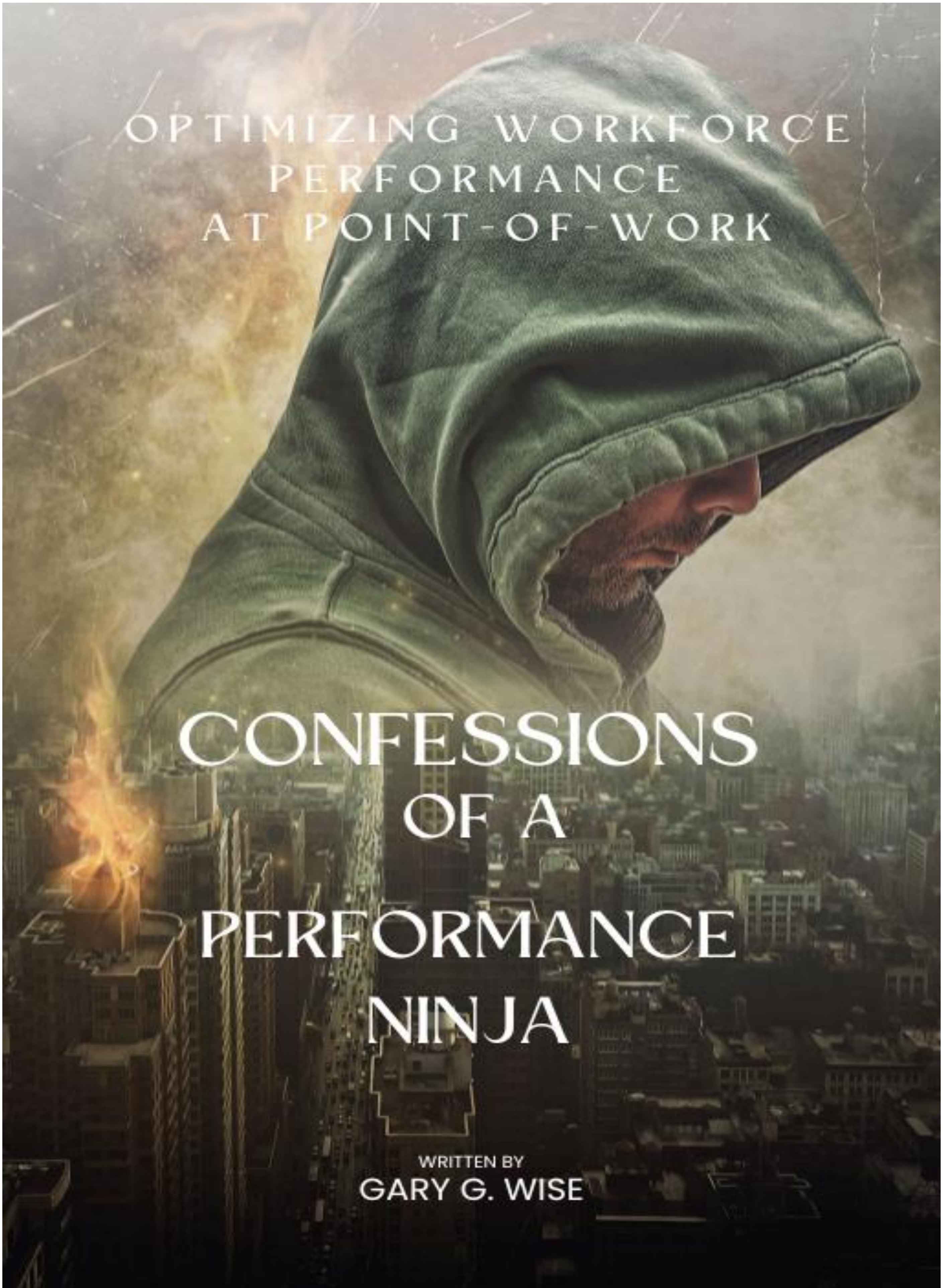

OPTIMIZING WORKFORCE PERFORMANCE AT POINT-OF-WORK
CONFESSIONS OF A PERFORMANCE NINJA
WRITTEN BY
GARY G. WISE

CONFESSIONS OF A PERFORMANCE NINJA

Foreword

Contrary to popular belief, executives must rely on something other than Training solutions to deliver optimized performance. A recent eLearning Industry article, "How To Overcome L&D Challenges By Creating Learning Strategies That Drive Performance," by Looop Marketing, postures that we have reached a point of inflection. I would call it a tipping point and time for a

Strategic Re-Think:

> *"Learning and Development (L&D) is at a point of inflection. It's being forced to reevaluate what it does and what it delivers, not because of fads and not for the sake of change. The desired outcomes for L&D and its stakeholders' expectations have changed. Regarding programs and content, L&D was about delivery and provision and measured by attendance, completion, and satisfaction, and it didn't speak at all to business results. Now, L&D is being charged with affecting performance, productivity, and capability."*

Exacerbating this *tipping point* are sea-change digital initiatives, not the least of which is **Digital Transformation** and the exploding cloud-based technologies options. The implied changes represent disruptions impacting every corner of the enterprise and every workforce member. Status quo Training strategies are falling short, held hostage by the long-held *Myth* that **TRAINING DRIVES PERFORMANCE**. This *Myth* perpetuates a false narrative that limits effectiveness when we depend on training as our default solution.

Is the *Myth* truly a myth? Yes, because there is an assumption commonly made that if Training is completed, competencies are met that enable improved performance. However, a measurable performance change has yet to occur, and the deliverable is only POTENTIAL.

- That means **TRAINING CONTRIBUTES TO POTENTIAL.** *Measurable Performance Outcomes* do NOT manifest until the *Learner* transitions to a *Performer.*
- The transition to *Performer* happens only AFTER Training is complete, and they have returned to their respective Workflows at multiple ***Points-of-Work*** to complete task-level work that generates measurable results.

This book positions that Workflows at the *Point-of-Work* represent our new **Ground Zero,** where we break from the status quo and apply holistic assessment scrutiny…

Assessing POINT-OF-WORK is mission-critical because it is our best source of what works, what doesn't, and most importantly, WHY!

The current rage in our L&D industry is the CONVERGENCE of Learning with Work. Concepts like *Learning in the Workflow* and *Workflow Learning* promote long overdue traction to drive this sea-change to better equip L&D to become a trusted business partner instead of a drive-thru Training-on-Demand operation.

L&D is our logical go-to business discipline to navigate this new *ground zero*; however, many Training teams still need the requisite discovery skills to assess multiple *Points-of-Work*. Those discovery skills are a mission-critical requirement for L&D, often handled by Performance Consulting Specialists, Performance Strategists, or [*Enter job title*], having similar discovery skills and business savvy.

This book is about my journey to overcome the *Myth* by adopting the thinking that we must go to *Point-of-Work* and apply evolved discovery skills through a proven process called ***Point-of-Work Assessment (PWA)***. "*Confessions of a Performance Ninja"* is one man's adoption, warts and all, of a new paradigm where P*oint-of-Work* becomes an evolved status quo. This book is divided into five parts:

- **Part 1 – *Point-of-Work & Why Give a Rip***
- **Part 2 – *Anatomy of a Point-of-Work Assessment (PWA)***
- **Part 3 – *Performance Restrainer Discovery Attributes***
- **Part 4 – *Point-of-Work Readiness Assessment for Learning & Development***
- **Part 5 – *Worksheets & Job Aids***

What changes? It starts with our need for a ***Different Conversation*** with Stakeholders who make Training requests. This *conversation* needs to ensure three things happen *differently*:

- ***Shift thinking*** *from default learning solutions to focusing on* ***optimizing and sustaining measurable performance*** *in Workflows.*
- ***Assess Points-of-Work*** *within Workflows to deliver prioritized Solution Design Road Maps to the L&D design/development/delivery functions.*
- ***Deliver Measurable Proof of Impact*** *that confirms our Performance Solutions overcome challenges, enable growth, and maintain business sustainability at Points-of-Work.*

In this book, I will share confessions on things that worked well, some things that never occurred to me, and things that could have worked better on my journey to embrace a ***strategic re-think*** and adopt ***tactical methods*** to assess *Points-of-Work* effectively.

Gary G. Wise
Performance Ninja – Writer of Things – Business Advisor/Coach
gdogwise@gmail.com (317) 437-2555
Web: Living In Learning – LinkedIn
Twitter: @gdogwise

Cover Art by Lobostudiohamburg from Pixaby

TABLE OF CONTENTS

PART 1

Point-of-Work
&
Why Give a Rip?

CHAPTER 1

WHAT IS POINT-OF-WORK?

Over the last fifteen years and numerous speaking engagements, I must confess that the premise upon which my passion has concentrated **– *Point-of-Work* –** has never changed in importance regardless of industry or work discipline. *Point-of-Work* represents a common denominator across all elements of our Learning Performance Ecosystems.

<u>**Working Definition**</u>**:** *Point-of-Work is any point in a workflow where actions are executed or decisions made to effectively and efficiently complete task-level work regardless of business discipline or industry.*

Success at *Point-of-Work* is supported by sustained delivery of measurable Performance and business value rather than by completing Learning programs. Therein lies the *Myth*.

Learning programs are still mostly provided off-task in classrooms or online, and both are NOT in the Workflow. That's where the ***Myth*** that ***Training Drives Performance*** gets underfoot and derails or limits our efforts to optimize Performance at *Points-of-Work*. Whether you are a senior leader, a line manager over a department, or an individual performer with defined tasks, the mindset *Myth* gets in the way and limits your effectiveness at all levels. The truth is that Training only contributes to POTENTIAL, and *Point-of-Work* is the only place where measurable PERFORMANCE evidence manifests.

The lowest common denominator is *Point-of-Work*. Why is *Point-of-Work* not a routine part of our thinking? Because *Point-of-Work* needs more mindshare. Mindshare is held hostage by the premise of the *Myth*…*if we do not train them, they will not perform*. This book is about shifting that mindset and prioritizing discoverable knowledge to frame solution designs for application in Workflows, at moments of need, and within task-centric, role-specific *Points-of-Work*.

The application of this shift in mindset is a *Pre-Design Discovery Methodology called* ***POINT-OF-WORK ASSESSMENT (PWA).***

More emphasis in L&D is moving toward Workflow Learning, which is excellent news that a shift is finally starting to gain traction. However, the skill set to optimize workflow learning design, development, and delivery must fight through the limits of the *Myth* that focuses on Learning instead of Performance. Our solution designs must ***Converge Learning & Support with Work***, which means solution accessibility in live Workflows, at moments of need, and at multiple *Points-of-Work.*

CONFESSION: **Jargon Alert** – *Speaking of things like Ecosystems to an operational stakeholder is a mistake. The last thing they need to hear from L&D is more of our jargon, no matter how progressive it showcases our thinking. Your time would be better spent teaching a pig to sing…and causing much less annoyance. Speak their language, not ours.*

Still, the interdependencies within a **Dynamic Learning Performance Ecosystem** are at the core of what may be influencing the restrained performance, so we need to redirect our enthusiasm and mastery of jargon into actionable behavior. More importantly, the restraining factors may have nothing to do with poor knowledge and skills. Can you see how the *Myth* can get underfoot if it serves as our default solution consideration?

Confession: *Yeah, I sold the Myth. Sold it for twenty out of thirty-five years. Sold it like a champ! It was job security. My compensation did not depend upon my stakeholders' performance at their Points-of-Work. My objectives were tied to how many butts-in-seats, course completions, good evaluation scores, and hours of training were pumped into the ether.*

To make matters worse, our stakeholders know about the *Myth* too. We sold it to them years ago. If stakeholders have a performance issue, they reach out to Training in a knee-jerk reaction we have been promoting. This is important to understand because the "issue" they experience may have nothing to do with Training, but we get the call. That action puts a challenge we cannot resolve in our laps because of the Myth and not necessarily in the appropriate entity who can fix it. As such, we own a ***liaison*** role because we completed the PWA discovery that points to other business partners who did NOT get the call. L&D must step up and connect the dots for them.

If a process improvement team like Six Sigma exists, they may ultimately own part of the solution, but who connects the dots required to bring Six Sigma into the pursuit of a solution? L&D should because L&D got the initial call to fix the problem with Training, not Six Sigma. The PWA showed the solution was partially process improvement oriented, so L&D plays an essential liaison role because nobody else got the call.

To preserve limited resources and optimize design, development, and delivery resources, an initial, holistic, *pre-design discovery methodology* that focuses on the root causes behind breakdown(s) in the workflow(s) and the measurable impacts at *Point(s)-of-Work* becomes essential. Why build a course when a Job Aid will do?

This methodology is called ***Point-of-Work Assessment (PWA)***, which is this book's primary focus. The next chapters will address the PWA in detail, along with how to:

- Change the Conversation with PWA findings *without mentioning PWA methodology*
- Leverage Change Leadership principles to gain sponsorship to access the workforce
- Define and validate root cause(s) within workflows to avoid chasing symptoms
- Validate and dispel assumptions and hypotheses related to initial Training Requests
- Gain stakeholder(s) buy-in and assign business impact priorities to Solution Road Maps

CONFESSION: *Do not make the mistake of sharing your immense knowledge and expertise by positioning Point-of-Work Assessment jargon as part of your next steps…instead say,* ***"I need to ask some questions to ensure the "Training" we build will meet or exceed your expectations."*** *You may not build any training, but you need to be prepared to explain what is occurring at Point-of-Work and why Training may not be the solution AFTER completing your PWA discovery.*

You may initially sound like you are on a mission to build Training when ultimately, you are on a mission to optimize performance at one or more *Points-of-Work*. Suppose Training is involved, that's okay. If not, think about how much time you saved on building a performance job aid in a fraction of the time that would have been spent developing training in Articulate. Don't waste time or cause concerns by discussing the new paradigm; hide *the pill in the cheese…*slip into the black pajamas, slide on the cheap sunglasses, and go Ninja.

CHAPTER 2

POINT-OF-WORK ASSESSMENT (PWA)

Working Definition: PWA is a PRE-DESIGN Discovery methodology that frames structured **Solution Design Roadmaps** based on validated sources that restrain performance outcomes at *Points-of-Work*.

The PWA does NOT deliver solutions; instead, it describes what solutions should accomplish when applied successfully in the workflow. In the hands of a performance consultant, the PWA provides clarity and direction regarding the learning performance assets required to effectively resolve and sustain measurable performance specific to the perceived problem(s). Instructional Designers, Developers, and other Business Partners collaborate with the Performance Consultant to fashion the appropriate solution asset(s).

The PWA organizes the attributes of what restrains performance in the workflow into six clusters in a brief graphic: (*See Figure 3-1*). We will spend more time with these attributes later in the book.

ECOSYSTEM Performance Attributes

DISCOVERY

ECOSYSTEM CATEGORYXP	ASSESSMENT DESCRIPTION	PERFORMANCE ATTRIBUTES
ENVIRONMENT/CULTURE	What internal/external work conditions exist that impact performance? What is the level of workforce engagement and support?	Culture - Change Management - Organizational Design - Regulatory & Legal Compliance - Upstream/Downstream Dependencies - Competition Frustration/Stress - Empathy - Inclusion - Urgency/Risk - Etc.
PEOPLE/CAPABILITY	Who is engaged in the work? Who supports the work? What required L&D skills are missing or deficient? What is Training's contribution to performance readiness? End-User Readiness?	Leadership - Role Clarity - Accountability - Job Expectations - Communications Collaboration - Workflow Acumen Savvy - Coaching/Mentoring - Career Pathing & Development - Talent Development: ***TRAINING*** *(Knowledge & Skills, Competencies*), Wisdom & Insight Sharing, Etc.
WORKFLOWS/PROCESSES	What is task-level work? Where is it failing? Why? Business criticality? Current design & development frameworks/methods? To what extent is learning & support embedded with workflows?	Task-level Workflows/Processes – Moment of Need Definition - Root Causes Requirements for task-level access to embedded learning & support (*Policies - SOPs - Methods & Procedures - Technical References*) – Insight Curation Protocols - Learning Design/Development Protocols - Performance assessment methods -Etc.
CONTENT/RESOURCES	What assets are consumed/required to execute in workflows? Are assets accessible? Are assets agile & current? How is content managed & maintained? Are assets *"pushed or pulled"* or both?	Accessibility at Moments of Need - Search - Relevance to Work/Process Application & Effectiveness @ Point-of-Work - Availability by Role -Current use of ***EMBEDDED TRAINING & SUPPORT CONTENT*** - Volume/Format - Content Management Protocols - Currency Updatability - Portability/Reusability - Etc.
TECHNOLOGY/SYSTEMS	What technologies and systems are/should be used to execute work? What systems are capable and necessary to connect learning and support assets to the workforce in their workflows? How does technology avoidance impact performance?	Access to ERP/CMS & Other Business Systems - ***LMS/LES*** **& DAP** - Mobility Enablement - Collaboration Platforms - Knowledge Bases - Effective Application of Technology - Migration Map Growth Implications -Technology interconnectivity/ Compatibility - Bandwidth - xAPI/Learning Record Store Content Repository Footprint - Legacy Authoring Platforms - Etc.
ANALYTICS/IMPACT	How is success measured? Are performance data accessible & actionable? Impact measurement at Levels 3&4? Are KPIs correct/missing/misaligned? How is end-user asset utilization tracked?	Utilization Data Capture - Data sources - Data Analysis - Data Application - Creating Reports - Requesting Reports - KPI/competency Alignment- Missing/Misaligned KPIs - Benchmarking - Level 3 Eval - Level 4 Eval for ROI - Etc.

See Figure 3-1

An important note is that the PWA does NOT deliver solutions per se. The PWA provides ***Solution Design Roadmaps*** essential for L&D resources to design, develop, and deliver the final learning performance assets. Some solutions may be Training-related, and some may target *Performance Support*. At the same time, some may require engagement with other business partners like Marketing Communications, IT Methods & Procedure owners, HR Organizational Design resources, etc. If your PWA findings point in directions away from, or in addition to, Training, it is our (*L&D's*) job to serve as liaison to connect those dots from our PWA findings for the affected business partner(s).

Great, another process that adds time that few of us have, right?

The PWA can be as simple as a thirty-minute conversation with a stakeholder or more involved via interviews or surveys with managers and individual contributors. While it may add time on the front end, consider the time saved when the PWA findings render a *Solution Design Roadmap* that eliminates time-consuming training design and development drills. Remember, PWA is *Pre-Design Discovery* that maps where we go next with our solutions' actual design and development.

A frequent mistake we typically make is to accept a request for Training as the *"best-fit solution"* and dive straight into a Training Needs Assessment (TNA) to identify:

- Knowledge objectives
- Who are the training targets
- What competencies need to be addressed
- Delivery method…that influences design and development
- Timeline for project completion
- Determine what development tool should be utilized

Some of us may do more, others less. Honestly, there is nothing wrong with completing a TNA, BUT if a PWA is done first, it *informs* the TNA and streamlines design decisions AND, more importantly, validates whether or not the requested training objectives are the right ones to impact and sustain the desired performance outcomes.

Too many TNAs are pursued due to the assumption that Training is the optimal solution. We are left with which authoring tool to use instead of knowing the root cause(s) triggering restrained performance. What if the solution is a ten-second video or a hot-linked resource with no training required?

My point is to avoid defaulting to a Training solution before examining the *workflow attributes* contributing to the performance challenge(s) with a PWA discovery. Again, the PWA is not an automatic injection of extra time and may be accomplished with a few questions to confirm…or not…whether a deeper discovery effort is warranted. We will dig deeper into Discovery tactics later in this book. Still, the following are examples of a single routine statement and several common questions I lead with to gauge how interdependent the hidden complexities are:

- **Statement**: Yes! We can help with your Training request and need to ask a few questions upfront to ensure the Training Solution we design and deliver to your workforce achieves the results you seek. (*Always use this as the routine response to a Training request*)
- Describe the primary audience for this Training solution.
- Describe the performance you have observed that indicates Training is required.
- What measures are acceptable targets to confirm our Training was successful?
- Describe how you will reinforce the Training concepts after completing the program.

Indeed, there may be more questions to follow up on and clarify, but those shown above are what I consider essential regardless of the nature of the training request.

The next chapter will focus on questioning and several best practices to consider as you follow a cascade down through the organization after fielding the initial Training request. Before the first question is asked, something more essential must happen – ALIGNMENT.

Alignment happens twice, with the second iteration being a RE-alignment:

- **First alignment** – When you meet with the Requestor to gain insights as to why they are requesting Training.
- **Second Re-alignment** – When you meet again with the Requestor to debrief and validate the actual Findings provided by the PWA discovery cascade.

That second *alignment conversation* is likely *changed* and puts you and the Requestor on the same page, not just in the same book.

CHAPTER 3

PWA SUPPORT OF DIGITAL TRANSFORMATION

What could be more disruptive than the pursuit of enterprise-wide **Digital Transformation?** Sadly, history shows most *Digital Transformation* efforts fall short or fail outright because of the many disruptions to workflows, processes, and new demands of using unfamiliar technology on end-user populations. Implications are clear – our status quo Training paradigm falls short.

So why not disrupt the status quo with a new strategy? Why not a **Disruptive Strategic Transformation** called ***Point-of-Work*** (*also applied enterprise-wide*)? All transformation efforts are destined to fail if we don't move aggressively enough, and likely for the same core reason:

We fall short because we stop short!

<u>**CONFESSION:**</u> *Despite popular beliefs, reaching **GoLive** and successfully launching Training for new technology into the Workforce is not the end. GoLive marks **Deployment** and the beginning of two more important things – **Implementation & Adoption**. Before adopting the PWA mindset, our team's routine objective was to get all end-users trained before the system went live. When training was completed, we were finished…time to breathe out. Wrong! YES, we **Deployed** Training, but we did not **Implement** anything. We did nothing to optimize **Adoption**, nor did we ensure post-training **Sustainability**. We stopped short…and transformational success suffered for it!*

What we should have done started well before building Training. We never fully accomplished holistic **Discovery** within the Workflows we were about to disrupt. The focus instead was on adding new technology training rather than the impact it would have on the Workforce in their Workflow. How would their widely diverse Workflow be disrupted? How would follow-up support and Training happen? How would we map solutions for a follow-up? How could we better prepare new hires to utilize the new technology before transitioning them ill-equipped into their *Points-of-Work*?

GoLive is only **Deployment**, and for that matter, so was our initial system training. **Implementation** happens after GoLive and after training when the application(s) are in the hands of the workforce…in their Workflows…and at their respective *Points-of-Work*. We would never reach full **Adoption** if we stopped at **Deployment** and defaulted to allowing the Help Desk to fight fires erupting in Workflows. That approach has proven over and over again to be unsustainable despite being a routine best practice for many.

We should have planned how to **Sustain** the transformation once everything was up and running for ongoing disruptions due to upgrades, patches, and routine fine-tuning. The whole point of successful **Adoption** flows from supporting Workflow **Implementation** to **OPTIMIZE** end-user utilization in their Workflow at *Points-of-Work*.

The Case for Disruption

Digital transformation is expected to add $100 trillion to the world economy by 2025. Platform-driven interactions are expected to enable approximately two-thirds of the $100 trillion value at stake from digitalization by 2025. (World Economic Forum). The digital transformation market is expected to grow at a CAGR (compound annual growth rate) of 23% from 2019 to $3.3 trillion by 2025. (Research and Markets) These numbers are staggering. Even more staggering is that successfully sustained transformations represent only a fraction of those attempted.

Please feel the urgency regarding what is happening to stress and restrain optimum performance in the Workflow in which our end-user population must operate efficiently and effectively.

Here are a few more nuggets to consider from several different sources:

1. *More than 50% of digital transformation efforts fizzled completely in 2018. (Forrester)*
2. In a *Forbes Interview*, Michael Gale said, "*Virtually every Forbes Global 2000 company is on some digital transformation journey. Some are getting it right, and others struggle. Basically, **one in eight got it right,** and then there were ranges of failure to really where more than 50 percent did not go right. In fact, their expectations were neither met nor exceeded, and the gap between expectations and meeting them was so enormous it was considered a failure.*"

3. *70% of digital transformations fail, most often due to* ***resistance from employees****. (Mckinsey)*
4. *Only 16% of employees said their company's digital transformations improved performance and were sustainable in the long term. (Mckinsey)*
5. *At least 90% of new enterprise apps will insert AI technology into their processes and products by 2025. (IDC)*
6. *Internet of Things (IoT) had the largest share of the overall digital transformation market in 2019, but AR/VR technology is predicted to have the fastest growth until 2025. (Research and Markets)*
7. *87% of companies think digital will disrupt their industry, but only 44% are prepared for potential digital disruption. (Deloitte)*
8. *From Gartner's perspective*, "*the transformation journey is taking large enterprises especially at least twice as long and costing twice as much as they originally anticipated." This is largely due to* ***cultural readiness*** *— "53% of the organizations surveyed remain untested in the face of digital challenge and their digital transformation readiness therefore uncertain*."

So why share all of these *Digital Transformation* facts, and what do they have to do with *Point-of-Work*? Quite simply – Everything. Every single Workflow that the Workforce encounters will Change. Regardless of how well Training was completed, we are confronted with one common restrainer – How much usable knowledge will be retained long enough to use in a new workflow on new technology? How sustainable is the strategy to position the Help Desk to meet the demands for assistance after Training is complete? How much trial and error in workflows is acceptable? What will the learning curve duration to full adoption cost the business?

Converging support in the Workflow using **Digital Adoption Platform (DAP)** technology is a best-in-class approach. In all honesty, DAP technology is a Workflow Performance tool that enhances Training by integrating Learning into actual Workflow using the same technology that will be utilized to optimize post-training workflow performance. DAP, in every respect, *Converges Learning with Work* by using performance assets *designed intentionally* for consumption in Training AND on the job.

What Is Digital Adoption Platform (DAP) Technology?

DAP is a software tool that gives users of applications the guidance they need to execute application tasks at the Point-of-Work in their Moments of Need. DAP provides this guidance concurrently inside the target application and guides the user through each step of their task.

Common DAP CHALLENGES:

- Premises-based DAP technologies often require embedded code insertion into the enterprise applications that will be supported. This is invasive to any IT owner, and the potential for live application disruption is a showstopper in many cases. The better DAP offerings now are cloud-based, require no embedded code to track with any application, and are application agnostic.
- The most demanded form of digital adoption is the Walk-Through which highlights each step in the live application, instructs the user what to do, allows the user to interact with the live application, then proceeds through each subsequent step until completion. A new cloud-based product that came out late in 2022 uses a FOLLOW ME capability far superior to other platform Walk-Through offerings.
- For most DAP providers creating a Walk-Through is very time-consuming and requires skill in the digital adoption tool. The better offerings enable User Acceptance Test Script development, which is the bane of IT's job, especially in meeting compliance validation testing requirements.
- Since any digital Transformation applications rarely remain static, maintaining Walk-throughs over time as processes change is difficult, and if not maintained, the Walk-Through will break. Compounding those fluid changes due to updates, patches, and fine-tuning to include Training updates for new hires and incumbent users in their workflows and maintenance becomes a huge drag on resources to keep the workforce optimized.

Formerly known as Electronic Performance Support Systems (EPSS) or simply EPS, the concept of DAP is not new; however, the integration into Workflows is radically different, non-invasive to IT infrastructure, cloud-based, and multi-functional at a fraction of the cost of earlier premises-based systems. There are several vendors in this space, and every one of them has a different sweet spot. The question becomes what sweet spot delivers the best operational advantage to your transformation journey.

Key DAP features to shop for are shown in *Figure 3-1* below:

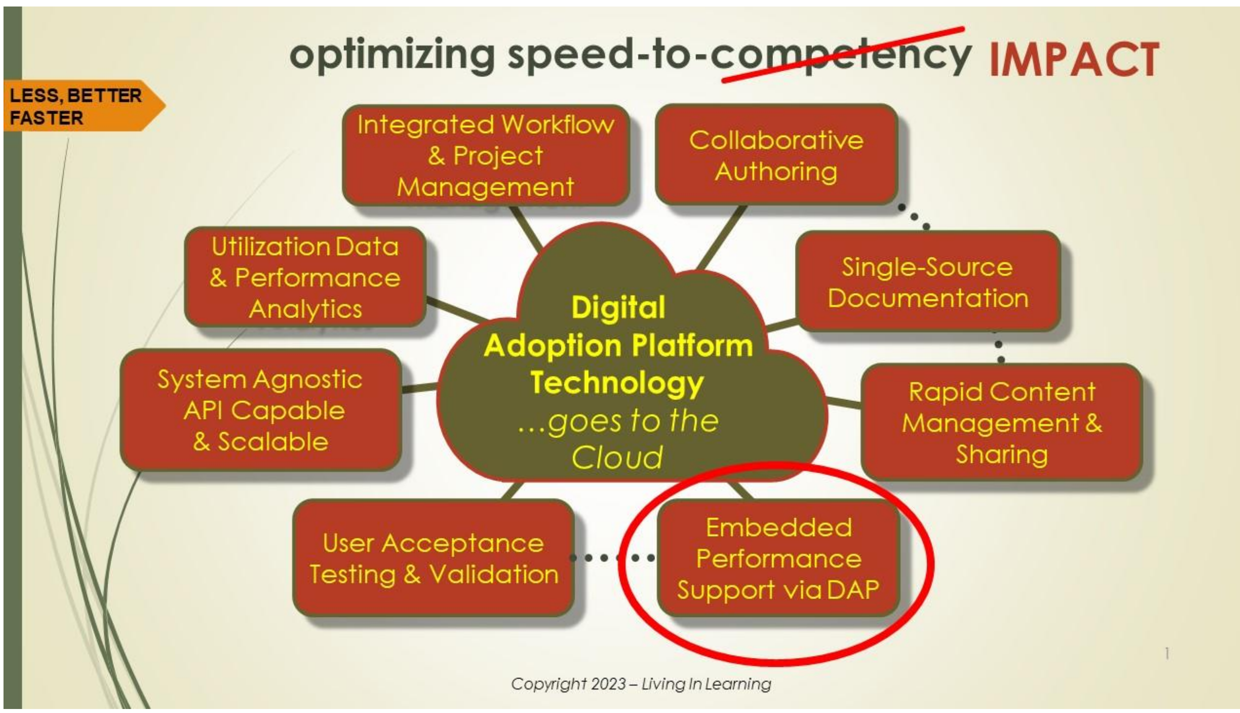


Figure 3-1

CONFESSION: *Content creation, reusability, maintenance, and portability drew me into this technology as an early adopter of EPSS technology (before DAP technology transitioned to the cloud.) The choices were all premises-based, and all had code that needed to be embedded in the host application. That was a mistake because embedded code was required for each application supported. I learned firsthand that IT did NOT want any foreign code inserted into a primary enterprise application, especially the ERP, Medical Records (EMR), or any other enterprise-wide deployment. After a very ugly experience, I learned that being an early adopter can lead to an early exit strategy. I did not get fired, but our vendor did. Despite the embedded code issue, their sweet spot was centered around the three upper right elements* *in the graphic above. Those capabilities were best-in-class at the time and still are after the transition to a cloud-based solution. Despite early version challenges, this vendor should be a regular consideration for any cloud-based DAP integrations.*

Figure 3-1 emphasizes *Embedded Performance Support* as the main event, which is often the most newsworthy feature; however, my experience points to several other considerations that drove vendor selection more so than the main event.

Integrated Workflow and Project Management

Rarely will a single person work in IT and Training Development; however, there is a considerable overlap where IT and Training default to the redundant effort that an Integrated Workflow Management capability can avoid. IT is not a fan of User Acceptance Testing (UAT) due to the tedious workflow process documentation, especially in System Validation efforts. Why not enable IT to run a simple recording capability to build the process flow for UAT that can then be REUSED by Training with added annotations for more information, resources, links, videos, etc., for both Embedded Performance Support AND End-user Training? This unified Workflow and Project Management capability assigns and tracks tasks across disciplines like IT, Training, SMEs, and others under a single project timeline. All handoffs are completed in the cloud without shipping cumbersome files.

Collaborative Authoring & Single-Source Documentation & Rapid Content Management

Integrated Workflow capability this platform enables multiple cross-discipline author assignments to work in the same workflow and hand off content and documentation to serve multiple purposes. Recall the "R" in DRIVER for Replicate: *Create Once – Use Multiple Times*. Keeping content current when things change is a monumental task. Single-Source Documentation tames that beast by everyone working off a single document in the cloud. Not only a single master document but the applications of that content can span Training Content in PPT, user documentation books for Workflows, simulations, and FOLLOW ME Walk-Throughs. A single update to a single document then flows to multiple output types.

System Agnostic

This feature is important because a Digital Transformation project will contain multiple platforms from multiple vendors. Whichever DAP platform you choose, ensure you are not on the hook for buying more licensed capability each time a new technology is added to your transformation project. In other words, buy into ***system-agnostic*** DAP technology that does not care what systems it supports or Windows applications like Word, Excel, etc. Scalability that does not break the bank is essential for a long-term transformation initiative.

