization then took over development of more than 300 instructional objects (including concept, skill practice, performance checklists, and other formats) to both streamline the learning process and improve operator capability. The resulting program will align the training with job duty requirements, thereby integrating learning with procedures and simplifying the compliance requirements for operators and supervisors.

- Curriculum Planning Meeting

For this project we facilitated a group meeting to define the architecture of an overall series of training products for delivery by an internal group specializing in coaching various types of discovery, development, and manufacturing teams.

Eli Lilly and Company

- Personal Bankers and Small Business Specialist Analysis

This project consisted of conducting a performance and knowledge/skill analysis to define and clarify the work performed by these two audience groups across multiple types of banks and in various markets. The end client used the data to both modify the role definitions, identify performance improvement opportunities (to be addressed through Six Sigma team efforts), and to identify training needs.

(Client name withheld per agreement.) *Project work performed through a contract with The Hobson Group.*

2004

- Curriculum Design for Lead Systems Analyst and Benefits Analyst Roles

This project was essentially an expansion of the Technology Core curriculum design project (below) to include two additional roles. Both roles are new (i.e., "future state") roles and will share instructional objects with the Technology Core roles where appropriate.

- Technology Core Curriculum Design

This project consisted of the analysis of three core technology roles (primarily programmers and systems analysts) as impacted by changes in team roles, technology, and work process. The analysis was used to design learning paths and an instructional object inventory for all three audience groups.

Hewitt Associates

- Document Taxonomy and Meta-Data Design

This project consisted of defining the basic file structure for all shared documents for the organization, along with common naming conventions. The intent was to improve accessibility of documents, eliminate redundancy, and as a result leverage organizational know-how.

Knight Foundation

- Quality System Interface

This project consisted of an analysis of a series of performance issues related to the interface with the quality system. The outcome is a series of recommendations for process/organization changes, tools, and training to improve organization performance related to compliance, document cycle time, and morale.

- "Devices 101"

This project was to design and produce an "emedia" program providing an overview of the customers, markets, products, organization, and key business processes in Lilly's device division. Intended for new employees, the program included information-rich printed job aids that distilled key information from the program for easy reference in meetings, etc. as the new employee comes up to speed on a complex business. (PRH Consulting engaged Glen Ellyn Media and Mindsight for scripting, technical, and production expertise.)

- Parenteral Operator Curriculum Development

Pete led a team of six network designer/developers in a large scale, rapid turnaround training development project to create instructional and qualification materials for five operator curriculum paths. By using templates and leveraging the curriculum design, the team was able to deliver approximately 4 weeks of classroom and lab (hands-on) training—including trainee materials, instructor materials, knowledge tests, and performance qualification instruments—within an eight-week period!

Eli Lilly & Company

2003

- Parenteral Operator Curriculum Design

This project includes analyzing the work performance and enabling knowledge/skills that operators need to perform pharmaceutical product manufacturing within a parenteral plant.

- Operational Leadership Development

This project includes the development of "gap" programs from the curriculum design project listed below. Pete led a team of designers and developers to create materials to support the global roll-out of the curriculum.

2003, continued

- Alliance Management Performance Measurement System Design

This project used previous analysis work to define how individual alliance manager performance could practically and effectively be measured, given a wide range of individual assignments. The process used a QFD-like matrix to identify key parameters that could be measured and then to select a subset to actually be measured. The project included development of a pilot version of the measurement system and the associated business process for collecting the data and reporting the results.

- Supply Chain Curriculum Design

This project included analysis and design of competency models and curriculum paths for thirteen different supply chain roles. This curriculum relies heavily on one-on-one coaching and reinforcement of common models across the entire organization to build internal capability.

- PDS Organization Curriculum Design

This curriculum design project resulted in design of competency models and "future-state" curriculum paths for ten different roles, spanning all but the marketing portion of this standalone device business within Eli Lilly. The goal was to shift focus and training time away from compliance toward building capability (while still remaining compliant with the regulations and related policies).

- Operational Leadership Curriculum Design

This project included performance and knowledge/skill analysis to create a detailed model of the capabilities (both performance and enabling "competencies") needed to perform as a leader specifically within a manufacturing environment. The data was used to design a curriculum path for each level of leadership.

Eli Lilly & Company

- Develop Simulation to Reinforce Leadership Competencies

This project consisted of leading a team of designers to create a series of three dynamic simulations for executive leaders to use as a vehicle to both discuss current business issues and figure out how to apply broad leadership competencies in a specific setting. The results were to be used to create change plans for individual divisions.

