

Allison Rossett

FIRST
THINGS
FAST

2nd Edition

A HANDBOOK *for*
PERFORMANCE ANALYSIS

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“Allison Rossett combines thought leadership for the profession with practical guidance. This book, the second edition of a classic in the field, is filled with proven practices and ready-to-use tools that make this a resource you’ll use frequently.”

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officer, ITT Corporation

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—Felipe Jara, director of learning technologies, Center for Innovation in Human Capital, Fundación Chile

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—David C. Hartt, commander, U.S. Coast Guard; and board of directors, International Society for Performance Improvement

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First Things Fast

A Handbook for Performance Analysis

Second Edition

ALLISON ROSSETT

Foreword by Ruth Clark

Afterword by Marc J. Rosenberg

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FOREWORD

HAVING WRITTEN six books on instructional design and development, I have *never* been tempted to write a book on performance analysis. Why? *First Things Fast* is such a readable and practical resource that to write another book on needs assessment would be redundant. My time is better invested in other projects. But why should “first things,” aka performance assessment, be part of your skill portfolio? Read what a recent graduate of my instructional design certification program had to say:

Needs assessment has never been formally applied or executed with our organization. The approach to training has been focused on fixing a specific issue, but exploring in depth the root cause for training has never been pursued or encouraged. Training has been approached as a stop-gap measure to provide a quick fix for perceived problems. By conducting a needs assessment for my product line, I have been able to uncover significant organizational issues such as lack of capturing solution-based metrics to measure

successful product installations and lack of funding to correct inherent software problems initially identified as a training issue.

Her reflections are not unique. Ask yourself, *What proportion of my recent training investment has resulted in bottom-line organizational payoff?* You are unusual if you can answer this question. Unless someone has surveyed the performance landscape surrounding a training request, any bottom-line lasting achievements will occur by chance alone. And today we need not wait for a training request! Performance technologists (and all of us in the “training” business are performance technologists) are increasingly taking a proactive role in business improvement. As part of a profession that collectively invests close to \$60 billion yearly in training in the United States alone, we cannot afford to waste resources on an expensive solution that won’t have a positive impact on organizational performance. At the same time, most organizational problems and initiatives are so short fused that there is rarely time to do a “comprehensive” needs analysis. Here’s where *First Things Fast* comes in!

“First Things” means that before you invest time and resources in a training program, you define the operational goals and the various drivers and barriers associated with those operational goals. After all, if you don’t know where you are going, it’s hard to know when you have arrived. “Fast” means you must be responsive to organizational initiatives. Needs assessments that take months will find that your business partners have lost interest and the original need has disappeared or is no longer relevant. Our challenge: to find efficient and effective ways to define operational goals, identify the processes and people linked to those goals, and determine whether those goals will be best realized through working aids, wikis, and other forms of knowledge management; process changes; upgraded tools; training; or some combination thereof. And when training is a part of the solution, your assessment must uncover specific knowledge and skills linked to bottom-line payoff.

If you are new to the training profession, welcome to a much broader role than you may have realized! You may have thought your job was to produce materials or facilitate—to turn out workbooks, develop e-learning, or debrief role-plays. Not so. Your real job is to make your organization more efficient or more effective. You will collaborate with internal stakeholders—your partners—to define their organizational goals and metrics, identify business processes and teams that support those goals, and ensure that the drivers needed for success are available. Sound challenging? Yes, but also it’s much

more engaging and rewarding than turning out yet another training program that looks good—that’s fun, that uses the latest technologies—but in the end costs a great deal to construct and deliver yet gives no bottom-line return on investment. In fact, by giving the *illusion* of solving a business problem, a training program can go beyond being a waste of resources. It can leave the organization in worse condition by preempting the genuine improvement that could accrue from a solution system that addresses root causes.

