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Building Capability

WHY EMPLOYEES NEED TO KNOW "WHY?"

leveraging know-how for performance!

PRH Consulting Inc.

Greetings!

After working since 1989 as a consultant in a small but well-respected firm (SWI) and then co-founding a company (CADDI) in 1998 to develop and market a lean-ISD methodology, I started my own consulting firm in 2002 called PRH Consulting.

Rather than focus on a specific deliverable or methodology, the goal of PRH Consulting is to provide general performance-improvement and instruction-related consulting services that build and improve the client organizations' capability. We partner with our clients to leverage know-how (ours and theirs).

What differentiates us? Always a good question. I believe one key advantage is our set of tools, methods, and templates. It allows us to analyze performance, capture knowledge, design interventions, and develop effective custom solutions *rapidly*.

Another advantage is our experience. We've worked with professional, technical, leadership, sales, and operations audiences. We've worked with subject areas ranging from telecommunications, product management, research chemistry, insurance, pharmaceutical manufacturing, computerized control systems, and others.

We also have an experienced team. Our network of consultants includes specialists in everything from training and document development to e-media production. We can bring them in as needed to address large projects with minimal "spin up time" because we've worked together before.

Finally, we use an approach I describe as "architectural." We try to structure work, supporting content, related processes, and systems so that the logic behind our solutions is visible. That gives our solutions the best chance of being sustained inside the client organization.

So far, we've been keeping busy and doing some interesting work (two of *my* key success criteria).

This is the first issue of a quarterly newsletter. We hope to keep the articles focused but informative. We may experiment with different delivery methods but for now we are using a pdf version for printing. It will also be available on our website. From time to time, extended versions of selected articles will be available on our website as well.

We hope you find this publication useful. We would love to hear your feedback!

Pete

Peter R. Hybert

Principal Consultant

Why Employees Need to Know Why

Dilemma

Imagine that you are a performance consultant. Your mission is to help people become capable of doing their jobs as quickly and effectively as possible. The catch? In addition to teaching "how," your client wants you to include the "whys."

But, you know one of the best ways to improve the effectiveness of almost any training or development activity is to eliminate unnecessary content.

IF: All work in this particular industry is governed by documented procedures.

THEN: You must not vary from them, ever. You are not supposed to work from memory—you are supposed to look up/print the current procedure and follow it. (It is not really OK to even keep a printed version around to refer to because you can't be certain it is current.)

SO: In this situation, why do performers have to know "why"?

Consider these two situations.

1. If a performer asked "why

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do we do XYZ this way?" a perfectly sufficient answer is "because the procedure says so and we can't vary."

2. If a performer made a mistake (i.e., varied from the procedure) they might ask "why does it matter that I did XYZ?" But, knowing "why" won't change what they have to do—the performer still has to record it as a "deviation" and follow the procedure for resolving it.

Maybe knowing "why" isn't really necessary. If not, including it will increase the time needed to develop and deliver the training. Worse, it could add a potential risk that performers might think they get to decide to what degree they follow procedural requirements.

But, the regulatory authority ***told*** them to do it. And, the client team thought it was a good idea too—they had all personally experienced learning something and having the light bulb go on when they understood the "why." Since it was a requirement for this project, we consultants had to find a way to be OK with it too. So we took a closer look.

Knowing "why" does NOT mean knowing the punishment for non-compliance ...it means understanding the rationale for requiring the performance in the first place.

A Closer Look

One thing we knew was that telling people "why" was treating them like adults instead of children. The workforce had experience, they were smart, and they were engaged. Morale then, was one reason for including the "whys" but it didn't feel very tangible.

The procedures were very specific. They often referred to other procedures. Though paper copies were not allowed, the performer could go to a computer terminal to look at or print a procedure. But the procedure takes you right to the detail—there was nowhere to go for a conceptual framework on which to hang all the detail inside the procedures as well as any changes.

This conceptual framework was really the missing link! The "whys" were not simply more information—they were part of the conceptual framework. If someone understood the intent of the manufacturing process, the purpose for various operations, and how the equipment worked, they would "get" what to do with new information and changes.