KW Tunnel Consulting

2002

- Alliance Manager Competency Model and Curriculum Map

This project included performance and knowledge/skill analysis to create a detailed model of the capabilities (both performance and enabling "competencies") needed to perform the job of Alliance Manager. This data was used to create a curriculum map, identifying training and development opportunities related to the capabilities and a recommended sequence aligned with a typical career path.

Eli Lilly & Company

- Develop Qualification Instruments for Validated Critical Environments

Building on the Time to Performance system, this project required the development of twelve qualification instruments to certify engineering specialists working in facilities that require system validation (typically, due to FDA requirements).

Siemens Building Technologies

2001

- Underwriting Curriculum Architecture Design Project

  Pete co-designed an overall corporate curriculum for the underwriter population spanning Fireman's Fund's five different business segments.

  Fireman's Fund Insurance Company

- Credit and Collections Simulator Instructional Activity Development Project

  In the previous project, CADDI developed call scenarios and learning units for representatives performing consumer sales and service work. In this project, we targeted collection call performance. Internal SBC developers built the scenarios while the CADDI team developed the learning units.

  SBC

- Customer Service and Collections Simulator Instructional Activity Development Project

  Another call center project! Using the IAD process, Pete lead a team to create and pilot 100 call simulations and fifteen learning units (plus exercise examples) for their customer service and collections agents servicing consumer loan customers.

  DaimlerChrysler Services

- Consumer Sales Call Center Personnel – MCD

  Pete was the lead MCD designer for several complete curriculum paths within a complete redesign of the Consumer Sales training for associates in both premerger organizations (Bell Atlantic and GTE).

  Verizon

2000

- Call Center Simulator – IAD

  This project was essentially a new technology development project to build a computer-based learning tool that allows customer service representatives to practice customer calls by speaking with a computer—the "Contact Flight Simulator." It involved voice recognition, computer-based training, simulation, and testing, all deployed over the intranet. The technology was handled by a number of other vendors—CADDI's role was the creation of a library of 100 simulations and approximately the same number of Learning Units, pilot testing the system with end users, and certifying client developers on creating/modifying new material for the libraries. Pete led the CADDI team, using PACT analysis and IAD processes to define the call flow model and specify a range of simulations spanning key types of orders, various customer types, degrees of sales complexity, etc. The challenge was trying to promote consistency while addressing necessary variations between the various operating companies (Ameritech, Southwestern Bell, and Pacific Bell), between individual regions, or, in some cases, between states.

  SBC

- Retail Site Operators Development Program—Global Curriculum Strategy

  As part of an effort to create a global curriculum "template" for all Retail Site Operators, we facilitated a planning process to compare existing curriculum designs from Exxon, Mobil, and Esso and to define a common learning path. We also created a Project Plan for the work the client team needs to complete in order to create the common version materials.

  ExxonMobil Fuels Marketing Company

2000, continued

- Wholesale Markets Billing Associates Modular Curriculum Development Project

  As part of a large-scale consumer sales curriculum design project, Pete played a "crane role" to drop in and facilitate a PACT analysis meeting.

  Verizon

- CAD for Wholesale Market Billings

  Pete worked with Guy (the first time on a CAD since 1994!) to design a curriculum architecture for billing service representatives who deal with wholesale customers across five centers. The goal: as usual, shareable modules and reduced training cycle time. The result? Training reduced from more than 70 days to 11 to 20 days (depending on the job).

  GTE Service Corporation

- Talon Control System CAD and MCD

  Supporting the introduction of a networked control system of six new products based on a new communications protocol can get complicated, especially when they are being developed concurrently with the training. Pete's 21st CAD and 46th MCD were completed in parallel—as the system evolved, more of the modules were designed and detailed into lessons.

  Siemens Building Technologies, Inc.
  Landis Division

- Miscellaneous Consulting

  Pete consulted with an internal team on how to use the PACT analysis process to build on existing competency and skills framework data.

  Hewlett Packard

1999

- Performance Tests

  To help further detail and clarify the specific performance requirements for certification, Pete worked on 150 performance test instruments to support the technology transfer at GMU.

- Practitioner Certification and Coaching

  As part of the overall technology transfer of the PACT Processes for T&D to General Motors University and their strategic suppliers, Pete conducted the MC/MI Analysis Workshop and observed, coached, and certified practitioners performing the analysis process.

  General Motors

- Comparative Value Study

  This project was a variation on the existing training assessment process within the CAD process. For a selected set of content areas, we researched comparable alternatives in the marketplace and compared strengths and weaknesses.