If you are a seasoned performance specialist or a “graduate” of the first edition of *First Things Fast*, what’s new in the second edition? Previously I mentioned that we are evolving from professionals who react to a training request to proactive business partners. As an instructional professional you have probably already made use of resources available in the Web 2.0. While Web 1.0 supported one-way communication, the new social web with blogs, wikis, and twitters offers you opportunities for data mining that were not available when the first edition was written. Consider this: You need not wait for that training request to start your needs assessment. If you are following blogs or discussion boards within your organization or among your customers, you can develop and maintain an ongoing proactive perspective on needs *as they emerge*. If you are “linked in” to your business partners, you can get a pulse on their concerns and initiatives as they evolve. Way before the customer service department contacts you asking for a “refresher on telephone help desk techniques,” you may have gathered a portfolio of customer complaints and perspectives on your organization’s help desk support. You can provide this data to your business partners *before* customer dissatisfaction turns into reduced sales or wasted resources. And you might be able to derail an unproductive training program before it is requested by suggesting alternative solutions—solutions you harvested from your ongoing Internet or Intranet research.

In summary—ten years after the first edition—first things are still first. And the resources for fast are more available than before. So whether you are an experienced performance improvement professional or just starting your performance journey, an investment of your time in reading and applying *First Things Fast* will yield high returns—for yourself, your business partners, and your organization.

Cortez, Colorado
February 2009

Ruth Clark

PREFACE

WELCOME TO the second edition of *First Things Fast*. Much has changed in learning and performance since I wrote the first edition. That is the reason for this second edition. It reflects a world with more technology in just about every aspect of learning and performance. It acknowledges the economic shocks of 2008 and 2009. This new edition addresses the challenges professionals confront today.

Is the new edition really new? Yes it is.

You will find

- New questions and templates that reflect the shift of learning and support into the workplace.
- New approaches that take advantage of wikis, blogs, and online surveys to gather information.
- Recognition of the shift to social networking and the possibilities presented for analysts.

- New cases presented in Chapter Nine, including Search and Rescue for the U.S. Coast Guard; failure investigation for a high-tech device; new hires skill development for The Maids Home Services; and an analysis devoted to finding support and the right blend for a telecommunications company.
- In most chapters, at least one sidebar commentary from a successful leader in our field who explains how he or she uses analysis to advance individual and organizational strategy. Two chapters have two commentaries. Hear from Susan Guest at Ingersoll Rand. Meet veteran consultant Jeanne Strayer. Listen to Mike Taylor; he's had a dozen years of experience in the nuclear industry. And then there's Vanguard University's Catherine Lombardozzi. There are more. Get to know them by digging into the chapters.
- A brand new foreword by Ruth Clark—and an updated afterword by Marc J. Rosenberg.

I've reviewed each paragraph in the book and asked: Is this useful? Does it add value?

Analysis was critical when I published the first edition in 1999. It is even more so today. Why more so? The answer is technology. Today, in harsh economic times, there is pressure to reduce costs while enabling people, sometimes fewer people, to practice with more skills and knowledge. Technology is favored over registrations in hotels and hours in classrooms.

In the good old days, an instructional designer could develop a class, and an instructor would then deliver it to a group in a room, all together, same time and place. When the ideas, examples, or exercises veered off mark, the instructor would fix it, on the fly.

Not so with technology-based delivery. Not yet. There's nobody there to help Marvin or Maria or Minjuan when they avoid, ignore, or dislike their programs. The programs were created before, earlier, in hopes that they would meet the needs of today, now.

Marvin is at home, watching the kids, and taking an e-learning module to introduce him to a new product. Maria now works for a multinational, and is reintroducing herself to her home country, Panama, after three years of

work and graduate school in the United States. She uses webinars, podcasts, and online communities to stay up to date and to feel connected. With technology today, the programs are baked in advance. She goes to them, hoping that something of value will appear. Minjuan is a retirement specialist for a large company. She is doing her certification training via a program that blends classes and online experiences. She's been to the face-to-face classes, but now finds herself under some pressure to complete the entire program independently, so she can begin working with a new group of clients.

What do Marvin, Maria, and Minjuan have in common? Choice. They have choices. If a module fails to meet a perceived need, they can do something else—or even nothing at all. If the archived virtual presentation or the podcast doesn't compel, they can skip them. If the examples or practices are not challenging or are too much so, they will have trouble finding time. The programs must fit the work, worker, and workplace.

Analysis is how we find that fit. When we target programs through analysis, we use data to capture and hold attention, and then to contribute to individual performance and organizational accomplishments.