Utilization Data & Performance Analytics

Knowing which end-users are using performance support content is vital information to track the volume of support and which specific support assets are accessed. This data is a flag for further assessment to determine why the asset was used. Was it a Training issue? Was the support asset no longer current? Did the system workflow change? Were end-users not notified?

CHAPTER 4

ALIGNMENT & DISCOVERY CASCADE

I always start at the TOP of the requesting organization to frame *beliefs, perceptions, assumptions, and hypotheses* held by the leadership role making the request. To protect the integrity of discovery, we should ask the same questions in multiple iterations downward through the cascade toward *Individual Contributors*. (*See Figure 4-1*) It is important to note that the questions are the same, although the wording is *localized* for each level interviewed. We need to identify perspectives and beliefs at the top (**Top-Down Discovery**) and make accurate comparisons based on actual Individual Contributor experiences vital to refining and validating what may be a very different reality (**Bottom-Up Validation**).

A *Re-Alignment Conversation* opportunity will result in fine-tuning the original request if/when cascade findings do not match the original *beliefs, perceptions, assumptions, and hypotheses.* Actual Discovery findings and related validations flow in the opposite direction – **Bottom Up**. The Ultimate Solution Design Flow is also sourced by the realities at the Bottom versus the *beliefs, perceptions, assumptions, and hypotheses* given to us at the Top.

In other words, a Discovery Cascade will minimize, if not eliminate, the problem centered on the *Myth*. We dispel the *Myth* by validating reality at *Points-of-Work*…at the Bottom…by re-aligning expectations before making the first move to design a solution. In addition, if the PWA discovery cascade identifies multiple solutions, we have the opportunity for the stakeholder requestor to prioritize what part(s) of the solution or parts of their target audiences are to be addressed first.

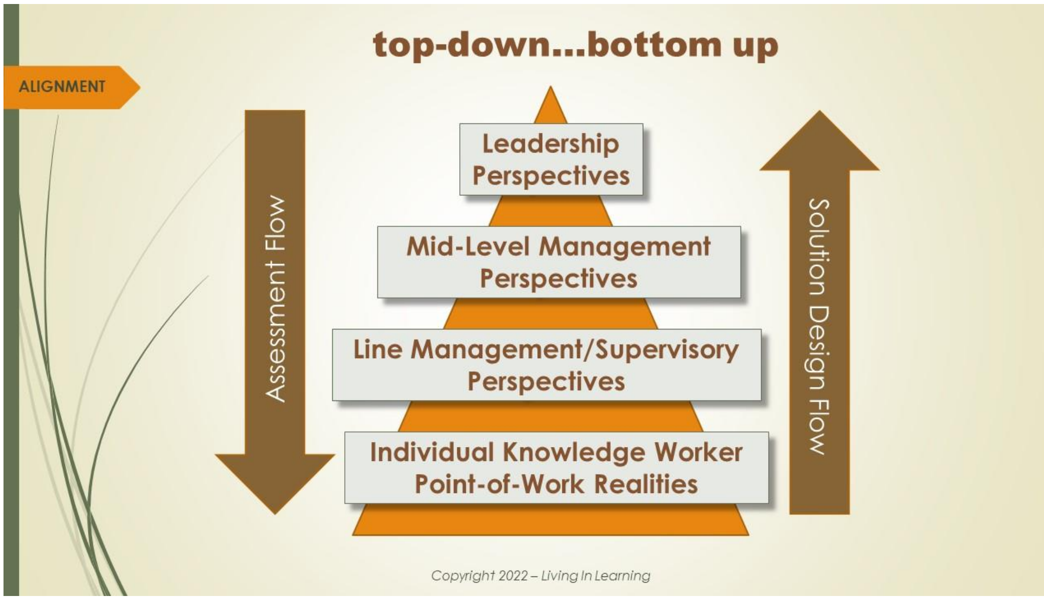


Figure 4-1

Discovery Cascade Categories

What follows are sample statements made during a PWA discovery accomplished by a survey that targets each level of role from Top to Bottom. The hierarchy could be as simple as two levels (*Manager to Contributor*) or consist of multiple levels of senior management aligned with multiple line-level supervisory roles to multiple Individual Contributor roles. Initial discussions with the Requestor will determine how many levels should be targeted.

<u>Confession</u>: Individual Contributors should be grouped as peers in forums or one-on-one when using face-to-face interviews. *Do NOT mix Individual Contributors with supervisory/leadership roles. Mixing levels will promote answer bias or, worse…limited truths. The same situation remains if a survey instrument is utilized. In the example above, there were three management levels. While the same survey is offered to each management level, extracting results specific to each level is essential. Why? If perceptions differ between top-level leadership and line-level managers, we need to know about it and direct more specific questioning to define the disparities uncovered. You may miss significant dysfunction among leadership ranks if you do not separate the levels.*

Typically, a survey approach takes the pulse of an organization versus extracting specific performance issues. The survey approach is a fast and convenient way to identify whi*ch rocks to look under* in advance of more focused discovery. Surveys work well for large or complex ecosystem scenarios where anonymous feedback is desired from a broad audience with multiple roles.

Six ecosystem categories frame multiple attributes that can impede or dilute performance results. There are two groupings on the table; the left-hand column shows the TOP of the cascade (*Leadership*), and the right-hand column shows the BOTTOM (*Individual Contributor*). The example below (*See Table 4A*) was used in a multi-level management scenario.

It is important to note that discovery questions may directly address topics or could use a ranking methodology like the survey shown below. Even if ranking is used, follow-up discovery utilizing active listening and active questioning become essential. For example, *"The survey rated that as a six. Why? What would you change to make it a ten?* Active open-ended questioning promotes expanded answers and better background information.

Below are several discovery statements from a cascade survey organized by the six ecosystem performance restrainer attributes categories. In the case where I used these statements, two are identical, whereas others are *localized* to reflect specific Individual Contributor *Points-of-Work*.

Keywords differing between the perspectives are highlighted. The most important aspect of these statements is their consistency. Consistency throughout the entire cascade across multiple roles and job functions ensure reliable comparisons that shine the light on *assumptions at the Top* with *validations at the Bottom*. This consistency is only accomplished if the questions or statements to each level are localized to their scope and role.

LEADERSHIP CASCADE	INDIVIDUAL CONTRIBUTOR CASCADE
Environment & Culture	
Our organization has a clearly defined culture	My work group has a clearly defined culture
Someone new joining the organization will have a positive first impression.	Someone new coming into my work group will have a positive first impression.
Collaboration within and among all work areas is encouraged, active, and enabled with the means to be effective and efficient.	Collaboration within my work group and with others is encouraged, active, and enabled with the means to be effective and efficient.
People & Capability	
The training received during onboarding fully equips all Performers to be successful in their current roles and workflows.	The training received during onboarding fully equipped me to be successful in my current role and assigned workflows.
As work volumes increase, our training team has been able to keep pace	As work volumes increase, our training team has been able to keep pace
Performance expectations for all current roles are clearly defined and supported across all areas.	My managers clearly define and support performance expectations related to my current role.
Workflows & Processes	
When workflows or processes change, all affected performers are informed and equipped to adjust/adapt quickly & efficiently at their task-level work.	When workflows or processes change, I am informed and equipped to adjust/adapt quickly & efficiently in applying changes to my task-level work.
All current job roles can easily and quickly access information and resources needed to complete their work.	In my current job role, I can easily and quickly access information and resources needed to complete my work.

Accessible information and resources utilized by all performers are designed for immediate & effective application within all workflows.	The accessible information and resources I utilize are designed for immediate & effective application within my workflows.
Content & Resources	
Searching for information and resources is accessible for all to navigate & find the correct content at a moment of need.	Searching for information and resources is accessible for me to navigate & find the correct content during a moment of need.
When critical resources & information change, notification to all affected Performers in their workflow is timely & accurate.	When critical resources & information change impacting one or more of my workflows, notification is timely & accurate.
When resource information needs to be corrected/out-of-date, all affected job roles have a clear path to reach content owners.	When resource information needs to be corrected/out-of-date, I have a clear path to reach appropriate content owners.

Systems & Technology	
Technology systems & business applications utilized in all current roles are easy to use and effectively and efficiently utilized.	Technology systems & business applications utilized in my current role are easy to use and effectively and efficiently utilized.
The correct personal technology and software for all performers to be effective in workflows are currently deployed to all appropriate roles.	The correct personal technology and software for me to be effective in my current role and workflows are currently deployed.
The Learning System (LMS) currently deployed provides adequate opportunities to learn & grow for all performers and roles.	The current Learning System (LMS) deployed provides adequate opportunity for me to learn new skills & grow my capability in my current role.
Impact & Analytics	
All performers are fully aware of the metrics and measures tracked that define their performance contribution.	I am fully aware of the metrics and measures tracked to define my performance contribution.
All performers can see the business value produced by the results of their performance contribution.	I can see the business value produced by the results of my performance contribution.
The best (*most accurate*) measures of workflow performance are currently being tracked.	The best (*most accurate*) measures of workflow performance are currently being tracked.

Table 4-A

Once again, you will notice that some of the statements are identical while others are *localized* to a narrower audience while retaining an equivalent theme. This format example was offered via a survey. The same study could be managed with face-to-face interviews; however, the volume of interviews may become a detractor, plus you would lose the anonymity factor. Survey Monkey (*or some other survey platform*) is advisable if anonymity is an encouraging factor for honest participation in the survey.

Now what?

Does the *Discovery Cascade* render a design solution? Nope! This *pre-design discovery* is used to reconnoiter the situation on the ground compared to the intent behind those issuing the requests/orders at the top. Disparities will exist, and those disparities are source data points to engage in a *Changed Conversation* discussion that recommends a more comprehensive solution design. An effective ***Alignment Conversation*** can save you a lot of time and resources with a small, focused time investment to reconnoiter *Point-of-Work* up front. Nothing dispels an assumption quite like actual data from the *Point-of-Work.*

- Our ultimate goal is to enable workflow solutions that converge support and learning assets to drive sustainable and measurable performance results. I highly recommend discovering what is driving and restraining performance at each *Point-of-Work* before taking an order to develop training at face value. This posturing will give you the look and feel of an *engaged business partner* to your stakeholder instead of a *training-order-taking-drive-thru* operation.

CHAPTER 5

CHANGING THE CONVERSATION

Over the years, L&D has done a stellar job convincing our operational stakeholders that ***Training Drives Performance***. I must confess to perpetuating that *Myth* for many of my 35+ years. Roughly fifteen years ago, I had an epiphany that performance only manifested when workers did something effectively; therefore, ***Training ONLY Drives Potential***. Looking back on it, that was not much of an epiphany, but our modus operandi was to take training requests from stakeholders and develop training. Period. That was our job. Our stakeholders expected it, and sadly, so did L&D. What breaks the *Myth* is the recognition that performance results only manifest once the workforce is back in their workflows and effectively addressing role-specific, task-centric *Points-of-Work*.

We must address *Points-of-Work* in the context of workflows and define the work environment attributes that impede performance outcomes. Our charge is to set expectations with our stakeholders that our solutions will be designed to improve and sustain performance outcomes…not just training. That stakeholder guidance can be a tough sell given we are TRAINING…and what do we do? We TRAIN. The tricky part is trying to dispel the myth directly, so my advice is to keep that nugget of knowledge to yourself…for now.

Bottom line? You must gently provide proof that a Different Conversation from their initial request for Training comes from the discovery you wish to accomplish to ensure the new Training is both relevant and effective on the job. Don't try to dispel the myth; change the conversation.

Following are three case studies where *conversations changed* by the outcomes of PWA findings. Names have been changed to protect the innocent, delusional, misinformed, and guilty. The case studies referenced came from real clients with what they thought were genuine training issues. These examples contain paraphrased dialogue and how the PWA outcome ***Changed the Conversation***…and blew up the *Myth.*

CASE STUDY #5A

TECHNICAL SUPPORT HOT LINE

Here's a perfect example where the *restrained productivity source fell outside the requested training solution's scope*. In a recent **Point-of-Work Assessment (PWA) Workshop**, the Performance Support Specialist I worked with received a request to *improve training* for the inbound call center technical support function. The stated issues were as follows:

- Decreasing customer satisfaction scores and customer attrition
- Degraded response times with client resolutions
- Technical Support Rep frustration and high employee turnover

While some knowledge deficiencies were discovered, these three factors listed above were priority influencers promoting the simple request - *Fix Training!*

The Requestor's paradigm was wrapped around the Myth…Training will fix my performance issues.

The PWA discovery revealed a *Solution Road Map* that recommended several training-related solutions, and some training would never resolve. One of the biggest non-training obstacles that restrained productivity and caused turnover had nothing to do with insufficient knowledge or skills. Still, it was an *organizational design* (OD) issue that compromised workflows with unnecessary delays, missed performance goals, and job frustration.

Tier One Support Techs had a 24-hour response window, and tier Two (*who accepted escalations for Tier One*) had a separate 48-hour response window to respond to Tier One. For every escalation made, the potential to miss Tier One's response window to the customer was at risk. The organizational design was mismatched because of how performance was measured across two work functions.

The result was a domino effect that extended deeply into the ecosystem, causing the following:

- Tech solution hand-off delays increased client response time
- Which in turn led to degraded customer satisfaction scores
- Mis-matched performance goals between tier-one and tier-two support functions
- This led to job frustration of competent technical specialists by missing call goals
- This led to excessive employee turnover, some were fired for non-performance, and some bailed out of a perceived hopeless situation
- This led to a recruiting backlog and delays in refilling highly talented and skilled roles
- This caused steep learning curves for newbies who lacked access to critical IP knowledge from, guess who…those who had just walked out the door.

Talk about an extreme domino effect…interdependencies do that all day long and are too often perpetuated and overlooked by well-intended requests for more training. This request was NOT exclusively Training related. If Training had been upgraded, how many performance restrainers would have been missed and Training impact diluted to the extent that Training was blamed for a poor course? Hey, been there and done that. That's why I use the PWA as a CYA tactic.

Following is the visual ***Conversation Changer*** from the PWA Discovery Findings
(*See Figure 5-1*)

PERFORMANCE ATTRIBUTE SUMMARY

ATTRIBUTE CATEGORY	Tag Count	%
ENVIRONMENT/CULTURE 14%	23	14%
PEOPLE/CAPABILITY 31%	53	31%
WORKFLOWS/PROCESS 21%	36	21%
CONTENT/RESOURCES 23%	39	23%
TECHNOLOGY/SYSTEMS 7%	6	4%
ANALYTICS/IMPACT 4%	12	7%
Totals	169	100%

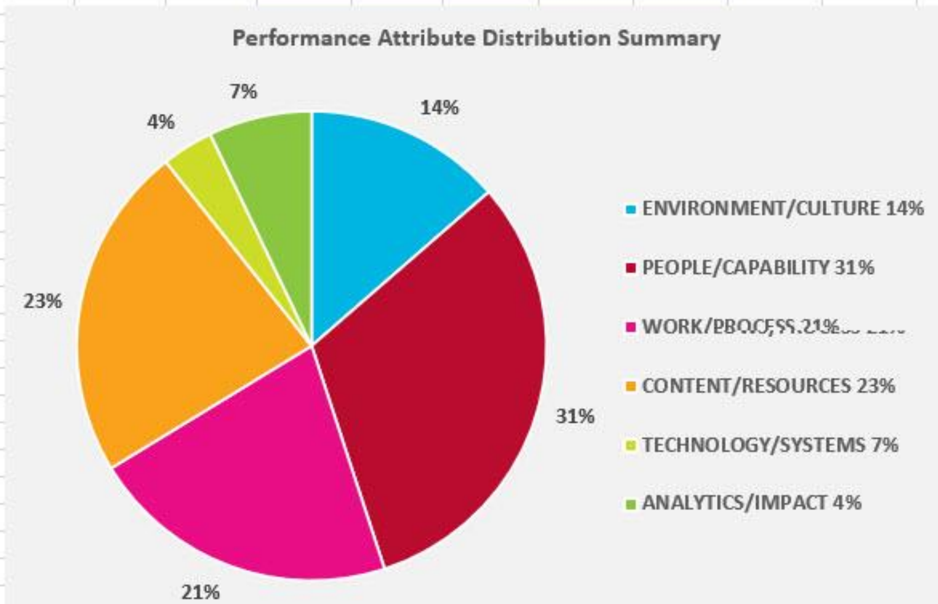


Figure 5-1

Did the PWA assessment reveal the need for additional learning? Yes, it did, and those needs were embedded within the 31% People/Capability pie slice above, but…and this is important…they were not courses; they were performance support tools (*targeted Job Aids*) that needed to be accessible in the workflow.

Following are several more *Conversation Changer* topics the graphic highlights:

- **Environment/Culture –** 14% reflected the job frustration stemming from unreachable performance expectations due to goal misalignment between the Tiers. An overlap surfaced in *Analytics/Impact* (*7%*) specific to unfair performance metrics. High employee turnover impacted those left behind with job volume overload, not to mention constant interruptions from peers asking for help because the other experienced tech support staff had quit.

- **People/Capability –** reflected several things beyond Learning and Support, and one major item was the OD misalignment. In the final analysis, no course(s) would fix the OD mismatched hierarchy goal alignment.
- **Content/Resources –** 23% were exclusively related to accessing methods and procedure documents in the workflow and technical specs. If they were hard to gain access to and were out-of-date/not current, they caused severe problems with accurate and timely customer responses.
- **Workflows/Processes –** 21% reflected consistent frustration specific to process and workflow hand-offs between Tier One and Tier Two support teams. While Analytic/Impact addressed metrics directly, many responded that this was a broken workflow or a compromised process. It is important to address both perspectives in a PWA because they are both correct, and overlap is common. Just record and Tag what you hear. Remember, the PWA is not a solution tool but a *Conversation Changer* to promote expanded thinking and informed prioritization.

What ***Changed the Conversation*** was the expanded scope of this Specialist's new role; she used the PWA to prevent L&D's eventual failure to deliver requested learning solutions whose success would be based upon the expectation that *only training* would fix poor performance in the target group.

Yes, there would likely have been some incremental improvements accomplished, and the Training Box would get a checkmark…BUT…the Performance Box would probably not fare so well…certainly not be optimized...the more significant bottom line Business Value negative impacts would continue.

Based on this case study, we have to ask ourselves, *"What are the chances of optimization being overlooked if strategy and tactics focus only on the learning part of the solution?"*

That eventuality would ensure a negative impact on this client. The same would happen to us and would limit our ultimate effectiveness if we do not enable a holistic *Point-of-Work Assessment* of the ecosystem's performance attributes at *Point(s)-of-Work.*

This example clearly shows how the *interdependencies* in a dynamic ecosystem set up a potential trap when a Training mindset fails to engage in assessment to learn WHY performance was restrained. Would the OD intervention in the example above even have been uncovered? Possibly not, because the requestor was locked onto Training as the solution. Call it a blind spot on the stakeholder's watch, but worse yet, it would have been a blind spot for L&D if a PWA did not reveal the OD-related restrainer.

Here is an essential point – Does L&D own OD redesign? Nope, but the ***Point-of-Work Assessment (PWA)*** revealed a need to act as a ***liaison*** to bring OD specialists into the solution mix, and very likely IT systems tracking response times, compensation, and, and, and. This points to another facet of *interdependency*; our need to include other business partners, resources, and specialties to collaborate with us to optimize an ecosystem performance solution, not just a learning solution.

CASE STUDY #5B

Initial Request: Update Sales Training to Align with the Selling Process

Stated Problem: Field Sales Teams need to follow the formal selling process to prevent an increase in time-to-close that degrades overall sales effectiveness and profitability.

Requestor Paradigm: Training will drive my sales team's performance to improve.

VP of Sales Perspectives: *We have some challenges with our field reps needing to follow the formal selling process and are slowing down time-to-close. We need some training to get them back on track. We may require new training; the Miller Heiman course must pay back a return.*

Note: Since my job title was Director of Sales Training, it made sense that I got the call as an undeclared performance Ninja; I remained covert (*no black pajamas*). I responded nonthreateningly, preserving the *Myth* that Training would solve his sales performance issues—no sense pushing back by telling him that Training may not be the issue…or any issue.

My Response: *Sure thing, John; I can help you with training updates. First, I'd like to ask you some questions and, with your blessing, interview some of your Sales Managers and Account Executives in the district sales offices. I want to ensure that any new training we develop meets or exceeds the performance outcomes you seek.*

Note: Several things were accomplished in this single exchange:

- First, I accepted his challenge to update training.
- Second, I aligned (*initially*) with his assumption that new training was the solution.
- Third, I got permission to ask him (*the requestor*) some qualifying questions.
- Fourth, I asked for his permission/sponsorship to speak with his sales team members.

My Response: *John, I have a few key questions to ask you and would like access to you for follow-ups as I begin field interviews. Here are a few initial questions:*

- *Why do you think time-to-close is extending?*
- *What evidence tells you the selling process is not being followed?*
- *How have you confirmed that the current selling process is correct?*
- *What tells you that Miller Heiman Strategic Selling is not effective?*
- *When we update training, what would "better" look like? What needs to change?*

Note: More clarifying questions were asked, but John consistently felt that ineffective Training was at the core of his problems. I found it hard to believe that deviating from a sales process was something to fix with training, but with no validation, I agreed to investigate further at that point. He did agree, however, that confirming the validity of the selling process was worth examining if/when findings revealed a change was necessary. I considered that a small win.

The point worth noting in the Requestor's responses: Accept what you are being told as those facts frame the Requestor's story based on their *beliefs* based on *perspectives, assumptions, biases, and hypotheses.* Your job is to validate or dispel those beliefs with facts from your PWA discovery findings. Always attempt to get a Requestor-approved map of what they believe are the most critical contributors to their performance challenges, *even if it is their best guess*.

Important Note: When interviewing many people and roles, it is best practice to author a draft courtesy message of ***sponsorship*** for the organization's senior leader (*Requestor*) that they can address to those who will be interviewed to encourage cooperation and facilitation for accessing the appropriate team members for interviews. Never discount the power of establishing senior leader endorsement or sponsorship. Write it for them, and make it easy for them to *sign and send* it on your behalf.

PWA Process: What follows is an abbreviated PWA description with emphasis on what *changed the conversation*. This PWA attempts to find proof that either validates or dispels the Requestor's belief that training is a single solution. Honestly, it may be precisely that, or until it is proven by the PWA to be a false assumption.

PWA Logistics of Discovery:

- Four sales districts with ten to twelve District Sales Managers (DSMs).
- Interviewed eight DSMs – four ranked highly, and four ranked at the low end of the scale.
- Interviewed four Account Executives form each DSM team for a total of 32 AEs, half were considered top guns, and the other half…not so much.

Note: The objective of the interviews is to get a cross-section of high performers who possess the attitudes and work ethics of high performers and also from performers in the inverse population who are challenged with issues that yield poor performance for whatever reason.

PWA Discovery Questions: What follows are questions designed to track the Requestor's perspectives on the source of performance challenges. I have not included follow-up or clarifying questions, but their answers were reflected in the Field Findings. We will spend more time on questions in later chapters.

- The current selling process has 23 steps. On a scale of 1 to 10, how effective is the current process?
- If you could modify anything about the process, what would you change, add, or delete?
- Why would you make those changes, and what benefit would be gained?
- The current sales training is based on Miller Heiman Strategic Selling (MHSS). Is that the right course? Why or why not?
- How is MHSS supported in the field after training?

PWA Discovery Findings:

- A majority determined that the current selling process had too many steps that caused delays in closing sales. (*Ultimately reduced steps to 18*)
- The teams, on average, agreed on eighteen steps as optimum, with three of the eighteen treated as optional.
- The DSMs were split on applying the principles of Miller Heiman post-training. Oddly enough, the top-performing districts followed the practices outlined in the worksheets when pre-planning sales opportunities. Those that did not consistently perform lower.

- The AEs were split as well. If they were in a high-performing sales office, it was because the DSM supported the process. Those without the benefit of DSM support did not perform as well.
- A couple of significant AE quotes spoke volumes about the consistency of applying Miller Heiman principles. *"When we got back from training, my DSM said, 'Okay, now I will show you how selling really gets done here.'"*

Changed Conversation at the Top:

The PWA discovery findings confirmed several things conflicted with the VP of Sales perspectives.

- Training was not a solution for deviations from the selling process.
- The selling process was not optimized, and the teams abandoned it to circumvent the unnecessary steps and made modifications accordingly. Those modifications were inconsistent across all the districts, so a Six Sigma team was assigned to optimize the process. (Not Training; however, a new approach would likely impact future curriculum for all new hires.)
- The jury was out on the use of Miller Heiman. Some loved it, and some did not and chose to do their own thing. Once again, not a training issue per se, but potentially a shift in training would come about.

Note: In the readout of findings, I postured what Training would do in the future and stated the following:

"You are paying us (Training) big dollars to use Miller Heiman. I do not care if we continue with Miller Heiman or shift to Holden Power Base, Application Selling, or whatever we choose to do that's home-grown. Just pick one! The bottom line is to get everybody on the same page and do two things; 1) Commit to consistent training. 2) Consistently commit to support and reinforce Training in the post-training application of the principles we teach."

The *conversation changed* because of the PWA findings. The PWA did not complete a solution but a Solution Road Map detailed a couple of milestones:

- Six Sigma would assign process improvement resources to optimize the selling process.
- Decide what sales training curriculum to pursue.

- Training resources would be applied if and when Training became part of the solution.
    - Training may become engaged after Six Sigma optimizes the selling process
    - Training may become engaged after a sales training discipline is defined

Note: While it's true that Training would likely play a role, the PWA redirected if and when Training would get engaged and acted as a liaison with Six Sigma to optimize the selling process. Another way of looking at the PWA is that it was a ***pre-solution design tool*** to ensure that precious design resources were tasked accordingly and not defaulted to building Training.

The primary Performance Restraint categories were:

- *Environment/Culture* due to inconsistent leadership
- *People/Capability* due to inconsistent Training reinforcement
- *Workflows/Processes* due to inconsistent Workflow adherence.

CASE STUDY #5C

This case is positioned differently by showing the accompanying output of a visual ***PWA Conversation Changer***. Later chapters will show you how to use PWA worksheets to create a *Conversation Changer* visual.

The Request: Update the Marketing Curriculum

The Stated Problem: We want our Marketing team to be world-class, and we need a world-class curriculum to get us there. Currently, we have neither.

Requestor Paradigm: Training will drive my Marketing team's performance to equal world-class stature.

Sr.VP of Sales & Marketing Perspectives: *I'm convinced that the recently departed VP of Marketing built the equivalent of an MBA program and loaded it onto the LMS. That Marketing curriculum is not working well enough to take us to world-class status. The solution, therefore, requires that you upgrade the course mix on the LMS to support our journey to world-class.*

By the way, I appreciate what you did for John and his sales team, and I expect similar results on this Marketing training upgrade. However, I don't have time for you to do a deep dive assessment…I want a new curriculum.

Note: Once again, I did not reveal my Ninja tendencies because this Requestor was wrapped a little tighter than his VP of Sales and pushed a marked sense of urgency that is not uncommon for more senior stakeholders. This stakeholder had drunk the *Myth* Kool-Aid, and it was clear that a different conversation would soon be forthcoming.

My Response:

Steve, I can help modify the Marketing curriculum, but I have a few key questions to ask you and would like access to you for follow-ups as I begin department interviews. Here are a few initial questions:

- *Besides Training, what do you think is preventing your team from being world-class?*
- *What workgroup(s) do you see most at risk of reaching world-class status?*
- *What do you think…he cut me off abruptly*

Sr.VP of Sales & Marketing Abrupt Response:

This is a Training issue. Period. None of my workgroups operate at world-class levels; you must concentrate on fixing the curriculum.

Note: It was made crystal clear that the Requestor did not have time for me to take a *deep dive,* and apparently, he did not have time for alignment questions either. So I needed the black pajamas and had to go Ninja…and do a covert *PWA lite*. I closed our meeting with a request to meet with some of his staff. *I did not specify precisely who or how many…I was going Ninja, after all…and what he did not know would not hurt him.* I needed discovery and could not allow a problematic client/Requestor to stop me.

Logistics of Discovery:

- Interviewed were six Directors, eight Group Managers and Supervisors, and a dozen Marketing Specialists from different functional areas.

What follows are **Core Questions** designed to track the Requestor's single perspective that substandard Training was keeping his Marketing team from operating at a world-class level. Notice that the questions focused on world-class performance and not world-class Training. I have not included follow-up or clarifying questions, but their answers were reflected in the Visual *Conversation Changer*. These questions are specific to this Case and represent the entire list of pre-interview questions. Each project will typically result in a unique *Core Question Set*, and more time will be spent on questioning in later chapters.

- Talk to me about what it's like working here. If anything, what would you change?
    - *Seeking Environment/Culture attributes*
- Do teams collaborate well on projects like new product launches? What challenges?
    - *Seeking People/Capability attributes*
- On a scale of 1 to 10, how would you rate the course selection at Marketing University?
    - *Seeking People/Capability attributes*

- Are workflows optimized? If not, what would you change?
    - *Seeking Workflow/Processes attributes*
- Do you/your team members have easy access to the right resources? If not, what's missing?
    - *Seeking Content/Resources attributes*
- Do you have access to the right technology to get the job done in your area? If not, what else do you need?
    - *Seeking Systems/Technology attributes*
- Do the performance metrics for your work/workgroup accurately reflect your contribution? If not, what would be a better measure of your performance?
    - *Seeking Analytics/Impacts attributes*

Note: *Lead core questions are shown above. Some open-ended to encourage broad answers. Some close-ended for specifics. Notice that each closed-ended question had open-ended qualifiers.*

PWA Discovery Findings:

The PWA findings confirmed that the existing curriculum was not optimized and aligned with the Requestor's assessment. What did NOT align with his expectations was that swapping out courses and inserting new ones would improve the curriculum. Those improvements would not pave the road to world-class performance because he had more significant issues that dwarfed what Training could ever hope to resolve...but because of the *Myth*…he had a huge blind spot.

Delivering the news to the Requestor that disputed his *"this is a training issue"* mindset would involve a significantly *different conversation* and could potentially include being tossed out of his office. When dealing with a tightly wrapped client, the best way to describe what will likely be received as contradictory news compared to their preconceived expectations, default to *less is more* but be prepared for more if required. The PWA visual *Conversation Changer* did the job perfectly, and no injuries or tossing events occurred. (*See Figure 5-2*) Surprisingly, only a few words were needed to hit the high spots, and the rest of the discussion fell into the Requestor's lap to set priorities of his choosing. Our debrief session only lasted about a half hour.

Below is the actual *Conversation Changer* placed in front of the Requestor. Using this visual, Findings were summarized on a single sheet of paper…and the only document he reviewed during our debrief, despite having a stack of verbatim interviews and curriculum reviews piled on the corner of his desk; I never touched a single sheet of the fluff.