  Motorola

- Modular Curriculum Design and Development of ABCs of Selling APOGEE

  An eight-day, group-paced training program to teach sales engineers how to determine customer needs, quantify business impact/return, and present and demonstrate the APOGEE product line. (APOGEE is a complete, networked control system consisting of a server-based workstation, several types of control cabinets, and devices for controlling the equipment in a commercial facility, including lighting, HVAC, and other systems.) The course included a reference tool and two simulation exercises, along with a number of other activities.

1999, continued

- CORE Program Design

  Before moving into job-specific training, there is a great deal of industry and company knowledge/skills new employees need. This project resulted in a design for a combination of a self-study CBT program and a 40-hour, group-paced classroom program.

- Qualification/Certification System for PM/PE/GOS

  As part of the Time to Performance project, qualification instruments for the project manager, project engineer, and group operations supervisor roles were developed. In the process of developing those instruments, Pete, along with Kelly Smith, were also able to certify three Siemens practitioners in the process.

- Overall T&D Module Inventory Framework

  Concluding the Time to Performance project, we handed off a current version of the T&D Module Inventory Framework. This required reconciling CAD-level designs for modules with actual modules resulting from various development projects.

- Time to Performance Implementation Support

  Implementation support was primarily performed by the internal Siemens team. Our role was to provide consulting on the process and design help with the various communication tools. To help inform the field organization, Pete facilitated the design of an on-line newsletter, as well as other infoware.

Siemens Building Technologies, Inc.
Landis Division

- CAD Update

  In 1996, Imperial Oil worked with Pete, along with Dottie Soelke, to design a curriculum architecture for retail site managers within their automotive business unit. Since that time, Imperial had been steadily working on executing the development plan to build/refine the retailer development program. This year, they asked Pete to facilitate a meeting to review the current business plan, technology changes, competitive issues, participant feedback, and other change drivers and put together a plan for the next three years.

- ISPI Awards of Excellence Application

  Based on participant feedback, improvement results, and comparison to "best-in-class" programs, Imperial decided to submit their New Retailer Development Program (NRDP) for an ISPI Award of Excellence. We provided coaching on the criteria and assistance with completing the application. (They won!)

Imperial Oil Company

- Brand Management and Market Research Curriculum Development Planning Guides

  Pete created a management training session and individual development-planning tool to support a curriculum designed and introduced by Eli Lilly's Global Sales and Marketing Training Organization for market research professionals. Since it worked well, we did another one for the Brand Management curriculum. The tool was an expanded version of the "PACT standard version" in the CAD process. It included a team development-planning tool as well, so that managers could make sure their organization as a whole had all the skills/capabilities it would need for the work they were expected to deliver.

Eli Lilly and Company

1998

- Project Manager/Group Operations Supervisor/Project Engineer

  Pete's 18th CAD project was the design of an integrated Development and Qualification Path for the above audience groups. This design was also integrated with the previously completed Specialist HVAC curriculum so that T&D Modules/Events could be shared where practical.

- Specialist Lab Curriculum Architecture Design

  This CAD was really an extension of the Specialist HVAC CAD addressing the additional performance and knowledge/skill requirements for installing, starting up, and maintaining systems controlling critical environments, such as chemical labs and industrial clean rooms.

- Administrative Process Design/Development

  This project resulted in a set of administrative processes for use by home office staff in managing the overall qualification system, including record keeping, continuous improvement/change management, and technical oversight for the system.

- Qualification/Certification System for Engineering Specialists

  The role of engineering specialist is a hybrid between a "journeyman" specialist, a project engineer, and a design engineer. Pete facilitated a team of top field performers to define the role and then to select and sequence Qualification Instruments from these roles into a single path for the engineering specialists. This project illustrated the type of benefits possible once a critical mass of analysis and design work is done with a target audience group for cycle time reduction and reuse.

- Base Line Specialist Modular Course Design

  Having developed Qualification Instruments to measure "time to performance," the next step toward reducing the time to performance was to provide learning alternatives that are more readily available and in the right size "chunks" to help someone learn what is necessary to pass the qualification tests quickly. This project began with the design of a distributed training system and produced detailed lesson-level designs for key modules within the base line portion of the specialist Qualification Path.