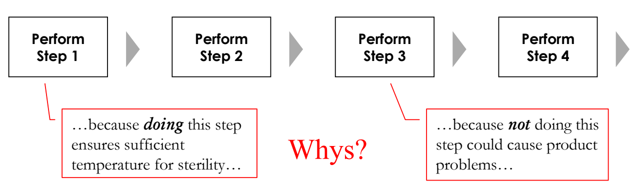
This felt more like a performance-based (or at least cognitive) rationale. People don't just *like* knowing "why," they *need* to know "why" to be able to learn the "how." But we've all been bored by someone dumping a bunch of theory on us when we wanted them to "just tell me what to do." So how would we deliver the "whys" effectively?

How We Did It

The project team consisted of operators and technical experts as well as the client's internal training people. Together, we decided that the key was to deliver each "why" in the context of where it was needed.

Each "chunk" of training had a defined structure for the content, including where the "whys" would go. They were in the overview, in the content presentations, in the demos, in the exercises, in the quizzes, and in the final qualifications. Initially, the instructor would provide the answer but subsequently it varied so that the learner not only heard the "whys" but had to remember and even explain them.

Where The "Whys" Apply



The "whys" address the reasons for performing or consequences of performing a task according to the procedure.

What Did We Learn?

One interesting outcome was that some of the "why" questions (usually generated by the operators) initially stumped the technical experts! The culture was so accustomed to "because the procedure says so" that much of the rationale had eroded from the knowledge base. More than once our technical experts had to do some research to find out the answers.

Another eye-opener was the sheer volume of know-how that exists in an audience group that does the job everyday.

Finally, this project highlighted the limitations of written procedures as a means of communicating know-how. We've been in many companies who rely on procedures that describe very specific details but those procedures almost never include the conceptual framework needed to absorb those details.

What Else Did We Do?

We did a number of things to make the project a success. We designed the training to be robust against changes in the procedures. Using templates, we were able to put a team of seven developers on the project and generate four weeks of hands-on training in about eleven weeks. And we came up with what we thought was a pretty nifty document and page layout that gave us lots of room to use graphics and minimize text.

Best of all, the clients did an independent ROI study that proved a return and made the case for another project!

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

Top 5 aka "The List"—Project Management Blunders

In the movie "High Fidelity," John Kusack and his co-stars continually generated lists (such as, the top five songs about death...remember one-hit wonder Terry Jacks' lame "Seasons in the Sun" ?)

The fun of a short, impromptu list is that it is so subjective—it consists of whatever happens to occur to you right at that moment—but to work, it has to be diverse and go a little outside the norm.

Here is our take at the "Top Five Project Management Blunders."

- **Overplanned**—Some project plans require three hours on the computer to adjust for one simple change. We say: use simple (paper/post-it) methods at first and work with the primary team to build a "doable" plan together.
- **Lot's of T-shirts but no team**—A team requires a shared mission. Going out for happy hour or buying T-shirts won't help if the team members really have NO stake in the success of the overall project.
- **Great issues list, poor issues resolution**—It is *maddening* (but not uncommon) for the biggest project issues at the end of the project to have been identified at the beginning! It's all about the (in-person) follow-up.
- **Scope blinders**—Different from "scope creep," scope blinders is ignoring important issues because you can rationalize that they are outside your immediate scope. Sometimes these are real obstacles to the success of your project.
- **No communication and information structure…or nobody uses it**—Nobody likes meetings but it helps the team (and management) if there is some kind of structure so they know where and when they can get the information and decisions they need. People don't like regular meetings but that still seems like the best solution in most situations—the key is to make sure they are worthwhile… and brief.

Project Profile: Cracking the Tax(onomy) Code

What is a Content Taxonomy?

Think about the file structure in your computer (or office). The taxonomy is the organizational scheme.

The Business Situation

Recently we did a project to design a document taxonomy for a client that was purchasing Documentum to manage their organization's documents. So, before moving all their current files they wanted an organizational scheme for that content.

They contacted PRH Consulting after attending one of our conference presentations. Our approach for defining curriculum content and performance competencies seemed to the client like a natural fit.

Our charge was to work with a designated set of client "content stewards" to figure out how to label and organize the documents for both their "home office" and approximately 30 satellite offices.

Project Process and Team

After getting familiar with the business, we met with the content stewards as a group to begin the process of defining the file structure. The steps...

- Define stakeholder segments
- Define straw model folder structure
- Test the structure using example cases
- Define other conventions (e.g., file naming, keywords)

Conclusions

The key organizing principle/the "independent variable." Should the content be stored according to it's use, according to who owns or publishes it, alphabetically by name? We started by focusing on use and then made exceptions for files with multiple uses—in those cases we used a content label.