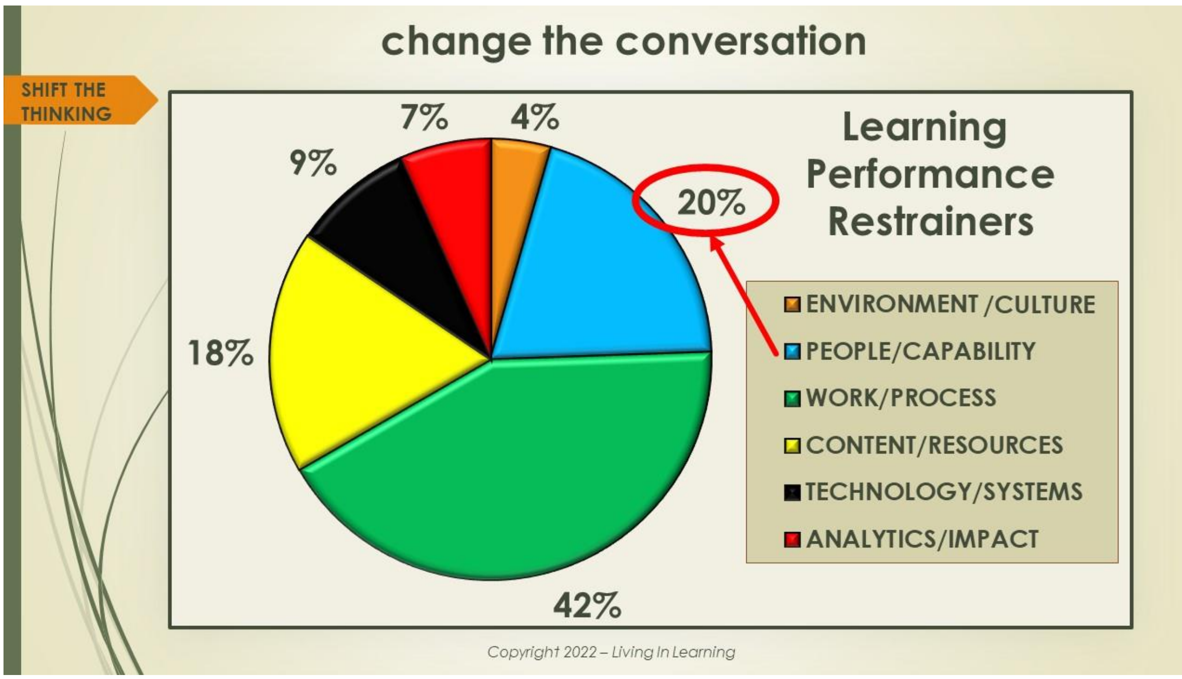


Figure 5-2

PWA Conversation Changer Shared at Debrief:

> **ME:** *You were correct about the existing Marketing curriculum. I leaned over his desk, drew a circle around the 20% figure, and said, "Your Marketing curriculum resides here at the online Marketing University. As you can see, 80% of additional restrainers in the categories impact world-class performance. I only represent the "Training" segment of your solution.* ***<u>Is being 100% effective on 20% of your challenges enough?"</u>***

Note: I paused after making that last statement and waited for a reaction. He picked up the graphic, sat back in his chair, and did not speak…then I continued:

- *You can easily see that the most significant area of performance restraint is centered around workflows and processes at 42%. Interviews revealed dysfunction and low collaboration among related work functions under your watch. This is a perfect Process Improvement initiative for Six Sigma to optimize.*
- *There were considerable challenges under Content & Resources at 18%. For example, some Specialists in Market Segmentation do not have access to various pricing database details necessary to do their jobs well. That is a Resource Access issue.*
- *Going back to the 20% that I circled are additional attributes that rise above and beyond Training, including Leadership, Role Clarity, Clear Expectations, and Collaboration. That means the Training Curriculum impact is well under 20%, possibly closer to 5%. Honestly, Steve, you have bigger fish to fry than tweaking the Marketing curriculum.*

Note: Again, I paused and waited for his reaction. This time he looked at me with a slow nod, still saying nothing. I wondered if I'd crossed the line with my first Sr. VP adventure. So, I took the opening before he could throw me out and asked, *"So…where do you want to start?"*

His response shocked me, *"I want it all! I'll have an appointment set up for next week for two hours, and let's discuss this in more detail. I'll also invite Nolan (his Six Sigma Black Belt) to get his input. This is good information. Thank you once again!"*

By having *Changed the Conversation*, my stakeholder went from not having the time to invest in a deep dive to suddenly having the motivation to MAKE time to do a much deeper dive. The entire project wound up taking nearly six months to complete. The Solutions were as follows:

- Engaged Six Sigma to pursue a Process Improvement initiative
    - Training partnered in building limited training and performance support solutions based on the recommended changes by Six Sigma.
    - Ten weeks were shaved off product development from ideation to product release timelines.
- A 3rd party vendor was engaged to measure Marketing Attitudes and Values using a survey tool.
    - The results targeted significant dysfunction that was impacting interdepartmental behaviors and collaboration.

- A different 3rd party vendor I knew from a previous life was engaged to use the Attitudes and Values survey results to construct a modified Marketing Curriculum.
    - The vendor delivered structured workshops across different disciplines based on survey results. This curriculum was not one-size-fits-all.
- A Leadership Academy was formed with a curriculum built in collaboration with HR/OD resources that rolled out a standardized Change Leadership discipline for Marketing and, ultimately, the rest of the enterprise.

All of these resolutions came from *Changing the Conversation* using a PWA. The requestor only had the time for a deep dive AFTER the *conversation changed* due to a two-week investment in discovery, which validated a broader need for pursuing world-class capabilities.

Top-Down Discovery started with a modified curriculum request as the assumed solution influenced by the belief that Training would deliver results at a world-class level.

Bottom-Up Validation painted a different picture based on validated facts revealed at *Points-of-Work* that supported a different conversation and holistic interventions that impacted not only Marketing but leadership roles across the entire enterprise.

PART 2

Anatomy of PWA Workflow

CHAPTER 6

PWA ALIGNMENT

In Part 2, I will break down the Workflow of a *Point-of-Work Assessment* (*PWA*) into functional components. The graphics come directly from the PWA Workshop and serve as Job Aids. The first function we will cover is associated with initial Requestor ***Alignment***. (*See Figure 6-1*)

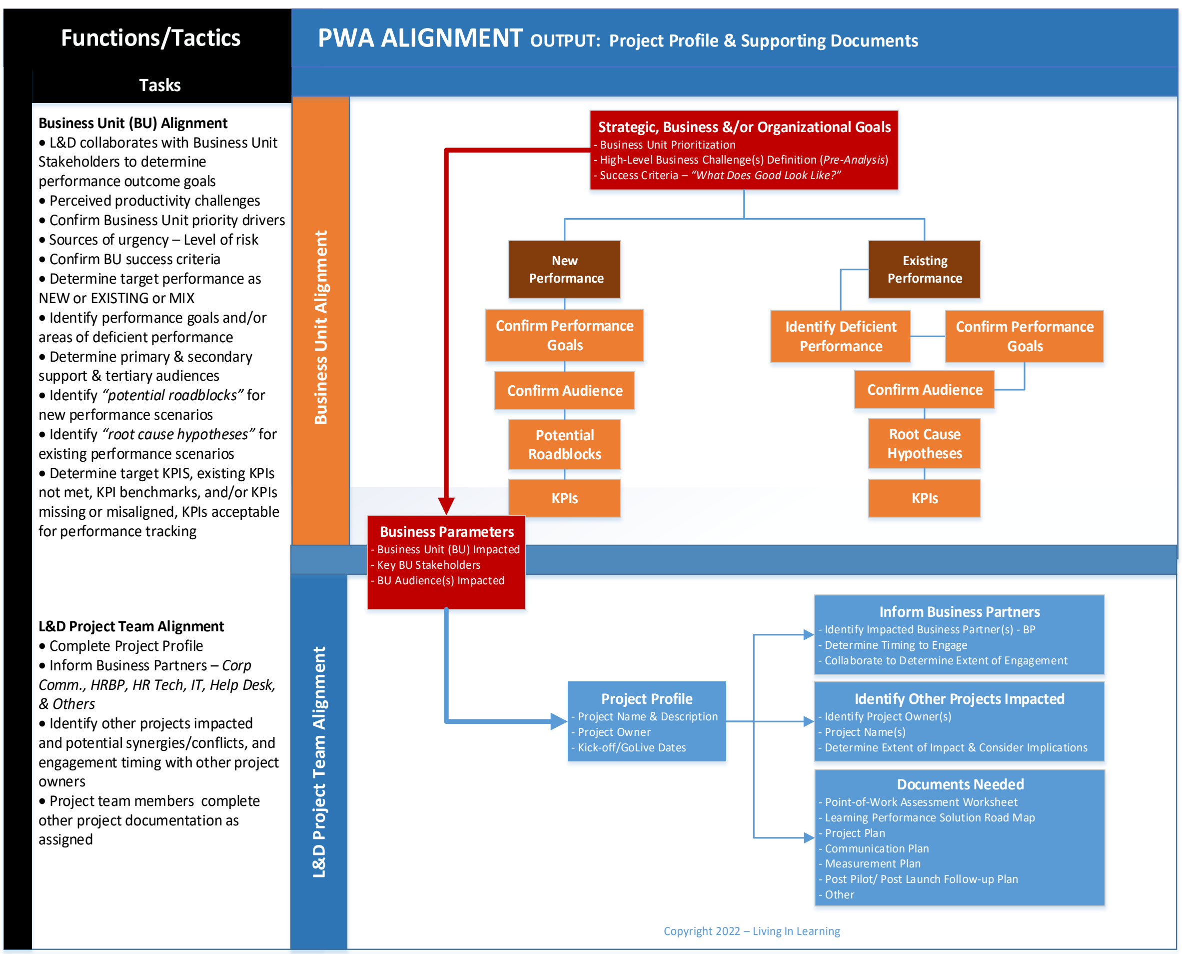


Figure 6-1

Each graphic has a Functions/Tactics section on the left with activities suitable for Project Plan milestones. The visuals on the right align with the tactical activities. The header on each graphic displays the Output of the described activity. In *Figure 6-1*, the Activity is *Alignment* – the Output supports a *Project Profile & Supporting Documents.*

Notice there are two sections on the graphic:

- **Business Unit Alignment** – Details specific to the Requestor's organization to accomplish Business Unit prioritization of challenges, high-level descriptions of perceived challenges, and success metrics for two types of performance:
  - *New Performance* – This indicates you have no history and must confirm performance goals, target audience, potential roadblocks anticipated, and Key Performance Indicators (KPIs) (*Requestor defined Metrics for success*)
  - *Existing Performance* – This indicates you have a history and must benchmark current performance challenges against existing performance goals. With existing performance, we must re-confirm the audience and identify Requestor beliefs, assumptions, and hypotheses related to the root cause(s) contributing to the challenges and the Requestor's success metrics.

- **L&D Project Team Alignment** – The *Business Unit Alignment* establishes the parameters under which a PWA is scoped, including the breadth of the PWA in terms of the Business Unit(s) impacted, who are the key stakeholders of each, and the targeted audience(s). The BU Alignment clarifies how the L&D Project Team should come together in the form of a Project Profile.
  - *Identify Business Partners* – Who should be included or, at a minimum, be notified of the PWA efforts that have implications for their engagement and timing?
  - *Overlap with Other Projects* – Are there projects currently underway that may conflict with or benefit from the PWA discovery? Check-in with the project owners to ensure there are no redundant efforts in either camp and identify synergies if there are any.

- *Set Document Expectations* – Some documents, like the PWA Worksheet, will be a work-in-progress and serve as a central repository for capturing data gathered during the PWA. Other documents may include:
  - *Project Plan – Created and maintained by the Project Manager*
  - *Communication Plan – What will be communicated, to whom, how often, and when*
  - *Measurement Plan – Stakeholder identified metrics for success and the logistics of capturing, start/stop, duration, frequency, formatting, and results sharing*
  - *Post Pilot/Launch Follow-up Plans* – Defined feedback loops and methods for extracting and evaluating adoption and utilization data

  - These documents typically apply when the PWA scope is complex within the ecosystem. PWAs that are accomplished with a 30-minute phone conversation may not require formal documentation, although the subject matter of each document should not be overlooked.

CHAPTER 7

PWA DISCOVERY

In *Figure 7-1*, the Activity is *Discovery* – and the Output yields a Learning Performance Solution Road Map intended for collaboration with L&D Design/Development/Delivery resources and/or other Business Partners. More details on the PWA Workflow are provided in later chapters.

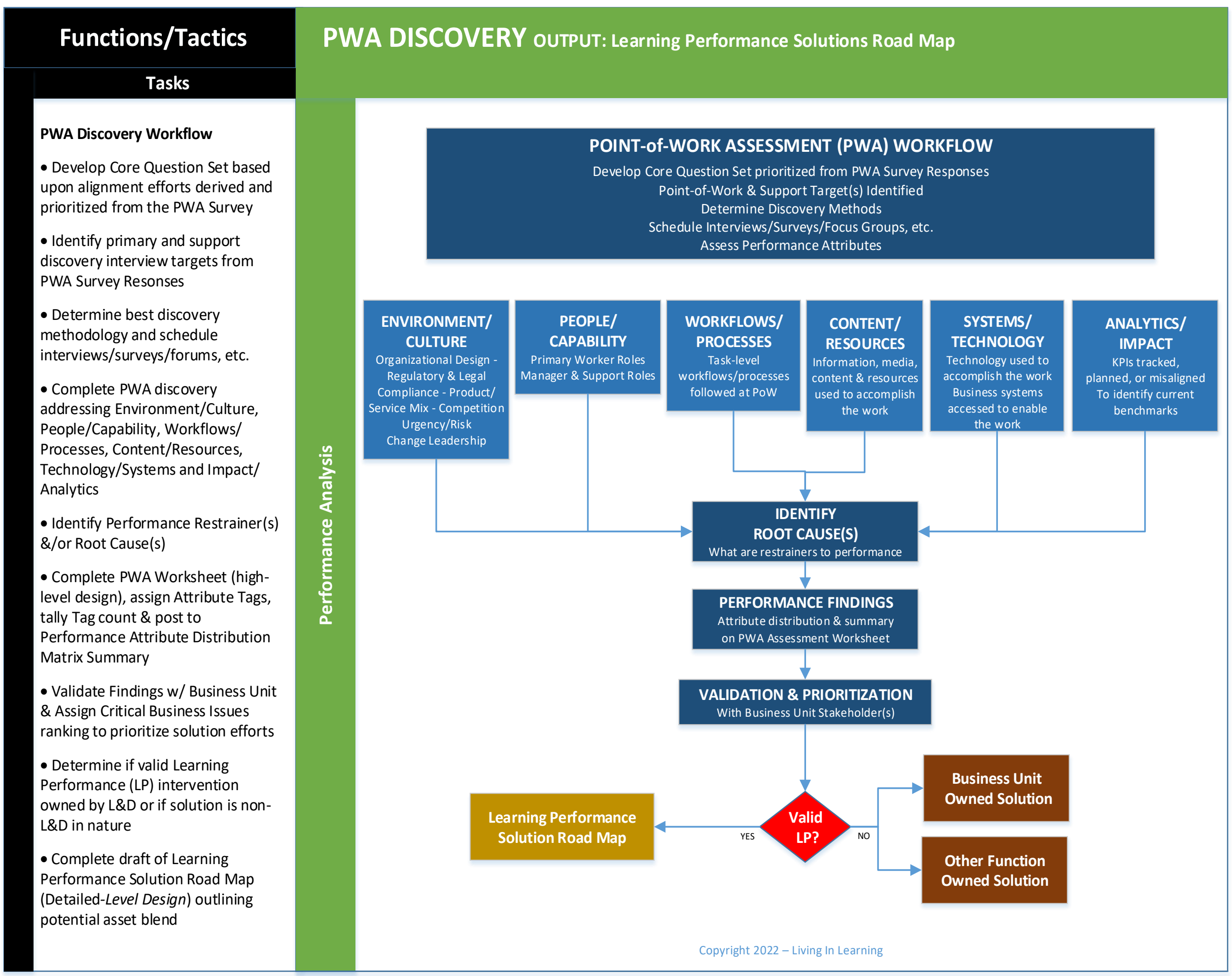


Figure 7-1

Stakeholder alignment shown in Figure 6-1 provides the source context for establishing a Core Question Set that any one or all of the six Attribute Categories with the intent of drilling down to root cause(s). The PWA Discovery Worksheet will enable the creation of a visual Conversation Changer pie chart that supports the Bottom-Up validation conversation with the Requestor for prioritization.

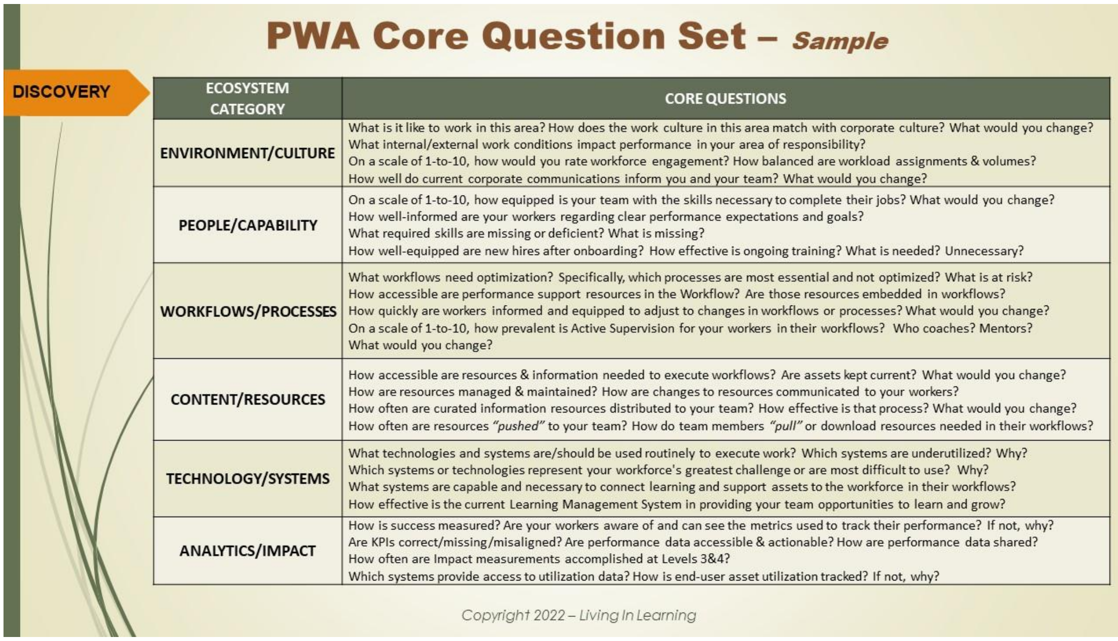
The *Changed Conversation* determines if this is a valid Learning Performance scenario, and if so, proceed to interface with the L&D Design team. If not, the solution could be a combination of an in-house-owned solution within the Business Unit itself or the intervention should be owned by another Business Partner entity.

What Is a Core Question Set?

Rather than go into a Discovery interview with a long list of questions, I suggest a *Core Question Set* of several key questions open up a dialogue with the interviewee. Below are seven (7) *Core Questions* I asked supporting the Marketing Curriculum Upgrade in Case 5B.

- Talk to me about what it's like working here. If anything, what would you change?
    - *Seeking Environment/Culture attributes*
- Do teams collaborate well on projects like new product launches? Challenges?
    - *Seeking People/Capability attributes*
- On a scale of 1 to 10, how would you rate the course selection at Marketing University? What should change?
    - *Seeking People/Capability attributes*
- Are current workflows and processes optimized? If not, what should change?
    - *Seeking Workflow/Processes attributes*
- Do you/your team members have easy access to the right resources? If not, what's missing?
    - *Seeking Content/Resources attributes*
- Do you/your team have access to the right technology to get the job done in your area? If not, what else is needed?
    - *Seeking Systems/Technology attributes*
- Do the performance metrics for your work and workgroup accurately reflect your/their contributions? If not, what would be better measures of performance?
    - *Seeking Analytics/Impacts attributes*

Figure 7-2 provides another sample listing of potential Core Questions.



PWA Core Question Set – *Sample*

DISCOVERY

ECOSYSTEM CATEGORY	CORE QUESTIONS
ENVIRONMENT/CULTURE	What is it like to work in this area? How does the work culture in this area match with corporate culture? What would you change? What internal/external work conditions impact performance in your area of responsibility? On a scale of 1-to-10, how would you rate workforce engagement? How balanced are workload assignments & volumes? How well do current corporate communications inform you and your team? What would you change?
PEOPLE/CAPABILITY	On a scale of 1-to-10, how equipped is your team with the skills necessary to complete their jobs? What would you change? How well-informed are your workers regarding clear performance expectations and goals? What required skills are missing or deficient? What is missing? How well-equipped are new hires after onboarding? How effective is ongoing training? What is needed? Unnecessary?
WORKFLOWS/PROCESSES	What workflows need optimization? Specifically, which processes are most essential and not optimized? What is at risk? How accessible are performance support resources in the Workflow? Are those resources embedded in workflows? How quickly are workers informed and equipped to adjust to changes in workflows or processes? What would you change? On a scale of 1-to-10, how prevalent is Active Supervision for your workers in their workflows? Who coaches? Mentors? What would you change?
CONTENT/RESOURCES	How accessible are resources & information needed to execute workflows? Are assets kept current? What would you change? How are resources managed & maintained? How are changes to resources communicated to your workers? How often are curated information resources distributed to your team? How effective is that process? What would you change? How often are resources *"pushed"* to your team? How do team members *"pull"* or download resources needed in their workflows?
TECHNOLOGY/SYSTEMS	What technologies and systems are/should be used routinely to execute work? Which systems are underutilized? Why? Which systems or technologies represent your workforce's greatest challenge or are most difficult to use? Why? What systems are capable and necessary to connect learning and support assets to the workforce in their workflows? How effective is the current Learning Management System in providing your team opportunities to learn and grow?
ANALYTICS/IMPACT	How is success measured? Are your workers aware of and can see the metrics used to track their performance? If not, why? Are KPIs correct/missing/misaligned? Are performance data accessible & actionable? How are performance data shared? How often are Impact measurements accomplished at Levels 3&4? Which systems provide access to utilization data? How is end-user asset utilization tracked? If not, why?

Figure 7-2

CHAPTER 8

PWA SYSTEMS/TECHNOLOGY FOOTPRINT

In *Figure 8-1*, PWA activity continues with a Technology Footprint (*Inventory of Current Systems*) and technologies used at *Point-of-Work.* The Output informs the Performance Solution Road Map specific to systems and technology. The sample below came from a PWA completed for a retail company.

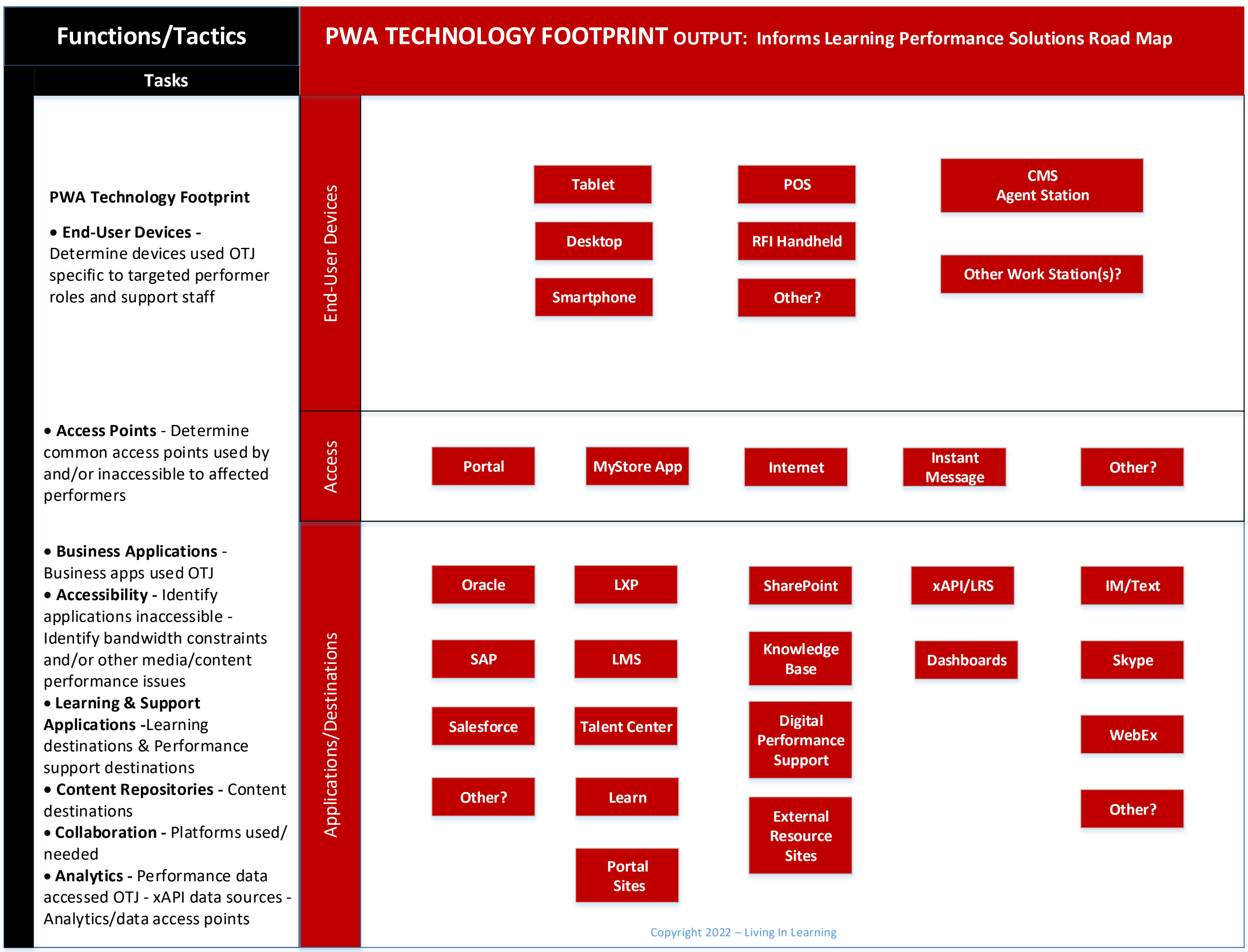


Figure 8-1

There are three primary sections to this discovery focus:

- *End-User Devices* – What technology is either in the hands of individual users or shared systems accessed as part of routine work? It is essential to know what the inventory consists of and if there are performance gaps associated with end-user proficiency.
- *Access* – How are the technologies and systems accessed from the Workflow? From what End-User device is access achieved, and are access rights correctly assigned to ensure End-User connectivity?
- *Applications/Destinations* – This category is crucial because we are dealing with End-User utilization and proficiency across the inventory of systems used and technology accessed.

CHAPTER 9

PWA ANALYTICS/IMPACT

In *Figure 9-1*, PWA activity continues with *Analytics and Impact Mapping,* and the Output informs the Measurement Plan Worksheet specific to analytics and impact. The Measurement Plan Worksheet is a unique Tab under the PWA Master Worksheet that will be covered later in this book.

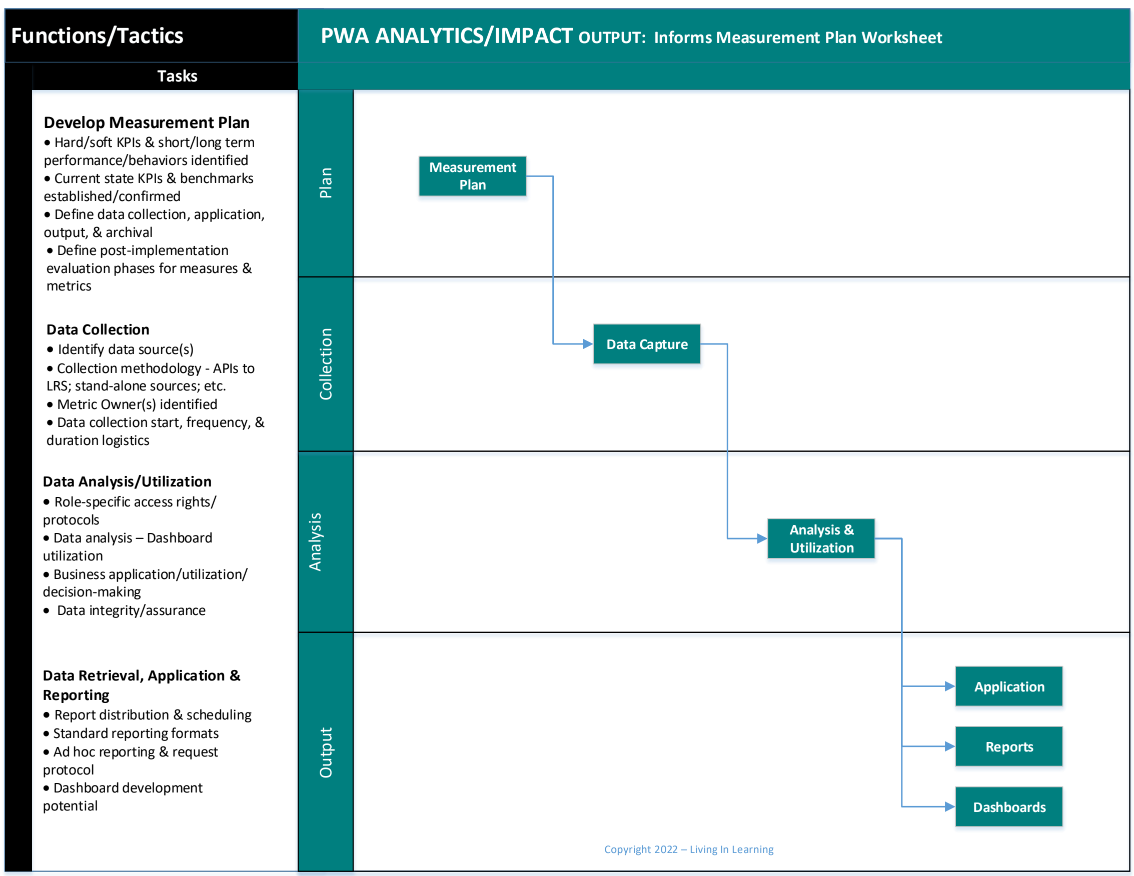


Figure 9-1

There are four sections to this graphic:

- *The Measurement Plan* – where current state benchmarks are established where existing performance exists and new performance KPIs where a new performance is planned. The actual definition of what will be tracked throughout and find post-project metrics and measures to confirm success and sustainability.
- *Collection* – Where is the data? Who owns it? Can we access it? How long do we track it, and what is the frequency for sampling the data?
- *Analysis* – Who has access to the data for analysis? Is analysis manual or dashboard-centric? How is the data utilized to support decision-making?
- *Output* – What is the format for reports? Who requests? Who delivers? What format is best?

CHAPTER 10

PWA DRIVER METHODOLOGY

In *Figure 10-1*, PWA activity continues with the collaborative DRIVER methodology, and the Output informs Intentional Design Documents to Enable Production, Incremental Test/Pilot Releases, & ultimately, GoLive.

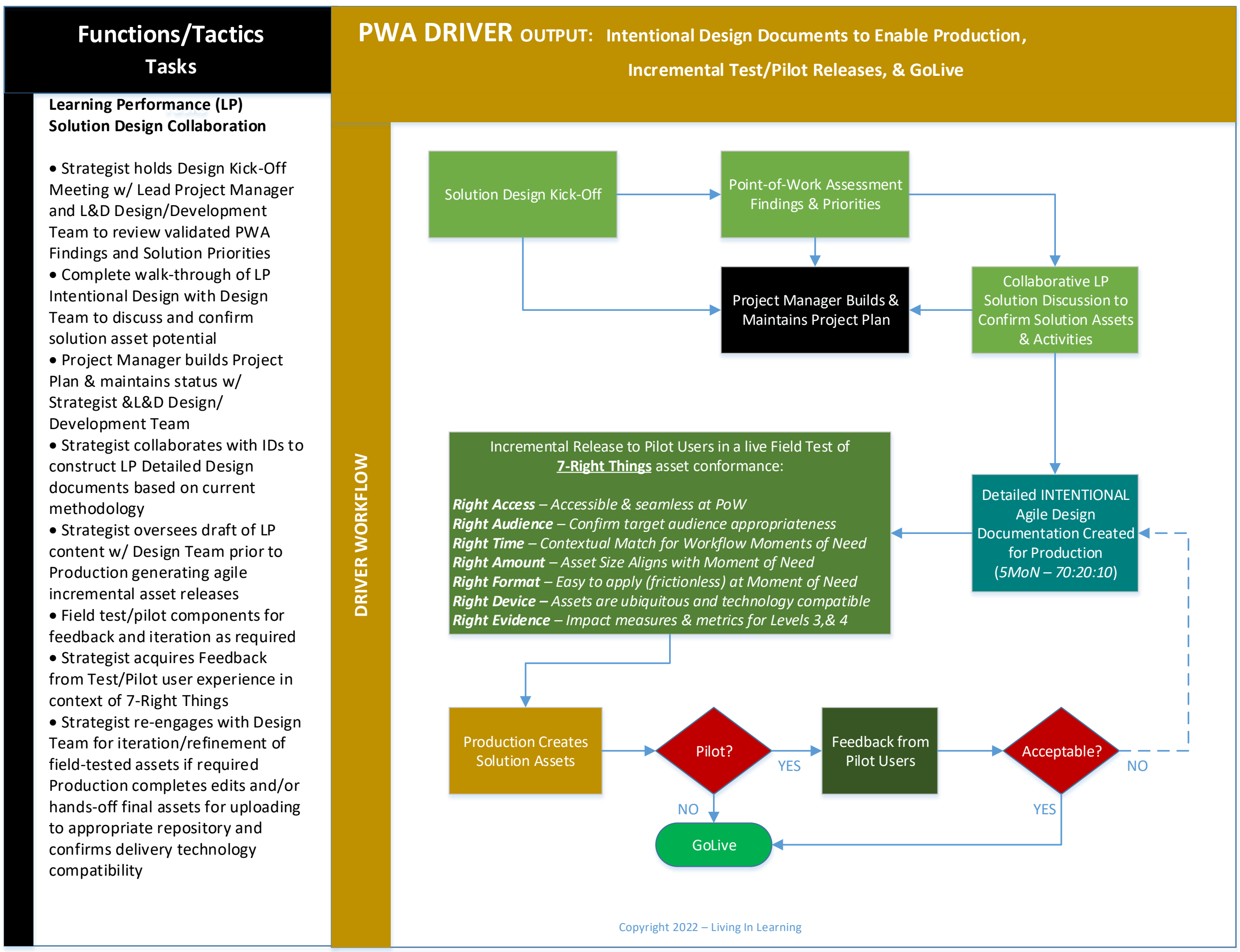


Figure 10-1

You may find a longtime survivor in the L&D profession that has yet to be a fan of one or more design methodologies, ADDIE being the oldest and likely foundational to everything else. My issues with design methodologies are defined by the limits of scope centering on *"design,"* with the assumption that learning/training *design* is the primary solution. I am convinced the *best-fit* solution set is often more significant and easily overlooked when *Point-of-Work* is ignored. The **DRIVER** methodology (*See Figure 10-1*) is a cradle-to-grave methodology encompassing whatever design method has already been adopted. My favorite is the *Five Moments of Need*, developed by Bob Mosher and Conrad Gottfredson of Apply Synergies.com.

