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Building Capability New and Changed

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Network of Strength

Again this year on Mother's Day, PRH Consulting will be participating in the Network of Strength walk for breast cancer research.



If you are going to be in Chicago on May 9, why not join us at Grant Park at 6:30am? (No worries, there is a Starbucks right across the street!)

Or, participate in one of the other 13 cities. Or participate on the virtual walk. Learn more about the event at

www.networkofstrength.org

Dear Peter

Greetings!

We have been watching the economy "beatdown" with a lot of trepidation...every news story has some connection to layoffs, unemployment, cost-cutting, and the like. It's a little scary, but we've decided that we can't solve anything by worrying about it. All we can do is work smart, work hard, and wait for results.



Part of working smart is coming up with new products and services. Not many organizations do it well. According to an American Productivity and Quality Control benchmarking study, new products (that is, those launched in the last three years) account for 27.5% of all sales. Yet, the same study mentioned that only 56% of those development projects meet their financial goals and only 51% of them are launched on time.

Looking back, we noticed that we have collected quite a bit of experience on this issue. We've done lots of projects where we have worked with a new product development team to identify potential performance changes and risks, and to develop solutions in the form of processes, training, reference materials, and information tools. In this issue we talk about how the human performance angle, that is, what people need to do to sell, make, install, use, or service a new product and how it is a key competitive opportunity.

How often do you hear people complaining about there being "too much information!" and we can't process it? We have noticed that in process and training projects, there is a tendency to find and document an ever-increasing amount of detail...after all, if you know it, shouldn't you write it down? But, is there a point where the density of the information makes it impossible for the average performer to penetrate to the meaning so that it helps them do what they need to do? Do you have any thoughts about this? We'd love to hear from you.

We also have some news about where we are presenting in the next few months (just in case you are in the vicinity and want to check us out) and a couple of interesting Internet sites and comments.

Pete

Peter R. Hybert, CPT

Principal Consultant

New and Changed
Always an Opportunity for Significant Improvement

Look for Team Faith.

Next Issue

Stay tuned for more on process and capability, as well as other relevant topics related to building and supporting human performance. Some topics we have on deck include

- Are you competent? How would you know?
- Is your performance organization more like an army or a group of lone rangers?
- Rant: Is compliance with a standard process equivalent to mastery performance?
- And more...

And for additional content, check out the Library on our website.



Twittering, etc.

 We are on Twitter (*though, we are not yet sure why*)

Chirp with us: @Prhconsulting

Spring Conferences

Please come out for our presentations at ISPI's International Conference. Here are the details.

Pete will be presenting with Dottie Soelke on

- "Chat and Chew" on how to collaborate effectively over the web
- Educational session on "A System for Developing and Assessing Performance"

Both presentations will be held on Wed, 4/21.

Or, stop and visit Pete at the ISPI Pharmaceutical interest group table starting at 10:30 am (also on Wed, 4/21).

There is still time to register for

Certainly, continuous improvement is important. But, as Tom Gilbert pointed out in *"Human Competence: Engineering Worthy Performance,"* the potential to improve performance (or "PIP") gets increasingly smaller as the environment becomes more competitive. Look at professional sports. Every possible statistic is tracked. Performance is recorded on video and analyzed in "super slo-mo." Any possible advantage is exploited - if you watched the ski jumpers in the Olympics, they would wait at the starting gate until they felt that the winds were favorable...and that made a difference.

Another way to look at it is, once the first wave of performance gains are realized, it requires ever increasing effort to get ever smaller improvements. At some point, you might decide that the performance is "good enough" and focus on another area where larger gains are available. (The same principal applies to cost-cutting, by the way.)

One area where there are always large gains to be had is "new and changed." Any time the organization makes a large-scale change or introduces something new (e.g., new product, process, tool) there is an opportunity for major gains in performance. We've seen enough change projects to know that you can't take the human performance issues for granted.