- Qualification and Curriculum Architecture Design for Engineering Specialists Working in Critical Environments™/Validated Systems

  Pete's 20th CAD addressed the performance of advanced technical work in a highly regulated (and high liability) environment. This project was challenging because it dealt with an emerging performance that was part future-state and part evolving (with widely different approaches across the Analysis/Design Team members). It came in handy to have had experience in the pharmaceutical industry and with the TQM discipline.

- Qualification/Certification System for Design Engineers, Specialists

  As part of the Time to Performance project, Pete spent time in the trenches developing Qualification Instruments for the audiences listed above.

Siemens Building Technologies, Inc.
Landis Division

1998, continued

- Delivery and Instructor Certification for Various PACT Process Workshops

  Continuing with the PACT Process Technology Transfer effort, Pete supported the workshop deliveries as a facilitator and as an observer/coach of internal instructor candidates.
- Design of a Curriculum Architecture for Supplier Quality and Supplier Development Engineers

  This was Pete's 15th CAD project for engineers who interface with General Motors' worldwide suppliers to help certify and/or improve the quality of their output (and often the productivity of their operations, as well). These engineers support the development and introduction of new products and components, as well as existing products.
- Design of Curriculum Architecture for Communications Professionals

  For this project, the analysis had been completed, but CADDI was tapped to provide a designer to meet the client schedule target. The team wanted to develop a single path for all communications professionals, including public relations staff, plant communicators, executive coaches, speechwriters, and others. And, they did.
- Curriculum Architecture Design and Implementation Planning for Human Resource Professionals

  Pete used the results from an analysis performed by two PACT practitioners (licensed and trained through our technology transfer project with General Motors University) to pick up the last two phases of the project. The challenge was to design a path for all human resource professionals—a widely varied target audience, both in terms of career path and role assignments. The result was a "multistreamed" path with shared and unique training addressing the needs of HR specialists ranging from plant administrators to corporate planners (and most of the roles in between).

  General Motors

- Qualifications Catalog for Engineering

  To support an SAP R3 implementation, Pete led a project to use the PACT Processes to analyze performance and knowledge/skill requirements for mechanical, electrical, software, project, and systems engineers as input to the development of a qualifications catalog. We also adapted the CAD design process to scrub the raw data into a manageable number of clear qualification items within a hierarchy (similar to the 5-Tier Module Inventory Structure). The client used the project outputs to implement an employee assessment and development planning process and to evaluate existing and "gap" T&D.

  Rockwell Collins

1997

- Project Manager/Group Operations Supervisor Incentive Program

  This "miniproject" required Pete to facilitate a one-day meeting with a group of 16 field operations managers to define the parameters for a performance-based incentive system for the above audience.
- System Specialists (HVAC) Curriculum Architecture Design

  To accompany the "Time to Performance" qualification system, the curriculum was redesigned to better match the Qualification Path. Since both the qualification system and Curriculum Architecture Design are based on the same Performance Model and Knowledge/Skill Analysis, the CAD required a relatively minimal incremental effort. (As an aside, the Performance Model and Knowledge/Skill Analysis were used by another team to revise the job descriptions.)
- Qualification/Certification System for System Specialists

  This project was undertaken to reduce the "Time to Performance" for new hires so Landis & Staefa could keep pace with their rapid sales growth. As the lead consultant on the project, Pete designed and planned the overall approach, analyzed specialist work performance requirements, and specified Qualification Instruments. The challenges of this project were to design a system that will be acceptable across a network of decentralized branches, to design an overall administrative system with minimal implementation overhead, and to install the system into the business so that it becomes a normal part of the work environment.

  Landis & Staefa, Inc. *(continued on next page)*

1997, continued

- Sales Training Design for Facilities Management Services

  This was an extremely accelerated project in which Pete led the Design Team in defining Training Modules for branch sales introduction to selling the Facilities Management business.

- Coaching and Simulation Development on Performance Contracting for Engineers

  Pete provided coaching to the client development team on project management and developed the role Datapaks for the simulation exercise.

Landis & Staefa, Inc.

- Modular Curriculum Design—Call Center Customer Service for University Customers

  This project was Pete's 38th MCD project in which an entire product training series was designed using a Design Team as a model for six additional "clone" series.

- Curriculum Architecture Design for Call Center Customer Service and Operations Representatives

  This project was Pete's 13th CAD project. It supported the redesign of the entire customer service processes for a new Call Center. Besides designing the CAD, the team also used the Performance Modeling data to identify 13 proposed solutions to address the highest priority environmental deficiencies.

- Consulting on ISD and Project Management Processes

  To enable the client to manage the development of the curriculum, Pete provided ISD expertise to create a modified version of the PACT MCD process defining standard milestones within the development and pilot for use by a diverse development team.