A more detailed discussion of the DRIVER Workflow follows as shown in *Figure 10-2* below:

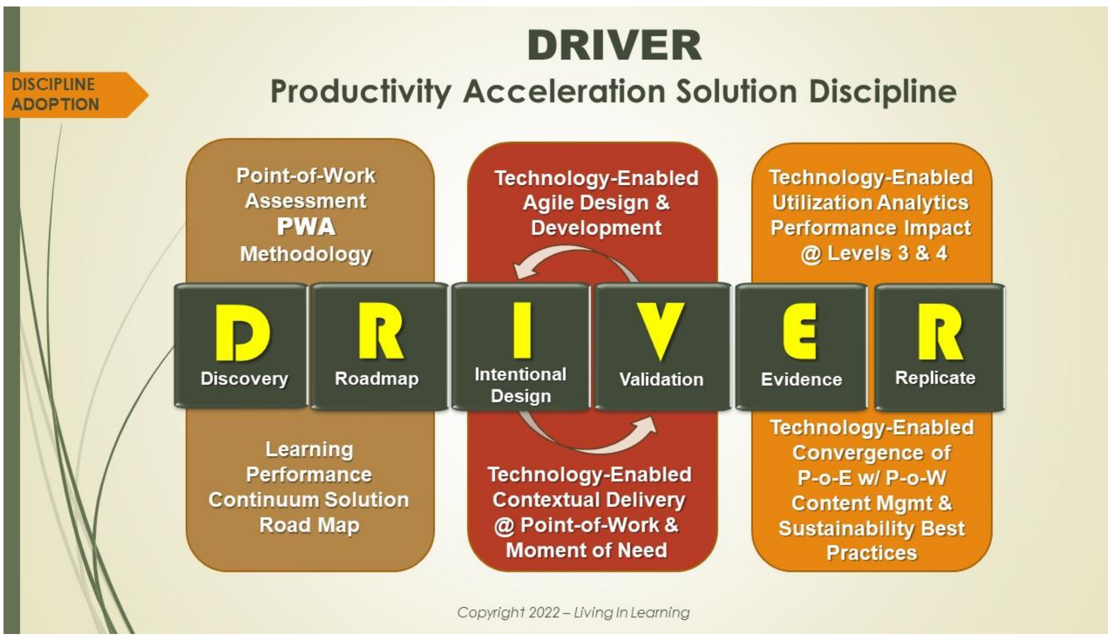


Figure 10-2

DRIVER was designed to include a more holistic approach to Discovery using *Point-of-Work Assessment (PWA)* methodology. As I mentioned earlier, PWA is NOT a design tool; instead, it is a PRE-DESIGN Road Mapping tool whose output enables collaboration and targets deeper dive discovery by core L&D resources like Five Moments of Need before engaging in Design and Development functions. PWA Pre-Design Discovery starts the entire process.

DRIVER's components require refined discovery skills (***Performance Consulting***) and agile design/development tactics (***Intentional Design***). More importantly, we find cultural mindsets locked and cocked to fire training at every performance challenge that also requires a strategic, if not a tactical, shift in thinking. Refer back to the concept of *Changing the Conversation*. PWA is the tool to accomplish that shift. The beauty of DRIVER is its compatibility with existing agile design methodologies. DRIVER provides a greater granularity for designing workflow-based performance and learning assets.

Additionally, foundational technologies that include **Digital Adoption Platforms (DAPs)**, formerly known as Electronic Performance Support Systems (EPS/EPSS), synchronize and converge performance assets within actual workflows.

Let us take a closer look at DRIVER:

- **"D" <u>Discovery</u> –** *Holistic Point-of-Work Assessment (PWA)*
    - Investigate All Six Performance Restrainer Categories of the PWA
    - Strategy & Business Goal Alignment (*Stakeholder Leadership-Defined*)
    - Define PWA Performance Restrainers (*Task-centric, Role-specific*)
    - Identify Root Cause(s) (*Contributing to Sub-optimal Performance Outcomes*)
    - Consider Ecosystem Interdependencies (*Ripple Effect*)
    - Business Issue Prioritization (*Requestor-Defined at Debrief*)
    - Complete Evidence-of-Impact Criteria/Target Planning (*Level 3 & 4 Analytics*)
- **"R" <u>Roadmap</u>** – *Ecosystem-wide Learning Performance Solution RoadMap*
    - Competency Alignment if/when Appropriate
    - Holistic Performance Continuum Mapping from *Point-of-Entry* to *Point-of-Work*
    - Align High-Level Pre-Design with Identified Performance Challenges
    - Design Change Management and Communications Plans
    - Leverage PWA Discovery to Support Agile Design/Development/Delivery
    - Ensure the presence of all characteristics of ***7-Right Things*** Critical for Agile Design
- **"I^3" <u>Intentional Design</u>** – *Evolved Scope for Holistic Learning Performance Continuum*
    - Utilize Agile Design & Pilots for Incremental Solution Testing
    - Address the ***7 Right Things*** Addressed in the Performance Road Map

  - Integrate Solution Assets into Workflow(s) Utilizing Digital Adoption Platform (DAP) Technology
  - Include User/SME/BME Feedback Loop for Iteration Refinement Best Practices
  - Iterate Based Upon Pilot Feedback from End-Users, SMEs, and BMEs
- **"V"** **Validate** – *Confirm "**7 Right Things**" Are Addressed at Point-of-Work*
  - ***Right Access*** to Effective, Efficient, and Relevant Solution Assets
  - By the ***Right End-User Population*** (*Role-Specific& Task-Centric*)
  - At the ***Right Time*** *(Accessible @ Moments of Need*)
  - In the ***Right Amount*** (*Designed for Efficient Workflow Consumption @PoW*)
  - In the ***Right Format*** (*Designed for Effective Workflow Application @ PoW*)
  - Utilizing the ***Right Technology*** (*Optimize Access Within Workflows @ PoW*)
  - Yielding the ***Right Evidence of Measurable Impact*** *(@ Levels 3 & 4 @ PoW*)
  - Validate all ***7-Right Things*** Through End-user/SME Feedback
  - Utilize Feedback as Source Data to Support Asset Refinement Iterations
  - Deploy/Implement Validated Solutions to Appropriate Target Users
- **"E"** **Evidence** – *Performance Impact Analytics Acquisition*
  - Execution of Business Impact Evaluation Plan Defined in *"Discovery."*
  - Acquisition of Data Targeted for Levels 3 & 4 Impact Evidence
  - Identify Potential Integration with xAPI Performance Dashboards (*if any*)
  - Extract Analytics to Confirm Business Impact for Leadership Reporting
  - Leverage Impact Evidence for Potential Future Asset Refinement

- **"R"** **Replicate** – *Support "Create Once – Use Many Times" Development Tactics*
  - Define Content Management & Maintenance Protocols
  - Leverage Agile Content Assets for Rapid Re-Use/Re-Deployment
  - Seamlessly Re-Deploy Assets Across Ecosystem
  - Embed Solution Assets in Formal Learning as well as Workflows to ensure consistency along the **Learning Performance Continuum** from *Point-of-Entry to Point-of-Work* (*See Figure 10-3*)
- Enable Asset Scalability That Is Seamless, Frictionless, and Ubiquitous

What is the Learning Performance Continuum?

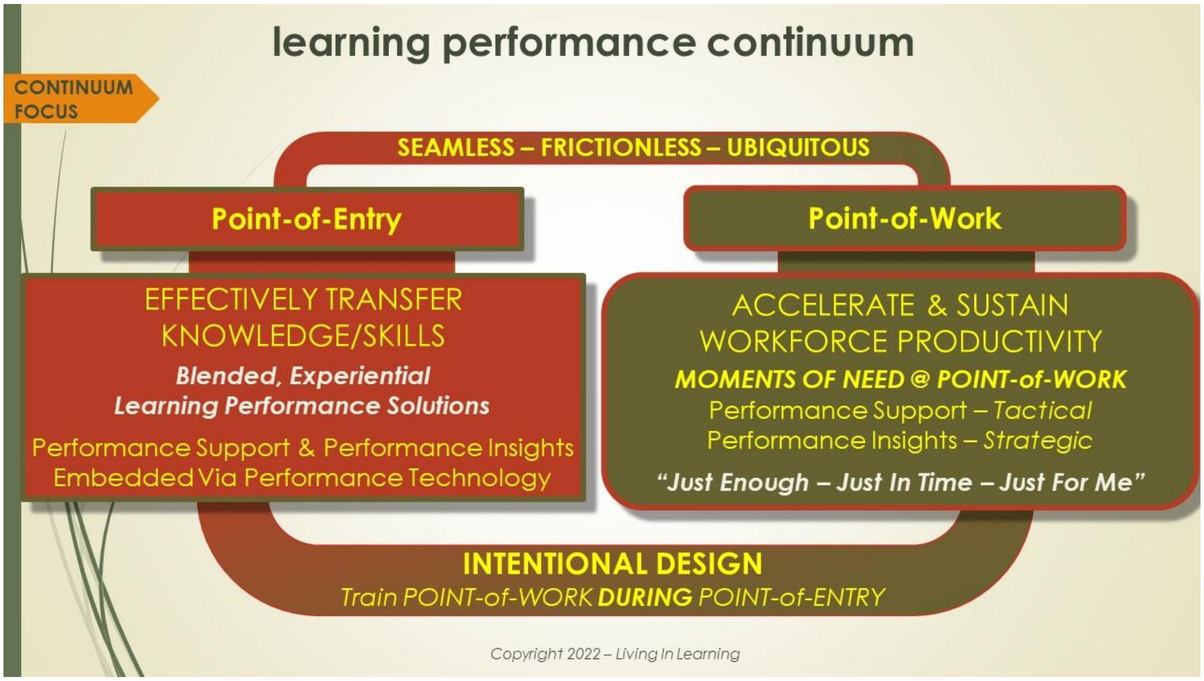


Figure 10-3

Here are a couple of thoughts related to the *Learning Performance Continuum*. Why continuum? Think about the journey to competency in any job role. It happens over time, beginning with ***Point-of-Entry (PoE),*** where initial knowledge and skills are acquired. *PoE* could be new hire onboarding or related to an incumbent moving internally to a new role or function. Here is where *Moment of Need 1* (NEW) & *Moment of Need 2* (MORE) is encountered. Training content is consumed in these Moments in some form like the classroom, eLearning, virtual, etc.

The continuum concept requires that performance assets designed ***intentionally*** for ***Point-of-Work*** should also be embedded in *Point-of-Entry* learning moments. This refers to the "R" in DRIVER – Replicate – (*Build Once – Use Many Times*).

If a new hire is confronted with the same assets during *Point-of-Entry* training that will be utilized in their actual Workflows, there is a sense of continuity that protects learning retention to *Point-of-Work*. Learning becomes *"sticky."* Additionally, Training should include the use of the DAP technology so that there is continuity of learning that aligns with actual workflows. In every respect, we are bringing *Point-of-Work* into the *Point-of-Entry.*

Confession: *My gap for the first 20 years of my L&D career, I never considered there was a need to engage at Point-of-Work. The Help Desk had that covered. Training WAS the standard solution, so why look beyond the obvious? Our L&D teams were order-takers and more focused on efficiently and effectively transferring knowledge which is/was what we were scoped and compensated for doing. The blind spot of never considering the Point-of-Work prevented us from taking our status quo methodology and solution design downstream to include sustaining workforce capability at Point-of-Work. Can you say "Cultural Blindspot?"*

CHAPTER 11

PWA INTENTIONAL DESIGN

Intentional Design supports "I" in DRIVER – Intentional Agile Design, and it also refers to the "R" in DRIVER – Replicate – (*Build Once – Use Many Times*). But there is more to intentionality than simple repurposing and re-using content. *(See Figure 11-1)*

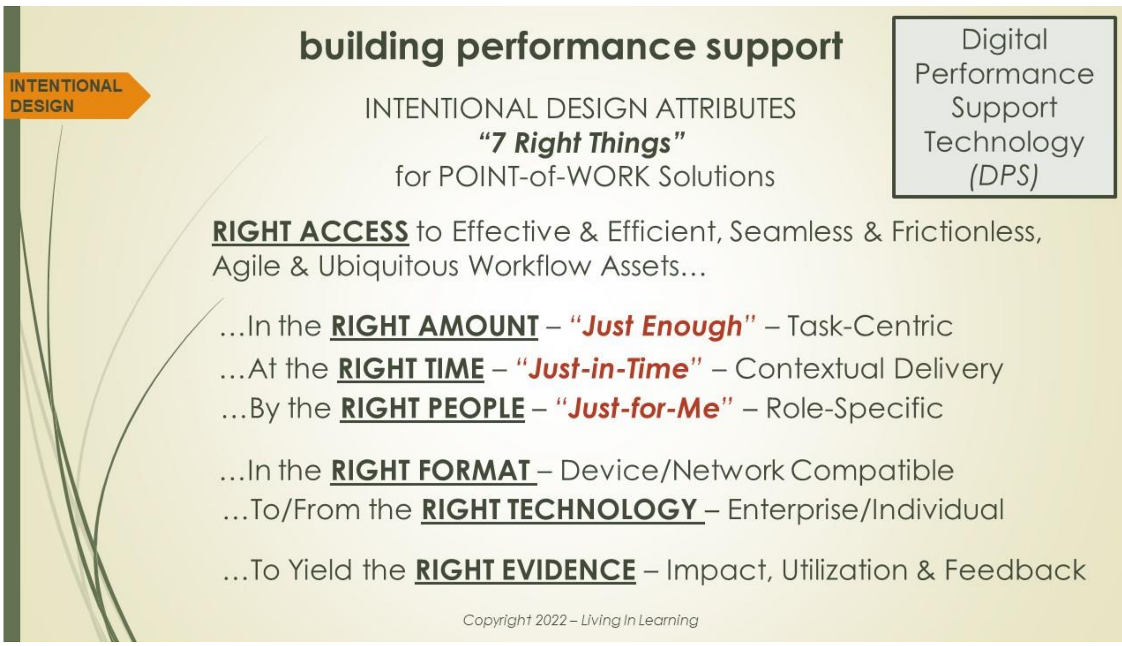


Figure 11-1

Intentional Design - ID does not replace *Instructional Systems Design - ISD*; rather, it enhances and expands ISD by looking through a longer lens (*greater magnification like a telephoto lens*) to gain clarity of what lies beyond the scope of Training solutions at *Point-of-Entry*.

What we must be able to see downstream and post-training is the *Point-of-Work*, a dynamic work environment where moments of need are as dynamic and diverse as the Workflows and the Workforce facing them. The need for both *performance agility* and *responsiveness* to the dynamics and urgency of workflow challenges is essential. Our design, development, and delivery of the required assets must be *intentionally* aligned with the dynamics of those Workflows.

This longer lens shapes a new perspective that requires an evolved approach to several key areas where disruption to the status quo will be felt:

- **Solution Pre-Design Discovery** – Point-of-Work Assessment
- **Solution Design** – Intentional design to inform ISD
- **Solution Delivery** – Integration of Digital Adoption Platform (DAP) Technology
- **Solution Impact** – Utilization of solution assets & Measurable outcomes at levels 3&4

Indeed, some disruptions are implied in the list above, but placing all our eggs in the Training discipline basket limits our impact downstream at *Point-of-Work,* where measurable business outcomes are won, compromised, or lost.

Solution Pre-Design Discovery

ISD roles are largely maintained with minimal disruption, and Storyboards remain a steady diet; however, both may target smaller and more concise assets. The actual challenge surfaces when we consider the reasons for being *"smaller and more concise."* Our primary ground zero being *Point-of-Work* implies we must assess the attributes restraining consistent performance. As history shows, not every performance challenge begets a training content solution when a small, targeted Job Aid, video clip, or live chat will do.

While content assets will be part of any solution, the greater need for ISD pre-design clarity rests upon the context of the workflow and ALL attributes causing impeded performance. The *Point-of-Work Assessment - PWA* is *"intentionally designed"* to do precisely that – *precede* ISD routines and *inform* how *context-sensitive assets* are to be applied in the workflow. Context-sensitivity impacts design, and design impacts how those assets are delivered, which impacts how the assets are measured to show evidence of business impact and value generation.

Solution Design

The solution product is designed *"intentionally"* to enable sustained performance at moments of need and most often at *Points-of-Work.* Those solution assets are not training assets; they are characterized by **"*Just enough - Just in time - Just for me*"** and are accessible in the workflow using *Digital Adoption Platform (DAP) Technology*. If designed appropriately, those assets are re-used during formal training in experiential, scenario-based exercises that mirror *Point-of-Work* and are applied using the same DAP technology. There is no other way to say it…We *"intentionally"* bring *Point-of-Work (Performance)* into *Point-of-Entry (Training)*.

The assets designed *intentionally* enable immediate access with *"Just enough"* information to overcome a moment of need that is usually *task-centric & role-specific*. Under these conditions, it's easy to see how small and targeted these assets may become. Being that small and diverse and numerous based on the universe of tasks and discreet roles, another disruption surfaces:

- How in the world do we author these assets?
- How can we deliver this flood of assets into the workflow?
- How do we keep these assets current?
- How do we integrate these assets into Training and *Point-of-Work* simultaneously?
- How do we ensure that access to them is seamless, frictionless, and ubiquitous?

Answers to these questions are addressed by the DAP technology depending on the vendor selected.

CONFESSION: *There are several leading DAP vendors; however, each has its sweet spot. Evaluation and selection of a DAP vendor require a comprehensive assessment of your unique business requirements before pursuing bright shiny objects or being seduced by a compelling sales pitch. It would be best if you had Current State requirements AND future migration projections because DAP implementations start small and scale. What is needed today must also serve tomorrow in both increased application volumes and covering additional business systems.*

Solution Delivery

Legacy learning technology, like the LMS, has a role and continues to have a role, though becoming more secondary as a Workflow delivery tool. The LMS is great for launching compliance eLearning like *Fire Safety* courses but does not have the agility for *Point-of-Work* moments of need urgency like *"hair on fire."*

There are no business risks or urgency to perform during formal training; it is a safe environment. We are very good at this and can prove our activity levels and successes, but only at evaluation levels 1 & 2. We will always need the LMS for this tracking and maintaining training history. Still, **Digital Adoption Platform (DAP) Technology** offers the best ***Just enough – Just in time – Just for me*** solutions that are agile and responsive enough to address the immediacy of workflow challenges…AND…contextually in the active Workflows.

Intentionally Designed Solution assets vary based upon moments of need; hence the essential nature of the PWA. Some moments of need are ***tactical*** in nature, and the solutions are called Performance Support. Cloud-based **Digital Adoption Platform (DAP) Technology** enables seamless, frictionless, and ubiquitous accessibility at the moment of need AND contextually inside the application workflow. Bob Mosher describes contextual delivery as successful if accomplished within *"2-clicks or 10-seconds".*

Digital Insight Curation Engines (ICE)

What about ***strategic*** asset solution delivery where moments of need require optimized *speed-to-insight* essential for supporting *critical thinking* and *informed decision-making*? Cloud-based **Digital Insight Curation Engines - ICE** have become the technology of choice. Curation is popular today but is also a source of bulk knowledge gluttony that overwhelms our workforce.

Here is some context around *curation gluttony* that needs to be considered, not to mention that it is happening right under our noses.

Does curated content ever reach the point (*or the right person*) to deliver knowledge, wisdom, and insights essential for *critical thinking* and *informed decision-making* to drive productivity forward? How much productivity is diverted to non-productive activities (*like extensive reading*) despite curated content intended to accelerate productivity? Curated content that arrives as bulk information can blow up productivity upon delivery by pulling a worker off-task to re-read what has been curated to extract the useful information needed. Content curation is a necessary evil that can quickly deliver a tsunami of non-productive time if it is not optimized early. Starting a file "*to read later*" is not sustainable, no matter how well intended, and at the expense of missing important information buried in the bulk.

When you consider that roughly 2% (*according to Pandexio)* of bulk knowledge embedded within curated content is extractable as wisdom and supportive of critical thinking, and essential for establishing *actionable insights*, we can see that the act of content curation alone is only part of the cost to get to the 2%. What if the curated content is *limited* to the embedded relevant insights…the *embedded actionable 2%* of knowledge and wisdom BEFORE the original curated content is forwarded?

How much productive time would be protected by everyone no longer being tasked to reread the original curations to extract the "*right insights*?"

Do the math…take two documents…read by 8-team members… require a 20-minute read each…and only on the project-relevant curated content. To me, that looks like 5-hours of productive time spent reading what had *already* been curated as bulk information. Plus…what guarantee do we have that the eight readers will extract the same 2%...or the "*right insights?*" What if they find "*other relevant insights*" that might be missed by the original curators or their team members? How are those new insights shared?

How do they capture their "*new insights*" and share them with the rest of the team without prompting another reading? They don't! Who has that kind of time? How many times will those same curated content documents get re-forwarded to perpetuate a "*rinse & repeat*" cycle of distracting the productive time of another worker? Sure, they're gaining positive knowledge and wisdom and forming their insights, but at what cost?

This scenario is one I've lived over and over in previous corporate gigs. Remember that this fictitious example is not unlike our day-to-day workflows as knowledge workers. If ***accelerating productivity*** is something we seek, I'm convinced part of the solution includes eliminating or minimizing the non-productive cycles we spend in pursuit of generating actual productivity.

One such solution is increasing **Speed-To-Insight** using a cloud-based ***Insight Curation Engine (ICE)*** technology like Pandexio to accomplish something I've referred to as **Curation 2.0.** *(See Figure 11-2)* Following is a sample workflow:

1. Curator extracts the relevant 2% from bulk knowledge from multiple sources
2. Highlight *actionable insight(s)* using 140-characters
3. Clarify the 140-character *insight* with a free-text abstract note
4. Tag the *actionable insight* with multiple relevant keywords
5. Group the *insights* by Topic (*multiple keywords also are tagged*)
6. Save the *insight* in a searchable Digital Brain accessible by a specific recipient, group distribution list, or the whole enterprise
7. Attach the source document to the *insight* as an *optional* read versus making the primary task to reread the entire document
8. Enable recipients to capture their *insights* and share by repeating 1 through 7

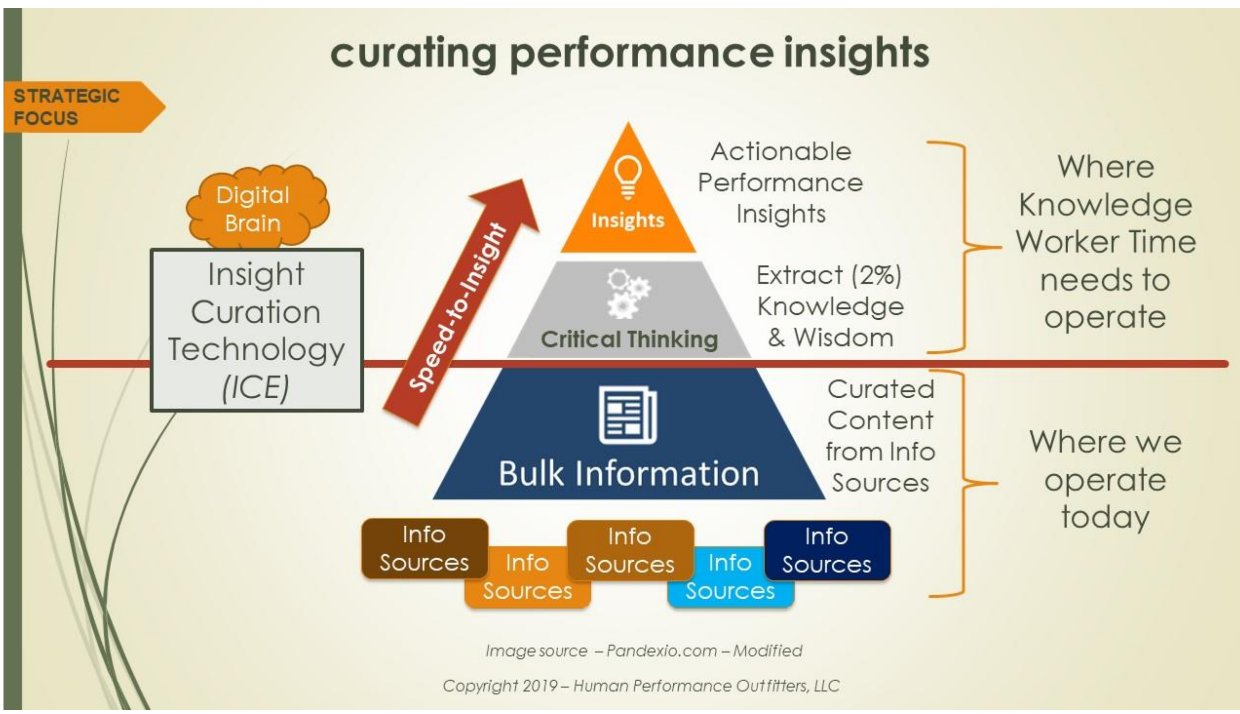


Figure 11-2

The graphic shows that our current state processes are operating below the red line. If we operate above the red line, we can accelerate **Speed-to-Insight** by curating those Insights from the 2% of knowledge and wisdom buried in the curated bulk information to highlight **Actionable Performance Insights** BEFORE distributing the content. Why burden knowledge workers to grind through and extract (*curate*) already curated content to extract their *Actionable Insights* in hopes that they are the *right insights*? That performance restrainer falls under the PWA discovery category of *workflow/process* and *content/resource* improvements that directly ***protect the productive time*** of each worker in their workflow on the receiving end of curated Bulk Information distributions. Is there a solution that enables this productive time saver?

The answer is “YES!” A new cloud-based technology – **Insight Curation Engines (ICE)** – enables a scalable solution suited to any role where *“Curation”* takes place. L&D would be a great example where curation plays a role in sourcing relevant learning materials for development and sharing with the workforce. Here’s another example that may not be so obvious; capturing Insights from soon-to-retire Boomers with heads full of IP…extracting those Insights, and plugging them into a searchable **Digital Brain** by Topic.

There’s little doubt that enabling *user-generated knowledge* is a rapidly growing necessity in sustaining a dynamic Learning Performance Ecosystem. I’m not suggesting that ICE technology is exclusive to the L&D function. However, I wish our teams had access to these capabilities while researching bulk knowledge sources that supported learning content and performance support solution design, development, and delivery in previous lives.

But there's more...there may be a more extensive audience scattered across the ecosystem. Consider boomers with hard drives, heads, and hearts full of knowledge, hard-earned wisdom, shortcuts, undocumented best practices, and countless *actionable insights* who are poised to abandon ship in retirement. Yes, those same souls are about to retire and walk right out the door with all that knowledge, wisdom, and insight to go fishing forever. Would it be more cost-effective to curate that walking knowledge, archive, and capture their wisdom and insights now rather than attempt to reacquire what was once in-house?

Hmmm…so maybe it’s not all about curating new content…maybe it’s also about capturing embedded knowledge as brain-based *intellectual property* while still in-house property.

Whether DAP or ICE assets are integrated as Workflow support, it remains foundational that they are all *intentionally designed* based upon accurately defined attributes at *Point-of-Work* that represent the source(s) of root cause(s) behind performance deficiency.

Solution Impact

Collecting data is the rage these days, and as is often the case, more is collected than is of value. Why do we collect it? Because we can. Virtually every enterprise system produces utilization data. Virtually all are API-capable and can pass data to digital warehouses and business intelligence technology. Tracking performance data is enabled through xAPI and Learning Record Stores – (*LRSs*), and all can populate performance dashboards. DAP and ICE have onboard analytics that track asset utilization and user engagement. In its infancy is the next wave of performance analytics supported by Artificial Intelligence (AI) beginning in manufacturing where complex process elements are of primary focus.

All this tracking capability is reasonable, provided a plan is in place to confirm that the correct data is captured and for the right reasons. Again, the PWA addresses Impact/Analytics as part of the discovery assessment to ensure our analytics addiction is controlled and…*intentional.*

So, is *intentional design* disruptive or non-disruptive? The simple answer is "YES!" I hope you see that *intentional design* is much broader than *instructional design* in scope and application.

- The PWA is *intentionally designed* for the L&D Performance Strategists to assess their respective *Points-of-Work* before collaborating on design requirements with ISD.
- ISD uses *intentional design* informed by PWA assessment findings to build asset solutions for both *Point-of-Work* Workflow applications and formal Training.
- Integration of Productivity Acceleration Technologies are *intentionally designed* to scale with Digital Transformation initiatives and ongoing performance challenge priorities in keeping with *start small - then scale* best practices.
- Impact and Analytics data are captured and analyzed based on *intentionally designed* evaluation plans.

PART 3

PERFORMANCE RESTRAINER ATTRIBUTES

CHAPTER 12

POINT-OF-WORK ASSESSMENT: ENVIRONMENT & CULTURE

In the following chapters, we will take a closer look at each of the six-performance restrainer attribute clusters found in every Ecosystem and covered in PWA discovery. We will examine performance-restraining attributes with accompanying specific discovery questions. We will begin with **Environment & Culture**. (*See Figure 12-1*)

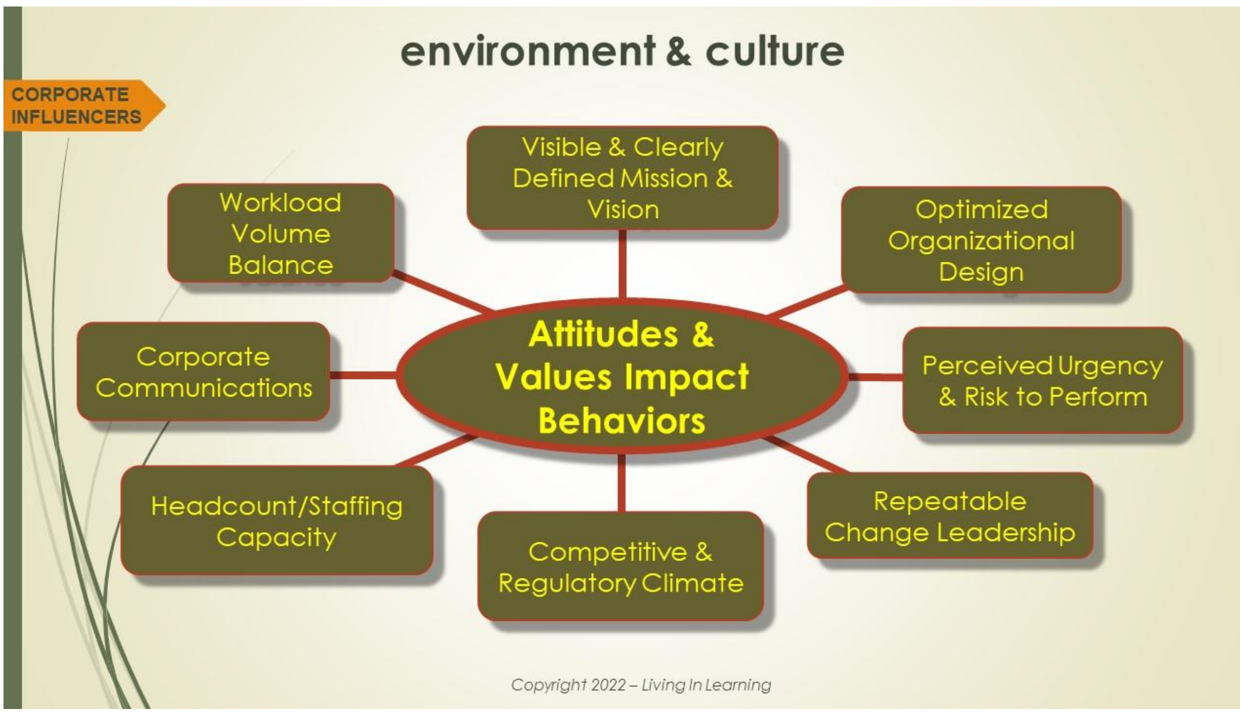


Figure 12-1

Ask ten people to define Culture and expect ten different definitions. I typically begin interviews with an innocent question like, *"What's it like to work here?"* So much of what shapes the culture in any environment is in the heads and hearts of the workers who live in the environment daily, and their *Attitudes* and *Values* shape their *Thinking,* and how they think shapes their *Behavior*. This is rich ground from which to harvest cultural thinking even without the interviewee's ability to define culture.

The rest of what you see influencing the Environment in *Figure 12-1* above can be internal and/or external. As shown in the graphic, we seek behavioral agility to respond to the potential influencers… or the inability to do so.

When Training is requested, our (L&D's) first inclination is to deliver a solution responsively and effectively. It's what we do and what is expected of us and part of a *learning culture*. It's also part of the perspective that perpetuates our existing paradigm (*Myth*) that limits, if not prevents, a deliverable of measurable solution outcomes our stakeholders seek. There's nothing wrong with building a *learning culture*…but at the expense of a *performance culture*? Training advocates think my position is just *word-smithing*, but I would call it something more accurate – *mind-smithing*. Learning opportunities for our workforce are essential for personal and career growth…but at the expense of neglecting enablement of measurable performance and workforce job satisfaction at the *Point-of-Work*? If performance does not happen, who cares about learning? Our Learners don't care how many courses they take; they care about how productive they are in their job roles.