Focus on the Human Performance Changes Early

The good news is that a little focus on the human performance changes upfront in the process of developing the change pays big dividends. The bad news is that many organizations start thinking about this too late. Why? Maybe there are several factors.

One reason is that you don't rise to a leadership position without being smarter than the average bear. You probably pick up on new things quickly. You may even have a personality trait that some would call impatient. This "get-it-done" approach is effective in conveying a sense of urgency in the organization. But if it isn't counterbalanced by planning, it can cause things to be rushed to market before they are ready, with disastrous results.

How can you tell if you might have a problem? Are multiple team members raising legitimate concerns about the deadline? Are they requesting additional resources? Do you get the feeling that people are telling you what you want to hear? Are people hiding behind a specification to hedge whether a given feature or function will be available at launch?

Of course, these symptoms can only be interpreted as a warning sign if they are not typical. Unfortunately, they are often present at some level in **every** situation! That is sort of the catch-22...at arm's length, you probably won't know the difference between a situation that is in control and a situation that is becoming a problem. Then, you end up with the all-too-familiar situation of a project being on schedule until a week before the deadline at which time it is three months behind.

Create an Environment of Trust and Communication

Below are three things you can do to address this situation and none of them is easy. The first is to create an environment where real conversation between project team members, project managers, and business leaders can happen. People have to feel comfortable sharing a problem or a challenge they are facing without the fear that they will be shot as a messenger bearing bad news. Somehow, leadership needs to be on the same side as the team and helping to make things happen, not the stern principal holding a poor student's feet to the fire...but still maintaining that sense of urgency. Building trust takes time and risk though...as an actor would say, you have to commit.

Ultimately, a short term win by hitting a date is outweighed by downstream problems or customer dissatisfaction.

Pay More Attention to the Details

The second solution is possibly more difficult. Leadership needs to get involved in specific project issues at a more detailed level than "arm's

the conference...contact ISPI!



Pete and Dottie had a chance to preview their ISPI session at a CISPI meeting this past Saturday. We had a great time. Thanks to everyone who participated in making the preview a great event!

**Discuss Amongst
Yourselves...**

Does Testing Work?



Lot's of teachers (and parents) complain about "No Child Left Behind." In particular, that it forces educators to focus too much on the tests. Yet, the whole point is to create standard minimum hurdles for people to clear...shouldn't that improve education? We advocate using performance-based qualification in the workplace to verify capability. If you're interested in the topic of testing, check out "Teach to the Test" on our blog.

www.prhconsulting.com/blog

We use the blog for short notes and commentary on issues related

length." Like building trust, it is easy to say but hard to do. There needs to be other conversations about the project between leaders and team members besides the formal project update meetings where management holds an all-day marathon session and each project is paraded in front of them for a thirty minute update. There is almost no chance of a useful exchange of information in that setting.

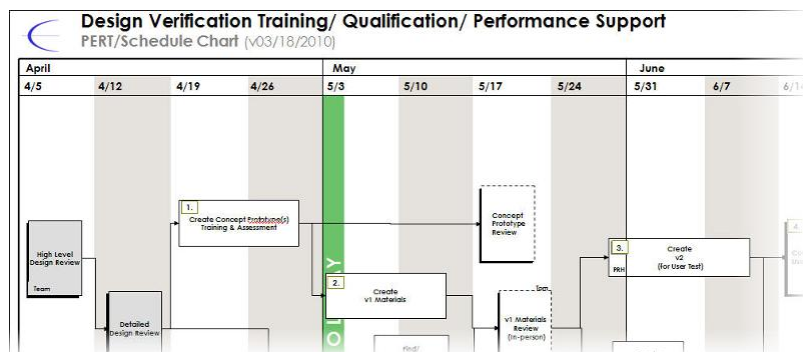
Instead, these sessions are really more like a court case - if issues develop later, you can pull out the transcript and skewer someone for not addressing it in the meeting. It's an effective way to scape goat team members but, it does little to help the business be more effective.