McLeodUSA (formerly Consolidated Communications)

- Consulting on Learning and Development Processes

  Pete presented the CAD and a competency modeling approach based on the Performance Modeling and Knowledge/Skill Analysis processes to a corporate-level HR team and participated in the planning of how these approaches could be tested/implemented within NOVA.

NOVA Chemicals

- MI Design Workshop Development

  Pete took the lead role in developing the MI Design Workshop within the MC/MI series for General Motors. One of his goals was to illustrate how a designer can integrate their own ISD approach within the PACT MCD/MI design process. And, for this workshop, Pete developed his 12th simulation.

- Design of Structured, On-the-Job Assignments for Tool & Die Supervisors

  Pete led a design meeting to use Performance Model data to identify job assignments that could be integrated into an 18-month supervisor development program. The intent was to help participants make a direct link between classroom learning; structured, on-the-job training; and the job.

- Coaching of MC/MI Practitioners

  On an as-needed basis, Pete coached various trained practitioners in preparing for, conducting, and documenting CAD process meetings.

- Delivery of the MC/MI Analysis and MI Design Workshops

  As part of an overall Technology Transfer agreement with General Motors, Pete conducted five deliveries of the above workshops for groups ranging from 7 to 16 participants. The challenge was assessing exercise performance to determine capability to perform on the job (for certification purposes).

General Motors

1997, continued

- Retail Site Management Curriculum Architecture Design

  Pursuing a strategy of operational excellence, Imperial Oil decided to use the CAD process to redesign their training for Esso retailers. Pete's 12th CAD, the challenge was to create a design that would fit a wide range of store sizes and market segments.

  Imperial Oil

1996

- Modification of the CADDI PACT Processes for General Motors

  Consulted with General Motors to explain the PACT Processes and to define modifications to process steps and outputs to customize it to General Motors.

- Development/Adaptation of the MI Briefing, Performance Modeling Workshop, and Toolkit

  Consulted with General Motors and served as a subject matter expert for the design and development of components of the various tools for supporting the technology transfer.

  General Motors

- Design of a Service Operations Management Course

  Designed a five-day, group-paced training course on managing customer service agreement accounts. Though this course did not include a simulation, it did include a number of job-related exercises, including making management decisions based on labor, material, and financial data.

- Design of a Performance Contracting Course

  Pete used a combination of the PACT Processes for CAD and MCD to define the engineer's role in the performance contracting process, and then designed a "mini-CAD" of 60 modules. Then, he led the field Design Team through the design of a five-day, group-paced training program including his 11th simulation.

  Landis & Staefa, Inc.

- Curriculum Architecture Design for Help Desk Technical Support Engineers

  This CAD (Pete's tenth) addressed technical and customer service training needs for technical support engineers for a manufacturer of high-end file servers. The challenge in this project was to meet the company's intent to avoid "handing off" customers who call in for help—this required rethinking the role played by new engineers, as well as creating an accelerated development process.

  Auspex Systems, Inc.

- Curriculum Architecture Design for PNBB/PNBE Process Operators

  Pete designed this, his ninth CAD, to address the operators of a batch chemical manufacturing process. The analysis and Curriculum Path identified ways to make it easier to use "fill-in" resources from other areas during peak workloads, as well as to develop new operators.

- Curriculum Architecture Design for Global Operations

  Pete's eighth CAD addressed 12 roles involved in FDA submissions for investigative and new drug applications. Much of this CAD was addressed through job aids and structured, on-the-job training delivery. In this project, Pete also used the Performance Model data to generate a role profile, listing performances and knowledge/skill requirements for the job, that was used for recruiting and selecting new job candidates.

  Eli Lilly and Company, *continued on next page*

1996, continued

- Curriculum Architecture Design for Price List Representatives and Medical Information Specialists

  These audiences are involved in supporting drugs that are currently on the market—either researching or communicating information to healthcare professionals or patients. (As a side note, almost immediately after the Analysis Phase the client reorganized, changing some tasks and shifting others between roles. The client was able to use the Performance Model to help direct and document the change with minimum effort.)

- Design and Development of a Prototype Database for Storing and Managing Performance Model and Curriculum Architecture Design Data

  Pete guided the development of the above database to enable the client to have greater use of the data following the CAD project.

  Eli Lilly and Company

- Technology Transfer Training for Combinatorial Chemistry

  Pete designed and developed application exercises ("canned labs") for training chemists in combinatorial chemistry methods as part of the client's licensing of this technology to other companies.