Do we excel at learning and then fall short of creating an environment where the workforce can perform effectively by applying that learning to deliver productivity and business value at their *Points-of-Work*? I am happy to call *Learning a desirable by-product* while performing in the Workflow, but not what is the primary objective. Yes, it is the objective for L&D, but is that the same objective for the operational stakeholder? Methinks not, and I would prefer to be on the same page as my stakeholder with expectations framed as performance outcomes not completed training.

The underlying reality and motivation for operational stakeholders making training requests are likely prompted by productivity or performance deficiencies at one or more *Points-of-Work*. Those requests are based upon a *learning culture* and a belief (Myth) that *training drives performance* and that perception frames the limits of the existing paradigm and perpetuates the *Myth*. If leadership believes this to be true, how do we take top-down perspectives and successfully assess what bottom-up realities dictate as effective and sustainable solutions that will accelerate productivity at *Point-of-Work*?

Though *accelerated productivity* is often not clearly articulated in the original request, no stakeholder turns away from that as a measurable outcome. *Figure 12-2* is another snippet from the [Point-of-Work Assessment (PWA) Workshop.](#) It illustrates the assessment flow that begins at the top, or as close to the top as accessible, to understand the *perspectives, assumptions, hypotheses, and objectives* of the Requestor(s). This early effort is essential to establish an ALIGNMENT of expectations, urgency, and priorities prompting the request, the target work group, and desired tangible productivity/performance outcomes.

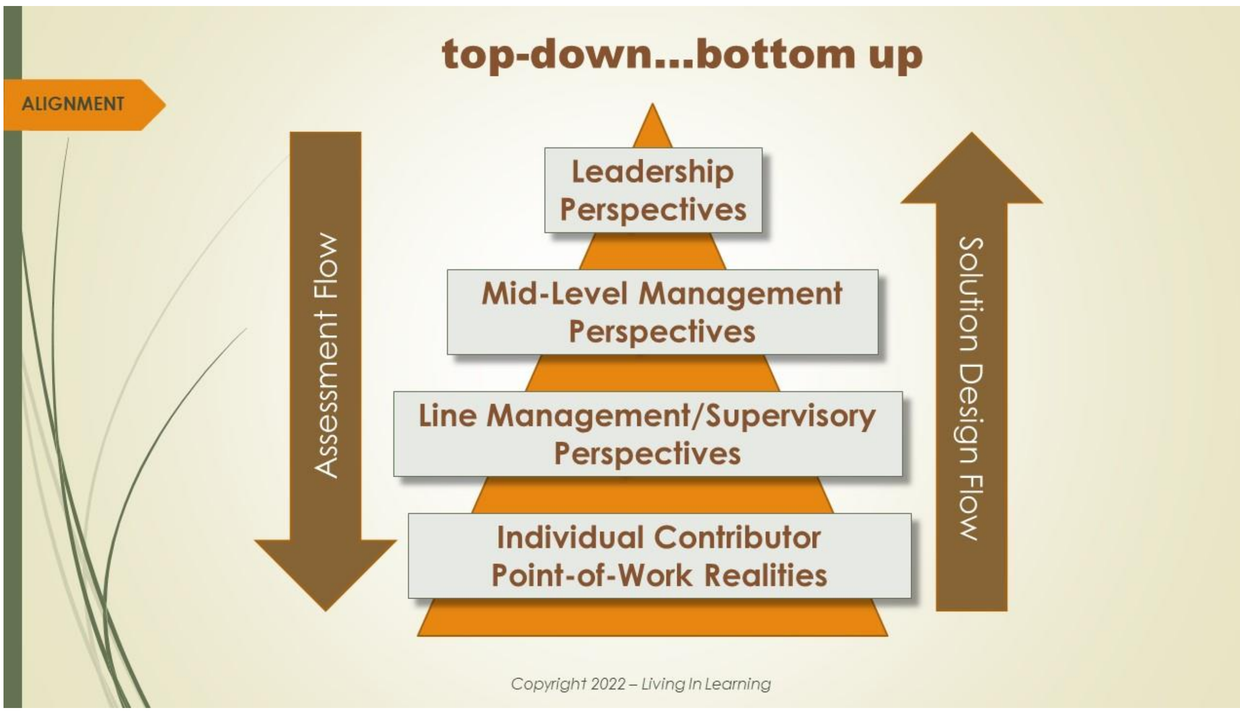


Figure 12-2

Those top-down perspectives often differ from the REALITIES revealed at the *Point-of-Work*. Assessment at targeted *Points-of-Work* will render the *realities* of actual root cause(s) that combine to restrain productivity and sub-par performance known most intimately by the Individual Contributor workforce tasked to execute; that degree of intimacy is not part of the reality known by most layers of leadership above and far removed from the reality of work.

That's not leadership's fault; it's just not in the scope of their day-to-day reality. It is, however, part of the ENVIRONMENT we must assess. Earlier, I mentioned leadership *assumptions* and *hypotheses* behind training requests…those are the things we must *assess*, *test*, *validate or invalidate* based on the attributes we confirm as realities found at *Point-of-Work*.

Task-centric and *role-specific* attributes that limit or restrain productivity at *Point-of-Work* become the basis for road mapping a blend of solution deliverables from the *bottom-up*. These attributes are defined by ground zero, where we find poor productivity and performance outcomes that serve as source information to inform and launch ***intentional, blended-solution design*** projects.

ORDER-takers formulate solutions based on requests that often are flavored by top-down perspectives of what's causing the problems. PERFORMANCE Consultants absorb the top-down perspectives to do a better job with *Point-of-Work* assessment to enable validated bottom-up solution recommendations.

No muss, no fuss, right? If only changing traditions were that simple…First things first...

Change Management – Preparing the ENVIRONMENT & Refocusing the CULTURE

Using the PWA and building holistic learning performance solutions represents our end game. The end game assumes a Learning Performance Paradigm has been adopted as part of what shapes the organization's culture. Indeed, L&D represents a significant adoptee and plays the primary role in execution in this culture, BUT…L&D and a PWA cannot be sprung upon unsuspecting operational stakeholders as a new secret weapon. Remember, we've sold them (*for years*) on the old paradigm (*the Myth*) that *training drives performance*. We have some conversations that need to change in this refocused culture before unleashing a new approach as our response when fielding training requests.

<u>CONFESSION</u>: *I mention unsuspecting stakeholders in the preceding paragraph, but what's even more important is unsuspecting leadership in L&D. If your leadership is not sponsoring the Point-of-Work discipline, you will be pushing a very large stone uphill. My first DAP deployment was evidence of this*

when a risk-averse boss denied our request for funding. The eventual deployment and implementation were successful, but getting there was complicated and delayed by politics and failure to gain sponsorship from L&D leadership first. Honestly, that scenario is why I built the PWA because it could change the conversation with stakeholders AND within my L&D leadership.

Adoption of a Learning Performance Paradigm (LPP) is not limited to L&D – adoption must include the business's operational side, top-down acceptance, and *visible, accessible, and engaged sponsorship* to be sustainable. LPP must become a refocusing force to evolve beyond a limited *learning culture* and adopt a *performance culture*.

"*Visible and Accessible Sponsorship"* is essential to establish comprehensive communications because all levels of management need to be on the same page. Alignment and buy-in are essential because *"how far from the top"* our top-down assessments begin will vary depending upon the complexity of the request. From senior leadership to mid-level to line-level supervisory management roles, all need to know and understand the new face of engagement to expect from L&D. As I mentioned earlier, *PWAs* are not Training Needs Assessments.

I cannot stress enough that a thorough understanding of the workforce's ENVIRONMENT at their respective *Points-of-Work* and the underlying influences of CULTURE impact productivity and performance. Here are three perspectives that a PWA considers:

- **Corporate:** Culture/Mission/Vision; Corp Communications; Repeatable Change Leadership Model; Reward & Recognition; Empathy; Diversity & Inclusion; etc.
- **Internal:** Organizational Design; Degree of Work Difficulty; Cross Team/Departmental Dependencies/Accountability; Budget Restrictions; Urgency/Risk; etc.
- **External:** Competition; Product/Service Mix; Company Consolidation; Reduction-n-Force; M&A Implications; Regulatory & Legal Compliance; etc.

These are not exhaustive lists by any means; instead, they are only examples of numerous attributes that can play a role in restraining productivity/performance. Some of what you see above have tactical implications, and others fall into more personal motivating…or demotivating impacts.

PWA interview questions like those that follow often provide dynamic and revealing answers across multiple work groups. Capturing diverse perspectives and opinions is precisely what we are seeking to discover because our solution mix may be equally as diverse across roles.

The questions in the following matrix are considered core questions and do not represent an exhaustive list. Additional follow-up questions (*Active Listening*) to expand upon responses are to be expected and encouraged. The most potent follow-up questions you can ask for clarification of root causes include:

- *"Why?" "Tell me more." "What do you think causes…?"*
- *"What happens when that happens...?"*

When responses indicate the potential for repetitive errors or multiple occurrences, always attempt to quantify. We need *measurable impacts* on time, resources, output volumes, and money if we have a prayer of showing evidence of impact at Levels 3 & 4:

- *"How often does that happen...?" "How much time does it take to resolve…?"*
- *"How much delay is introduced to work time...?"*
- *"When that happens, how much does it cost us...?"*

Following in *Matrix 12-3* is a partial list of sample questions from the PWA Workshop. It is important to note that only some questions on this matrix would be asked during an interview, and targets for building a Core Question Set would be framed during the Alignment Conversation with the Requestor. Also, it is typical for the direction of the interview to change by making different questions a better fit.

Confession: *One of the worst habits to fall into is creating a list of questions you can read verbatim in an interview. A list is not bad, just don't read down the list as you ask questions. It is way too easy to focus on your next question and not actively listen to the answers you are given.*

#	ATTRIBUTE CATEGORY	DISCOVERY QUESTIONS
	ENVIRONMENT/CULTURE	How does the organization describe company culture? - How does that culture description differ from what you experience in your work area? - What's different in your area of responsibility? - How could it be improved?
		For someone coming into this role brand new, would this work environment leave positive or negative first impressions? Why? What were your first impressions? If negative, what do you feel would prevent or improve that impression?
		In your role what do you see as your most valuable contributions to the mission of this organization?
		Of the areas under your scope of work which would you tag as highest priority &/or most URGENT to perform effectively? - What makes them highest priority? What's at risk?
		What do you feel are the greatest RISKS (resulting consequences) associated with issues that prevent/impede successful completion of work in your job responsibility? - Define the sources of those risks - What are the potential impacts to the business?
		On a scale of 1 to 10 how balanced is your workload compared to you and your team's capacity? What contributes to the imbalance?
		What are the top three sources of challenge or difficulty that interfere or limit your productive time?
		On a scale of 1-to-10, how effective do you feel current L&D solutions are in producing your requested performance outcomes?
		On a scale of 1 to 10 how cohesive & engaged is your group/team? What would improve it?
		What other work teams/groups/functions do you depend upon to accomplish your work tasks accurately and on time? Challenges?
		What other work teams/groups/functions depend upon your work output for their subsequent task-level work? Challenges?
		Are corporate-level communications effective to the extent you feel well-informed on top priorities? - If not, how could they be improved?
		As Changes to the business take place, do you feel communications are handled effectively and consistently? - If not, how could communications be improved? As Changes take place, do you feel you receive clear expectations specific to your contributions to the business? - If not, how could it be improved?

Matrix 12-3

At the top of my bucket list, I'd like to facilitate a discussion in the deep carpet of the board room addressing an organization's senior leadership and request, "*Individually describe your culture in two or three words"* on a sheet of paper, collect, and then read them aloud. What do you think would happen? How closely would their two or three-word descriptions match? Would any Leadership Team even agree to the exercise? Or would we receive an invitation to leave?

Not sure if I'll ever get to check this adventure off my bucket list, but methinks it would reveal an interesting dynamic at the top. Why do this?

If the definition of *culture* varies at the top, what definitions and realities would you expect to consistently, if any, exist downstream? Those variances could validate findings taken back to the top for debrief, especially if *Workforce Engagement* is on the radar to address.

Here's a sobering thought – ***The absence of a cohesive culture…IS a culture!***

"So…what's it like to work here?" I'm certainly not an expert on culture, but I am pretty sure asking a simple question like this could reveal a great deal of insight at multiple levels and paint an interesting abstract.

CHAPTER 13

POINT-OF-WORK ASSESSMENT: PEOPLE & CAPABILITY

Next, we will examine the restraining attributes specific to People & Capability, followed by more specific discovery questions (*See Figure 13-1*)

Figure 13-1

This graphic is from the Point-of-Work Assessment (PWA) Workshop and focuses on the Workforce (*Human*) attributes that influence roles and capabilities at *Point-of-Work*. Typically, when we (*L&D*) consider the *"People"* variable in our training solutions, the key focus is on the Learner and essential job-related knowledge transfer requirements.

That's not wrong; it's just not enough…

Suppose sustained and measurable workforce performance at *Point-of-Work* is the end game. In that case, we cannot take this narrow focus, or we risk missing multiple influencers that drive or restrain productivity/performance, as shown above. (*See Figure 13-1*)

It is safe to say that raising workforce competency takes a village. That leaves us with pivotal questions, *"Who is the village? Where is the village? How will the village help? Is assistance from the village accessible in the workflow?"*

As you see in *Figure 13-1*, there are eight clusters of attributes specific to human influences on the performance of the Workforce. The degree of influence varies, some more direct than others, but suffice it to say none should be discounted or overlooked; therefore, it should be included in every PWA effort.

Leadership Influence

It's funny how Leadership is often the Requestor and turns out to be a guilty party contributing to restraining influence on productivity and performance. Sound like a minefield? It can be if findings are flavored with blame. *Clarity of Performance Expectations* surface in the PWA:

- Do workers expect what they are to do in their assigned roles?
- Do workers clearly understand *"What good looks like?"*
- Do Primary Workers receive enough active supervision to ensure clear direction, and are reinforcement resources accessible?
- Is feedback immediate and relevant to performance outcomes?

Team Dynamics

In some ways, Team Dynamics overlap with Environment & Culture when considering things like *Engagement and Motivation*. And it's important to note that I'm not talking about engagement in the process of taking Training classes but engagement in the collaborative process to achieve success at the *Point-of-Work.* Team Dynamics extends beyond the concept of roles when you consider the impact on the Primary Worker on a personal level, like *Career Development and Performance Management* interactions. Are these interactions built on consistency, integrity, and freedom from fear?

Collaboration, Coaching & Mentoring

Do Primary Workers work in an environment with *Trusting Relationships* with managers and peers? Do the Primary Workers have the opportunity to *Collaborate* and build relationships through *Peer-to-Peer Networking*? Does the organization facilitate the ability for *Collaboration* and *Knowledge Sharing?*

Role/Goal Clarity & Performance Expectations

We must clearly understand who the Primary Workers are**:**

- Who does the work?
- Is the role clearly understood?
- Are performance expectations clear and concise?

Not to be overlooked are those individuals (*likely with different roles and responsibilities*) who are **Secondary Workers**

- Who supervises the Primary Worker?
- Who coaches? Who mentors?
- Who provides *Active Supervision*?
- Who supports moments of need during the workflow?

Further downstream (*or even upstream*), there may be **Tertiary Workers** who have interdependencies that should be considered:

- Who are the end-consumers of the Primary Worker's output?
- Do vendors play a role? Affiliates? Re-Sellers?
- Are there other entities that could benefit from the Primary Worker's solution?

Workforce Knowledge Capabilities

Workforce Capabilities deal directly with *"readiness to perform"* instead of *"completed training."* L&D (*Training*) is part of competency development; however, it is not the silver bullet. Competency is reached over time and through hands-on experience at the *Point-of-Work,* along with knowledge gained through mistakes and failures in the workflow. Is *"in the workflow"* support available? Mentors? Coaching? How much attention is paid to ensuring the ability to *Think Critically*? Are those support resources aligned with the right competencies? Have we identified the most impactful mistakes?

The PWA is designed to discover those mistakes and their impact on business value and then refine learning and performance support assets to eliminate/minimize their occurrence. Status quo strategies are not sustainable when Performance outcomes form our primary focus, especially when we consider other Truth(s) that Training alone cannot handle effectively:

- Every organization owns a Dynamic Learning **Performance** Ecosystem
- Training drives Potential – not Performance – dispelling the ***Myth***
- Performance manifests ONLY at the *Point-of-Work* in Workflows
- Knowledge retention degrades before Workers can APPLY it at *Point-of-Work*
- Competency cannot be *"trained in."* It is reached over time and with practice on the job – How much time and cost are incurred due to errors and mistakes?
- There are 5-Moments of Need – Training ONLY addresses 2 of them (*New & More*) – the other three manifest in workflows at *Points-of-Work* (*Apply, Solve & Change*)
- Workforce sustainability & value generation happens at *Point-of-Work.* Is that where L&D shows up ill-equipped or, worse, MIA altogether?

<u>Confession:</u> *If you have not figured it out by now, I can unleash more passion than may be necessary to drive home a point, but hey, that's what thirty-five years in this profession can do to a person. I respect the disciplines of L&D but have little tolerance for maintaining the status quo when the survival of our at-large organization is at stake. I've been downsized from Training organizations three times in seven years, and none of them addressed Performance as a priority. None of those Reductions in Force would have been necessary if L&D functions had a positive, measurable business impact. Being busy does not spell impact…it spells cost center. Don't be a cost center…be a Performance Ninja.*

Following in *Matrix 13-2* is a partial list of sample questions from the PWA Workshop:

#	ATTRIBUTE CATEGORY	DISCOVERY QUESTIONS
	PEOPLE/CAPABILITY	On a scale of 1 to 10 how collaborative is your group/team with knowledge-sharing? How could that be improved?
		How do you collaborate with SMEs/peers/partners to share knowledge and best practices?
		What, if anything, would you like to see change to better facilitate sharing and collaboration within your team and across other teams?
		Of your current job responsibilities which of them would you tag most difficult or time-consuming? Why?
		Considering whom you depend upon for success, and who depends upon you – What obstacles do you encounter? - Why do you think these obstacles exist and what would improve or overcome them?
		Did your onboarding experience enable you and/or your team to be effective at your job? - If not, what would you add/change/delete to improve it?
		Prior to starting your current job role, what about your training would you add more of...prefer less of...or simply delete altogether to be better prepared?
		How has the training you receive changed in the recent past? - What additional changes do you feel would improve training efficiency & effectiveness?
		As you grow in your current role do you feel existing training opportunities are sufficient to help you develop? - If not, what would you like to see added as options to increase your skills and capabilities?
		How are training concepts supported/reinforced after you are back on the job? - How could support or reinforcement be improved?
		In your role do you feel performance goals and/or performance expectations were clearly defined? - How could additional clarity of your role/performance expectations be improved?
		Who provides coaching/mentoring to you/your team? - Is it sufficient? If not, what would you change to improve those opportunities?
		If your role requires that you coach or mentor others, do you feel you have been adequately prepared and equipped to be effective? - If not, what do you feel would improve your coaching/mentoring capabilities?
		If your role requires leading your team's day-to-day activities - encouraging their engagement - driving productivity, what are your toughest challenges?

Matrix 13-2

Regarding this list of questions, should you ask all of them? Not likely. During your pre-interview preparations and in the Alignment phase with your Requestor, you should have a general idea of which questions are most relevant and should receive priority.

<u>Confession</u>: *As a new Performance Consultant, I had a tendency, also known as a bad habit, of heading toward a solution before the problem was thoroughly revealed. This is especially hard for an L&D pro who knows beyond a shadow of a doubt that this solution will be built in Articulate. Articulate may get the call, but eight of the fifteen objects built into Articulate could be stand-alone Performance Support Objects available in Workflows at Moments of Need. That design decision is part of the Intentional Design discussed in Chapter 11. Best advice… sit on your hands and listen with no preconceived solution judgments.*

CHAPTER 14

POINT-OF-WORK ASSESSMENT: WORKFLOWS & PROCESSES

Workflow & Process performance attributes help us understand relevant *task-centric, role-specific* work situations that either drive or restrain productivity and performance at multiple *Points-of-Work.* Typically, every PWA will have elements that restrain performance within this segment. What is most critical is defining the nature of restraint from broken or non-optimized processes from knowledge and skill gaps associated with Workforce competencies.
(*See Figure 14-1*)

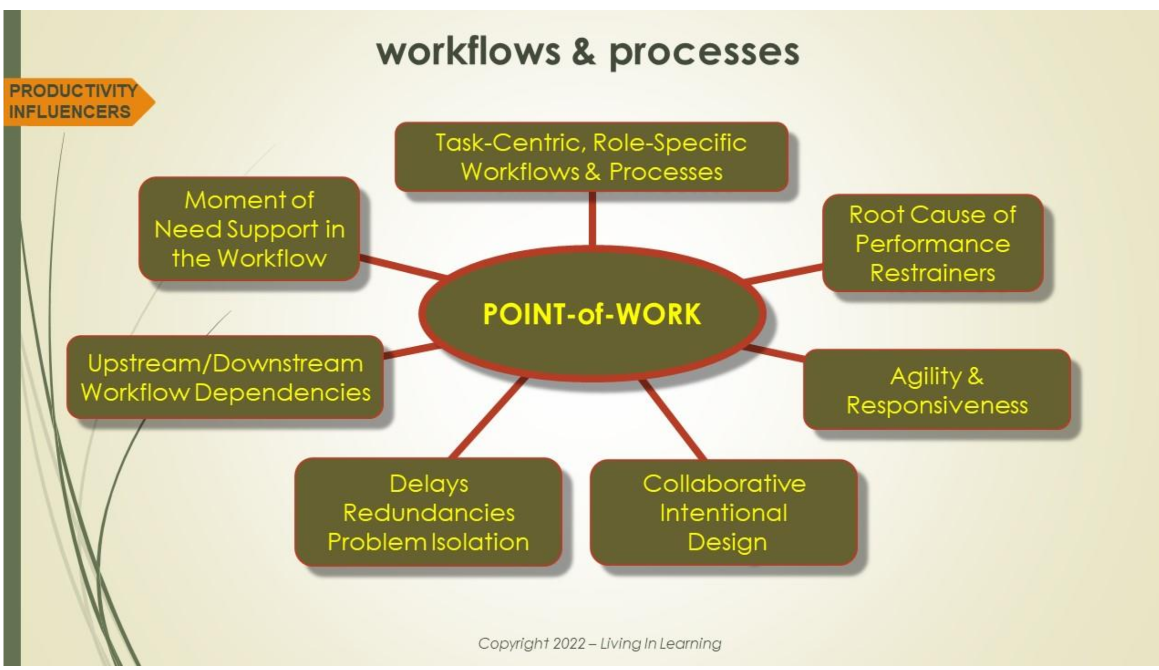


Figure 14-1

Both Workforce and L&D *Point-of-Work* perspectives are influenced in *Figure 14-1*. Every element in the graphic applies to both; Workforce, specific to job execution, and L&D, from a solution design perspective. Each aligns with their discreet *Points-of-Work*. There are seven influencers shown above that are related to Workflows & Processes that impact the Workforce and, equally as necessary, are specific to L&D functions:

- Identify restrained workflows and processes by roles and tasks
- Assess root causes restraining productivity and performance at *Points-of-Work*
- Develop road maps for learning performance solutions to inform subsequent design that supports workflow agility and responsiveness to change
- Collaborative support of *Intentional Design* and development of *Moment of Need/Point-of-Work* asset solutions (*Discussed in Chapter 11*)
- Isolating workflow delays and redundancies that restrict optimized operations
- Identifying ripple effects upstream and downstream that influence performance
- Define access, recommend, and manage Moment of Need access to and delivery of *Point-of-Work* solution assets in the Workflow

1 – Task-Centric & Role-Specific Workflows & Processes – Individual Contributor Focus

Workflows & Processes that directly generate [*or compromise*] tangible business value by our workforce are characterized by assorted **TASKS** and assigned by different **ROLES**. Cat herding comes to mind almost immediately because of the diversity of moving parts. The implied solution design by L&D requires us to compartmentalize by *priority* where we discover the most significant business risk, determine where the greatest reward is to be found…and then build learning performance solutions to overcome or achieve them. That *prioritization* happens during our Bottom-Up debrief with the Requestor. The Requestor defines priorities based on our PWA Findings.

Then? Rinse & Repeat on each subsequent priority until the effort to overcome or achieve becomes more expensive than the return on the solution results. Don't recommend a $5,000 solution to a $300 problem.

Primarily, we are focused on how work gets done:

- What is/are the root cause(s) contributing to workflow challenges?
- Knowledge gaps cause how much restraint?
- How much restraint is related to broken processes?
- How prepared is the workforce to be effective in their task-level work?
- How much support to function effectively is accessible within workflows?
- How much of the perceived performance challenge is caused elsewhere?

2 – Root Cause of Performance Restrainers

This segment is a primary L&D discovery skill set that requires a degree of business acumen/savvy and business awareness to handle discussions and interviews with operational stakeholders at multiple levels. Typically, this role requires skills found in Performance Consultants or Performance Strategists, and I have seen capable Instructional Designers fill the role with some guidance.

The objectives in this phase target where to begin based on the most significant impact. "*Greatest impact"* is stakeholder-defined in terms of exposure to business loss, liability, delay, creation of material waste, or other anomalies affecting bottom-line results.

3 – Agility and Responsiveness

Discovery details from identified root causes revealed in the PWA serve as source input that informs subsequent collaborative *intentional design* discussions. When performance manifests in the workflow, our solution design must be as *agile* as the workflow in which it is applied, and our workforce is as *responsive* to the constant dynamics of day-to-day Change. The Solution Design Road Map supports a *different conversation* critical to a shift in thinking that *Training* is the only answer…to integrating Learning Performance solutions at Moments of Need and within workflows found at the *Point-of-Work.*

4 – Collaborative Intentional Design

Chapter 11 introduced the **7-Right Things**. We will look at them again in the context of the Solution Design Road Map responsibility belonging to the L&D Performance Consultant/Strategist. This role summarizes the sources of restraining attributes impacting productivity and performance. The objective is to produce the source document from which the Consultant/Strategist collaborates with Instructional Design and Development resources to apply whatever agile design methodologies they have adopted.

Whatever design methodology is used, *intentionality is* aligned with workflow performance and should frame the design criteria. PWA discovery findings should clearly define the complexity of deficient performance and the reasons behind it. Sometimes, a deeper dive into Workflows & Processes requires a more robust agile design methodology like the Five Moments of Need (5MoN)**.**

Once again, the PWA is not a design methodology like 5MoN; instead, PWA serves as a *front-end pre-design diagnostic* intended to identify where a methodology like 5MoN should be utilized for deeper Task Analysis for detailed solution design. In short, PWA informs 5MoN design decisions where the *intentions* are focused on specific assets for accelerating productivity and performance by closing gaps at affected *Points-of-Work*.

The primary drivers for *intentionally designed* assets include:

- **Accessibility** at the Moment of Need
- **Relevance** to identified roles tasked within the Workflow
- **Effectiveness** at the Moment of Need when APPLIED at the *Point-of-Work*
- **Sustainability** of post-development currency after insertion into the ecosystem

PWA informs the ***Intentional Design*** of learning performance assets (*often Performance Support*) characterized by encompassing **7-Right Things:** *(See Figure 14-2)*

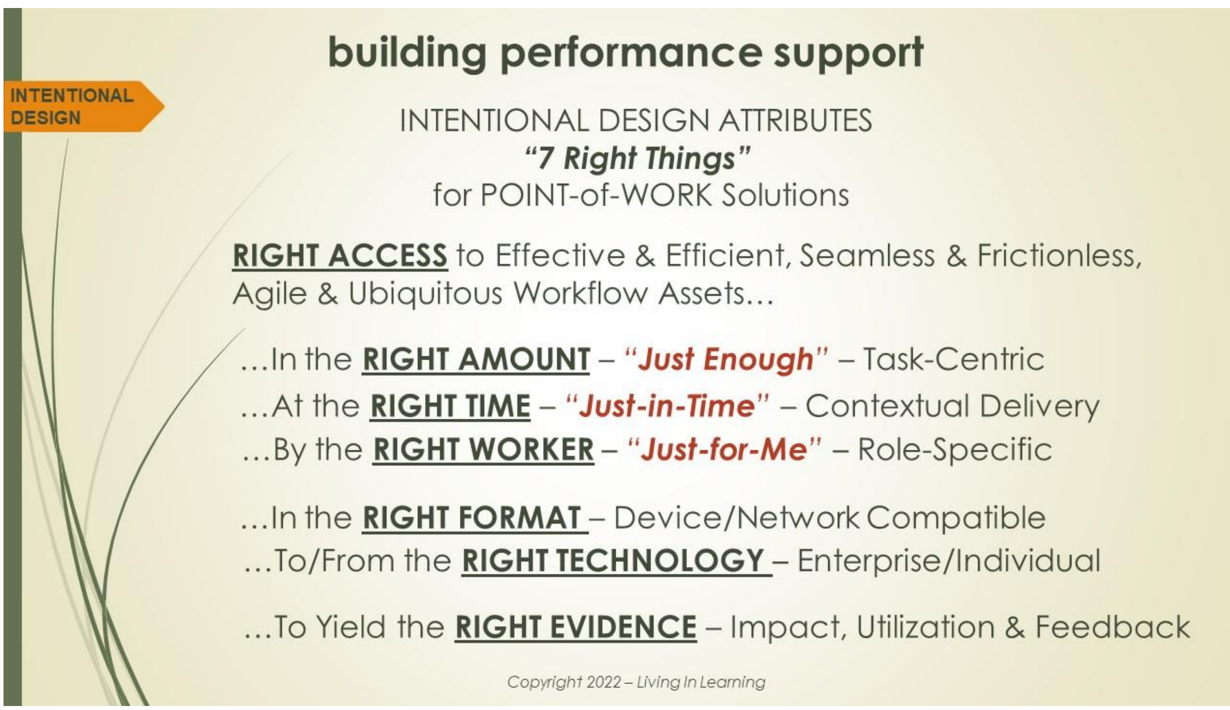


Figure 14-2

These *7-Right Things* are foundational to Learning Performance Solution assets regardless of the agile design methodology utilized.

- **RIGHT ACCESS** is most critical of all
    - For solution assets to be most *effective* and *efficient* in the application, the Workforce must have access from within their Workflow.
    - *Seamless* and *Frictionless* describe streamlined access where the Workforce does not need to waste time searching, remembering where to find them, or exiting their workflow to gain access to the asset.
    - The asset design should be as *Agile* in the application as the Moment of Need dictates for a successful problem resolution.
    - *Ubiquitous* access from an active Workflow that enables immediate access to assets at any time, from anywhere, and from any device.

Effective and Efficient application of the content Intentionally Designed for problem resolution follows a phrase picked up at a conference years ago from Aaron Silvers in an xAPI breakout session. xAPI assets were characterized by being small in size and targeted to specific work; hence the phrase – *Just Enough – Just In Time – Just For Me.* The phrase stuck with me and fitted perfectly in the *Intentional Design* conversation.

- **RIGHT AMOUNT – *Just Enough*** describes intentional designs that *"fit"* the need. This is a perfect definition of a job aid or quick reference asset designed for a specific Task.
- **RIGHT TIME – *Just In Time*** speaks to accessing the asset while engaged in the workflow at a specific Moment of Need.
- **RIGHT WORKER – *Just For Me*** speaks to an intentionally designed asset for a specific role.
- **RIGHT FORMAT** – Relates in many ways to the Ubiquitous requirements of the Right Access but from a design perspective. Does the content need to be accessible from several different devices? Can every potential device handle video? Do we need to consider responsive design to enable screen sizes across multiple device platforms?

- **RIGHT TECHNOLOGY** – Technology is a two-way proposition. Are we accessing the right technology to PULL assets in Moments of Need…AND…do we even have access to that technology from our device? On the flip side, do the devices in the hands of the workforce interface with the technology that will PUSH assets to them in Workflows?
- **RIGHT EVIDENCE** – Evidence can mean several things:
  - Can we extract evidence of *Impact* from asset application in workflows?
  - Can we extract *Utilization* metrics providing evidence that systems are being accessed and gauging the frequency and proficiency of usage?
  - Are feedback loops provided to channel communications back to asset owners from the Workforce users? This is critical to maintaining currency and fine-tuning when asset applications are unclear or out-of-date.

5 – Solution Asset Maintenance

Managing and maintaining learning performance assets after development and deployment can quickly become the tail that wags the dog. *Intentionally designed* assets vary from training-specific content, to stand-alone performance support, to performance insights enabling critical thinking…to social interaction and collaboration opportunities. Given that these assets are not always destined for formal training, we must consider several things regarding their application at the Moment of Need and workflows at *Points-of-Work*. Questions that require answers include:

- Where are the assets reposited?
- How are solution assets accessed?
- What taxonomy metadata is attached to enable efficient search and ownership?
- Who owns the assets and the ongoing responsibility to maintain currency?
- How are tracking asset utilization analytics accomplished?
- How are updates and new assets communicated to the Workforce?

