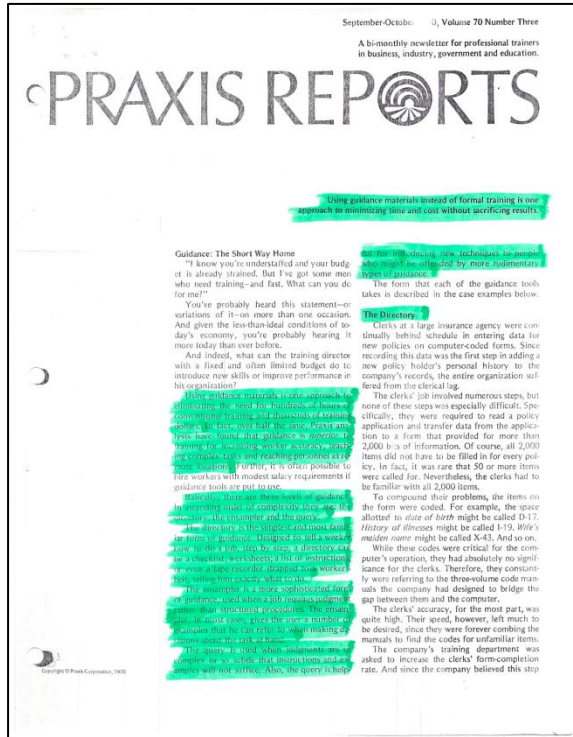




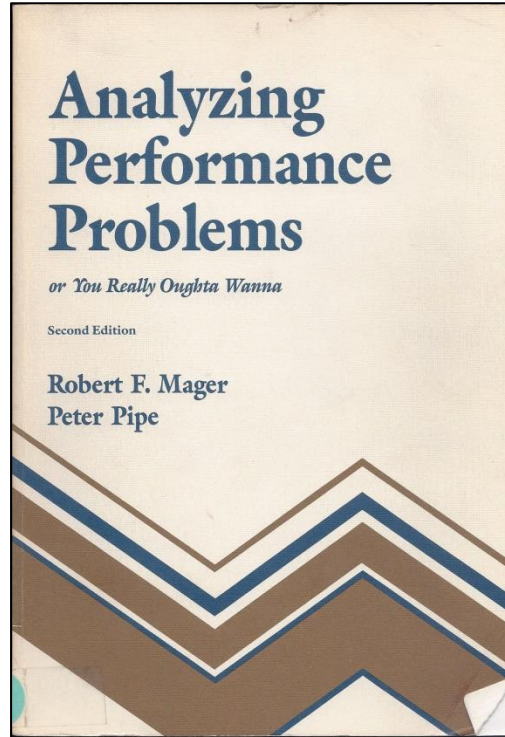
Guy W. Wallace
Performance Analyst
& Instructional Architect
since 1979

Focus on Performance Performance & Enabler Analysis

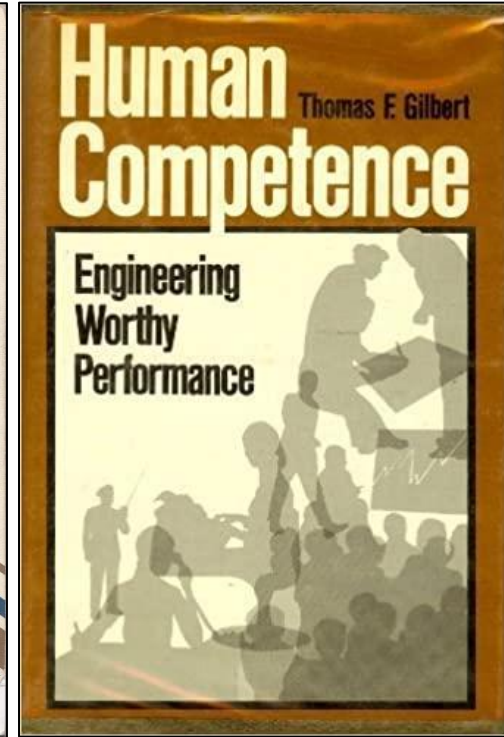
On Day 1 – August 6, 1979 I was given these 3 things to read and study...



Published September-October 1970



Published 1970



Published 1978

Later that week I was given a 400+ page binder to read and study...on page 404...

