

Five Steps - Changing Paradigms from Training to Performance (May 15)



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“While these four steps are necessary and vital, they are not sufficient to complete the paradigm change from training to performance and to establish the new paradigm as the norm.”

It's hard to imagine now, but there was a time that we thought the Earth was the center of the universe. The planets, the Sun, and all of the stars revolved around us. The movement of these celestial bodies influenced and affected the things that happened on our planet from feast to famine, fortune to poverty, Mayweather vs. Pacquiao.

We now know of course that none of this is true. The Sun, not the Earth, is at the center of our solar system. Our Sun is just one of many in the galaxy which is in turn one of many in the universe.

Humans lived under the paradigm that the universe revolved around us for millennia. It was easy to understand, comforting, and even pragmatic. We were able to predict the best time of year to plant and harvest. We were able to navigate around the world using stars in the sky as our guide.

For decades, we have lived under the belief that training can enable employee performance. Whether it's learning to use a new software system, how to repair a piece of equipment, selling product to a customer, or flying an airplane, training will take care of it. It's easy for our stakeholders to understand, and it's comfortable for us to execute.

But it's wrong.

We now know that while training is useful and pragmatic, there are more efficient and effective methods to enable employee performance. In particular, we know that combining training and performance support (PS) in a thoughtful way allows employees to learn critical and frequent tasks before the job and then learn the remainder on the job (Please see the References at the end of this article: Gal & Nachmias, 2011; Nguyen & Klein, 2008).

The challenge for many organizations today is how to change the paradigm from training to performance. This transition includes not just the traditional training organization but also senior business leaders, stakeholders, and even the average employee.

Changing the paradigm

As Figure 1 shows, this article and the next explore five steps that any organization can undertake to drive this paradigm shift. This one addresses the first four steps, and tomorrow's article will spotlight establishment of a standard performance-support methodology. In addition to what is involved in each step, we'll also illustrate how each step was implemented by a Fortune 100 training organization that went through a similar transition over the last several years. For the purposes of these two articles, we'll refer to this training organization as *The Group*.



Figure 1: Five steps to transitioning a training organization into a performance organization

Step 1: Transform your learning organization from a training function into a performance organization

Whether by design or by accident, most learning organizations tend to produce a small variety of interventions. Though they may produce the occasional job aid, most current learning organizations develop online learning that is delivered through web-based training (WBT), scenario-based learning, or even learning games. They may also employ a blend of instructor-led training (ILT) delivered in a physical or virtual classroom.

Regardless of the form of training produced, most content is typically delivered before a new employee even starts their job. In the case of a tenured employee, these individuals are usually taken out of the context of their work for a period of time to complete the training and are then sent back in the hope that they will remember and apply what was delivered.

The first step to challenging this paradigm is to transition from a *training focus* to a *performance focus* across your learning organization. In the case of *The Group*, this was done in several ways.

First, they assembled from existing resources a new dedicated team comprised of learning technologists and technical writers. They tasked this team to be champions of performance support, to establish new processes and technologies to enable PS, and most importantly, to drive adoption of performance support across the enterprise.

Next, they expanded the products offered by *The Group* to its internal customers to include performance support (among others). Since *The Group* operated as an internal profit and loss center, standard rates were set for each of the learning products.

In the case of performance support products, early projects were priced below normal cost, or selectively at no cost, to help drive initial adoption, particularly in comparison to higher-priced ILT or WBT products. They used the performance-support usage and business-impact data collected from these early PS projects to “sell” future performance support projects to prospective clients. They also asked stakeholders from past PS successes to provide testimonials and assist in marketing performance support.

Step 2: Reset business leaders’ expectations

Before your new performance support team even begins working on a project, it is critical that senior business leaders understand that this new learning product will not only look different than traditional training, but it will also produce better business results. Ensuring that senior leaders are bought into this change first will eliminate future barriers for the PS team once they begin working with stakeholders such as application owners, employee experience designers, or subject matter experts.

In the case of *The Group*, the organization valued analytics and data-based decision making. Senior learning leaders used a combination of external and internal data to build the case for why learning on the job was better than training before the job.

Though the research behind Ebbinghaus’ Forgetting Curve is somewhat dated (1885), the basic concept is intuitive and often easy for senior business leaders to understand. *The Group’s* senior leaders used this research to help illustrate the fact that about half of what is delivered in training is forgotten within 20 minutes after completing a class. Within a day, only one third of the information is retained, after a month only 21%. Research has demonstrated however that you can mitigate this loss of knowledge if employees are given the opportunity to immediately apply what they learn to real life situations.

The Group emphasized the fact that delivering any before-the-job training should be both critical in nature and succinct in delivery. From a retention, application, and individual performance perspective, it is better for the organization to invest its limited financial resources to help employees learn during training what resources were available (performance support) to help them continuously learn and perform.

In the event that Ebbinghaus’ concepts were insufficient to convince senior business leaders, *The Group* used data from research (References: Bastiaens et al, 1997; Gal & Nachmias, 2011; Mao & Brown, 2005; Nguyen, Klein & Sullivan, 2005; Nguyen & Klein, 2005) to demonstrate how other organizations have used this new form of on-the-job learning. In particular, they used any data that demonstrated reduction in costs to project potential savings to the organization. For example, in the case of *The Group’s* call center operations, the organization proposed a 50% reduction in the new hire training time. By integrating

performance support directly into the call center’s content management software, *The Group* reduced the onboarding program from six weeks to three.