  Sphinx Pharmaceuticals

- Curriculum Architecture Design for Industrial and Wholesale Marketing Support Roles

  Pete's sixth CAD addressed customer service roles' performance within a petroleum wholesale organization. Key features of the design included extensive use of structured, on-the-job training and cross-training. This was also Pete's first "formal" use of the Performance Model data to identify solutions for environmental performance gaps.

  Imperial Oil

1995

- Regulatory Affairs Operations Organization and Staff Development Plan

  Consulted on regulatory affairs customer and stakeholder requirements to identify a portfolio of projects to address the highest priority opportunities.

  Eli Lilly and Company

- Curriculum Architecture Design for PNBB/PNBE Process Operators

  See previous description above.

  Eli Lilly and Company—Clinton Laboratories

- Design and Development of an Organizational Capability Assessment Workshop

  This workshop was for staff consultants performing organizational capability assessment supporting strategic business planning efforts. We created the OCA process, and Pete led the MCD process (his 32nd) to design the workshop and simulation.

  Amoco Corporation

- Delivery of Product Management Process Training—New Product Introduction

  A five-day, simulation-based course for product planners and managers within the switching, operations systems, wireless, and business units on how to plan the development and introduction of a new product.

  AT&T Network Systems

1994

- Operations Management and Self-regulated Team Curriculum Architecture Design
  Pete's fifth CAD addressing the performance needed to support the introduction of self-regulating teams in the production environment.
- Strategic Plan for Training & Development (Phase 1)
  Pete conducted a series of executive interviews, co-facilitated planning sessions, and developed the Phase 1 report assessing the overall business needs at the site and the implications for the T&D function.
  Novacor, Corunna Site

- Design and Development of a Total Quality Guidebook
  Led a Design Team using a modified PACT MCD Process to design a 160-page guidebook describing total quality principles, concepts, tools, and resources for technical and administrative staff. He also performed some of the development work.
  NASA Lewis Research Center

- Development and Delivery of Product Management Process Training—New Product Introduction
  Pete designed and developed simulations and group-paced training on how to lead a cross-functional product team.
- Delivery and Train-the-Trainer for Product Management Process Training—Life Cycle Management
  This course design was a conceptual clone of the new product version, except that the content and simulations are designed around leading a cross-functional product team through the key decisions following product introduction, including promotion and growth, customer support, and through discontinuance.
  AT&T Network Systems

1993

- Companywide Curriculum Architecture Design
  Co-designed a curriculum architecture to support the re-engineering of an entire distribution business. The CAD contained 20 Curriculum Paths and more than 700 modules addressing 53 business processes.
  Spartan Stores/ISSC

- Delivery and Train-the-Trainer for IPD Training for Program and Team Leadership
  This was a five-day, simulation-based, group-paced course on how to lead a team through the product development process.
  Lockheed (General Dynamics)

- Total Quality Workshop
  Pete used the MCD process to design and develop a two-day workshop on total quality principles, process improvement techniques, and implementation planning to be delivered by us at Cornell.
  Cornell University

1993, continued

- Development and Delivery of Product Management Process Training—Life Cycle Management
  See previous description above.
- Redesign of the Product Management and Market Management Curriculum Architecture and NS 1251: Product Management Process Training
  This project was an update of an earlier project in which the Performance Model, Knowledge/Skill Analysis, and Existing Training Analysis were validated/expanded before revising the Curriculum Architecture Design. As a result, the eight-day keystone training course was reconfigured into two five-day programs, which led into Pete's 28th and 29th MCD projects.
  AT&T Network Systems

- Design of a Multilevel Training Evaluation System and Instruments to Support a Large-Scale Business Process Re-engineering Effort
  This project was to design an integrated set of evaluation instruments addressing Kirkpatrick's "four levels" (plus some operational measures) that would work to track the BPR training and that could be instituted as an ongoing training evaluation system following the BPR effort.
  Amoco Production Company

1992

- Delivery of IPD Training for Program and Team Leadership
  See below for a description of the project.
  General Dynamics

- Quality in Program Management Course Design
  A truncated application of the MCD process to design a workshop on the application of quality tools and methods in the program management of large-scale systems integration projects. This was Pete's 27th MCD project and seventh use of simulation exercises.
  Digital Equipment Corporation

- Design of Reactor 300 (PRISM) Training Course and Verification Tests
  Pete used Performance Modeling and Knowledge/Skill Analysis to design and develop structured, on-the-job training and performance tests for batch chemical process operators in his 26th MCD project.
  NALCO