The first thing Performance, Inc., does in making a performance analysis is determine and describe the ideal or desired performance of the em-

activity the employees engage in, but rather by identifying the major accomplishments or outputs (the results of the activity) of the job.

Then, the performance requirements, expectations, or standards for each
pared to the desired, thereby identifying areas that require further analysis and action.

From a Praxis Workshop 1972

Praxis was the consulting firm of Geary A. Rummler , Ph.D. and Tom Gilbert, Ph.D.

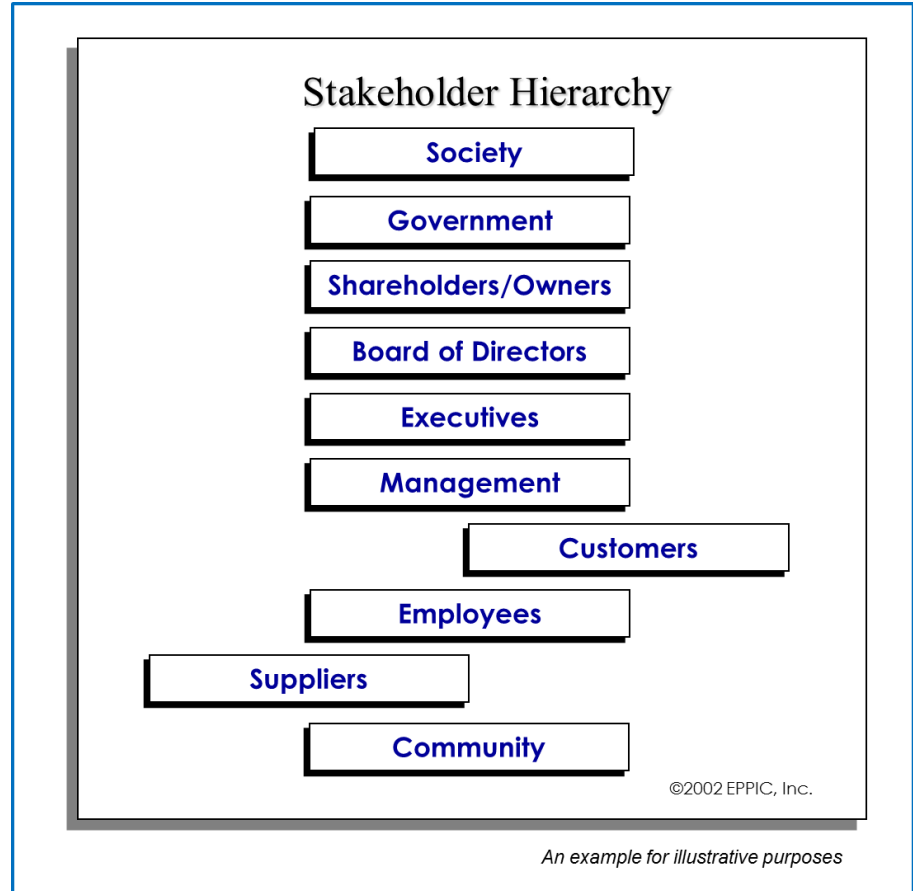
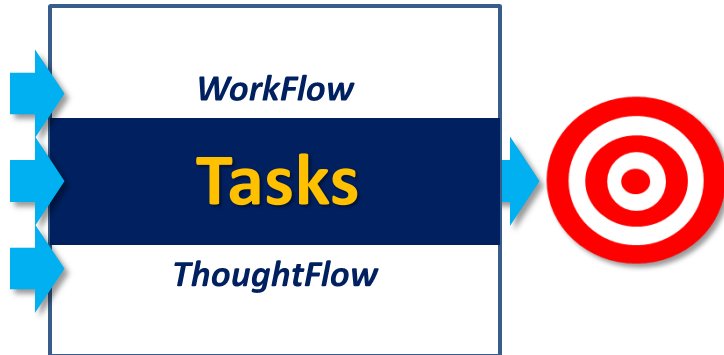
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1- Define the **Outputs**