Confession: *Do not make the mistake of overlooking the creation of protocols for maintaining ownership of content, maintaining visibility of ownership, and providing easily accessible feedback loops to and from end-users with content owners. This becomes extremely important when the number of learning performance assets increases, and I am serious about the asset tail wagging the dog.*

6 – Upstream & Downstream Dependencies

Where do the ripples go if a stone is thrown onto the still surface of a pond? Everywhere, right? Even the edges of the pond receive ripples dependent upon the proximity to the initial point of impact; such are the dependencies in our ecosystems. A core Six Sigma topic (SIPOC) maps the upstream and downstream dependencies from which we may source improved performance. What do upstream processes have to do with our Primary *Point-of-Work* process target? Does a ripple impact our Point-of-Work from upstream? Likewise, what does a change in our Primary *Point-of-Work* process mean to the processes downstream from our target? We need to know both to account for ripples incoming and outgoing accurately. (*See Figure 14-3*)

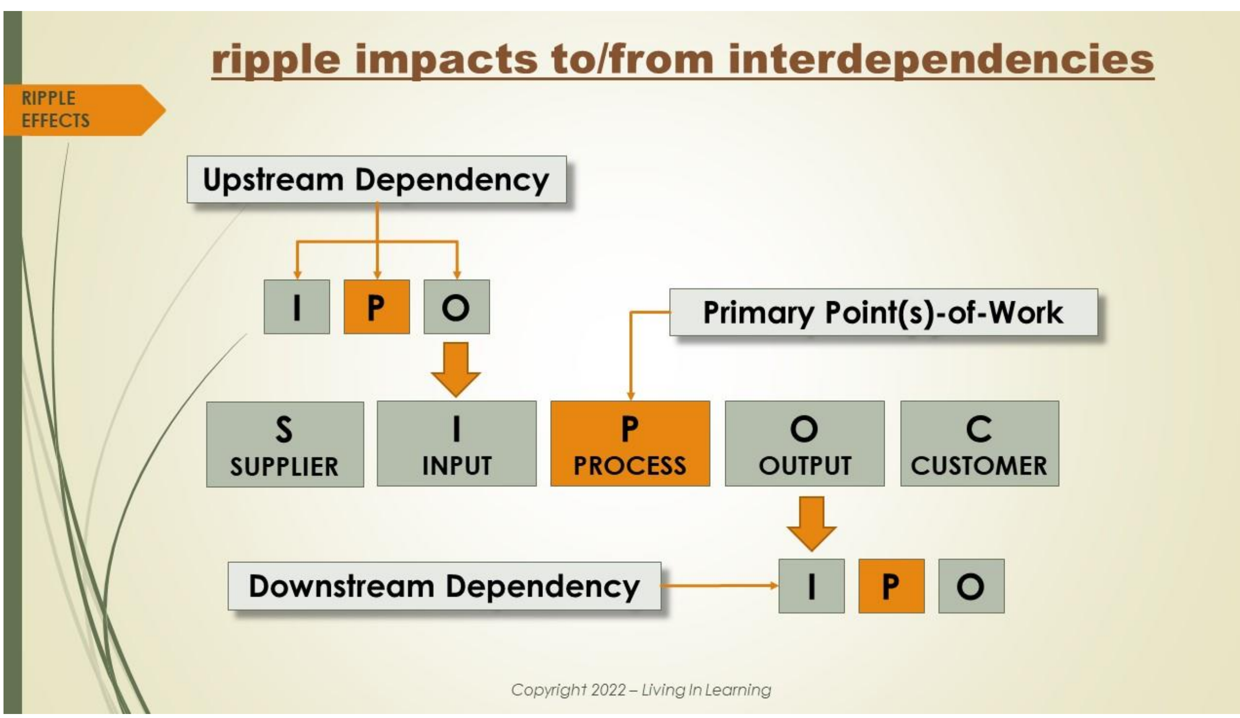


Figure 14-3

In short, *Upstream Processes* create *Output* that becomes *Input* for our *Target Process*. Similarly, our *Target Process* creates *Output* for whomever or whatever *Downstream Process* receives as *Input*. Remember that *ripples* can be significant to others caused by our primary target solution.

7 - Moment of Need Support in the Workflow

Our solution designs need to facilitate the CONVERGENCE of learning performance support opportunities with Workflows. That reduces the viability of Training as a primary solution and escalates smaller targeted Performance Support resources accessible in Moments of Need in Workflows at multiple *Points-of-Work.*

Remember that Performance Support resources may not always be content-based; instead, support may require live collaboration with Business Matter Experts (BMEs), coaches, mentors, or supervisors.

The nature of the *Point-of-Work* challenge and the work context of the Moment of Need will point to the best-fit solution.

Recall the Five Moments of Need:

- **Moment 1 (NEW)** – First-time learning, often during new hire onboarding but may be associated with first-time learning related to a job or function change of an incumbent worker.
- **Moment 2 (MORE)** – Next level of learning, greater complexity, additional advanced learning.
- **Moment 3 (APPLY)** – When the worker must complete a task or decide to take action during a workflow at *Point-of-Work*.
- **Moment 4 (SOLVE)** – When a worker is faced with an anomaly, a broken process, a malfunctioning system, or out-of-date content and needs to revert to Plan B.
- **Moment 5 (CHANGE)** – When routine workflows or processes change due to an update or upgrade in policy, new technology, regulatory demands, etc.

Following in *Matrix 14-4* is a partial list of sample questions from the PWA Workshop:

#	ATTRIBUTE CATEGORY	DISCOVERY QUESTIONS
	WORKFLOWS/PROCESSES	What are the most critical tasks you handle in the routine of your job? - What's at risk if these tasks are not effectively and efficiently completed?
		Of the tasks under your current work responsibilities which of them would you tag most difficult?
		What are your greatest pain points or roadblocks associated with those tasks? - What are the obstacles/roadblocks? What causes them to surface? - How often do they occur? - What is the impact to your work productivity when these roadblocks surface? - What do you feel would lessen or remove those pain points?
		After onboarding and new on the job, what key work processes need immediate reinforcement and support in your workflows? - What do you feel would be the most effective way to reinforce or support you in the workflow?
		When confronted by an issue that stops your workflow, where and/or to whom do you go to for help? - What other options are available to help overcome an issue or challenge during a workflow? - How long does it typically take to find an answer or solution?
		Describe your access to job aids or checklists immediately available the moment they are needed in current work processes or system-based business applications?
		How efficient is the process when searching for help or information resources? - What would improve the search and acquisition of necessary information at your moments of need? - How much time does a typical search require? - How often is search required?
		How are changes to workflows or processes communicated to you? - Are those communications timely and effective? If not, what would improve them?
		How are you trained on changes to workflows or processes? - What kind of follow-up support is provided after training completion?
		If training is not provided, how do you become effective in the new or modified processes or workflows?
		Are there aspects of current workflows you feel are inefficient, redundant, or unnecessary? - If any, what would be the tangible benefit of eliminating or minimizing them?

Matrix 14-4

As you can see, the WORKFLOWS & PROCESSES attributes assessed in the PWA have implications for not only the Workforce environment but the engagement and influencing of L&D decisions regarding solution design and post-deployment support.

Once again, the PWA Methodology is not a design model nor a development tool; instead, PWA is a *front-end pre-design diagnostic discipline* that informs the deeper dive completed during detailed solution design phases where agile design tools and tactics are applied. PWA provides a road map that identifies and prioritizes *what rocks to look under*…not the details of *what's under them.* Please don't consider that wasted motion; rather, the PWA effort *prevents wasted motion*, where we typically build solutions for symptoms and miss root causes altogether.

PWA deliverables facilitate the ***Changed Conversations*** we must have with operational stakeholders to re-examine their training requests to prevent our subsequent training solutions from only partially addressing the productivity and performance challenges they face. Training may or may not be a viable solution, and it's our job to make that distinction, and doing so shifts our role to a true business partner instead of running a drive-through window where orders are quickly filled.

Workflows & Processes represent the most relevant measurable ecosystem attributes contributing to work delays, wasted motion, errors, material waste, business liability, mistakes, rework, redundancies, uninformed decisions, and…and…and…take place. These attributes are essential to quantify if we have a prayer to measure impact at levels 3 & 4.

CONFESSION: *Do not stop questioning when you acquire a good definition of a behavior change. Ask, "SO WHAT?" So what will be the impact in observable performance that we can measure…and by how much. Do not neglect to establish a* ***Current State Benchmark,*** *so you have something to compare performance changes to after post-solution implementation. It is a mistake to zero in exclusively on training when workflow assets in a dynamic learning performance ecosystem require workflow application, especially when a hard-dollar impact can be attached. Stakeholders want proof…here is where we find the source data to provide it.*

In chapters 18-23, we will examine related considerations for L&D because our Workflows & Processes run parallel with those facing the workforce. New assessments, skills, and technology imply a change to L&D paradigms and solutions. There is an inherent risk in confusing *"ready to change"* with *"readiness to change."* More later…

CHAPTER 15

POINT-OF-WORK ASSESSMENT:

CONTENT & RESOURCES

As we progress through the Point-of-Work Assessment, in previous chapters, we've considered performance attribute clusters specific to *Environment & Culture – People & Capability – Workflows & Processes*. Hopefully, you've seen a degree of overlap and interdependencies among these three clusters. This chapter describes the importance of ***Content & Resources*** our Workforce relies upon to optimize their performance at task-centric and role-specific levels. As you see in *Figure 15-1,* the potential for performance restrainers has many influencers we need to address in our PWA discovery efforts.

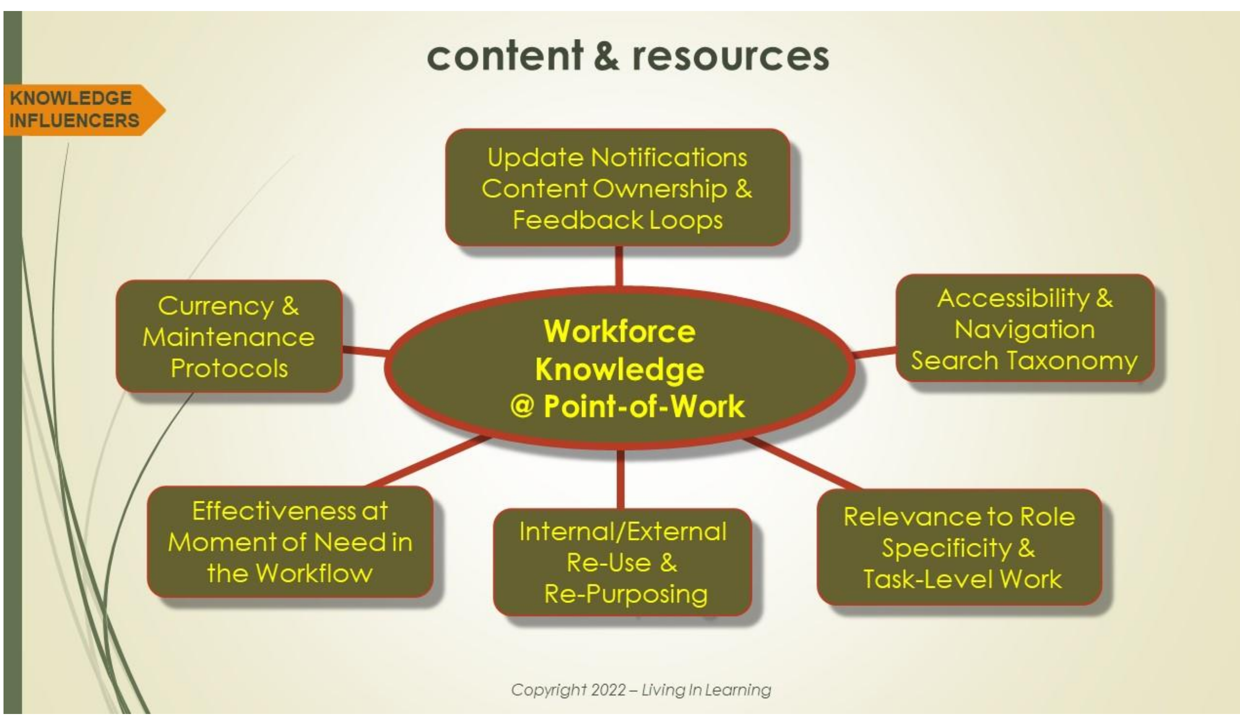


Figure 15-1

POINT-of-WORK ASSESSMENT: Content & Resources

Assessing attributes across critical *Content & Resources* overlaps directly with *Workflows & Processes.* However*,* it is more specific to efficient accessibility and practical application at the Moment of Need at the *Point-of-Work*. Why? Would you stop assessing the toolbox and not include the tools inside?

The first consideration of significance deals with what form *Content & Resources* take. When considering how our Workforce accomplishes their jobs, we must determine how readily they can get their hands on the *Right* assets (*tools*) at the *Right* time…Recall the *7-Right Things* mentioned earlier in Chapter 11. What that list of tools includes may not always be content based. Consider:

- Job aids and checklists
- Contextually delivered step-by-step instructions – *Pulled at Moment of Need*
- Contextually delivered step-by-step instructions – *Pushed when things have changed, or limits have been exceeded or overlooked*
- Policy documents, Methods & Procedures (M&Ps) or Standard Ops Procedures (SOPs)
- Compliance Guidelines, Rules of Engagement
- Direct contact with Subject-Matter Experts (SMEs) or Business-Matter Experts (BMEs)
- Collaborations with peers, project team members
- Active Supervision in Workflows and Feedback Loops
- Confidence in asset currency and accuracy

You may be able to think of others, but regardless of what may be missing from the list above, there are several commonalities relative to all.

Accessibility & Navigation

Of the 7-Right Things, you may recall that ***Accessibility*** is at the top of the list. What good are the right assets if they are not readily accessible? What are other factors restraining or wasting productivity specific to accessing the assets?

- By whom should they be accessible?
- What are the work conditions and urgency at the right moment of need?
- How difficult is searching for and finding the right assets?
- How effective is the taxonomy structure and metadata tagging on content?
- How efficient is interfacing/collaborating with the right human assets?
- Does the right technology exist to enable access at the Moment of Need?
- What is the cost to the business when access is restrained or nonexistent?

Relevance to Role Specificity and Task Level Work

Typically, at the Moment of Need, there likely exist degrees of implied urgency to APPLY the asset to resolve the Moment. What are the business implications when that *urgency* is not intentionally factored into the design and delivery of the assets to the Right People (*Just For Me*)? Do we need instructions to build a watch to tell what time it is? Relevance to telling time is one thing, but what about *relevance* to telling time under the workflow's physical, geographic, or network connectivity constraints by functional role? Are there role variances to consider?

Role-specific, individualized designs match roles with tasks and identifiable performance restraints experienced in the workflow at *Point-of-Work*. Remember that *Right People* may include secondary support, coaches, mentors, and vendors/clients/customers.

Task-level centricity is at the core of *Intentional Design,* where *intentionality* is framed by the task(s) to be accomplished and the conditions under which that must happen. The content design of the resource must be formatted and relevant and directly in lockstep with the task, and that can only happen by first determining the nature and complexity of the *task* at the *Point-of-Work*.

Effectiveness at Moment of Need in the Workflow

At first glance, *Effectiveness* sounds much like *Relevance*, and in some respects, they are related; however, *Effectiveness* is borne out by something else - ***Results***. Effectiveness is also a function of the Right Time (*Just In Time*) – Moment of Need. Add in the Right Amount (*Just Enough*). Does the worker need to leave the Workflow to access the support asset? This overlaps with Accessibility and Search; the urgency drives both to perform in the Workflow and the business risks associated with performing poorly or with significant delay. DAP technology plays a significant role in addressing accessibility in the moment of need.

Currency & Maintenance Protocols

This is a big one. Retaining the currency of performance assets becomes even more critical when the work environment is fast-moving and susceptible to frequent Change. We do a yeoman's job of creating content and providing resources, but do we have effective *Maintenance* protocols in place? This category overlaps with Update Notifications, Content Ownership, and Feedback

- What is the current process of updating content? How long does that take?
- Who owns the content? Are those owners visible and accessible to End Users?
- How many generations (*versions*) of the original content exist, and where are they?
- How much of the same content is embedded in PDFs, PPTs, Training content, etc.?
- How are changes communicated to the Workforce?
- Are notifications *PUSHed* directly into contextual workflows to protect time on task?
- Do existing resources need to be pulled out of service to perform updates?
- How many approval/review gates do updates have to clear before redeployment?
- What's the cost to the business for delays in performing updates on outdated content?
- Does existing technology enable rapid development and updating of these assets?
- Are we able to measure if our *Maintenance* protocols are even sustainable?
- Do we have visibility to asset utilization co-related with an actual performance at the *Point-of-Work*?
- Is that level of visibility even possible in the current state?

Here we see the interdependency and overlap with attribute clusters *Impact & Analytics* and *Systems & Technology*. Can you see how inaccurate performance support assets that take two weeks to be updated can impact bottom-line performance results? Our client-facing support services are only as well-informed as the *Content & Resources* available to them. It amazes me that updating essential information is not one of the highest response priorities in our ecosystem.

CONFESSION: *Be sure to maintain line-of-sight to content owners with mission-critical support assets and the assets themselves. Jobs change, and content owners transfer or leave the organization. Does a maintenance protocol exist that re-connects content to a new owner? Keep in mind that it is easier to track content by functionality than by owner. That said, set up a "Content Issue Database" and have a role that oversees activity and can serve as a traffic cop to get ownership aligned with an issue as a priority when an issue is reported. Years ago, I suggested that an overseer role like Content Czar was needed to wrangle database issues, but that idea did not fly…maybe I should have been in pajamas with cheap sunglasses at the time….*

Following in *Matrix 15-2* is a partial list of sample questions from the PWA Workshop:

#	ATTRIBUTE CATEGORY	DISCOVERY QUESTIONS
	CONTENT/RESOURCES	When you consider the information and resources used in current workflows, which ones are most difficult to access? What contributes to the difficulty?
		Are the resources you utilize effective and easy to apply at the moment of need? - If not, how could they be improved?
		Describe your search process. - How much time would you estimate you spend searching for the right information? - If you could change anything about searching for information or resources, what would it be?
		What information/resources do you need that you currently do not have…or are unable to access quickly?
		How many different content locations do you have to search through to find the information resources you need? - What are they?
		How are the right resources/information accessed when you are engaged in a workflow and encounter a moment of need?
		Once resources have been located, is the content specific enough for immediate application to a task or is additional reading or searching within a document required to find the right information?
		To whom and how do you send notifications to when you find something that is out of date or incorrect? - Do you receive acknowledgement or confirmation concerning receipt of your notification?
		How are content owners identified, tracked and updated as roles change, promotions, moving job roles, or leaving the company?
		How long does it take for content identified as out of date to be updated? - What is the associated risk/liability in your role if there is any delay?
		How do you access and/or share Knowledge Assets and Best Practices associated with your workflows?
		What home-grown hacks or cheats have you or a colleague developed that have improved work productivity? - Who else in the organization could benefit from these hacks? - How would you accomplish sharing them?
		How is curated content distributed to you/your team? (IE. E-mail attachments, shared drives, forums, etc.) - Do you feel the delivery method and curated content format are optimized? - Do you feel there would be value in having Actionable Insights already extracted from curated content before you had to open and read the entire curated document?
		Are curated content/resources you receive relevant and specific enough to effectively support task-level workflows and processes you handle? - If not, how could they be improved?
		How do you extract insights and actionable knowledge from curated content/resources forwarded to you? (I.E. white papers, articles, blog posts etc.) - How do you share valuable information you discover in your own searches?

Matrix 15-2

As you can see, the CONTENT & RESOURCES attributes assessed in the PWA have implications for not only the Workforce environment but the engagement and influencing of L&D decisions regarding solution design and post-deployment support. Several questions are key on the topic of Insight Curation. You will see additional references in the Systems & Technology (*Chapter 16*) for Insight Curation Engines (ICE).

<u>CONFESSION</u>: *"If only Madeline were still here, we could ask her. She was the resident expert." Or "I sure wish John was still here; he knew where all those documents were stored." Ever heard side conversations like these? Sadly, I had a chance to minimize those mournful conversations by spending quality time picking the brains of the more senior workers who were about to retire and leave…along with their intellectual property knowledge. I would call those workers Business Matter Experts (BMEs) because they knew the business…knew where the bodies were buried…not simply what a process was but how to do it and why it mattered. Always make an effort to include BMEs in your PWA interviews.*

CHAPTER 16

POINT-OF-WORK ASSESSMENT:

SYSTEMS & TECHNOLOGY

In this Chapter, the PWA methodology focuses on Systems (which may include multiple enterprise systems, software apps, and human systems) and Technology utilized by our Workforce to accomplish task-level work. (See Figure 16-1)

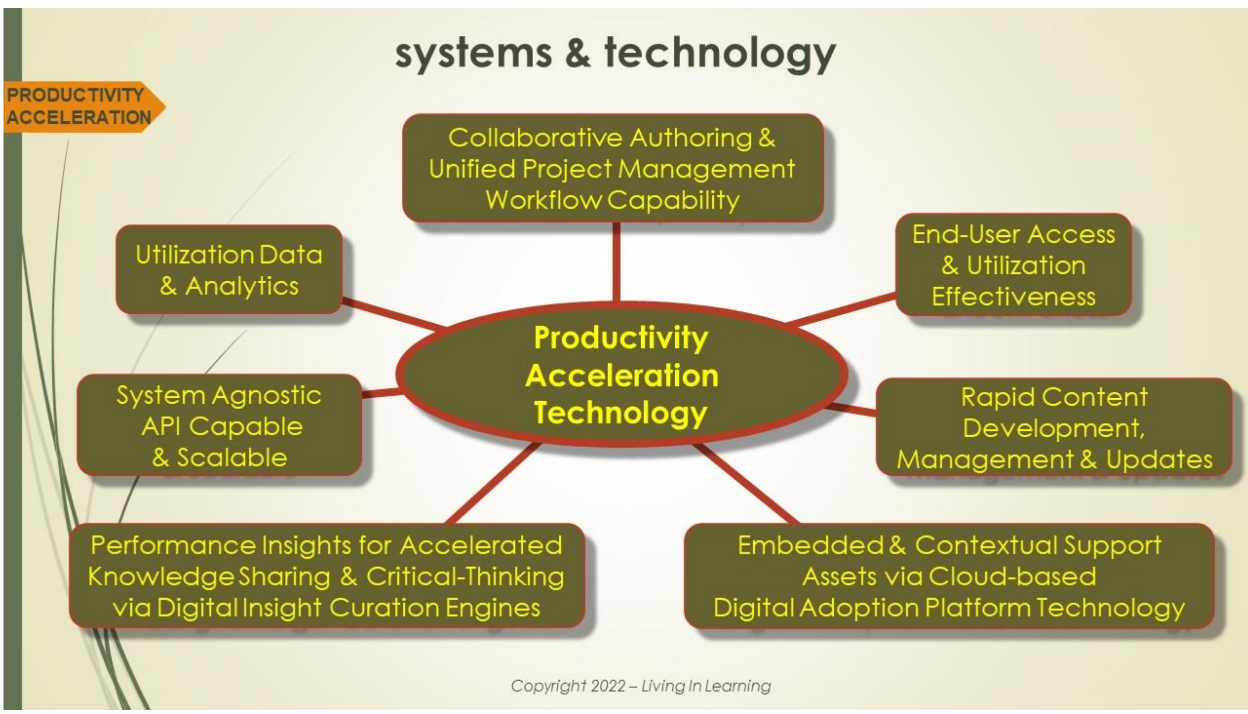


Figure 16-1

End User Access, Utilization, and Effectiveness

Workflows often require accessing any combination of work systems from End-User technology (which may include mobile phones, tablets, desktop computers, and other hand-held devices). Unfortunately, End-Users having access does not ensure effective utilization. We often experience this when a new *system goes live. Training is complete, but utilization is low, tendency to make mistakes is high, and the Help Desk has been overrun. That is not sustainable, yet it remains as status quo more often than not.*

Optimizing usage should happen within the Workflow with contextually accessible performance support. Forcing the worker to leave a workflow for support is inefficient, and the answer is a technology that converges performance support contextually in the Workflow. Formerly known as Electronic Performance Support Systems (EPSS) have evolved into cloud-based Digital Adoption Platforms (DAPs). DAP capability directly impacts L&D and the consistent application of Intentional Design specific to WHAT, WHEN, and HOW to support the Workforce in their Workflows. DAP technology is essential for proficiency development along the Workers' Learning Performance Continuum from Point-of-Entry (During Training) and their ultimate Points-of-Work (Post-Training) destination.

While *Productivity Acceleration* manifests when reaching *Point-of-Work*, applying the new technology should be first experienced during *Point-of-Entry Training*. As such, introducing this new technology has implications for the solutions designed (*intentionally, of course*) to serve as experiential source content for exercises and activities that emulate/simulate actual *Point-of-Work* scenarios. The performance assets designed for *Point-of-Entry* are the same assets recommended in the PWA Road Map for application at *Point-of-Work*. Doing this accomplishes a couple of favorable outcomes:

- The amount of time spent training and the volume of training are reduced dramatically
- Content development time and ongoing maintenance and updates are reduced
- The Workforce experiences actual *Point-of-Work* scenarios DURING *Point-of-Entry*
- Workers have less to remember/recall when back at their *Points-of-Work*
- An *experiential continuity* during the learning experience accelerates *time-to-competency*
- Faster *time-to-competency* accelerates productivity and decreases the cost of mistakes, error isolation, rework delays, material waste, business liabilities…and…and…and…

Compartmentalizing Systems & Technology

The objective of the PWA is to establish a *current state* benchmark of the *Systems & Technology* footprint; this becomes doubly important if the organization is on the path to achieving **Digital Transformation**. Why? Because every phase of the transformation has implications of CHANGE that will impact:

- The Work *Environment* demonstrates a *Cultural* shift toward accelerating productivity as a priority
- The workforce (*People*) and their **readiness** (*Capability*) to adapt to and adopt work activities using new technology interfaces
- Different *Workflows* and *Processes* that are updated or changed, disrupting task-level workflows and familiar routines
- Access to and acquisition of new supporting *Content* & *Resources*
- Utilization of *"new" Systems & Technology* for optimized application of embedded and evolved capabilities at *Point-of-Work*
- *Analytics* essential to gauge adoption and *Utilization Impact* at the *Point-of-Work*

In other words, **Transformational Change**, which often restrains/limits/delays the success and sustainability of our transformation efforts, may need to be revised. Simply put, we are not discussing a GoLive event where the default post-GoLive plan directs calls to the Help Desk, and that's not sustainable.

We have to get closer to, if not within, the workflows and the *systems* utilized at *Point-of-Work*. The LMS will not *"deliver the mail"* in that regard. We've all been through the chaos of these singular events; now multiply those events over a couple of years of new phase iterations of ***Digital Transformation*** and the fallout dependent upon ***training the workforce to the point of readiness*** to deliver optimized results and remain productive as learning curves are extended… AND…at what cost?

IT will handle the heavy lifting and leverage their IT version of *Change Management* to ensure successful GoLive events; however, that's only a slice of what defines successful implementation. But what about GoLive events related to *workforce readiness to perform* and full adoption we count on to accelerate their productivity? ***Digital Transformation*** represents a headlong movement to the cloud. Should we also position *Productivity Acceleration Technology* like DAP and ICE there as well? We absolutely should, especially when the load on IT resources and internal disruption falls on them to maintain the infrastructure.

Considering the elements shown in *Figure 16-1*, you may note that the focus largely involves the L&D role and is centered around **Productivity Acceleration Technology**. While there are many tools and apps on the market, and with more surfacing every day, there are two varieties I see as foundational:

- **Strategic** – where the outcomes key to accelerating critical thinking and informed decision-making from ***Performance Insights*** curated from bulk source content before burying recipients with redundant effort. Yes, curating curations…to improve *speed-to-insight* using ***ICE Technology***.
- **Tactical** – where task-level support assets are contextually embedded directly into workflows and the enterprise systems themselves at *Point-of-Work*…AND…embedded within experiential learning opportunities during *Point-of-Entry* using ***DAP Technology****.*

The upper right section focuses largely on the *Workflows & Processes* related to:

- Cross-discipline efforts to rapidly collaborate and author learning performance assets
- Unify project management to streamline activities across disparate team responsibilities
- Rapidly develop, update, and maintain assets in multiple formats from a single source

At the bottom of *Figure 16-1,* we see where Productivity Acceleration Technology blows the doors off any LMS and serves as the capability to embed learning performance assets into both the workflows and systems along with actual Training opportunities, whether Performance Insights or Learning Performance Support.

Given that multiple enterprise technologies will be involved in ***Digital Transformation***, minimum selection criteria require choosing ***system-agnostic platforms***. Also, since the transformation will scale over a couple of years in larger installations, the acceleration technology should be ***non-disruptive and scalable***. The newer cloud-based acceleration technologies require little, if any, direct IT hardware/software involvement.

Finally, how do we know we've been successful? As part of the PWA, we determined *"What good looks like"* in terms of Level 3 & 4 impacts, but how will we know if we've arrived at those results without access to ***utilization analytics*** that tracks Workforce engagement and actual performance results? Again, the choice of platform should include this level of visibility as onboard capabilities.

CONFESSION: *Invest time proactively with IT; Partner with them early in any new enterprise system introduction. The typical approach of waiting for IT to release the final system screens to begin building training does not come close to "final" because of frequent fine-tuning. If collaborating early, L&D can leverage DAP technology to accommodate* ***single-source authoring*** *for making quick updates on the fly. Additionally, the most hated job in IT is writing UAT and system validation scripts. Why not leverage the DAP technology to* ***record/write those scripts*** *AND serve as intentionally designed sources for learning performance support content? It is inefficient to wait for IT to toss a finished system to L&D to build training. Likewise, L&D shouting "Incoming!" to the IT Help Desk after training is completed and GoLive has launched is not very cool either.*

Quite a lot to think about, right? My advice…step away from bright, shiny *Productivity Acceleration Technology* until you've established a few things:

- A benchmark of *current state* technology. What is the current footprint?
- Where is it headed in conjunction with ***Digital Transformation*** strategy?
- What new technology is planned, and what is the migration timeline for prioritization?
- When is it going to happen?
- Who is going to be responsible for utilizing it successfully?

This may be oversimplified, but these elements of knowledge will inform a decision regarding *Productivity Acceleration Technology* that will be as brilliantly planned and executed 18 months down the road as it was 30 days after GoLive. You can quickly go from hero to goat in 90 days to six months if the vendor decision prevents scalability.

Following in *Matrix 16-2* is a partial list of sample questions from the PWA Workshop:

#	ATTRIBUTE CATEGORY	DISCOVERY QUESTIONS
	SYSTEMS/TECHNOLOGY	When you consider the different Systems, Applications & Tools you and your team use on the job today, which ones represent the greatest challenge to use effectively? - What is most difficult in the use of these systems/applications/tools and how does that impact your work? - What do you think would help overcome or minimize these challenges?
		Do you feel you are well-prepared at the point of GoLive to effectively use new systems/applications/tools? - What would you add/change/eliminate to improve your success?
		How difficult is it to gain access to or move between systems? (I.E. single sign-on, access rights/privileges)
		If you need to exit a business application to access support information, do you lose your work in progress?
		What systems do you use to complete Training? - What is your biggest complaint in how easy these systems are to use? What would you change?
		What systems do you use to access support information when engaged in a workflow? - What is your biggest complaint in how easy these systems are to use? What would you change?
		How are you trained when a new system comes on-line? - Do you feel the training technology helps prepare you to be effective on the business system? If not, what would you like to change?
		How do you receive training when changes or system updates are made? - How are you notified of changes? - Does that training take you off task? - What would you change about that approach?
		Are you and your team equipped with the right personal technology (including mobile capabilities) to be effective on the job? - If not, what devices, apps, or tools do you need?
		How do bandwidth and/or network connectivity impact your performance? Or to the performance of your apps?

