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Building Capability

LEVERAGING KNOW-HOW USING A METHODOLOGY

leveraging know-how for performance!

PRH Consulting Inc.

Greetings!

As a consultant, sometimes it can be difficult to identify your specific value-add. Certainly there are things we bring to the party, such as experience with multiple companies and industries, depth of expertise in a focused area, and tools/methods for getting things done effectively. Sometimes we even bring in a little knowledge of the subject matter—though we don't bill ourselves as subject matter experts, our experience does help us get up to speed quickly.

And there are things that are even more intangible. One is that being outside the client company we can see solutions that people in the environment everyday can't always see. In some clients we pick up "inferred credibility" just because we don't work there. (This is balanced though, by clients who assume we *don't* know anything because we are just "vendors!")

Sometimes you are hired to do a simple task (e.g., create training) with the assumption that the client has the content well in hand...but in reality, they don't. So, you end up defining or clarifying the work before you can get to the training. (We've learned never to make that assumption.)

But how do you quantify the value-add? We often partner with our clients to work through problems and solutions and, when you are working together, it isn't always a good idea to try to determine who really contributed what. We may lead the project but sometimes we sort of coach the project. (One client joked that working with us was like going to a psychiatrist because the questions we asked helped them identify things they were doing just "because that's the way we do things.")

Ultimately, we usually work with clients in a team setting to execute a project. That project as a whole should have an expected value-add that eventually leads to cost savings or top-line benefits at some level of the organization. We work together to capture the benefits and, as long as our efforts generate more return than cost, we, as a team, have added value.

If we do our homework , we will define the value-add for the entire endeavor upfront. After that, our focus shifts to making the project happen.

We have an approach for figuring out and scoping integrated human performance projects that add value. Please call if you would like to talk over some ideas.

Pete

Peter R. Hybert
Principal Consultant

Leveraging Know-How Using a Methodology

There's a Method to the Madness

Sooner or later, any business that is engaged in a novel endeavor (i.e., something they have invented) or in trying to grow a business will begin to think about how to deliver consistently and how to pass this know-how on to new practitioners.

This isn't a new idea—this is exactly what franchises do. But it isn't as easy as it sounds on the surface. We have had the opportunity to work with a number of clients in methodology projects. It is a smart business idea but, in many cases, the business methods are not really as well understood and agreed to as it seemed at first. Of course, that is just like almost *every* training design and/or development project!

What is a Methodology?

First things first—let's start with a definition. To us, a methodology is a prescribed way of doing work along with the supporting tools and information. Documenting the methodology

Inside this issue:

Leveraging Know-How Using a Methodology, continued

means capturing the know-how and packaging it into process, tools, information, and training. We recommend you have at least the following:

Deliverable	Description/ Comments
Process	The steps, roles, outputs of the methodology
Tools	May be hardware or software tools—things that do some of the work for the performer
Reference Information	On-line or paper documents—on-line tools may actually straddle the fence between a reference and a tool
Training	Support processes and materials for transfering and verifying capability to execute the methodology
Other Resources	Usually this category consists of experts who are available to provide assistance
Branding	Identifying images, slogans, etc. to help others recognize the methodology

Process First

Before you can think about transferring capability, you first need to define the work process. The work process includes the overall intent, steps, roles, and deliverables of the methodology.

> **"Documenting the methodology means capturing the know-how and packaging it into process, tools, information, and training."**

This is usually where you discover that the methodology is not as consistent and commonly understood as initially believed. As the methodology evolves, people become accustomed to innovating, which gets the job done but results in many different ideas about what the methodology really is.

We recommend working with a group of top practitioners to define the process (aka, the heart of the methodology) as a group. This team can become advisors and advocates later.

One company we are aware of created a product introduction methodology using a small team of staff "experts" to dictate what the new process would be for four business units with very different business models. There wasn't much resistance, though—the target audience just pretty much ignored it.

Tools

Tools are anything that either helps you do more work or do work you wouldn't be able to do if left to your own devices. A jack helps you lift a car you ordinarily couldn't. Google's search engine helps you find information faster than you could by browsing.

Probably the most common tools in a methodology are forms for capturing information and decisions. Checklists of steps are also common.

Ultimately, the key with tools is finding opportunities where tools will make the methodology easier to use or more fool-proof. Creating tools is similar to a process improvement or simplification effort—it requires a knowledge of the process (so you know where the "pinch points" are) and enough knowledge of the relevant technology to know a tool can be built effectively.

Reference Resources

Technically, reference sources are tools but in a methodology project you may make a concerted effort to build these to support new practitioners.