1991

- Development of IPD Training for Program and Team Leadership Development
  Co-designed and facilitated initial deliveries of a five-day, simulation-based training course for leaders of various types of aircraft development teams. (This was Pete's 25th MCD project.)
  General Dynamics

- Development, Delivery, and Train-the-Trainer for Marketing Process Training
  An MCD effort to define and instill marketing process knowledge and skills for marketing professionals in a technical industry. Pete led the development team through the handoff to Network Systems instructors. This was Pete's fifth opportunity to develop performance-based simulations (rather than simply exercises or cases).
- Delivery (USA) of Product Management Process Training
  AT&T Network Systems

1991, continued

- Development of Service Technician Selection System Training Course

  Pete designed and developed this self-paced program to train managers in the use of a comprehensive, standardized selection process that involved interviewing candidates using a benchmarked questionnaire, evaluating their performance in a role-play, and administering a standard aptitude test.

  Whirlpool Corporation

- Supporting the Sale: A Team Approach

  A briefing for technical sales team members (including account managers, technical support, and sales office management) addressing key "watch-out-fors" in customer contact situations such as sales meetings and service calls. This project included a video, job aid/pamphlet, and a small facilitator guide for use in sales office training sessions.

  AT&T Network Systems—Wireless Business Unit

- Managing a Diverse Workplace

  Development of a facilitator guide for use by retail store managers in local training programs on diversity, the Americans with Disabilities Act, and sexual harassment.

  Sears

- Design of Gas Chromatography Training Course

  The intent of this project was to design "gas chromatography for dummies"—nontechnicians who needed to analyze a sample chemical quickly without understanding the many nuances of setting up the instrument and interpreting the results. Pete used an abbreviated MCD process to map the performances, identify an overall training process, and specify a set of job aids for his 20th MCD project.

  Occidental Chemical Corporation

1990

- Development of Labor Relations Training

  This project was the first use of the "Lesson Map of Activities," which is really the heart of the MCD group design process. This five-day, simulation-based training program addressing the management of bargaining unit employees (across six different agreements) was piloted in 90 days after the Steering Team kick-off meeting and was very well received. This was in large part due to the commitment of the Analysis Team that, after completing the Analysis Phase, actually insisted in staying on to complete the Design Phase (even though we really didn't need to keep all of them an extra two full days!)

  Illinois Bell

- Development of Composites Bonding and Fabrication Training

  This was an 80-hour, group-paced training program for manufacturing technicians building composite aircraft components for stealth fighters. One of the project challenges was that the manufacturing methods were being refined as the training was being developed.

  General Dynamics

- Revision and Delivery of Product Management Process Training

  See previous description above.

- Development of Test Instruments for Product Management Process Training

  This small project required the development of pre- and posttests to accompany the simulations as an additional source of participant achievement data.

  AT&T Network Systems

1989

- Delivery of Product Management Process Training

  See previous description above.
- Delivery and Revision of Product Support Planning and Management Training

  This five-day, simulation-based training course addressed the management of a cross-functional team through the planning of the product service and support channels, warranty processes, product upgrades and "recalls," and discontinuance.

AT&T Network Systems

Selected Publications

- "HPT, ISD—The Challenge of Clear Boundaries in an Evolving Discipline"
  Performance Improvement (October 2002)

- "Designing for the ISD Life Cycle" (co-author)
  Performance Improvement (February 2003)

- "Give Customers What They Meant to Ask For: Designing Training Systems at Three Levels"
  Performance Improvement (October 2001)

- "Choosing Training Delivery Media"
  Performance Improvement **(May/June 2000)**

- "Performance Modeling for *lean*-**ISD**" (co-author)
  CISPI Performance **(June 2000)**

- "Performance Modeling for *lean*-**ISD**" (co-author)
  MISPI Technologist **(January 1998)**

- "Training Strategies for Small Target Audiences"
  CISPI Website at www.cispi.com (Authored in 1996)

- "Five Ways to Improve the Contracting Process"
  Quality Progress **(February 1996)**

- "Beyond the Buzzwords—TQM, HPT, and Shareholder Value" (co-author)
  Performance & Instruction **(February 1995)**

- "Action Learning and Simulation"
  Pursuing Performance **(Spring 1995)**

- "Belabored Relations: Simulating Management/Labor Interactions"
  Pursuing Performance **(Winter 1994)**

- "Around the Product Life Cycle in Eight (Not Eighty) Days: Simulating Product Management Skills"
  Pursuing Performance **(Fall 1994)**