A good test for a manager could be whether you can summarize the major challenges currently facing your team and the steps that are being taken to resolve them for a layperson. In fact, this would be a good skill for almost anyone to develop, as managers become increasingly overloaded and projects become more complex.

More and Better Planning

Maybe the easiest of the three solutions is simply more and better planning. Planning is not hard to do but it is hard to *make yourself do*. It is something that PRH Consulting can help with. Planning is pretty much a reasonable process, though we have our share of tools and "tricks of the trade" to help make decisions and identify risks quickly. Sometimes having a third party facilitate a planning session is easier for a project leader because they can focus on the business issues and activities instead of also worrying about getting the plan written down and distributed after the meeting.

Don't underestimate how vital planning is, even when you think you know what you want to do. If you have a team, everyone needs to be on the same page about where you are going.



In addition to planning tasks, we recommend identifying the business processes affected by the new product or tool and then analyzing how the changes affect the related human performance (e.g., tasks, criteria, skills, and even which role performs things). Use this information to identify the capabilities to be addressed through training, reference documents, job aids, or even performance tools. You will probably also identify things that are better addressed through a change in the product or process...which can save a number of headaches downstream when changes (or errors) are more costly.

Of course, with "new and changed" there is no control group or baseline. You can't easily point to numbers that improved. But you can point to results: cycle time to complete the project, achievement of original project goals, outcomes (such as sales, other output measures, and end user feedback). The potential for improvement in "new and changed" performance is significant. And, the earlier in the development of the change you start, the more rewards you will reap downstream.

If you are interested in seeing one of our planning tools, you will soon be able to visit our website and check out the on-line presentation "Low Tech Project Planning with a Flipchart and Post-Its." The name is a dead giveaway but we think this is a very practical way to figure out a plan with a team - you can always enter the plan into MS Project or another tool after the planning session if you want to use it to manage the project.

to business and human performance. Other recent posts include

- Service Excellence (Yay Dell Computers!)
- More Powerpoint Bashing

For the details, click to visit.

Pass it On

It's easy to forward this newsletter to interested colleagues -- just click the "forward" link at the bottom!

"Lunch and Learns"

We know budgets are tight these days so we are offering a series of **mini-workshops at no charge** for departments or teams. They can also be delivered as executive briefings.

These mini-workshops could be excellent ways to get ideas in front of your staff or co-workers to start dialog or innovation on a number of topics, such as:



- Object-based instructional design
- Capability model (vs. competency model)
- Integrated performance-improvement process
- How to create performance tests
- Planning and managing training and information development projects

These topics address issues of interest to professionals in a wide range of specialties, including training/instructional design, technical writing, HR, quality, engineering, or marketing.

The sessions vary in length but most are under one hour (not counting time out for plate-stocking). We will bring the materials but you will have to provide the audience...and the lunch. And, if you are out of town, travel expenses (sorry).

For more info, email us.



Related Information

Apologies to Past Emailers

In the last month we discovered a bunch of emails from readers did not actually reach us. It's our fault (but also sort of Yahoo's fault) and we apologize for that. Late last fall, Yahoo changed the way our business email works and didn't tell us. (*Sorry Yahoo...but that was really annoying so, it's under the bus for you.*) We figured it out and changed most of our email logins but overlooked the newsletter email address until we happened to notice the problem a couple of weeks ago. We were happy to see the correspondence but very sorry we missed the opportunity to respond in a timely manner.

Going forward, we will though, so please continue to send us your feedback and comments. Thanks!

Four Interesting Places to Visit on the Web

Click to waste time.

In those moments when you really want to waste time but don't want to commit to a movie...check out these entertaining links selected by our team of crack web surfers.

40 Birds on a Gibson

French artist Celeste Boursier-Mougenot set up a couple of electric guitars and filmed and recorded birds landing on it. That's cool...but a couple of those birds were really trying to play them!

http://www.bbc.co.uk/blogs/thereporters/willgompertz/2010/02/40_wild_birds_play_a_gibson_le.html

OK-Go

You may have seen their treadmill video...this is in the same genre...that and a Honda commercial a couple of years ago.