In addition to the information about the methodology, in some cases, you may elect to capture past know-how. For example, one client whose methodology involves finding best-in-class pricing and delivery for purchased products, stores the results of previous project research in a database as a resource for later projects.

If you choose to capture knowledge (in addition to process), we recommend defining the content structure (i.e., create a format) for experts to fill in—it will result in content that is easier for learners to search than simply collecting historical content.

Training

No matter what the project, we always advocate training to capability. If all you intend to provide is information, just point people to the reference info. Training should include opportunities for each individual learner to try out at least the key steps.

Of course training doesn't have to be limited to the classroom. We have built tools and processes for

- On-the-job learning and coaching
- Verification of capability through review of work outputs or observation of performance
- On-line modules for "a little before just-in-time"

Branding

Branding is not the most important component but it helps to have a recognizable identity. Usually that identity consists of an image (such as a logo), a slogan (that summarizes what differentiates your methodology), and a standard "look and feel" for any artifacts (especially deliverables).

Conclusion

Documenting a work process and then working toward consistent performance is a central focus on most quality approaches (e.g., TQM, lean, Six Sigma, etc.)—you need to get a process under control before you can improve it.

It is hard work to "reduce something to practice." However, if you do decide to capture and transfer a methodology in your business, we hope this article will help you begin planning the effort. Furthermore, we would be delighted to help because we have been there and have done that before.

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

Top 5 aka "The List"—Human Performance Concepts

What are the top five concepts in human performance technology and instructional design? Hopefully, these aren't all obvious—let us know what you think.

Performance Before Behavior—This one assumes that any behavior only has value if it leads to results. For example, it doesn't matter how many sales calls you make, it only matters how many *sales* you make. So you have to define results first. Doing this can lead you to identify things that really work, instead of just the tasks everyone does. This shift in thinking is most associated with Tom Gilbert and his book "Engineering Worthy Performance."

Measured Results—Once you define what you expect to happen, then you have to measure it to really know if you made an impact. (Sure, Six Sigma advocates the same thing...Gilbert suggested this in a book published in 1978.)

System Mapping—Just because we like diagrams, this technique (Rummler/Panza) has to make the top five. It allows a team to look at a collection of business processes and analyze and troubleshoot it visually. (And, they published this approach well before Peter Senge hit the market with his system diagrams.)

Learner-Centered (vs. Instructor-Centered)—A cornerstone of ISD now, when Mager and others advocated a learner focus it signaled the end of droning instructor lectures...or should have. The intent was to focus on what you want the learner to do as a result of the training rather than what you want to tell them.

Learning Taxonomy—Along with the learning hierarchy, this ISD tool can shortcut the analysis of complex performances and knowledge sets. And, it provides the underlying logic for effective object-based development approach. *(Stay tuned for more on this in a future issue.)*

Project Profile: **Transferring a Methodology**

Combinatorial Chemistry?

In a nutshell, if normal chemistry is where you mix different chemicals in a test tube to see what happens, combinational chemistry is like taking 24 miniature test tubes (a "plate") and systematically mixing a bunch of different (but related) chemicals together at one time to see what happens. This results in more compounds faster.

Our clients had created a complete practice, including theories, methods, tools, etc. Surprisingly, many of the tools were low tech—one of the subject matter experts (all of which were PhD chemists) literally used a Sears 3/8" variable speed drill and a band saw to create some of their lab equipment.

How Do You Sell a Technology?

The buyers weren't interested in the compounds our clients discovered—they wanted to learn how to do combinatorial chemistry for their own purposes. Establishing a value for a methodology is similar to valuing a business: you look at what it is worth to the buyer over time. You also build in non-compete/non-resell agreements as appropriate to protect your business.

Still, there is the question what, exactly you are selling. What will the buyer take with them? Materials? Trained practitioners? In this case, the answer was both. The methodology had to be made explicit and documented and then transferred to practitioners.

The Solution

The diagram below shows how we think about solution design, though with digital technology, the line between training and support tools can get pretty blurry. The essence of what we (as a combined team) delivered was

- Definition of the work (methodology)
- Definition of key supporting knowledge, skills, and tools
- Documentation of their "chemistries" (i.e., the formulae and results)
- Development of materials for instruction and simulated experiments

(We called the simulated experiments "canned labs"—they led to known results but took the learners through the use of all key equipment and procedures used in the methodology.)

What Did We Learn?

There were many "lessons learned" from this project but we only have space here for a few.

"There is no one way." When we dug into the details, we discovered that each chemist had his/her own spin. (And, in some cases, it seemed that perhaps there was some resistance to sharing their own "tricks of the trade"…)

> **"Capturing a methodology will always require shifting know-how from unconscious to conscious performance."**

We worked with a group of top performers to create a common view of the methodology, incorporating the key elements of all the approaches.