Use standard or "cloner" file/folder hierarchy and structure. For example, this organization had a large number of programs. So, each program had a similar set of sub-folders so that users would know that contracts, for example, were always kept inside the relevant program folder rather than a general "admin" folder.

A more subtle challenge arises when you shift away from the mental picture of a filing cabinet to a hyperlinked file structure in a computer. Technically, you could put documents *anywhere* and just put links and key words in the system. (Not a good idea, though.)

An organization scheme has to make sense to a wide range of potential users...not just the designer.

How deep into the data storage layers do you want to dig? Do you want to manage documents that are shared across the entire company, across a single department or project, or just one individual? Do you want to include content that exists in databases? We focused on the shared documents, however, we did get down to department folders in many cases.

How do you want to handle the transition to the new structure? Figuring out the new file structure is really the easy part…the hard part is moving all the files! Just like when you move into a new house, you don't want to move junk you should really throw out. Our approach was to set up the structure so people could move files in as they use them. Then in a year or so you can remove and archive off any files that were left in the old structure.

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

News and Events...

Though the past couple of years have kept us busy with client work, we did have some time for marketing and professional development, especially with ISPI, the International Society for Performance Improvement.

In 2004...

For ISPI's *ISD Conference* in Chicago last September, Pete presented a session titled *"Streamlining the Support that Enables Performance"* describing an approach for designing an integrated performance support system that encompasses training, reference tools, procedures, and even measures. He had a great turnout and quite a bit of interesting discussion.

We also hosted a table at the Chicago Chapter's "Performance Expo." The display showed our approach for *Performance-Based Qualification*.

Coming Up in 2005!

In the spring of 2005, the *ISPI International Conference* will be held in Vancouver, British Columbia from April 13 to 15. PRH Consulting will be involved in two presentations.

Pete will present *"ROI—Determining the Value of a Performance Solution"* with Dottie Soelke, of Soelke Consulting Inc. The approach is based on defining the "performance cycle" and then determining the value of various changes to that cycle.

Pete will also be presenting another session titled *"Beyond Competencies—Managing Human Capability"*. The session will focus on how to connect process requirements, role requirements, and career development paths to define and manage the capability of the organization to ensure readiness for future needs. The bad news? The session time. It is scheduled for 3pm on the final day of the conference! Pete is thinking about ways to bring in attendees—one idea (seriously) is taking drink orders from participants at the start of the session. (Of course, you must be present to collect!)

Vancouver should be a great place to visit in the spring...if you're there, please stop in and say "hi" or sit in on one of the presentations.

Visit "the library" on our website for the 2004 presentation hand-outs and related articles!

For Fun—Visit the Chicago Art Institute!

We like to think our solutions use an "architectural" sort of approach. Whether it is an information taxonomy, a curriculum design, a training program, or a reference document, we define a structure for the content so the *concept* is visible as well as the *specifics* of the solution. The *concept* is where any new thinking is going to be evident.

The Art Institute of Chicago is now hosting an exhibit called "Ten Visions" in which ten Chicago architects were selected to "*...define an important issue for the future of Chicago and create a 'spatial commentary' on that particular theme.*"

The exhibits are diverse. There were alternatives for development of the lakefront and around U.S. Cellular Field. One concept turned an entire stretch of highway into more of a "nature drive" through landscaping changes. In one exhibit, you walk through a series of spaces with video cameras and monitors (positioned so you never see yourself) to make you think about privacy and boundaries. One even dealt with Howard Gardner's multiple intelligences model.

Those of you that are fans of Edward Tufte should make a visit just to see how they convey a large amount of information graphically. One graphic put the cost of housing, population growth, income growth, crime, etc. together for a very compelling message. Others were more visually complex and took some time to figure out.

Sometimes it can be productive to learn what is going on in other disciplines. We picked up some new ideas for conveying complex performance and system concepts that we think will help us in conversations clients.

If you can get there, we recommend visiting the "Ten Visions" exhibit at the Chicago Art Institute. It will be there until April 3.

(If you can't get there, unfortunately, you will probably be disappointed by the information available on the web at http://www.artic.edu/aic/exhibitions/10visions/overview.html.)