The Process – Workstream – WorkFlow



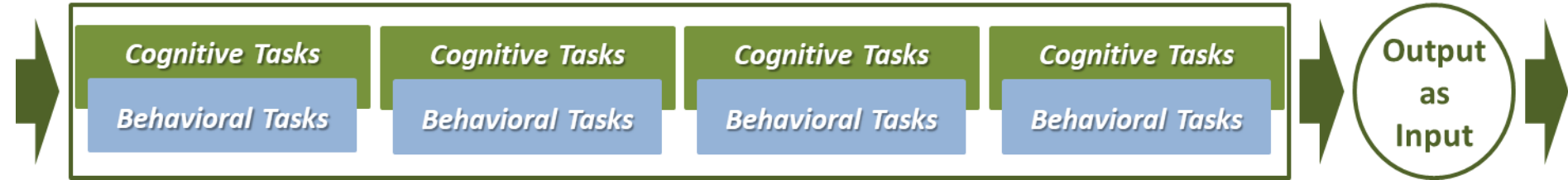
2- Establish the **Output's Measures & Standards**



3- Define the **Tasks** per Output

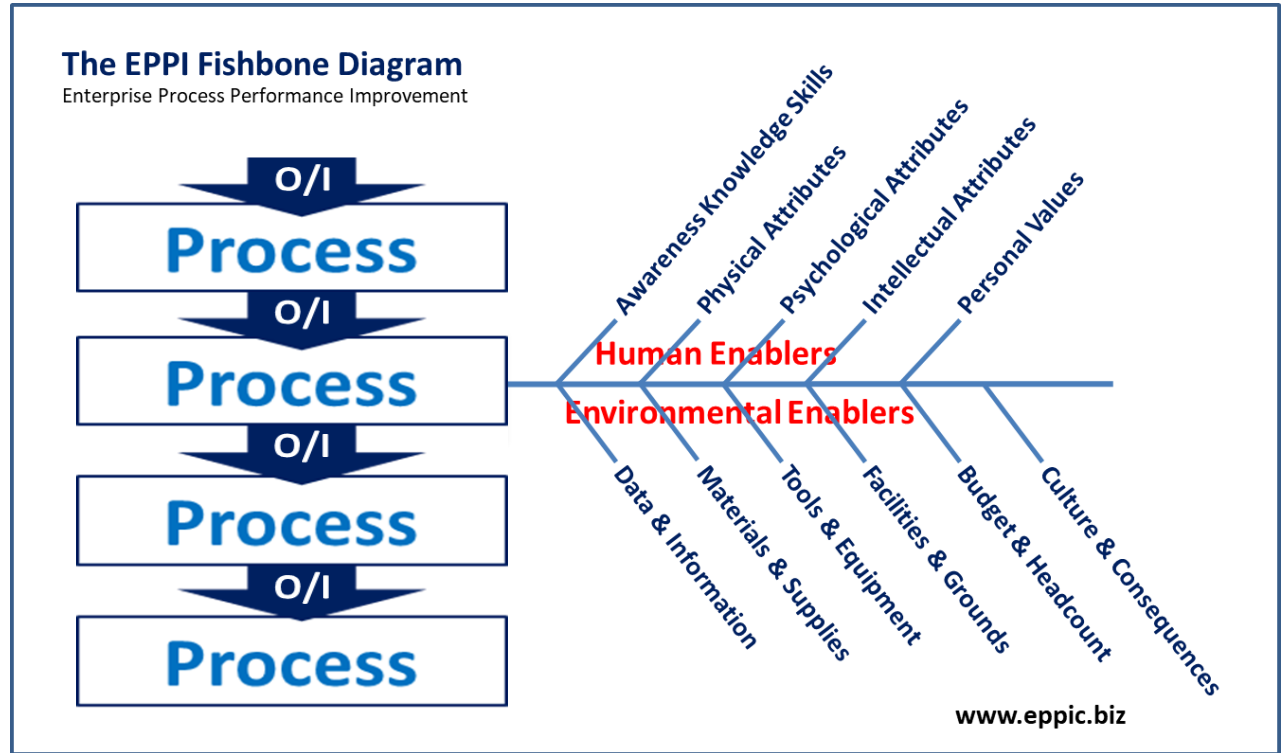
Both the **Behavioral** & **Cognitive** Tasks