- "Managing the Interaction of People with Your Product"
  Quality Progress **(July 1994)**

- "Sim City, Sim Earth, and Now, from SWI . . . Simulations for Corporate Training"
  Pursuing Performance **(Summer 1994)**

- "Managing Risk in the Team Environment"
  Pursuing Performance **(Fall 1994)**

Selected Publications, continued

- "Continuous Improvement and Training" (co-author)
  ***Tool and Manufacturing Engineers Handbook* (1993)**

- "Tips for Human Performance Support of New Products"
  ***Pursuing Performance* (Spring 1991)**

Additional articles available upon request

- "The Return on Your PACT Investment"
- "Areas of Performance"
- "Performance Modeling for *lean*-**ISD**"
- "CISPI Cracker-barrel: PACT Processes on the Road – Tool"
- "Systems that Help People Get Work Done"
- "Simulations for Corporate Training"
- "Time to Performance: Implementing a Performance-based Qualification System"
- "PACT℠ Processes for T&D – MCD-*lite*℠"
- "Project Profile: Competitive Learning Curve Cycle Time"
- "Project Profile: Simultaneously Redesigning Call Center Processes and Training"
- "Project Profile: Designing and Implementing a Performance-based Curriculum Architecture for Retail Managers"
- Call Center Training and Knowledge Management Support Series
- Three Levels of Training/KMS Design Series (expansion of "Give the Customer What They Meant to Ask For" into a five article series)

Presentations

- Determining the Value of a Performance Improvement Opportunity
  ISPI International Conference, April 2004

- How Knowledge Management Can Reduce Variability in Human Performance
  Chicago Section of ASQ Meeting, April 2003

- Learning by Doing—Using Simulations to Improve Performance
  ISPI International Conference, April 2003

- Give the Customer What They Meant to Ask For—Designing Training (and KMS) at Three Levels
  ISPI International Conference, September 2002

- Performance-Based Knowledge Management Systems
  ISPI International Conference, April 2002 and (revised version) ISPI International Conference, April 2003

- Designing Performance-Based Simulations for a Call Center Environment
  ISPI International Conference, April 2002

- Build the Business Case Before Building the Project
  ISPI International Conference, April 2001 and (revised version) Wisconsin ISPI Chapter, May 2001

- Web-based Call Center Simulation
  ISPI International Conference, April 2001

- Performance-based Qualification—It Only Counts if You Can Do the Job
  ISPI International Conference 99 Seconds Session, April 2001

- Build the Business Case Before Building the Project
  Chicago Chapter of ISPI Miniconference, March 2001

- Modeling the Performance Support System
  CISPI Cracker-barrel, 2000

- Just Do It—Performance-based Qualification
  ISPI International Conference, April 2000, Workplace Learning Conference, 2000 and Michigan ISPI Chapter, April 2000

- Time to Performance: Implementing a Performance-based Qualification System
  ISPI International Conference (Business/Industry Group Session), 1999; CISPI Chapter Meeting, 1999; ASTD Techknowledge Conference, 1999

Presentations, continued

- Determining the Value of a Training Opportunity (lead presenter)
  ISPI International Conference, 1998

- Performance Modeling and Knowledge/Skill Analysis and *lean*-**ISD** (co-presenter)
  ISPI International Conference, 1998

- *lean*-**ISD** (co-presenter)
  Lakewood's Training '98 Conference, February 1998

- Using Activity-based Costing to Manage the Training Function (lead presenter)
  ISPI International Conference, 1995

- Partnering with Your Clients to Build a Better Case (lead presenter)
  CISPI Winter Workshops, 1995

- PACT Process for Performance-based Curriculum Architecture Design (CAD) (co-presenter)
  ISPI International Conference, 1994 and encore in 1995

- Applying Quality Tools to Human Performance Improvement (lead-presenter)
  ISPI International Conference, 1993

- Beyond the Buzzwords—TQM, HPT, and Shareholder Value
  CISPI June Meeting, 1993

- Case Study: Designing an Integrated Human Performance System
  ISPI International Conference, 1993

- Integrating Human Performance Support Systems Planning for New Products, Services, and Tools
  ISPI International Conference, 1992

Presentations, continued

- Integrating Human Performance Support Systems Planning for New Products, Services, and Tools
  Chicago ISPI Chapter, 1991 (plus encore)

- Case Study: Cross-Functional Team Simulation (lead presenter)
  ISPI International Conference, 1990