Analysis is obviously important, but it does not always happen. Even though books, articles, and speeches on the topic are plentiful, it is not a stretch to describe analysis as continuing to attract more heat than light. Why is that?

- Leaders often prefer a quick fix. Most executives want what they want when they want it, not after a study of the matter.
- Analysis is even less interesting to leaders in organizations than training. Few executives want to talk about training, and fewer still are intrigued with the planning associated with it. Their eyes glaze over.
- There is little history in the organization of analyses that have made noticeable dents in what matters. Even the telling results of fine analysis studies are often lost in the excitement of rolling out reengineered processes, a new recognition program, and just the right training. Too often, the data gathering and involvement of sources are lost. And that's when such excellent studies even exist. It's not hard to find professionals who can't point to a single result of their planning efforts aside from the frustration of the impatient customer.

- Your customers believe they know what they need. Accustomed to leading, many customers refrain from posing a problem or challenge and instead leap to habitual solutions, often those that are single interventions, such as training or documentation.
- While there is pressure to measure, only a small percentage of measurement efforts (single digits in recent studies) are defined by the eventual impact on strategic goals or even the subsequent delight of the customers they serve. When measurements are taken, most are still fixed on those variables that are easy to discern, such as people in attendance or the number of meetings that are facilitated.
- People don't know what analysis is. There is little agreement about what constitutes effective planning, whether you call it analysis, scoping, diagnostics, auditing, needs analysis, needs assessment, or performance analysis.
- Analysis is not easy to do. It involves many challenges, from figuring out how to plan, to convincing sources to participate, to collecting data, to figuring out what the data mean, to making the findings matter in the organization. Political, interpersonal, and cognitive skills are tapped during analysis.
- Analysis takes time, and time is in short supply. Little explanation is necessary here. We all know the number one reason for avoiding analysis—there's no time for it.
- The number two reason is leadership. Leaders are not yet convinced. Now is the time to convince them, by conducting lean, actionable analyses.

This book attempts to address each of these barriers. It is meant to be a practical guide to handling every one of them through examples, explanations, tools, and templates. If you're new to the field, this handbook will help you anticipate resistance and deal with it. If you're a veteran, I hope you'll appreciate my efforts to bring clarity and concreteness to an often murky topic. Borrow some of these examples. Use them to help make a case for study prior to action.

I try to make a case for performance analysis by telling stories and offering dialogues about our business. Some are true. Some are imaginary. All are familiar and plausible.

I've always enjoyed Greek mythology, thanks to Edith Hamilton (1993). I've taken that appreciation into my current work, continuing to savor themes that put people at the heart of the story, that recognize flashes of the monstrous and miraculous in most circumstances and individuals, and that honor the critical struggle to make the unknown known.

Isn't this what performance analysis is about?

I hope that this book helps you ask and answer better questions for yourself and for your organization or the organizations you serve.

San Diego, California

Allison Rossett

March 2009

ACKNOWLEDGMENTS

I'VE LEARNED important lessons from my academic colleagues and students at San Diego State University. I have been blessed with smart colleagues who nudge me and our graduate students to consider emergent approaches, ideas, and technologies. In particular, I want to thank Marcie Bober, Elsa Tapia, Bob Hoffman, Pat Harrison, Rebecca Frazee, and Jim Marshall for their support and their kindness.

One blessing of teaching at the university has been my contact with generations of graduate students in educational technology. Some have read chapters from this book and offered suggestions. Others provided the grist for the tales that pepper the book. Joe Williams was a significant contributor to Chapter Seven. Rebecca Frazee added much to Chapter Eight. Lisa Schafer, with whom I have worked on many projects, was always there with an example or a citation. Marcie Brown, one of the SDSU EDTEC online graduate students, helped enormously by soliciting, editing, and communicating with the sidebar experts. This is a new feature in the book, and I

could not have done it without Marcie and those contributors, now sprinkled throughout the book.