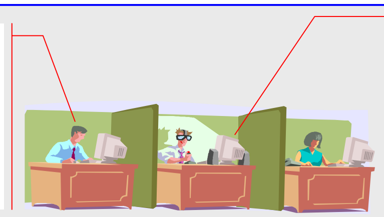
"Focus on outputs (or accomplishments) and criteria first." On almost *every project,* we have to work through what the real outputs are and how to tell a good one from a bad one. People have a lot to say about tasks but rarely have clear descriptions about what the tasks produce—they assume everyone knows!

Numerous times, we had to define and clarify things they took for granted. After discussion, we were able to figure out the reasons and generate rules for learners. They knew what they were doing but had just never *articulated* it. Capturing a methodology requires shifting know-how from unconscious to conscious performance; or, you could say from "tacit" to "explicit" know-how.

Performer-Resident:

Capabilities the performer needs to use "live"

- Knowledge
- Skills
- Characteristics (e.g., attitudes, traits)



Environment-Resident:

Capabilities that can be stored in/provided by tools or resources in the workplace

- Information
- Reminders/ "prompts"
- Direction (e.g., from a coach)
- Etc.

Project Profile, continued

Work with a group to establish a structure and individuals to work out the details. Working with the team was critical for defining the framework of both the methodology and the training. But, when it was time to actually work on the details, we worked one-on-one with individual SMEs. Since the big picture was well understood, it was possible to focus individuals on targeted areas and move quickly.

Conclusion

A methodology really consists of the combined set of information and know-how for performing a work process reliably. To transfer or deploy that methodology requires training, performance support, and information support (in addition to hardware and software tools). It will only work if you approach it systematically and at the detail level.

Every training project is like a methodology transfer project. There are proven ways to succeed—we can help if you are interested.

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...

What's Been Happening in 2006...

Once again, our primary focus for marketing has been ISPI, the International Society for Performance Improvement.

For the Chicago Chapter's February meeting on "Process Improvement," Pete led an icebreaker on lean tools and methods. Each participant received an envelope with two cards inside, each containing ***either*** the name or description of a one tool or method, from 5S to balanced scorecards to Hoshin Planning. Of course, their cards did not match—their goal was to network and find the people who had the "other half" of their cards. In the process, they met a number of new people and were at least exposed to several tools. (And, their "takeaway" summarized all of them.)

In the spring, we attended the ISPI International Conference held in Dallas, Texas (4/9—12). Besides meeting up with colleagues he normally doesn't see, Pete presented "Beyond Competencies—Managing Human Capability." This presentation focuses on how to connect process requirements, role requirements, and career development paths to define and manage the capability of the organization. It also connects content objects (e.g., training) to performance requirements.

The session was well-attended and fun to conduct (especially now that we've added two activities). We hope the participants received value from it as well! (Pete also presented an abbreviated version during CISPI's Annual Conference Preview on 4/2.)

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

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We design and develop systems and tools that improve and support performance!

For Fun—Read Small Books

We find that time is limited these days...even more than in the past. Maybe it is because running a business requires you to change hats constantly. Maybe we are just moving slower or maybe time goes faster the older you get (because each day is a smaller percentage of your total). Whatever the reason, there just doesn't seem to be much time to read. So reading a big book doesn't work—it loses momentum.

So instead, we've been reading more small books and, going even smaller, short stories.

One we can recommend is written by Steve Martin—"The Pleasure of My Company." (Yes, *that* Steve Martin.) The main character is intelligent but has social and mental problems...he may even be a little autistic. Martin does a fantastic job of portraying that type of condition with humor but compassion.

Another good small book is "The Mezzanine" by Nicholson Baker. It is not a new book but it is one of a kind. The main character is an engineer or tech writer and the "story" is pretty much everything he thinks about during one trip to a store over his lunch hour. The way he captures the feel of a modern office job and the idiosyncratic mix of thoughts that go through your mind when you aren't really focusing is well worth the time. If you are between maybe 40 and 50 years old, you will probably get a kick out of the associations he makes about everyday objects (for example, how staplers and turntable tone arm designs used to be reminiscent of trains but have since evolved).

One last suggestion—a collection of short stories by Maxine Chernoff. Very unique perspective and the stories feel like Chicago stories. As far as we know, this is the only book she has published but it is worth tracking down.

Of course, we would be very interested in hearing about any of your recommendations. As far as *writing* a small book, if Abe Lincoln was right, it would take more work than writing a long book. Still, the idea is intriguing...

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.