Matrix 16-2

CHAPTER 17

POINT-OF-WORK ASSESSMENT:

ANALYTICS & IMPACT

In this Chapter, we focus on assessing the attributes of *Impact & Analytics*. Traditionally, we (*L&D*) do an excellent job of evaluating at Level 1 (*the training experience was satisfactory*) and often at Level 2 (*knowledge was transferred during training evidenced by a test or activity*) to document successful learning interventions. In reality, those evaluations only represent our activity and *POTENTIAL* since none of our participants have delivered any tangible business value or impact at Levels 3 (*observable changes in behavior in the Workflow*) & Level 4 (*measurable financial benefit to the business*), which only manifest at *Point-of-Work*. Often, Levels 3 & 4 are defined in general, non-specific terms and represent a challenge when the business asks for verifiable evidence from L&D of tangible impact. More proof is needed! *(See Figure 17-1)*

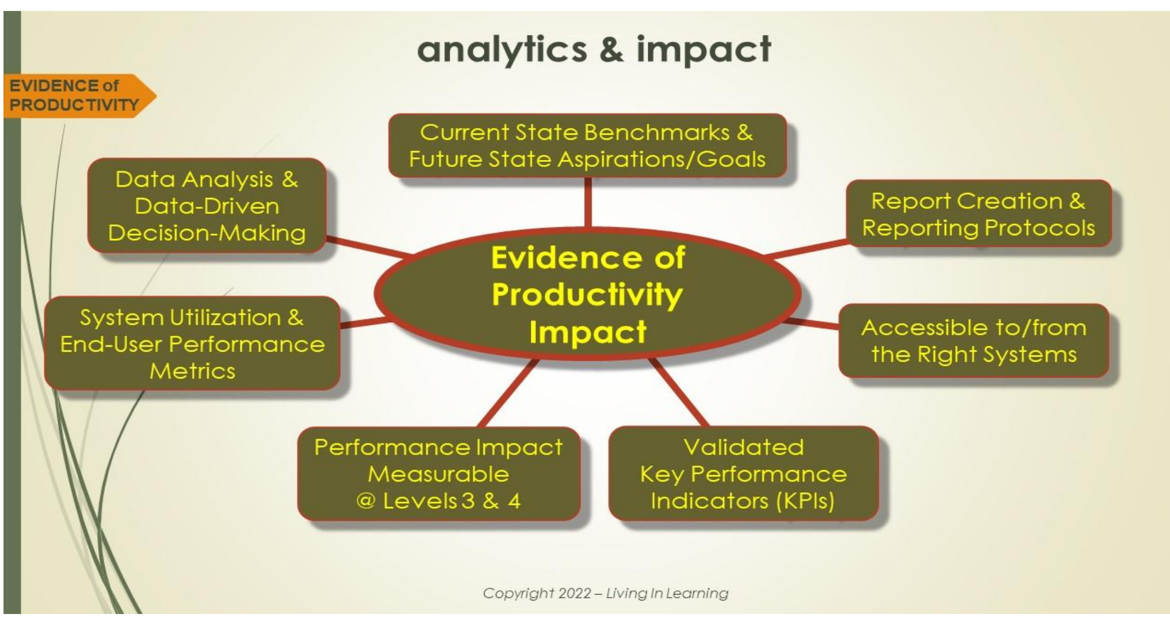


Figure 17-1

To accurately demonstrate impact, we must begin with an accurate *benchmark* to establish the ***current state*** and a basis for ***future state*** metrics and measures before building any solution.

CONFESSION: *We must establish the current state of performance and the measures currently used to track that performance. Without* ***current state benchmarks****, there is no valid basis for future state comparisons. Defining the Current State results must be accomplished at the beginning. Most scenarios where Levels 3 & 4 are not tracked are because no current state benchmarks were defined upfront. Building a successful measurement foundation demands upfront assessment of the analytics available, accuracy, and relevance to tangible impact only visible at Point-of-Work. Don't settle for confirming how busy you are…when how effective your solutions are is most desired by stakeholders.*

Current State Benchmarks

Figure 17-1 illustrates seven key assessment areas, beginning with *"Where are we today?"* to establish *Current State Benchmarks*. As with any journey, even our GPS is useless without identifying the *point of origin*. We know where we need to go…just as our stakeholders have an idea of where they want to go based on our efforts…BUT…we need to establish *current state* performance measures to establish a *"before"* benchmark if we hope to provide evidence of improvement in *future state* outcomes in our *"after"* results at Levels 3 & 4. Neglecting this level of assessment dramatically limits our ability to show evidence that L&D contributed meaningfully to the bottom line…which is typical of a non-contributory cost center.

Reporting & Accessibility

The use of data, or *"big data,"* is rapidly integrating into workflows to drive decisions and actions across the enterprise. I often find there is no shortage of analytical data; the challenges become more demanding of peripheral logistics like:

- Does a measurement plan exist, and is it aligned with the *future state*?
- What data is available, where is it, and should we utilize it?
- Do we have access rights to acquire the data?
- Can we analyze efficiently and effectively enough to enable informed decisions?

- How are results reported…in what format…how and to whom are the results shared?
- Do analytics feed a performance dashboard? Are performance dashboards desirable?
- Does the right technology exist to support multi-platform data capture?

In addition to identifying relevant measures, we must consider several things:

- Where in the ecosystem will these KPIs surface?
- Which systems are sources of data?
- How do we…can we…access them?
- Are there protocols in place related to Who accesses the data?
- When do we measure…How long…How often do we measure?

Validated Key Performance Indicators (KPIs) & Measurable Impact

Part of establishing the *current state* is making sure the existing key performance indicators (*KPIs*) are appropriate measures and relevant to the performance targeted for improvement.

- Do KPIs even exist?
- Are there KPIs that are misaligned?
- Are there KPIs that are missing?
- Are there KPIs that are irrelevant?
- Will new performance requirements create new KPIs for monitoring and tracking?
- How long will it take for measurable impact to manifest? Immediately? 2-Months?

These questions must be answered when we craft *future state* measures to show evidence of our learning performance success.

Utilization & Performance Analysis

We want evidence of positive business outcomes from sustainable performance. Do not overlook the *"sustainable"* aspect of performance in that statement. Measuring impact as a *"snapshot"* quality and easy to call it good when we see improvement; however, *a flash in the pan* does not confirm that we have established a trend or pattern of *sustainability* over time. The Measurement Plan defines a beginning and an end (*or ongoing*) to measuring data, how often, by whom, etc.

Also, from an L&D perspective, it is very helpful to know ***"who is using what"*** of the resources and performance support solution assets we provide. First, we learn quickly how often a particular asset is being used…but…we do not know *where* in a workflow or *why*. The point for L&D's benefit is *knowing what and who*…and this enables follow-up investigation to find out *where and why*. DAP technology can make this a reality…except for *why*. Secondly, we need to establish a communication loop for knowledge workers to provide *feedback to content owners* to address asset usability, relevance, and accuracy and offer suggestions and ideas for improvement.

Utilization of systems and resource assets also serves to show levels of *engagement*, and engagement is essential in the longer-term goal of reaching full *adoption* and *sustainability*. The IT team has a primary interest in systems utilization, and IT is one of the richest areas for Workforce performance data, and that data resides in the hands of the IT help desk. The call logs are usually categorized by *"reason codes"* or *"tagged"* in some way that points to the need to collaborate with IT during our PWA efforts. What better information could we have upfront than to know the reason behind calls to the help desk? ALWAYS include the Help Desk in a PWA.

A Measurement Plan should include all the components in this chapter, whether the Plan provided is used or not. Hopefully, the message is clear…*we must plan for post-training impact measurement BEFORE training and support solution design and development*. Who knows, the solution may not be training, opening the door for making tangible performance impacts with non-training solutions applied and tracked at *Point-of-Work*. That said, L&D needs to own and be equipped to work effectively in both venues.

On a recent LinkedIn thread, someone lamented how outdated Kirkpatrick's four evaluation levels were. Truthfully, I see L&D only using half (*Levels 1 & 2*) and framing Training, not performance results. *Achieving Potential* is good, but does it pay the rent?

Our business stakeholders ask for improved and accelerated performance and, more importantly, verifiable evidence of outcomes hitting the bottom line. L&D is in the best position to provide this evidence, but only if we prepare through assessing the attributes at *Point-of-Work* that are relevant, accessible, and reportable as stakeholder-accepted evidence of impact. We must have an advanced plan for measuring observable, measurable behavior changes (*Level 3*) and bottom-line business value generation (*Level 4*). The mistake so often made by L&D is NOT defining the metrics for either in advance with accompanying *current state benchmarks* as points of comparison.

Following in *Matrix 17-2* is a partial list of sample questions from the PWA Workshop:

#	ATTRIBUTE CATEGORY	DISCOVERY QUESTIONS
	ANALYTICS/IMPACT	Specific to work tasks in your area - What key performance measures are currently tracked?
		What other measures of performance are not currently tracked that would better demonstrate results? - How accessible are those data points? - From what system(s) would those data points be extracted?
		How would those measures be meaningful to the business? - What story would they tell that's not being told currently?
		To what extent do you see activity taking advantage of metrics (gaming the system) to inflate or "cook" results positively for measurement sake?
		What challenges exist in capturing the right performance data?
		If you request reports in your role, what challenges do you experience when you make requests?
		What challenges do you encounter specific to analyzing and applying business data from reports to make informed decisions?
		What real-time performance data would help you manage your job better and/or enable quicker decisions?
		What challenges do you encounter specific to analyzing and applying business data from existing reports?
		To what extent are performance dashboards used currently? - If dashboards exist, what performance data are tracked? - For what purpose? - What data are not tracked that should be included on the dashboard? - What is preventing tracking that data?

Matrix 17-2

PART 4

POINT-OF-WORK READINESS ASSESSMENT (PWRA)
FOR
LEARNING & DEVELOPMENT

CHAPTER 18

WHAT IS A READINESS ASSESSMENT?

Implementing the PWA discipline within a dynamic learning performance ecosystem requires enhanced discovery skills and evolved roles within the L&D team in collaboration with:

- Operational Leadership & Stakeholders
- Subject Matter Experts (SMEs) and Business Matter Experts (BMEs)
- Individual Contributors functioning in Workflows at multiple *Points-of-Work*
- Potentially external contributors like vendors, affiliates, resellers, or customers

This level of discovery is often out-of-scope and beyond traditional L&D skill sets and prompts the single most critical question that needs an answer...

Is your team "READY" to deploy & implement the PWA methodology?
Or is your team in a state of "READINESS" to adopt the PWA methodology?

A *PWA Readiness Assessment* ***(PWRA)*** represents a starting point to establish the ***"current state"*** of L&D readiness to deploy, fully implement, adopt, and sustain the PWA methodology for in-house application. The PWA version used for *L&D Readiness Assessment* is the same tool used to define the ***current state readiness*** of operational stakeholders seeking to accelerate and sustain operational performance results. What differs are the interview questions asked.

PWRA recommendations for L&D implementation and adoption may suggest the following:

- *Step-change shift in strategy & planning* to re-orient solution emphasis from *training* to enabling sustainable, measurable *performance* outcomes
- *Adoption of agile, intentional design methods* & tactics that utilize methods like the Five Moments of Need

- *Integration of Digital Adoption Platform (DAP) Technology* to optimize contextual workflow delivery and accessibility of performance support resources.
- *Tracking new analytics* that deliver tangible evidence of performance impact & accelerated productivity realized at *Points-of-Work* at Levels 3 & 4

An L&D optimization roadmap essential to implement, adopt, and sustain the PWA discipline requires an accurate, *current state benchmark*. Trying to enable a sea-change L&D strategy evolution without accurately defining the *current state* is like using GPS mapping without the benefit of *point of origin*.

Point-of-Work Readiness Assessment (PWRA) methodology represents a precursor assessment to prioritize where specific optimization should focus. Readiness is assessed top-down, whereas detailed learning performance solution optimization is a bottom-up activity based upon PWRA readiness findings at *Points-of-Work*.

Like the generic PWA, bottom-up design becomes prioritized based on assessment findings to ensure accurate definitions of specific Moments of Need within workflows. It ensures an optimized level of effort when creating solution assets. The design objective is to enable asset accessibility through *Digital Adoption Platform* technology and effective and efficient application in the workflow that accelerates productivity and measurable performance outcomes at *Point-of-Work*.

PWRA Phases

- **Phase 1 –** One-on-one or peer-level team engagement at the senior leadership level having scope and authority to accomplish the following:

    - Participation in an Executive level presentation and discussion to establish a *Point-of-Work* strategic vision and operational context to gain commitment and sponsorship to move forward.
    - Discuss *current state* performance outcomes against existing goal expectations.
    - Share the top view of known or suspected *current state* performance challenges and anticipated *future state* challenges related to the execution of the strategic PWA plan.

- Share the vision of anticipated *future state* major initiatives or transformations, technology migrations, etc.
- Identify *current state* Talent Development and Continuous Improvement collaboration initiatives.
- Establish tactical prioritization and confirm points of contact for subsequent downstream *PWRA* discovery interviews, focus groups, or surveys.

- **Phase 2** – One-on-one or group mid-level/line management interview engagements having key functional stakeholder roles to accomplish the following:
  - Participate in discovery to address *current state* performance per functional role across relevant Attribute categories shown in *Figure 18-1*.
  - Provide root cause perceptions, assumptions, or hypotheses regarding *current state* performance challenges; identify current steps taken toward mitigation; and results, if any.
  - Define *current state* training methodologies; needs assessment methods; design methods & roles; authoring platforms; delivery methods & technology; availability & access to business resources & information, performance support integration; information curation methods; utilization of actionable insight curation; asset distribution & archival protocols; taxonomy and metadata application practices; training content ownership & maintenance protocols; update notification protocols; etc.
  - Observations of *current state* training delivery sessions (*if available*) and/or access to relevant legacy training content samples.
  - Identify key Individual Contributor roles and/or functional L&D teams/groups for subsequent discovery interviews, focus groups, and/or surveys.

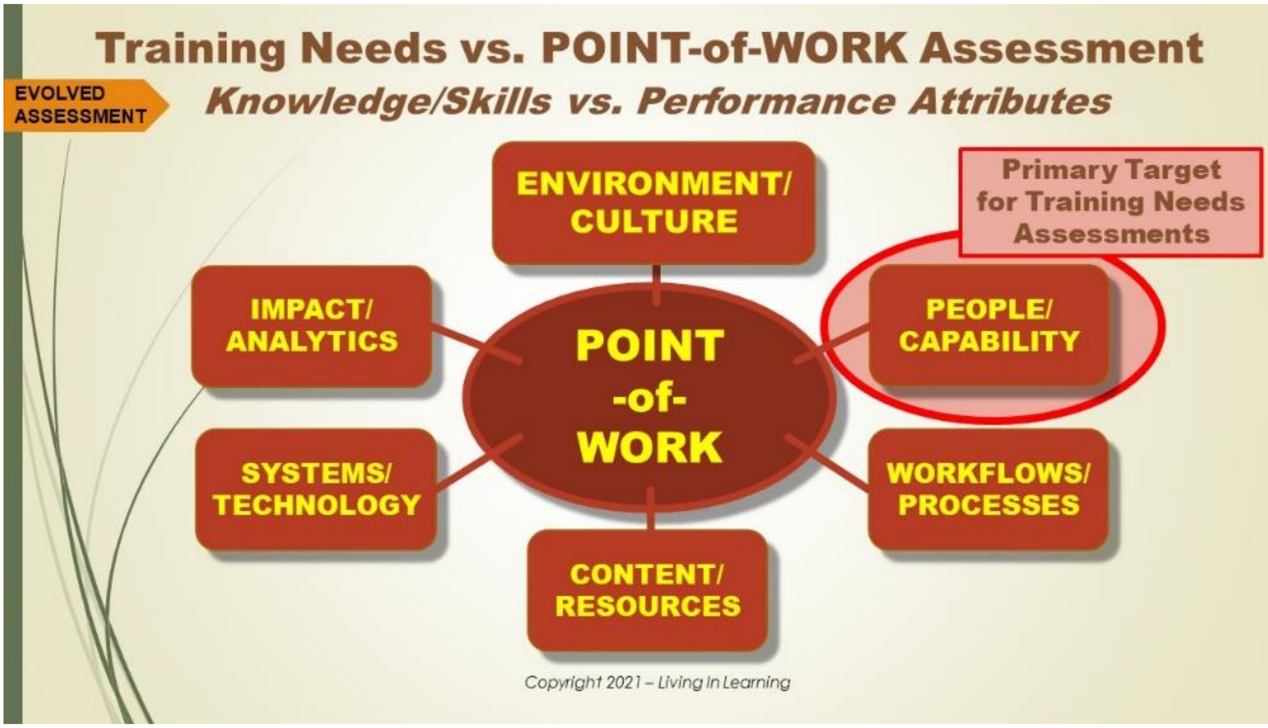


Figure 18-1

- **Phase 3** – One-on-one or peer-level group forum interviews or surveys engaging Individual Contributors having key roles to accomplish the following:
    - Participate in/observe discovery interviews to address the *current state* per functional performance role across relevant Attribute categories described in *Figure 18-1*.
    - Evaluate current assessment/discovery tactics or needs analysis methods.
    - Observe Instructor-led Training (ILT) or Virtual (VILT) sessions if available.
    - Determine the degree of sharing legacy training content across *current state* delivery venues.
    - Degree of integration of performance support assets in formal training content and delivery venues.

Who should administer the PWRA in your organization? Choose the person(s) who will also administer PWA assessments with your operational stakeholder population. Please enable them to become the PWA BME who can spread the skills to others as growth demands.

This role is best suited for a Performance Consultant or Performance Strategist. Those skills enable a conversation with Operational Leadership of any business discipline where business savvy and operational acumen are commonplace. The most important skill sets are active questioning and listening.

The following chapters align with the six categories of *performance restrainer attributes* specific to L&D. The interview questions provided are designed to identify functional areas in L&D where a state of readiness to serve as a business partner with our operational stakeholders effectively needs to be optimized.

CHAPTER 19

POINT-OF-WORK READINESS ASSESSMENT FOR L&D

– ENVIRONMENT & CULTURE –

The following Matrix 19-1 addresses questions relevant to L&D specific to *Environment & Culture.*

On a scale of 1-to-10, how effective do you feel Operational Stakeholders believe L&D's training outputs produce requested performance outcomes? Why was that rating chosen?
What trends do you experience in the requests you receive from stakeholders for building training solutions?
What shifts in training expectations are you experiencing with Millennials as they become the larger percentage of the workforce?
Who determines that Training is the "*solution of choice*" for improving knowledge, skills, or capabilities for improving performance outcomes? How should that change?
Trends show that more training responsibilities are being pushed outward to supervisory roles for delivery. How does that compare with what you are experiencing in your environment?
On a scale of 1-to-10, how successful have you been in creating a *"culture of continuous learning?"* Explain your ranking.
The L&D Industry is shifting rapidly toward the ***Point-of-Work*** by adopting approaches like **Workflow Learning** and **Learning in the Workflow**. How readily do you see your organization's leadership embracing this adoption? Explain your answer. What are you doing to influence this shift? What impedes or limits the shift?

Describe the methodology or framework applied to support initiatives where principles of Change Management are essential success factors in implementing a solution.
Is a documented, repeatable Change protocol followed when Change Management is part of a solution application?

Matrix 19-1

CHAPTER 20

POINT-OF-WORK L&D READINESS ASSESSMENT

– PEOPLE & CAPABILITY –

The following Matrix 20-1 addresses questions relevant to L&D specific to *People & Capability.*

Matrix 20-1

How do training requests originate, and what is the standard follow-up practice? • How could it be improved or more efficient?
Who determines that Training is the "***solution of choice***" for improving knowledge, skills, capability, and/or improving performance outcomes? How should that change?
How are training concepts supported and reinforced after the completion of the event?
How has training changed in the recent past? • What additional changes do you feel would improve training efficiency & effectiveness? • How has Learner engagement shifted over the recent past?
What steps are underway to address the concepts of either ***"Workflow Learning"*** or ***"Learning in the Workflow?"*** • What challenges are you facing now? Anticipated in the future?
Who (*what role*) handles Training Needs Assessments (TNA)? • With whom do they interact when identifying needs? • To what extent are job role competencies addressed?
What are the expected outcomes of completing a TNA?
How are TNA findings shared with design and production staff? • How could that be improved?

CHAPTER 21

POINT-OF-WORK L&D READINESS ASSESSMENT

– WORKFLOWS & PROCESSES –

The following Matrix 21-1 addresses questions relevant to L&D specific to *Workflows & Processes.*

How does a work/project request trigger responses from your team to get pre-qualified, screened, and assigned? • How do you feel this process could be improved?
How often are Training Needs Assessments (TNA) completed on training requests? • What information is routinely gained from your TNAs? • How are TNAs assigned, progress reported, and tracked?
How are urgent knowledge and/or skills changes critical to performance at *Point-of-Work* addressed? • How are they determined to be specific to knowledge or skill deficiencies? • Who defines the urgency? • How is business risk defined if the urgency is not addressed? • How are measurable performance outcomes *(Levels 3 & 4)* aligned with training objectives? If not aligned, why?
What are formal design methodologies followed currently? • Are they considered agile methodologies? • Do you feel an agile design methodology should be adopted? Why or why not?
Where do delays typically occur in your design and production workflow? • What do you feel would alleviate those delays?
What causes the delays?

• How much delay is added? • What is the frequency of these delays?	*Matrix 21-1*
Describe the workflow associated with training and support content updates. • Is there a standard protocol for handling updates? • What challenges exist in maintaining content with content owners?	
How are update notifications communicated to the user population? • Are these notifications efficient and timely? If not, why not? • How could they be improved, and what would be the impact?	
How much time delay exists between receiving an urgent change request and the coincident update of training and/or support materials? • What causes the delays, and how do you feel they could be minimized?	
Describe the communication process to reach content owners by end-users. • If the path is not efficient, effective, and timely, how would you change it?	

CHAPTER 22

POINT-OF-WORK L&D READINESS ASSESSMENT

– CONTENT & RESOURCES –

The following Matrix 22-1 addresses relevant questions to L&D specific to *Content & Resources.*

How long does it take for training and support content identified as out-of-date to be updated? • How are content owners and their content aligned and tracked? • What is the associated risk/liability?
How are multiple authors/SMEs assigned tasks and workflows managed within a single project? • How are task milestones tracked and notifications for timely hand-offs handled with multiple content authors?
How does your review and QA process work? • Are compliance or legal reviews required, and if so, how are documents shared, annotated, and returned? How many review iterations are typically required? • Do you feel the review process is optimized? If not, how could it be improved?
Describe the process for updating training and supplemental resource content. • Do you feel the process is optimized? If not, how could it be improved?
To what extent are performance support assets being used in Workflows currently? • Give examples
To what extent are performance support assets embedded within formal training content? • Give examples

To what extent are training content and support assets reused in other training and non-training venues? (I.E., Help Desk, Vendor education, Customer education, etc.)	Matrix 22-1
To what extent are learning and/or performance support technologies used to support formal training content and in-session exercises/activities?	
What options do training participants have for immediately accessing critical information resources at moments of need while active in ***system-based applications*** and ***non-system-based workflow*** *exercises*? *(I.E., embedded links to Intranet; direct links to SharePoint; activities integrated with knowledge bases, performance support technology, etc.)*	

CHAPTER 23

POINT-OF-WORK L&D READINESS ASSESSMENT

– SYSTEMS & TECHNOLOGY –

The following Matrix 23-1 addresses relevant questions to L&D specific to *Systems & Technology.*

Matrix 23-1

What Learning Technology do you utilize currently?
What plans are in place for upgrades or replacements?
What Digital Adoption Platform Technology (*Performance Support*) do you utilize currently?
What Curation capability is currently in use?
What are your current authoring tools of choice?
How does available bandwidth and/or network connectivity impact the delivery of formal training? • How do you determine if there are issues between training content and end-user technology? (*I.E., audio/video capability, etc*.)
To what extent do you utilize live systems/applications **<u>during</u>** training that users will be expected to use on the job after they complete the training?
How do you deliver training when changes or system updates have been made? • How are you notified of changes that indicate additional training or follow-up? • Do you feel this process is optimized? If not, how could it be improved?
How do you confirm available bandwidth, connectivity, and/or device compatibility that could impact your design/production decisions and your ability to provide training for your stakeholders?
How geographically dispersed are your End-Users? • What connectivity challenges do they face?

CHAPTER 24

POINT-OF-WORK L&D READINESS ASSESSMENT

– ANALYTICS & IMPACT –

The following Matrix 24-1 addresses relevant questions to L&D specific to *Analytics & Impact.*

What Learning-specific data are currently tracked?
How often are Level 1 evaluations administered, and related to which training venues? • How are Level 1 evaluation data utilized?
How often are Level 2 evaluations administered and related to which training venues? • How are Level 2 evaluation data utilized?
How often are Level 3 evaluations administered, and related to which training venues? If not tracked, why not? • How are Level 3 evaluations *(observable behavior changes*) accomplished? • How are the data utilized? • With whom are the data shared?
How often are Level 4 evaluations *(financial impact)* administered & related to which training venues? If not tracked, why not? • How are Level 4 evaluations accomplished? • How are the data utilized? • With whom are the data shared?
To what extent are content utilization data tracked/monitored? If not tracked, why? • Which content utilization data points are tracked? • Which systems do you have access to for extracting utilization data? • How are utilization data used?

Describe how you determine measurable business impact with current training if Level 3 & 4 evaluations are not completed.
What challenges do you encounter specific to analyzing Learning results and applying them as evidence that proves measurable Business Impact?
If you capture performance data and/or generate reports, what issues do you encounter in data capture and reporting? Which systems do you have access to for extracting performance data? • If you do not have direct access, do you have a resource who can acquire the data? • How would direct access help you?

CHAPTER 25
FINAL THOUGHTS & NEXT STEPS

I sincerely hope you have found value in reading *"Confessions of a Performance Ninja."* This book has been in progress for many months, and some of the content was captured over several years from actual field experiences. Creating the book was a great deal easier than the journey it details. I say that because the *Point-of-Work* discipline represents a paradigm shift in thinking. As paradigm shifts do, new or evolved thinking is invoked, accompanied by new skills, which spells *Change*. People tend to resist change when there is a comfortable, familiar, and embedded status quo already in place, and that resistance is precisely why I felt Ninja tactics would be called upon. True, the black pajamas and cheap sunglasses were optional equipment, but new thinking is at the core of a Point-of-Work discipline.

Do not misunderstand; the Ninja role is not as covert as you might think. What's *"Ninja"* about it is that you will accomplish holistic discovery at *Points-of-Work* without broadcasting that you are doing holistic discovery at *Points-of-Work*. Our business stakeholders want performance results; therefore, we must discover what is happening…or not…and why…at *Point-of-Work* where results manifest. This discipline is NOT a solution in and of itself; it is a pre-design discovery tool to ensure that what is ultimately developed by L&D ISD/Dev resources will impact performance at *Points-of-Work* and produce measurable results.

In closing, I will make another confession: The *Point-of-Work* discipline is not rocket science. There is nothing involved that a Performance Consultant or any role that has a shred of business savvy and operational acumen will struggle with. This is a shift in thinking and an evolved discovery skill set.

My role in what may be your next steps are primarily advisory in nature and in the form of delivering PWA workshops and coaching for L&D professionals desiring to adopt the *Point-of-Work* discipline all or in part. I say "*All, or in part,*" because there may well be much you already do tactically to support your stakeholders. The Readiness Assessment Chapter will provide a good guideline of what capabilities should be intact and can serve as a decent readiness checklist.

Whatever you choose to do…or not…I offer my thanks to you for reading the book. As always, I welcome deeper discussions and hope to receive any feedback you care to share.

Thanks for reading, and take good care!

G.

Gary G. Wise

Performance Ninja, Coach/Advisor, Writer of Things

gdogwise@gmail.com

(317) 437-2555

Web: Living In Learning

LinkedIn

PART 5

PWA WORKSHEETS (W/ INSTRUCTIONS) & JOB AIDS

MASTER PWA WORKSHEET TEMPLATE

Download Worksheet here – **Master PWA Worksheet Template**

PWA Master Worksheet Template Instructions:

This Excel spreadsheet is not password protected and has nine (9) tabs:

IMPORTANT NOTE: Before using this template, open it in Excel and immediately SAVE AS with a different filename (i.e., PWA Worksheet – WORKING COPY) so the Master version remains a true Master. Any future update downloads will contain an Update Version # and retain this naming convention (**PWA Master Worksheet Template – Version X.0**). Always begin a new PWA discovery from your WORKING COPY file and SAVE AS a new filename. Much of this spreadsheet has embedded links; keeping your Master as a Master will protect those links. The spreadsheet is NOT password protected, so making a master copy is a good plan.

INSTRUCTION FORMAT: The following instructions show illustrations that walk you through the TABS and pages under each. You will notice there are cell-by-cell guidance notes on the spreadsheet pages. You may print these Instruction Tabs listed below unless you have a dual-screen extension arrangement.

- *PROFILE TAB*
- *ALIGN TAB*
- *ATTRIBUTE TAB*
- *DISCOVERY TAB*
- *WORKSHEET TAB*
- *DISTRIBUTION TAB*
- *PRIORITIES TAB*
- *MEASUREMENT TAB*
- *DRIVERS TAB*

CONFESSION: *I'm not a fan of filling out forms; hence, these pages in this spreadsheet may never be used more than once, most likely only as an initial guide. Some may never be used. So why provide them? Everything in this spreadsheet should be considered during a PWA, whether the worksheet is used or not. As such, I've defaulted to the lowest common denominator once again and included the minutia that I trust your judgment to include or exclude as your PWA project prowess dictates.*

Profile-1 shown below is basic information about the Project and primary contacts.

PROFILE TAB

TOC

PWA - PROJECT PROFILE

PWA for	Enter Client Name	Busness Unit	Enter BU Name	Date	Enter Project Start Date
Project Initiative Name	Enter Project Name	Lead Business Owner(s)	Enter Primary Owner Contact	Enter Secondary Owner Contact	
Projected GoLive Date	Enter GoLive Date	Phone	Enter Phone	Enter Phone	
		Email	Enter Email	Enter Email	

Profile – 1

Profile-2, shown below is a continuation of the Profile Tab

BUSINESS UNITS IMPACTED	Enter BU Name				
BU Stakeholder Name	Enter BU Contact				
Phone					
Email					
Engagement Notification Date	Enter when to notify affected BU contact				
Extent of Engagement	Description of BU Engagement to/from Project				
BU Roles Impacted	Impacted Role(s)				
Other Projects Impacted	Enter Up or Downstream Projects Impacted				

Profile – 2

- **Business Units Impacted** – What OTHER Business Units may this project impact?
- **Engagement Notification Date** – When will the OTHER Bus need to be notified – Used by the Project Manager to build a timeline and milestone targets.
- **Extent of Engagement** – Description of the engagement related to the input or output of this project to/from the OTHER BU.
- **BU Roles Impacted** – What roles (if any) in the OTHER Bus will be impacted? This information serves to identify potential support assets necessary to aid those roles. Recall the SIPOC model where up/downstream RIPPLE effects must be considered. Recall the "R" in DRIVER for *Replicating Content*…(Create Once - Use Many times)
- **OTHER Projects Impacted** – What projects besides yours are underway that may be impacted? Are there elements of those projects that would be redundant efforts? Are there assets from the OTHER projects that make new creations unnecessary and can be repurposed or reused in your project? Etc.