I've continued to work with many of our alumni long after their graduation. Their ideas advance my thinking every day: Jordan Baldueza, Ed Beale, Terry Bickham, Randy Bland, Audrey Bloom, Jeff Brechlin, Betsy Bruce, Antonia Chan, Caleb Clark, Colleen Cunningham, Carl Czech, Ann Derryberry, Nancy Dosick, James Frazee, Fernanda Gimenez-Groenendijk, Shirley Gresham, Chris Hall, Liz Herrick, Cathy Kang, Doug Lucas, Paul McManus, Erica Mohr, Matt Moore, Marty Murillo, Milagros Noy, Marci Paino, Dawn Papaila, Rudy Robles, Lou Sanchez, Jeanne Strayer . . .

Not everybody I know is a former student. I also have professional colleagues and pals who deserve acknowledgment. Some posed interesting consulting problems on which we worked together, others helped me through their writings and professional contributions, still others have been wonderful conversationalists: Roger Addison, Cynthia Anderson, Sarah Beers, Sven Blomberg, Bill Brandon, Bryan Chapman, Susan Considine, Kathy Dardes, Joe Durzo, Heidi Fisk, Rob Foshay, Marguerite Foxon, James Frazee, Gloria Gery, Michael Glass, Tony Gleeson, Susan Greenberg, Ruhe Hao, Paul Harmon, Sam Herring, David Holcombe, Joe and Julie Hymes, Roger Kaufman, Ann Leon, Dave Merrill, Becky Monroe, Santhiru Murugiah, Kevin Oakes, Brian Patterson, Deb Pettry, Sandy Quesada, Rena Robey, Patty Schutt, Janice Simmons, Katie Smith, Tim Sosbe, Tom Stewart, Ruth Stiehl, John Stormes, Will Thalheimer, Ellen Wagner, Pat Weger, Deb Wharff, and Diana Wright.

I'd also like to acknowledge the antecedents of this book in what Ruth Clark, Tom Gilbert, Joe Harless, Erica Keeps, Robert Mager, Dave Merrill, Marc Rosenberg, Harold Stolovitch, and Ron Zemke have written and said. Their contributions are woven into the way I approach my work.

I've acknowledged many people. There are others. I fear I've forgotten many. I apologize if you are not included in these long lists. You know who you are. Please know that I am appreciative.

Finally, I want to thank Sue Reynolds for everything, absolutely everything. I'm happy there is no need to update anything about that sentence.

THE AUTHOR

DR. ALLISON ROSSETT, longtime professor of educational technology at San Diego State University, is in the *Training* magazine HRD Hall of Fame, was recently a member of the ASTD International Board of Directors, and was honored by selection as an ISPI Member-for-Life. Recipient of ASTD's singular recognition for lifelong contributions to workplace learning and performance and designated a 2008 LEGEND, Allison co-authored *Job Aids and Performance Support: Moving from Knowledge in the Classroom to Knowledge Everywhere* in 2007.

Rossett edited *The ASTD E-Learning Handbook: Best Practices, Strategies, and Case Studies for an Emerging Field*. She is the author of four award-winning books, including the first edition of *First Things Fast: A Handbook for Performance Analysis*. Prior award-winning books are *Training Needs Assessment* and *A Handbook of Job Aids*. Some of Allison's recent articles are "Performance Support Tools: Delivering Value When and Where Needed,"

“Moving Your Class Online,” “Confessions of a Web Dropout,” and “Training and Organizational Development, Siblings Separated at Birth.”

Allison has conducted research and published articles on needs analysis, learner engagement, and persistence in online learning. Her client list includes IBM, HP, the Getty Conservation Institute, Fidelity Investments, Deloitte Consulting, BP, the IRS, Amgen, Royal Bank of Scotland, the National Security Agency, Transportation Security Administration, and several e-learning start-ups.

1

Introduction

Nancy Lewis, then IBM vice president for sales and on demand learning and now the executive in charge of learning for ITT, contributed to the LearningTown blog on April 11, 2008:

Business leaders know that the rate of information change is accelerating, growing faster than our ability to consume it. The result being that we will all have skill gaps, all the time, and that skill gaps will be a constant state of life in the future. We also know that our roles are becoming as complex as the knowledge we work with. There will never be enough time to learn everything we need to learn. There is such a consistent and rapid churn of the skills and knowledge required to maintain job performance that learning can no longer be provided as a set of events. This is the new challenge for learning: enabling people to capitalize on new technologies, discoveries and business insights, to be first to the marketplace with new solutions that exceed our clients' needs and expectations. At the heart, therefore, the essence of any company's ability to adapt and grow is its ability to learn. And that involves new ways of thinking about an approach to learning.