ThoughtFlow in the WorkFlow



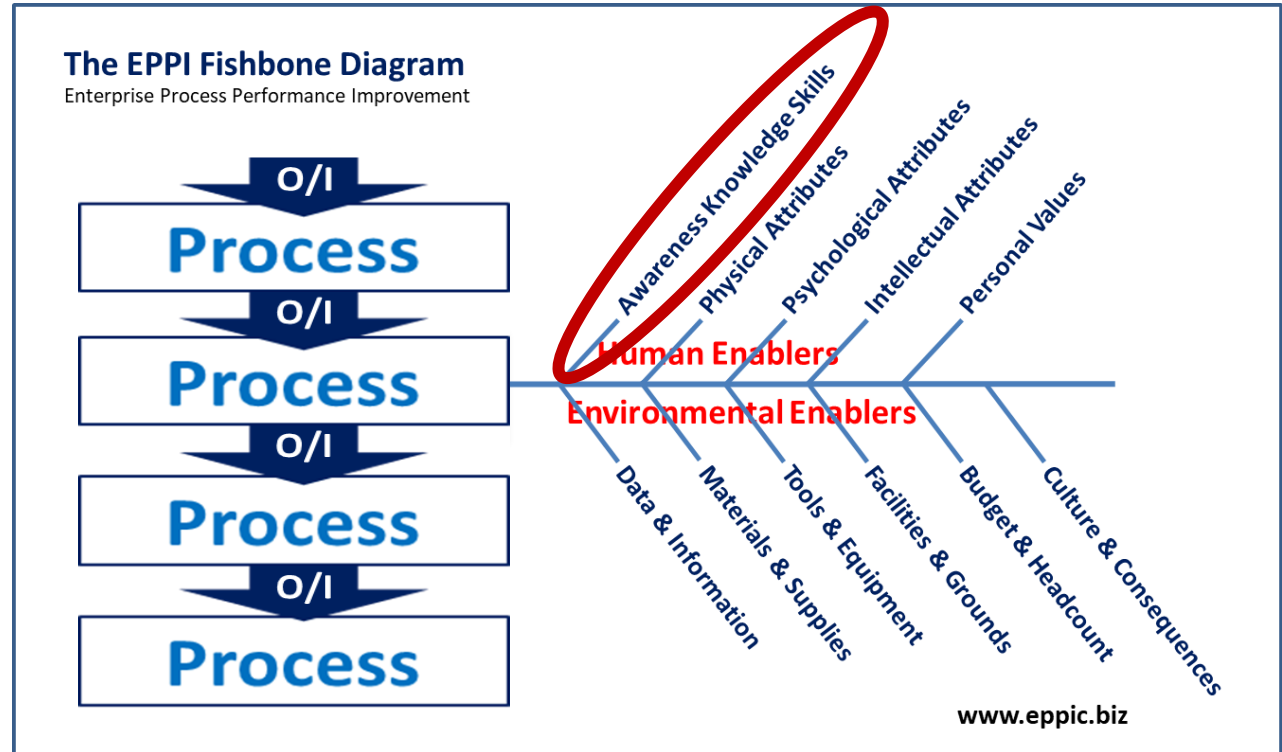
Research shows that due to the Non-Conscious Nature of Knowledge – Experts will miss up to 70% of what a Novice Needs in order to perform. (Richard E. Clark, Ed.D.)

Determine the Gaps & Probable Causes



Adapted from the Ishikawa Diagram and Gilbert's Behavior Engineering Model (BEM)

Derive all of the Enablers



Adapted from the Ishikawa Diagram and Gilbert's Behavior Engineering Model (BEM)

Awareness-Knowledge-Skills are needed for ISD/LXD

Ideal Performance Analysis

Performance Data	PACT Analyst's Performance & Gap Data – Questions
Areas of Performance	- What are the major phases or elements of the performance or process? - What are the chunks of the job? - How can we break this performance up into some logical segments (somewhere between five to nine is ideal)?
Outputs Produced	- What are the key deliverables/outputs produced within this Area of Performance? - What is left over when you are finished performing the tasks?
Measures	- What are the measures/metrics that can be applied to the output? - How can you tell a good output from a bad one?
Standards	What are the standards of acceptable performance given those measures?
Tasks Performed	What are the tasks performed to produce those outputs?
Roles and Responsibilities	- Who is involved in this performance? For example, whose task responsibility is it to - E = Execute - I = Input to - A = Approve/reject - S = Support - R = Review/give feedback