CONFESSION: *If your solution generates positive results, remember to make sure those results do not negatively disrupt another group's workflow. Our team improved productivity in an order-entry function by 70% every week and never considered the downstream RIPPLE effects of 70% more orders landing in the laps of the FULFILLMENT team every week. This impact was positive, BUT there was a period of chaos (backlogs) to adjust to the higher volume of orders. Suppose we had run a limited pilot to gain experience on the productivity impact. In that case, we could have at least minimized the "Holy Backlogs, Batman!" moment and not blown out the Fulfillment team's performance metrics for timely order fulfillment.*

Recall the "I" in DRIVER for Intentional Design…especially the incremental deployment drill using pilot tests. We failed to ***start small and scale****…always a best practice.*

ALIGN TAB

PWA - ALIGNMENT

#	Statement of Business Challenge *(Current State)*	Performance Benchmarks *(Current State)*	KPIs *(Current State)*
	Enter a description of the stakeholder's challenge(s)- It may be stated as a missed goal or deficient performance in general terms if specifics are unknown initially.	What performance is currently measured and what are current results or level of performance - May be general or specific	Current KPI units tracked
	Operational/Behavioral Evidence of Impact – Level 3 *(Future State Performance Targets)*	**Financial Evidence of Impact – Level 4** (Future State Financial Targets)	**KPIs** *(Future State)*
	Desired level of observable behavioral performance (Level 3) as defined by the stakeholder	Desired targeted level of financial impact (Level 4) as defined by the stakeholder	Define KPIs if different from current

Align – 1

- **Current State Business Challenge** – Enter a description of the stakeholder's challenge(s). It may be stated as a missed goal or deficient performance in general terms if specifics are unknown initially.
- **Current State Benchmarks** – What performance is currently measured, and what are the current results or level of performance?
- **Current State KPIs** – Current KPI units tracked.
- **Future State Behavioral Evidence of Impact at Level 3** – Anticipated observable behavioral performance (Level 3) as defined by the stakeholder. (*If any is known*)
- **Future State Financial Evidence of Impact at Level 4** – Anticipated financial impact (Level 4) as defined by the stakeholder. (*If any is known*)

<u>CONFESSION</u>: *We should have asked for these impact numbers more often than not. Try not to allow disappointment to show on your face when the Requesting stakeholder is not prepared to quantify measures at Level 3 and especially Level 4, but be sure to ask, as these measures are critical to quantifying the business impact of your project. You may find out the best measures from your PWA interviews, and* *that's okay, be sure to validate them with the Requestor. These numbers are essential to extract the evidence stakeholders want, so try to get them, even if they are best guesses.*

ALIGN TAB (Continued)

PWA - ALIGNMENT

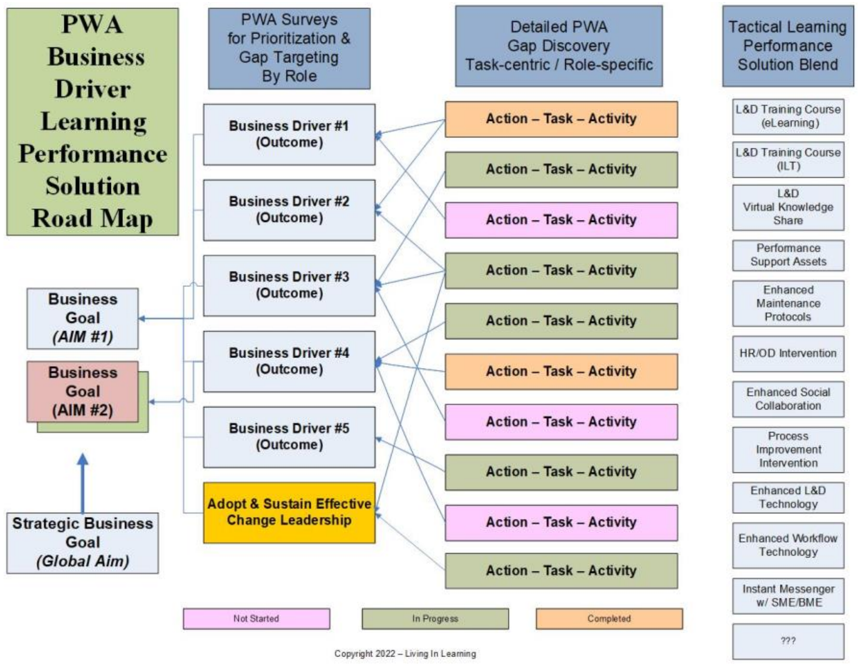
DRIVERS & RESTRAINERS - Required Performance Outcomes - *(4-6)*

#	Description of Driver (Future State)	KPI(s) (Future State)	Restrainers – Root Cause(s) Hypotheses (Current State)	Potential Performance Roadblocks (Future State)
A	*Enter a description of the stakeholder's challenge(s)- It may be stated as a missed goal or deficient performance in general terms if specifics are unknown initially.*	***What are KPIs used to track performance?***	***Description of Requestor's perceptions, assumptions, or hypotheses related to root causes (if any)***	Anticipated areas that may impact performance. This is typically an unknown and serves as a touch point for follow-up post-implementation to confirm or modify as appropriate.
B				

Align – 2

- **Future State Drivers** – Enter a description of what **Outcomes** must be accomplished to overcome the stakeholder's challenge(s) and contribute to Business Goals.
- **Future State KPIs** – What KPIs will track performance?
- **Current State Restrainers** – **Root Cause – Hypotheses** – Description of Requestor's perceptions, assumptions, or hypotheses related to root causes (if any). If unknown, try for *"best guess"* from the Requestor and notate accordingly.
- **Future State Potential Roadblocks** – (*Used for New Performance scenarios*) Anticipated areas that may impact performance. This is typically an unknown and serves as a touch point for follow-up re-assessment post-implementation to confirm or modify as appropriate.

PWA Discovery at *Action – Task – Activity* levels contribute to one or more Business Drivers (Outcomes) that contribute to one or more Business Goals. (*See Align – 3)*


PWA Business Driver Learning Performance Solution Road Map
PWA Surveys for Prioritization & Gap Targeting By Role
Detailed PWA Gap Discovery Task-centric / Role-specific
Tactical Learning Performance Solution Blend
Business Driver #1 (Outcome)
Business Driver #2 (Outcome)
Business Driver #3 (Outcome)
Business Driver #4 (Outcome)
Business Driver #5 (Outcome)
Adopt & Sustain Effective Change Leadership
Action – Task – Activity
Business Goal (AIM #1)
Business Goal (AIM #2)
Strategic Business Goal (Global Aim)
L&D Training Course (eLearning)
L&D Training Course (ILT)
L&D Virtual Knowledge Share
Performance Support Assets
Enhanced Maintenance Protocols
HR/OD Intervention
Enhanced Social Collaboration
Process Improvement Intervention
Enhanced L&D Technology
Enhanced Workflow Technology
Instant Messenger w/ SME/BME
???
Not Started
In Progress
Completed
Copyright 2022 – Living In Learning

Align – 3

ATTRIBUTE TAB

The graphic *Attribute – 1* is embedded in the PWA Worksheet on the Attribute Tab and can be printed and used as a **Job Aid**.

Note the **ATTRIBUTE TAGS** highlighted in yellow:

- **E** – Environment/Culture
- **P** – People/Capability
- **W** – Workflows/Processes
- **C** – Content/ Resources
- **S** – Systems/Technology
- **A** – Analytics/Impact

These TAGS will be used in the Discovery Tab for categorizing interview responses. The Attributes in each category of restrainer are not an exclusive list. Feel free to add or ignore it based on your environment. I've included what I've experienced most often.

PWA - ATTRIBUTE MATRIX

Attributes listed below represent a JOB AID of potential drivers or restrainers to performance and productivity at Points-of-Work. Feel free to add or delete as necessa

ATTRIBUTE CATEGORIES - (6)

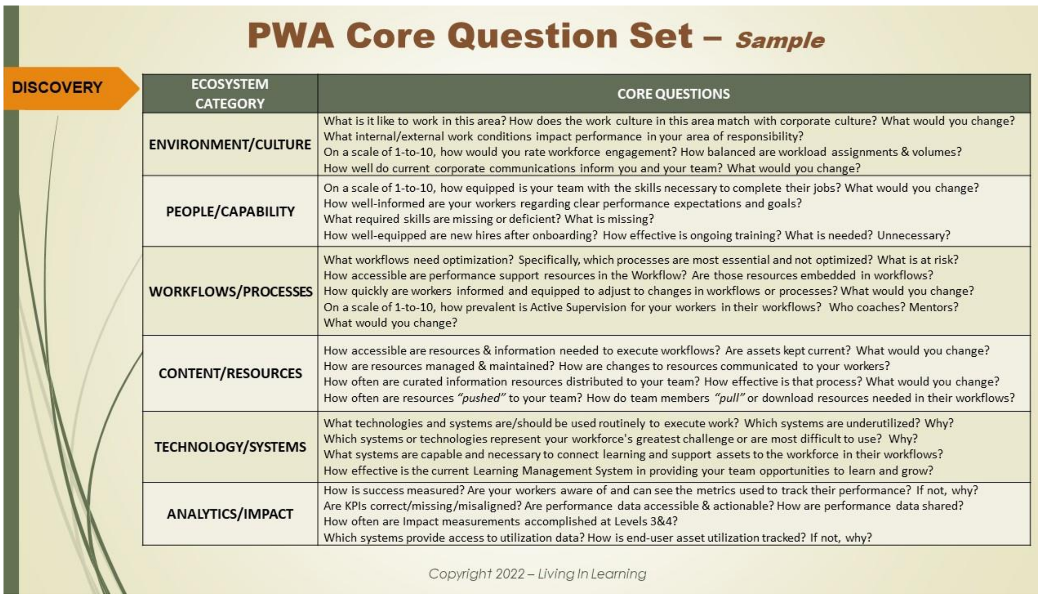
E	ENVIRONMENT/CULTURE	What internal/external attributes influence environment & culture at PoW?
	Culture – Mission – Vision – Organizational Design – Cross Team/Departmental Dependencies – Change Leadership – Corporate Communications – Inclusiveness Cohesive Teams – Engagement – Regulatory & Legal Compliance – Product/Service Mix – Competition – Pricing – Product Availability – Perceived Urgency/Risk to Perform Pace/Velocity of Demand – Workload/Volume Balance – Headcount/Staffing/Capacity M&A Implications – Budget Restrictions/Pressure Empathy/Value/Caring	
P	PEOPLE / CAPABILITIES	Who is involved? What human attributes influence roles & capabilities at PoW?
	Leadership – Role/Goal Clarity – Role Accountability – Performance Expectations – Team Communications – Intra-Team/Inter-Team Collaboration – Active Supervision Coaching/Mentoring – Talent Development (*Training - Knowledge - Skills - Competencies*) – Career Development Performance Management – Succession Planning	
W	WORKFLOW / PROCESSES	What is the work? What attributes influence workflows & processes at PoW?
	Task-Level, Role-Specific Workflows/Processes – Root Cause Performance Restrainers – Productivity – Project Management – Process/Procedural Change Management Decision Support – Critical-Thinking Support – Informed Decision-Making Support – Moment of Need Support – Policy/Methods/Procedures/SOPs – Delays – Redundant Effort – Problem Isolation – Process Improvement Opportunities – Creation of Excess Material Waste – Absent or Slow Feedback/Notification – Inefficient or Compromised Upstream/Downstream Hand-Offs/Contacts – Workflow Dependencies	
C	CONTENT / RESOURCES	What information, content, media & other resources are used at PoW?
	Accessibility – Navigation – Search – Taxonomy – Relevance to Task-Level Workflows & Processes – Application & Effectiveness @ Point-of-Work Availability at Moments of Need – Distribution of Resources – Content Volume/Format – Content & Resource Ownership & Maintenance Resource Update Notification Protocols – Sustainability Content/Portability – Repurposing/Reusability – Missing Content	
S	SYSTEMS / TECHNOLOGY	What systems and end-user technology are involved at Point-of-Work?
	Access to Appropriate Business Systems – Mobility & Utilization – Effective End-User Application of Technology & Apps – System Search Functions Content Repositories – Learning Management/Experience Platforms – Collaboration Platforms – Analytics Platforms – xAPI/Learning Record Stores Additional/Missing Technology Required Upgrades/Consolidations – New Technology Deployment – Bandwidth/Connectivity Migration Road Map Implications – Digital Transformation – Systems Transition/Migration	
A	ANALYTICS / IMPACT	What metrics and measures serve as validated evidence of impact at PoW?
	KPI Alignment (*Current State/Future State*) – Benchmarking – Report Creation – Requesting Reports – Performance Dashboards – Forecasting Planning – Modeling – Data Analysis – Application of Data – Data-based Decision-making – Learning Impact Measurement at Levels 3 & 4	

Criticality Ranking	Optional 1	Nominal 2	Important 3	Mission Critical 4

Attribute - 1

DISCOVERY TAB

The Discovery Tab shows all six categories of *Performance Restrainer Attributes* provided earlier in Chapter 17. These questions may serve as Job Aids or source content for establishing a **Core Question Set** before Discovery interviews. *(See Discovery – 1)*



ECOSYSTEM CATEGORY	CORE QUESTIONS
ENVIRONMENT/CULTURE	What is it like to work in this area? How does the work culture in this area match with corporate culture? What would you change? What internal/external work conditions impact performance in your area of responsibility? On a scale of 1-to-10, how would you rate workforce engagement? How balanced are workload assignments & volumes? How well do current corporate communications inform you and your team? What would you change?
PEOPLE/CAPABILITY	On a scale of 1-to-10, how equipped is your team with the skills necessary to complete their jobs? What would you change? How well-informed are your workers regarding clear performance expectations and goals? What required skills are missing or deficient? What is missing? How well-equipped are new hires after onboarding? How effective is ongoing training? What is needed? Unnecessary?
WORKFLOWS/PROCESSES	What workflows need optimization? Specifically, which processes are most essential and not optimized? What is at risk? How accessible are performance support resources in the Workflow? Are those resources embedded in workflows? How quickly are workers informed and equipped to adjust to changes in workflows or processes? What would you change? On a scale of 1-to-10, how prevalent is Active Supervision for your workers in their workflows? Who coaches? Mentors? What would you change?
CONTENT/RESOURCES	How accessible are resources & information needed to execute workflows? Are assets kept current? What would you change? How are resources managed & maintained? How are changes to resources communicated to your workers? How often are curated information resources distributed to your team? How effective is that process? What would you change? How often are resources *"pushed"* to your team? How do team members *"pull"* or download resources needed in their workflows?
TECHNOLOGY/SYSTEMS	What technologies and systems are/should be used routinely to execute work? Which systems are underutilized? Why? Which systems or technologies represent your workforce's greatest challenge or are most difficult to use? Why? What systems are capable and necessary to connect learning and support assets to the workforce in their workflows? How effective is the current Learning Management System in providing your team opportunities to learn and grow?
ANALYTICS/IMPACT	How is success measured? Are your workers aware of and can see the metrics used to track their performance? If not, why? Are KPIs correct/missing/misaligned? Are performance data accessible & actionable? How are performance data shared? How often are Impact measurements accomplished at Levels 3&4? Which systems provide access to utilization data? How is end-user asset utilization tracked? If not, why?

Discovery – 1

Will you ask every one of these questions? Probably not. For example, the seven **Core Questions** I asked in Case Study 5B are listed below. Many follow-ups were asked, like *"Tell me more about that. Why do you think that happens? What would you do differently?"*

- Talk to me about what it's like working here. If anything, what would you change?
    - *Seeking Environment/Culture attributes*
- Do teams collaborate well on projects like new product launches? Challenges?
    - *Seeking People/Capability attributes*
- On a scale of 1 to 10, how would you rate the course selection at Marketing University? What should change?
    - *Seeking People/Capability attributes*
- Are current workflows and processes optimized? If not, what should change?
    - *Seeking Workflow/Processes attributes*

- Do you/your team members have easy access to the right resources? If not, what's missing?
    - *Seeking Content/Resources attributes*
- Do you/your team have access to the right technology to get the job done in your area? If not, what else is needed?
    - *Seeking Systems/Technology attributes*
- Do the performance metrics for your work and workgroup accurately reflect your/their contributions? If not, what would be better measures of performance?
    - *Seeking Analytics/Impacts attributes*

WORKSHEET TAB

The PWA Discovery Worksheet is used to RECORD, and TAG responses by restrainer Category for each question asked. *(See Worksheet – 1)* The worksheet TAG entries feed the algorithm that populates the **Conversation Changer** Pie Chart in the Distribution Tab.

PWA - SUMMARY WORKSHEET

This worksheet can be used during discovery interviews or as a summary of responses post-interview. If used after the interview, be sure to take good notes, as it is important to include specific details of the responses to attach the appropriate TAGS. Each response TAG is marked with a numeral denoting how many responses fall into each TAG category. For example, if two responses matched with Environment/Culture, then the "E" TAG would be marked with a two (2). If in that same response column there was a reference to Systems/Technology, a one (1) would be marked under the "S." Upon completion of the interview, a **Criticality Ranking (CR)** of 1 to 4 would be added in the CR column where **1 = Optional 2 = Nominal 3 = Important 4 = Critical**. This ranking is accomplished collaboratively with the Requestor during debriefing.

DISCOVERY QUESTION	RESPONSE	E	P	W	C	S	A	CR	GAPS/ROOT CAUSES/RESTRAINERS
What's it like to work in this area?	The workload is very high since people have left - E A lot of frustration exists from not getting support - E The new pricing system is very difficult to use - S	2				1		4	Workloads out of balance Supervisors not providing support in the workflow Users not prepared to use the new pricing system

Worksheet – 1

It would be best if you used this worksheet to generate the visual pie chart Conversation Changer that is automatically built in the following Distribution Tab.

I've found it easiest to use after the interviews and work from my notes or a recording.

<u>**CONFESSION**</u>***:*** *I am wired half-duplex, meaning I can do two things, but only one at a time; hence, I always try to use a recorder, so my full attention is on the responses given during the interviews. In other words, I cannot take effective notes AND listen actively. I find it easier to listen to the recorded questions and responses given after the fact so I can accurately fill out this worksheet.*

The Workbook is built with only two pages—the second page *(See Worksheet – 2)* has instructions to add rows. Note that this sheet's summary of Restrainer Attributes resides at the bottom of the last page. To protect the algorithm's integrity, you MUST add additional rows above the Gold Line.

Add/Delete rows above this line (*as required*) to preserve formula integrity in Summary Section & the Conversation Changer Distribution Graph on the DISTRIBUTION TAB									
PWA Restrainer Attribute Summary Section									
	ENVIRONMENT/CULTURE		**2**						
	PEOPLE/CAPABILITY		**0**						
	WORKFLOW/PROCESSES		**0**						
	CONTENT/RESOURCES		**0**						
	SYSTEMS/TECHNOLOGY		**1**						
	ANALYTICS/IMPACT		**0**						

Worksheet - 2

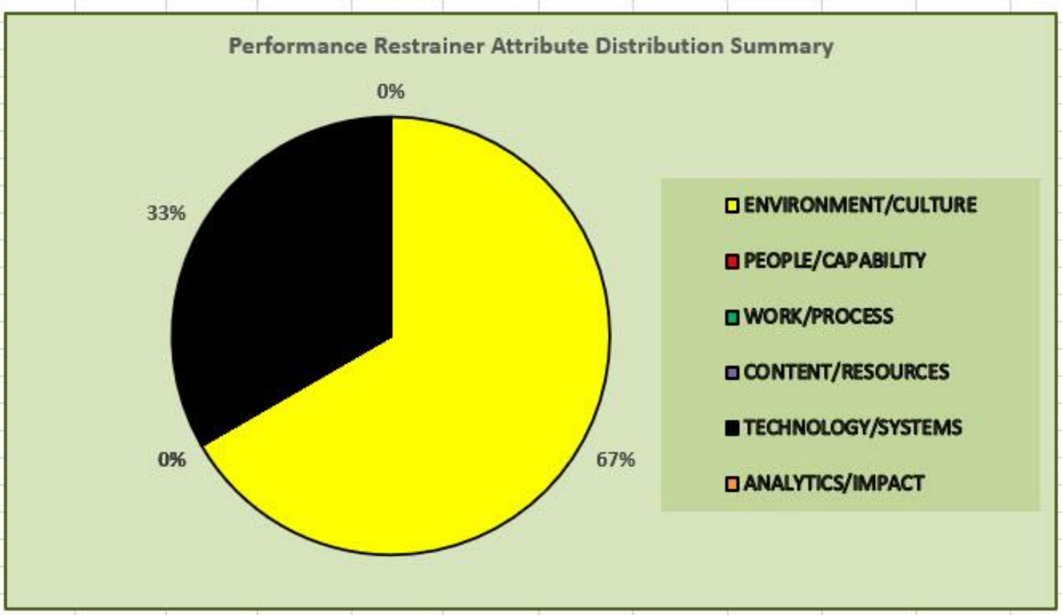
DISTRIBUTION TAB

The Distribution Tab is fully protected and populated from the data input on the Worksheet Tab. (See Distribution – 1)

<u>CONFESSION</u>: *I find that I do not need to use this worksheet in its entirety. Despite the size and complexity of this Worksheet, you may quickly find that you can* ***Change the Conversation*** *by using only the WORKSHEET TAB and the DISTRIBUTION TAB. So why did I build the rest of this Workbook? It is a field guide, and I believe in the Learning Performance Continuum, which means building competency by supporting Point-of-Entry through to Point-of-Work. That said, you may be more comfortable using fewer tabs; for example, you may already have project management software, so you may not need to bother with the PROFILE TAB.*

PERFORMANCE RESTRAINER ATTRIBUTE SUMMARY

ATTRIBUTE CATEGORY	Tag Count	%
ENVIRONMENT/CULTURE	2	67%
PEOPLE/CAPABILITY	0	0%
WORK/PROCESS	0	0%
CONTENT/RESOURCES	0	0%
TECHNOLOGY/SYSTEMS	1	33%
ANALYTICS/IMPACT	0	0%
Totals	3	100%



Distribution - 1

Recall the example from the Worksheet Tab where we had two Environment/Culture responses and a single Systems/Technology response. Those data are carried forward to this Distribution graphic. The pie chart changes dynamically based on changes you may make in the Worksheet Tab.

The pie chart is your ***Conversation Changer*** visual.

PRIORITIES TAB

The PRIORITIES TAB *(See Priorities – 1)* is used for several reasons:

- **Stakeholder Requestor Debrief** – Where Discovery Findings are shared with the Requestor to validate what is happening at Point-of-Work by Attribute Category and Root Cause.
- **Prioritizing Solution Design –** In support of the "I" of DRIVER – *Intentional Design* and incremental deployment in Test Pilots to validate effectiveness. Prioritization is completed collaboratively with the Requestor.
- **Establishing Success Metrics –** Confirm with the Stakeholder Requestor which measures of success are acceptable to establish Future performance goal targets by projecting impact.

Priorities – 1 is an example screenshot of a Solution/Action Priorities page from an actual PWA.

PWA - SOLUTION/ACTION PRIORITIES

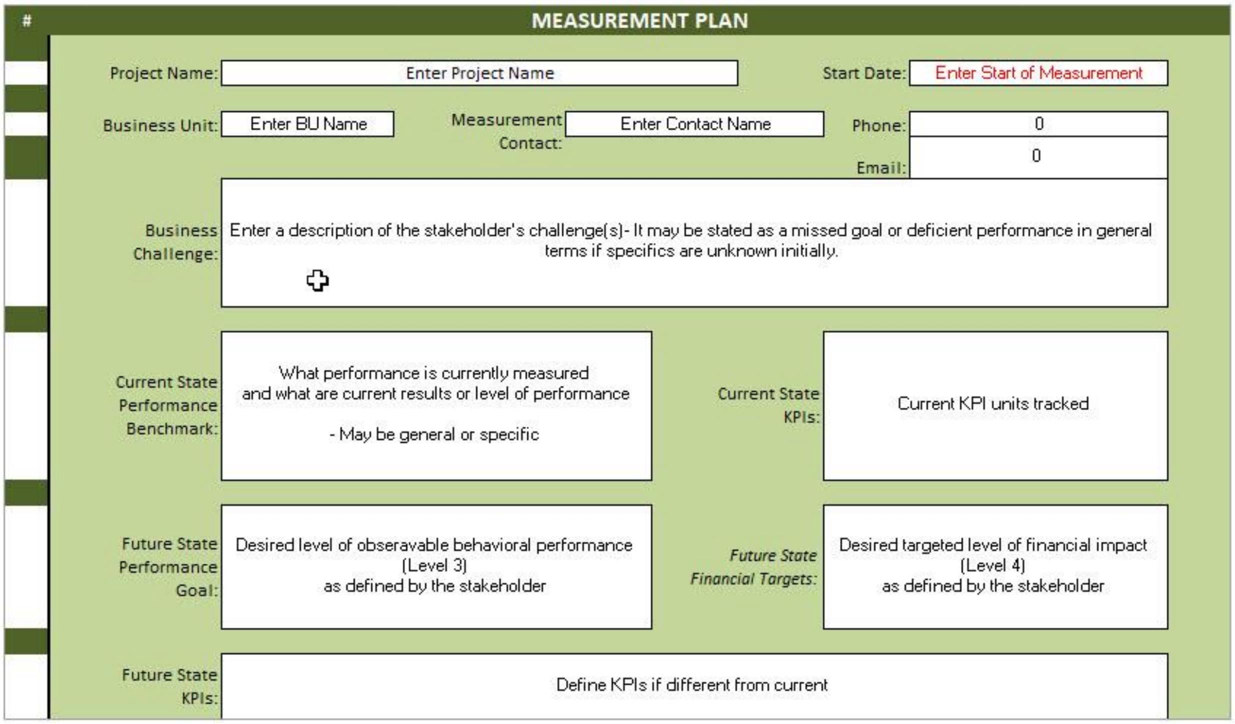
#	ATTRIBUTE CATEGORY	GAPS/ROOT CAUSES/RESTRAINERS	PROJECT/ACTION INITIATIVE/OWNER	PROJECTED IMPACT	CBI
	Restrainer Attribute Category *Sub-Category*	Cause(s) of Performance Gap	Description of Recommended Actions Responsible Owner Contact	Description of impact evidence KPIs if available for Levels 3 & 4 evaluation source data	Critical Rank (1-4)
1	**Content/Resources** *Application Effectiveness*	* Use and process around KB articles: * No single point of accountability; * No process to confirm currency or updates;	* Continue KB Deep Dive Project * Currently being driven by Ginger with aspects managed by vaious members of Technical Support Managememt Team	Call Hold Times <9 min/call First Call Resolution increase to > 75% Decreased escalation to Tier 2 by >25% Improved Customer Sat scores to >90%	**4**
2	**Content/Resources** *Missing*	* Difficulty finding the right information resources for technical problem resolution in timely manner * Search function not returning appropriate information * Some KB resource info may be missing altogther	* Identification of items that are currently available but possibly overlooked by team * Clarify with team on individual aspects for details on what is missing * Collaborate with SEs on creating content confirmed to be missing * Confirm nature of search challenges and develop job aids for workflow and training insertion	Call Hold Times <9 min/call First Call Resolution increase to > 75% Decreased escalation to Tier 2 by >25% Improved Customer Sat scores to >90%	**4**

Priorities - 1

MEASUREMENT TAB

The MEASUREMENT TAB has links from the PROFILE TAB where entered data is carried forward to this tab except for the *Start Date of Measurement*. *(See Measurement – 1)* This sheet is protected, so if you did NOT use the PROFILE TAB, break the links and manually fill in the Measurement Plan.

PWA - IMPACT/ANALYTICS


**MEASUREMENT PLAN**

Project Name: Enter Project Name
Start Date: Enter Start of Measurement

Business Unit: Enter BU Name
Measurement Contact: Enter Contact Name
Phone: 0
Email: 0

Business Challenge: Enter a description of the stakeholder's challenge(s)- It may be stated as a missed goal or deficient performance in general terms if specifics are unknown initially.

Current State Performance Benchmark: What performance is currently measured and what are current results or level of performance

- May be general or specific

Current State KPIs: Current KPI units tracked

Future State Performance Goal: Desired level of obseravable behavioral performance (Level 3) as defined by the stakeholder

Future State Financial Targets: Desired targeted level of financial impact (Level 4) as defined by the stakeholder

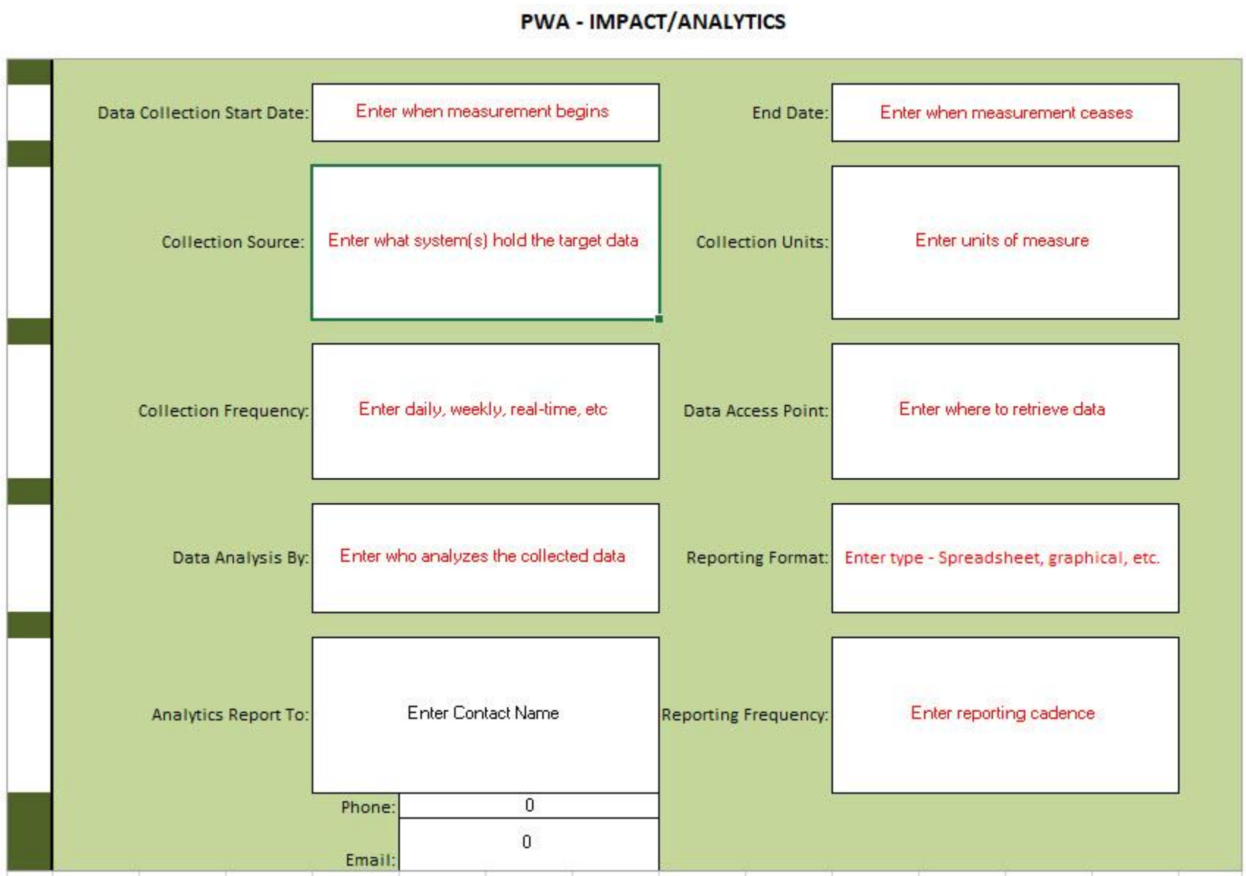
Future State KPIs: Define KPIs if different from current

Measurement – 1

<u>CONFESSION</u>: *For years, we NEVER planned for measuring beyond how many butts-in-seats, classes held, eLearning courses completed, participant satisfaction scores, etc.*
We evaluated (L & D) performance on activity, not impact! We consistently had Level 1 for Sat scores and, not quite as consistently, Level 2 when we had a final exam or some pre-test/post-test indicators. Level 3 & 4 evaluations on impact were a pipe dream; we either made it up or cooked the books. *We could only prove how busy we were…not how effective*.

MEASUREMENT TAB

The second page of the MEASUREMENT TAB is not linked, so all entries must be made manually.



Measurement – 2

All data fields on this second page must be filled in manually except for the "*Analytics Report To:*" field carried forward from the PROFILE TAB.

IMPORTANT NOTE: If you are serious about responding to Stakeholders asking for proof of impact, you will need to build a *Measurement Plan*. Data points on this example plan should be included before the solution is launched. Collecting impact data is a post-training or post-implementation event, as is reporting results to the stakeholders.

Ongoing measurement is a great source for tracking Sustainability, highlighting where performance may be dropping off. Measuring performance in that manner should trigger a follow-up limited scope PWA to find out why performance dropped and then optimize with updated solution(s).

Words to live by: If you have not or cannot measure impact – it never happened!

DRIVERS TAB

The DRIVERS TAB *(See DRIVERS – 1)* is intended to support post-discovery collaboration with Instructional Design, Development, and Delivery resources in L&D.

Working Definition: A DRIVER is any successfully executed *activity/task/decision* that produces measurable results necessary to deliver a desired business OUTCOME. In other words, a DRIVER represents the successful *"finished state"* of a specific activity.

#	DRIVER ASSET INTEGRATION								
	Driver #A	Enter a description of the stakeholder's challenge(s)- It may be stated as a missed goal or deficient performance in general terms if specifics are unknown initially.		Root Cause Hypothesis	Description of Requestor's perceptions, assumptions, or hypotheses related to root causes (if any)				
	Process BME		Phone Email		Content Owner		Phone Email		
TASKS/STEPS Critical to Business Driver									
#	Description of Task - A1	Deficient Performance?	KPI	PS Object Description	Medium	Source/Link	Access Technology	Direction	Embed?
#	Description of Root Cause Impact		Source of Root Cause			Potential Ripple Effect			
#	Description of Task - A2	Deficient Performance?	KPI	PS Object Description	Medium	Source/Link	Access Technology	Direction	Embed?
#	Description of Root Cause Impact		Source of Root Cause			Potential Ripple Effect			

Drivers – 1

The DRIVERS TAB has room to describe six DRIVERS with three TASKS under each.

CONFESSION: *This is another Tab designed to serve as a field guide, not necessarily a form to complete for every task identified.* ***A word of caution****; however, I can recall many times a team member needed to accomplish an update to an existing asset only to have no clue where the original author may (or may not) have stashed it. This is even more critical when a video is involved because it may be stashed in a completely different archive. Recall the "R" – Replicate in the DRIVER model.* ***Manage your content, or it will manage you!***

- **Description of Task** – What must be completed successfully?
- **Deficient Performance** – Is this Task a source of the problem?
- **KPI** – What are the units of measure?

- **PS Object Description** – What should the performance support object be? Job Aid? Video clip? Hotlink to a Policy file? Etc.
- **Medium** – What will the delivery medium consist of? Video, links to database, etc.
- **Source/Link** – How do designers/developers get to the asset?
- **Access Technology** – How do end-users access the asset? Digital Adoption Platform (DAP), Link to SharePoint? Etc.
- **Direction** – Is this asset to be Pushed, Pulled, or both by the end user?
- **Embed?** – Will this asset be embedded in formal learning programs or other documents?