<http://www.youtube.com/watch?v=qybUFnY7Y8w>

T-Shirt War

Odd but entertaining special effects. Also, a clever marketing idea.

<http://www.youtube.com/watch?v=DKWdSCt4jGE>

TED

TED is an organization that began with the intent to address Technology, Entertainment, Design (which is where the "TED" came from) but is really more about big ideas in general. They have a ton of speakers in the archives, including scientists, politicians, authors and artists. (This one only qualifies as a waste of time because you might get motivated to fix a problem that is really out of your sphere of influence...that's not all bad though.)

<http://www.ted.com>

Representing Processes

A Process is a Construct

Any process on paper is simply a representation of the actual work...it isn't really the actual process. Therefore, creating that representation

Do you think employees should just follow procedure or do they need to know the "why's" behind the requirements. To find out what we think, check out the extended version of an article that ran in an early issue of our newsletter "Why Performers Need to Know Why."



You can also find articles and presentations on a range of topics in our online library.

requires decisions about what to include and what to leave out. Often, the more closely you look at a process, the more detail you see. This can tempt you to include more detail in the representation, which increases the complexity. It also makes the representation less useful for some purposes but may make it more useful for others.

Ultimately, it is important to understand what the process is intended to achieve - its overall scope or intent. And you want to have a clear vision for how the representation of that process should be used. We use the following terms to help differentiate these levels, but the boundaries can get a little fuzzy.

Level/Type	Description	When to Use
Model	Visual or graphical representation of a concept or a macro-process	Illustrating a general idea that people need to be able to talk about without referring to a document
Process Map	Graphical representation of a sequence of activities or tasks that accomplishes a desired result over time May include "loopbacks" or decisions The typical representation of this level would be a flowchart or "swim lanes"	To show how to perform something May be higher level for an organization, or lower level, for an individual performer
Procedure	Series of specific, detailed steps to complete a task Often represented using a "step/action" table or simply numbered steps	Reference manuals, work instructions, manufacturing tickets, etc.

You can see how the boundaries can get blurry. If the concept is a series of work activities, a model representation may look like a process flow diagram. We recently completed a project to define a ten-step sales process. The model view showed the ten process steps with a few added elements. The process representation had more detail, such as substeps and key "watch-for's." But it stopped short of defining a procedure.

On the other hand, we have worked in manufacturing operations where the work process was governed by VERY detailed procedures...from which employees were never allowed to deviate. In those environments, employees were frequently required to "sign off," and often log specific information, as each step was completed to verify adherence to the process.

How Much Detail is Enough?

Understanding how much of the work you really need to document in order to achieve your purpose is the key to creating a useful process representation. If your purpose is just to provide an overview, a model will probably work. To establish a common vocabulary and mental framework about the work, a process (ideally, within seven to nine steps, plus or minus two...the same as short-term memory can store) will help if the focus involves sequence.

The level of detail in the representation affects how consistent performance will be across employees. But it comes at a price - going to the procedure level adds a lot of overhead. More detail means there is more to be debated and decided upon, in other words, more time developing the procedure. It also makes the process less flexible - a series of bullet points fits more situations than a script. And then there is

the ongoing cost to keep the procedure current as minor changes begin to accumulate.

For example, if you were describing the five phases in your new product development process, you would probably use a model, maybe even showing how customer feedback enters the process, but without going into detail about specific deliverables and roles.

If you decided to show a process for new product development, you would need to add detail, such as specific deliverables, roles, etc. For instance, it would need to tell you when the final business case should be generated, who would review it, and what to do if you need to revise it.

You could go even further and define the specific roles, review steps, and approvals required for the business case as it progresses through the various interim drafts on the way to completion. Or, you might even go as far as to build a sample or a template of a business case to provide more tangible guidance about the necessary financial information, the key sections, etc.