What Lewis is touting is not computers, although technology, of course, plays a starring role in the delivery of learning and support. Lewis's focus is learning in juxtaposition with the work and workplace: "We looked at where learning actually takes place most of the time. It's in the workplace, not in the classroom. We learn naturally on the job. We learn by doing, by solving problems. There will always be a need for formal training, but it will likely be much more in direct support of the capabilities that cannot be learned in the workplace."

Placing learning and references closer to the work is brilliant, except when it is the wrong learning or references. Executives favor such an approach, especially in harsh economic times. Employees reject programs that are extraneous, bloated, or obsolete. That's true in the classroom and online. The big difference is the instructor, present for face-to-face experiences. Instructors typically fix instruction when it is not right. An instructor adds an example to make it more relevant. Another reminds the employee of all that he already knows. Yet another instructor provides an opportunity to tackle a problem that is within the student's abilities, to ensure a success experience. And another links the example to the concept, when the students' faces are blank. Finally, a savvy instructor would recognize when a class, as now written, ignores a critical new product or geopolitical reality. She makes fixes to ensure that the class is timely.

When we diminish instructor centrality in favor of on-demand and workplace-based resources and experiences, more responsibility falls on us. We must be certain about the resonance of our programs. What do our people need? What is top priority? What is already known? For what do they clamor? What will add value? What must they know by heart? What can they seek as they need it? It is performance analysis that answers these questions.

In April 2008, Delta and Northwest Airlines announced their intentions to merge. A Delta learning leader, in a personal email that very morning, shared feelings about the merger. She expressed enthusiasm for it, and closed by remarking that she now needs to get her arms around what Northwest learning is all about and what their people require. She has to figure out how to make this merger work at 550 mph. How does she gain insight into their people, challenges, and programs? What should she do first? What next? And

how does she engage colleagues in the process, so that her ideas are not just Delta ideas or habits? It is performance analysis that answers her questions.

A former student provided another example. After a dozen years in training and development in financial services, he reports that he is now, finally, getting more control over the “juicy” projects. “I want to use technology to meet the needs of the far-flung IT community. When their executive asked me to look for ways to improve awareness about system security, I immediately thought about Second Life.” Why was Second Life (<http://secondlife.com/>) such a natural here? I asked. He had reasons that began to bring me around, such as the interest the approach would generate in a skeptical audience and the immersive and vivid nature of the experience. But how would he direct their experiences on his corporate island? How would he rivet their attention, since other even “juicier” opportunities lurked on nearby islands? Given all that could be done, how would he decide what they see, tackle, and do? It is performance analysis that answers his questions.

You could be at IBM or Delta, or even contemplating the design of your corporate island in Second Life. Perhaps your organization is rolling out a new product. Or maybe you are tasked with getting more value from the current learning management system or with squeezing cost out of the current enterprise. Or consider the executive who wants assurance that what his people are studying in class will transfer to the manufacturing floor. Then there is the sales leader who notes that great things are going on across the world and laments that the rest of the salesforce rarely profits from these breakthroughs. Your job is to embrace these requirements as opportunities and to customize programs to ensure performance and results. How do you make that happen? No surprise. The answer is performance analysis.

Where once human resources and training professionals enjoyed a niche defined by familiar activities, such as offering classes or facilitating meetings, now there are urgent expectations about results, speed to competence, benefits and efficiencies from technologies, and eagerness to distribute smarts everywhere, accessible where and when needed.

These expectations define us by customers and causes, not by history, habit, or job title. They lead to tailored services. They lead to data and perceptions gathered from associates, managers, experts, leaders, and benchmarking

groups. They lead to solutions enlightened by causes and drivers. They lead to uncovering data in unexpected places, including blogs and wikis. They lead to cobbling together solution systems from across the organization, including assets and experiences that compel attention over time and geography.

The basis for all of this is performance analysis. An effective performance analysis delivers the information and support you need to chart a fresh, tailored approach.