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Gap Performance Analysis

Performance Gap Cause Analysis Data - Questions		
Typical Performance Gaps		Given those measures and standards, where do the performer's outputs typically fall short in meeting the expectations?
Probable Gap Cause(s)	dP (Process)	Is the performance gap caused by a lack of a process, or adherence to an existing process?
	dE (Environment)	- Is the cause of the performance gap due to a lack of environmental supports? - Information/data - Procedures/policies - Materials - Feedback - Organizational structure - Tools/equipment - Task interference - Consequences
	dK (Knowledge/Skill)	Is the performance gap caused by a lack of the performer's knowledge and/or skill?
	dI (Individual Attribute/Value)	Is the performance gap caused by a poorly selected individual who has neither the physical, psychological, and/or intellectual attributes and/or values to perform or learn/acquire the skill?

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Adopt and Adapt these Questions as Needed

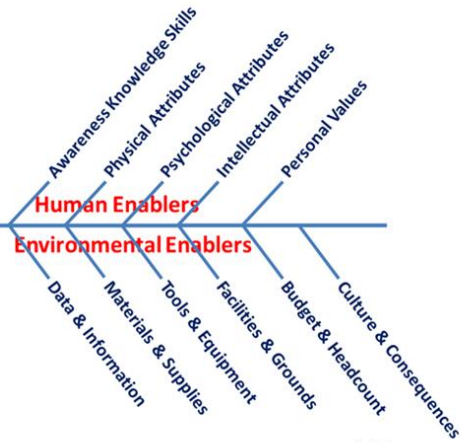
This suggests that Learning may not be the solution to a client's Performance Problem.

Exactly. That's why our ISD/LXD Analysis efforts need to always go beyond asking what people need to do and know.

The Foci of Instructional Analysis

The EPPI Fishbone Diagram
Enterprise Process Performance Improvement

Process - Processes

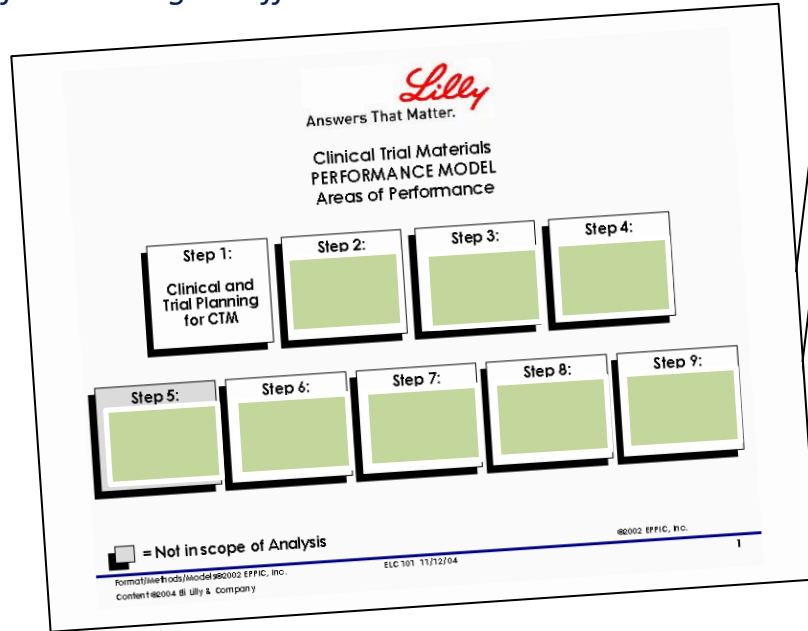


Adapted from the Ishikawa Diagram and Gilbert's Behavior Engineering Model (BEM)

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Documenting Both the Ideal and Gap Performance

After a Six Sigma effort...



Lilly
Answers That Matter.

Clinical Trial Materials

Performance Model

Area of Performance: 1A. Clinical Planning

Key Outputs - Measures	Key Tasks	Roles/Responsibilities				Typical Performance Gaps	Probable Gap Cause(s)	dt dt dt
		CRA	RCRA	CDA	CFM			
Drage and Device Requirements • Accuracy • ...	• Communicate needs to - CTM - CMS/C - Project Management	2.1.104			E	• Not communicated appropriately in detail to other groups	• No owner • Inexperience • Not understanding how info is used by other	dt dt dt
								

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From 2004

Documenting the Enabling Knowledge & Skills

Not every project uses all 17 K/S categories...