You can see that your task can grow in a hurry. And not only in scope and scale, but complexity. You might get immediate agreement that every new product may require a business case. But what exactly that business case should look like is a much more difficult question to get agreement on. And, as things change, someone will need to update that example - it becomes an ongoing maintenance task.

Standardize to Improve

Still, if you want your organization to perform consistently, the process is the place to start if you intend to manage or improve the way any work is done. How closely you need to manage that process depends a great deal on how closely it is currently managed. People tend to resist going from full freedom to constraints or from "make it up as you go along" to "follow the book." But to improve, you first need to standardize. You need to be in it for the long haul.

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.



leveraging know-how for performance!

Fewer Rules, Better Performance?

When to Depend on Performer Judgment

Growing up my whole life with traffic control in its various manifestations be they octagonal, triangular, electronic, yellow, red, or any combination thereof, I was not surprised when I received a \$100 red light ticket regarding a rolling right turn made at a deserted intersection at two in the morning. I was however surprised by the growing movement in Europe to do away with traffic control *altogether*.

The problem was identified by Dutch transport planner, Hans Monderman, who felt that traffic lights had failed to improve road safety and traffic flow. Drachten, the location of Monderman's experiment, **removed all traffic signals**. "When you don't exactly know who has right

of way, you tend to seek eye contact with other road users," he said. "You automatically reduce your speed, you have contact with other people and you take greater care."

Oddly enough, it is working! "There used to be a road death every three years but there have been none since the traffic light removal started seven years ago." The success is catching on across Europe in places like Bohmte, Germany. According to Jörg Hennerkes of the German Transport Ministry, "Many road signs are only put up so that we are covered for insurance purposes and not necessarily because they provide the driver with useful information." ([For more details.](#))

Is it possible there are lessons that can be learned from Mr. Monderman that are relevant to instructional design and training? How often do we find ourselves bogged down following procedures or allowing liability concerns to dictate how and what we focus our training on? Are we stopping to look both ways and take in the full context before we go or are we just waiting to see the magic light box to tell us whether to stop or go?

The key assumption that underlies Monderman's thesis is a big one: that people are capable of regulating themselves. Managers and governments are particularly skeptical of this claim but perhaps that's just a bias. After all, Monderman has demonstrated results.

Of course, the procedures (and traffic signs) do allow us to proceed at a greater speed. But if you rely on them exclusively, without using critical judgment (i.e., "defensive driving") accidents will happen.

Maybe we shouldn't just be telling employees procedures or concrete orders, but instead (or in addition) should tell them "why". Some managers might argue if you tell an employee the why's, you are implying that the employee could choose not to follow the procedure as closely or even create their own method of performing the task.

The flaw in this logic is that it presumes the current procedure is perfect as is and cannot be improved. This is either true, in which case the employee is better off fully understanding why he or she should never deviate from the procedure or it is not true in which case obvious performance improvements are overlooked by those in the best position to recognize them. An employee that understands what the manager considers a "win" is in a much better position to wow that manager than an employee who strictly understands their task at a procedural level.

Downplaying concrete directives and allowing people to use discretion within parameters to self regulate is not a completely *foreign* concept. Americans do have some familiarity with some similar ideas in traffic policy. For example in Montana, "scrapping speed limits brought a 7mph drop in average speeds and a 30 percent reduction in accidents." ([For more detail.](#)) Mr Monderman, 61, compared his philosophy of motoring to an ice rink. "Skaters work out things for themselves and it works wonderfully well. I am not an anarchist, but I don't like rules which are ineffective and street furniture (which) tells people how to behave." Maybe we can improve our performance support by giving people the important parameters and the "why's" and then trusting them to use their brains!



This article was contributed by consultant Ian Hybert.



Thank you for your interest in PRH Consulting! For more about our company, approach, and experience, please visit our website at www.prhconsulting.com.

We hope you think of us the next time you need help improving or supporting performance.

Sincerely,

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