Jeanne Strayer never underestimates the value of a training intervention. With her background as a teacher of English as a Second Language (ESL), she understands the importance of a structured curriculum to address a specific knowledge deficit. But what she found upon entering the business world was that training could just as easily be the *wrong* solution to a problem. Whether working as an independent consultant or an in-house instructional designer, Jeanne expanded her repertoire of skills “to include other interventions to solve performance problems.”

In her current position as a partner with the Six Degrees Company, Jeanne finds that even repeat clients often think first of training as the solution to a problem, rather than imagine other possible solutions. To address this illogical leap, Jeanne uses one of several techniques to get a client to slow down, step back, and acknowledge the need for some good, old-fashioned analysis.

1. *Ask the right questions in order to lead clients to discover the value of analysis.* Performance consultants have a need and a knack for asking questions about a problem that “bring to light” the unknowns and uncertainties of a situation. Asking those questions together with the client helps the client see the value of doing analysis. Jeanne had a client who wanted to reach a very large target audience of real estate agents, numbering in the thousands. The client wanted an e-learning product to lead the agents to use a new software product. Jeanne said to the client, “Well, let’s see. You say the agents need online training on the new software system, but they never used point-and-click training offered in the past. What makes you think it will be different this time? Why do you think they didn’t use it last time? Do they not understand how to do it? Or do they not see the value in the training?” Asking questions can create an “Aha!” moment so that clients see the value of investigating further before investing in a solution.

2. *Demonstrate that budgets are easier to develop after analysis.* Sometimes the scope of a project is so big that it's hard to place an actual dollar figure on a solution without some serious initial analysis. In the situation above, the client *thought* that e-learning was the best way to reach the many real estate agents. After a few questions, Jeanne discovered that the problems were due to motivation, marketing, and implementation—in addition to training. Once the client accepted those drivers, it was clear that further analysis was needed to scope the project and to put some budget numbers together. Jeanne used data to show that a live event was the best way to market the new software. With this information, the client was able to budget for the cost of x number of events in a targeted geographic area, as well as the marketing campaign to promote the live events.

3. *Use the Gilbert model to de-emphasize training.* The Gilbert Behavior Engineering Model, created by Thomas Gilbert, classifies performance problems into one of six categories: information, resources, incentives, knowledge, capacity, and motivation. Jeanne uses this model as a way for project leaders to think about the performance problem. She then asks, "Before committing project dollars to a training program, doesn't it make sense to see if any of these other factors are at work so that we can use those to leverage performance?"

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Is This Book for You?

This book is for you if you've found yourself thinking or saying,

I don't know where to start.

I don't know what to do.

I must get it right or I fear they won't use it.

What is performance analysis?

Why should I spend time on performance analysis, when my clients want ACTION?

What would competence look like, really look like?

A certain amount of analysis is critical, I guess. OK, what's the minimum?

They've reorganized, and now I'm in this unit called "client relationships," and we're supposed to be doing performance consulting.

What should we do? How might analysis help here?

How do I avoid analysis-paralysis?

How do I get a better fix on what to do first, second, and next?

It's all about technology around here now. How does the shift to technology and independent learning influence the way we plan?

We have online communities, wikis, blogs . . . should I use them in my analysis? How would I do that?

This analysis is just a small part of my job. I don't have time for all of this analysis. What's the least I can do and still derive value?

Whom do I ask? What do I ask?

What's analysis got to do with evaluation?

My customer says she knows what she needs and that it's not analysis. How can I make a case with her for study prior to action?

They want some courses, and one customer wants scenario-based e-learning. But I have my doubts about whether an isolated course, in the classroom or through high technology, is going to solve this problem. How can I make them see this?

The challenges are numerous: a world economic crisis; skepticism from clients; time pressures; the strength of habits; unfamiliar roles in changing organizations; cultural, language, and time zone differences; uneven technology platforms; and expectations regarding cost recovery and collaborations across units. Whereas the traditional roles of human resources and training were functional, tactical, and blissfully familiar, this new world of performance analysis, consultation services, and solution systems is more fluid and strategic. It demands more of you. The changes won't be easy.