Clinical Trial Materials

Answers That Matter. *Lilly*

Knowledge/Skill Matrix

Knowledge/Skill Categories

- Company Policies/Procedures/Practices/Guidelines
- Laws, Regulations, Codes, Agreements, and Contracts
- Industry Standards
- Internal Organizations and Resources
- External Organizations and Resources
- Marketplace Knowledge
- Product/Service Knowledge
- Process Knowledge
- Records, Reports, Documents and Forms
- Materials and Supplies
- Tools/Equipment/Machinery
- Computer Systems/Software/Hardware
- Personal/Interpersonal
- Management/Supervisory
- Business Knowledge and Skills
- Professional/Technical
- Functional Specific
- Other
- Other

Formal/Method/Model/EPIC, Inc.
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Page 1

Clinical Trial Materials

Answers That Matter. *Lilly*

Knowledge/Skill Matrix

Knowledge/Skill Category: 1. Company Policies/Procedures/Practices/Guidelines

K/S Item	Link to Area of Performance									Select/ Train N/A	Criticallity H/O/L	Criticallity H/O/L	Volatility H/O/L	Depth A/E/S	
	All	1	2	3	4	5	6	7	8						9
Clinical Trial Materials Policy (Global)	40	X	X	X	X	X	X	X	X	X	T	H	AA	AA	K
Clinical Trial Materials Global Standard of Procedures	40	X	X	X	X	X	X	X	X	X	T	H	AA	AA	K

Materials for use in clinical investigations

Area of Performance:
All A/E

1 = Clinical Training
2 = Training
3 = Preparation of Clinical Trial Materials
4 = Shipping of Clinical Trial Materials
5 = Storage of Clinical Trial Materials
6 = Packaging of Clinical Trial Materials
7 = Receipt of Clinical Trial Materials
8 = Reconciliation of Clinical Trial Materials
9 = Destruction of Clinical Trial Materials

Selection:
A = Select
T = Train
H = High
L = Low

Criticallity:
AA = Assurance
A = Assurance
H = High
L = Low

Depth:
K = Knowledge
S = Skill
E = Experience

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Page 1

From 2004

The Enabling Knowledge & Skills

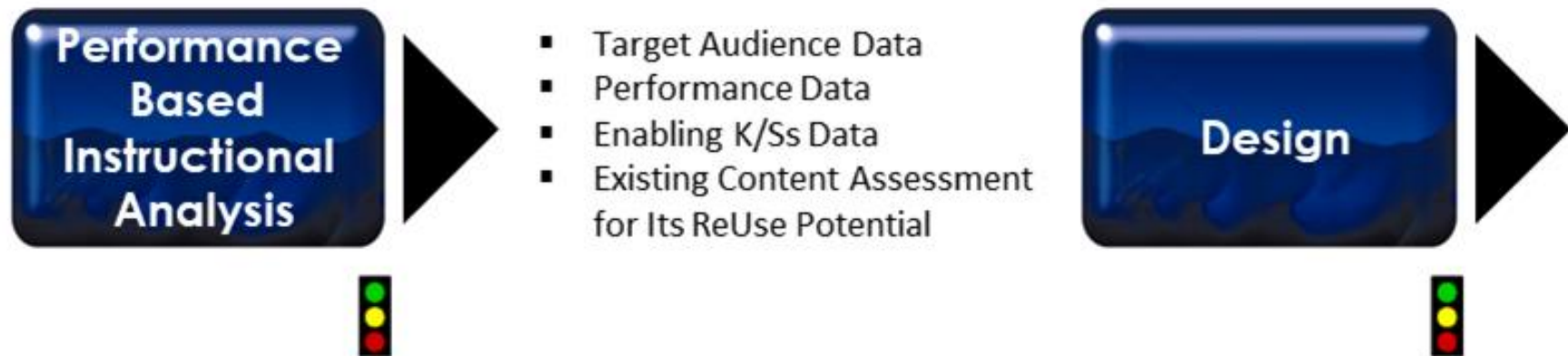
1. Company Policies/ Procedures/ Practices/ Guidelines
2. Laws, Regulations, Codes, Agreements, and Contracts
3. Industry Standards
4. Internal Organizations and Resources
5. External Organizations and Resources
6. Marketplace Knowledge
7. Product/Service Knowledge
8. Process Knowledge

9. Records, Reports, Documents, and Forms
10. Materials and Supplies
11. Tools/Equipment/Machinery
12. Computer Systems/Software/Hardware
13. Personal/Interpersonal
14. Management/Supervisory
15. Business Knowledge and Skills
16. Professional/Technical
17. Functional Specific

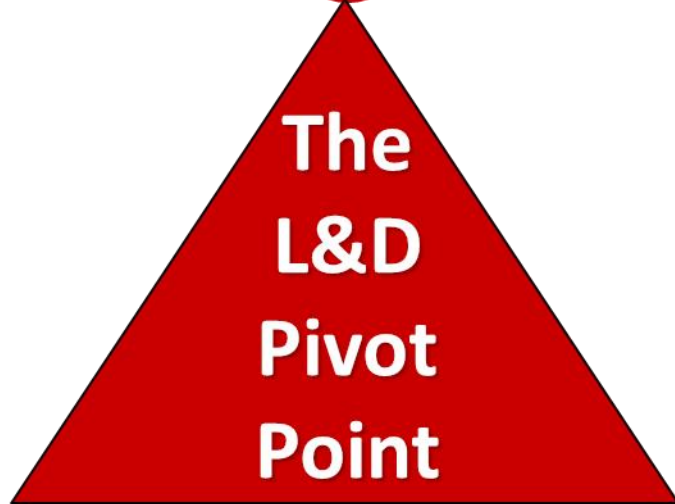
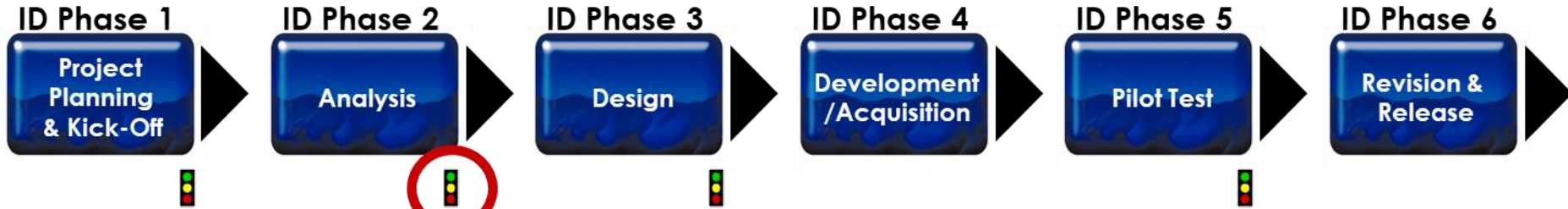
Derive These – Don't Brainstorm Them



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Instructional Development



**Analysis Data Informs the
Client & Stakeholders' Business
Decision to Continue, to Pivot,
or to Do Both**

4 Instructional Options

Option 1

Leave it to Informal Learning Means



Option 2

Standalone Job Aids



Option 3

Job Aids embedded in Training



Option 4

Training – for Memorization
and/or Honing Critical Skills



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What are the **Risks** &
Rewards at Stake?

What does the
Performance Context
Demand or **Allow** –
a **Memorized** or
a **Referenced**
Performance
Response?

**No, wait!
Let's take
that out
and put this
new
thought in.**

**When you are not anchored to the
authentic Performance Requirements from
back on the job, what you include and how
you address it, is all completely arbitrary.**

**Analysis should drive
Design and Development**

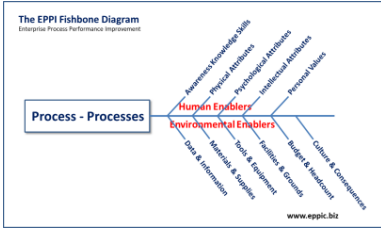
Performance Competence

**Is the Ability
to Perform Tasks
to Produce Outputs
to Stakeholder Requirements**

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Focus on
Performance

Performance &
Enabler Analysis



Questions & Answers

Thank You for your time today!

**Please feel free to reach out via SM or email
with any Questions, Comments, or Concerns!**

Enterprise Process Performance Improvement Consultancy

Achieve Peak Performance

Protect and Improve the Enterprise



Leverage Your Current Master Performers for Higher Performance!



guy.wallace@eppic.biz

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