One of the primary challenges with performance support is that few senior business leaders will understand PS nor remember the term when it is simply explained to them. However, most will want it as soon as they see an example of it.

To take advantage of this phenomenon, *The Group* identified high-potential targets for performance support. These were typically internally developed systems or off-the-shelf software being purchased and modified. High-potential targets may also include projects that are high-profile or high-impact to the company, or projects that would be easy to implement.

Once they identified the high potential PS projects, *The Group* developed mockups of the systems that included performance support embedded into the tools. If possible, they developed these mockups in conjunction with employee experience designers who were responsible for interface and navigation within the platforms.

Step 3: Upskill your performance support team and instructional designers

With a clear path from a training organization to a performance organization, and following senior leader alignment to this transformation, the next step is to prepare the team so that they comprehend the change in their roles, understand how the change benefits the organization, and develop the skills that will be necessary in their new roles.

Since *The Group* built its new performance support team using existing personnel, it did not design an organization around a prescribed formula or recruit ideal candidates for these PS roles. Roles, processes, and technologies at the start evolved over time and new capabilities were added along the way.

As Figure 2 shows, three core skillsets emerged that allowed *The Group* to successfully build performance support solutions.

PS team core capabilities

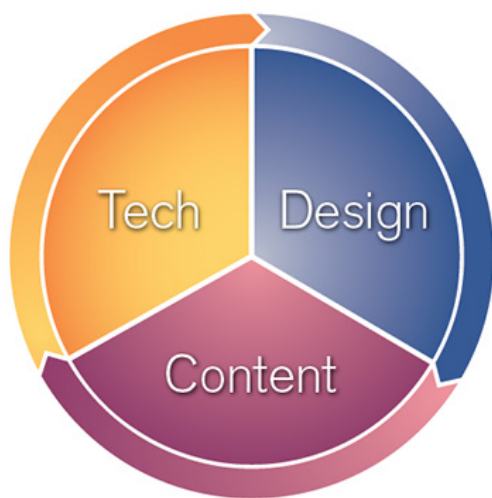


Figure 2: Performance support team core capabilities

Technology: Systems Engineer. Though it should not be the exclusive focus of a performance support strategy, technology can be a key enabler for many PS solutions. Since *The Group* built its new performance support team from the footprint of its learning technology team, this was the core strength of the new organization.

For example, one of *The Group's* initial PS projects required creating a simple authoring tool that would enable subject matter experts (SMEs) to create and maintain PS content. The PS solution also required a content management system for information produced by SME's and integration of this information directly into the employee interface of an internally developed call-center management system. Leveraging its existing technology background, the team was able to quickly adapt an open-source blogging platform (WordPress) and its large collection of plug-ins to build the content authoring tool. It also developed custom functionality to meet specific employee requirements.

Not only did the team's technical background enable them to create PS solutions, it also allowed them to establish relationships and communicate with application development teams. This relationship facilitated integration between PS content and the interface that employees would use in the workplace tools.

While a software engineer can bring technical expertise to the team, they typically lack knowledge of employee experience, performance support requirements, and how to connect the right information to the employee at the right time. This skillset is the domain of the performance support designer.

Design: Performance Support Designer. Since performance support focuses on learning on the job, whereas training focuses on learning before the job, there is some skillset overlap between traditional instructional design and performance support design. However, performance support designers require greater depth in specific areas:

- *Analyze the work interface and audience.* To determine what type of performance support you should use, it is necessary for a PS designer to analyze how an employee interacts with the primary work interface in their job and how it impacts their behavior, determine where learning may be necessary in the workflow, and identify placement of on-the-job learning at the appropriate time and place.
- *Analyze job tasks.* Though instructional designers may also conduct task analyses, a key difference with PS design is that the outcome of such an activity directly affects the design and content organization of the performance support system. The PS designer must work with SME's to break down processes into component tasks. They then translate these tasks into a content hierarchy that should logically mirror the business workflow. By doing so, employees can then quickly see how tasks relate to each other, which allows them to quickly locate the appropriate content if necessary.
- *Identify learning bites for the moment of apply.* Since employees must interrupt their workflow in order to use performance support, it is important that they can find the right information quickly, and that the content is succinct yet informative. As a result, the performance support designer must select the right "content bites" for the moment of need, either from existing information that can be reused or by working with the technical writer to create new content for the specific process or task.

Content: Technical Writer. With performance support, it is necessary for the on-the-job learning to be brief enough not to interfere with the work yet descriptive enough to enable the employee. It is necessary for technical writers to use precise and concise language to support fast processing of information and accurate understanding. In addition, information-mapping principles can also be used to help organize and structure the presentation of content so that an employee can quickly scan and locate useful information.

Step 4: Educate and manage subject matter experts

Even if an organization builds and develops a new performance support team, it will still not be successful without the right partnerships with key stakeholders in the organization. In particular, a performance support team must work in tandem with the teams that own the employee work interfaces. These other teams may include user experience designers, software development teams, and subject matter experts. Figure 3 shows the potential roles that a performance support team (circles) may take on in contrast to extended stakeholders (hexagons) who may be involved in the performance support project.

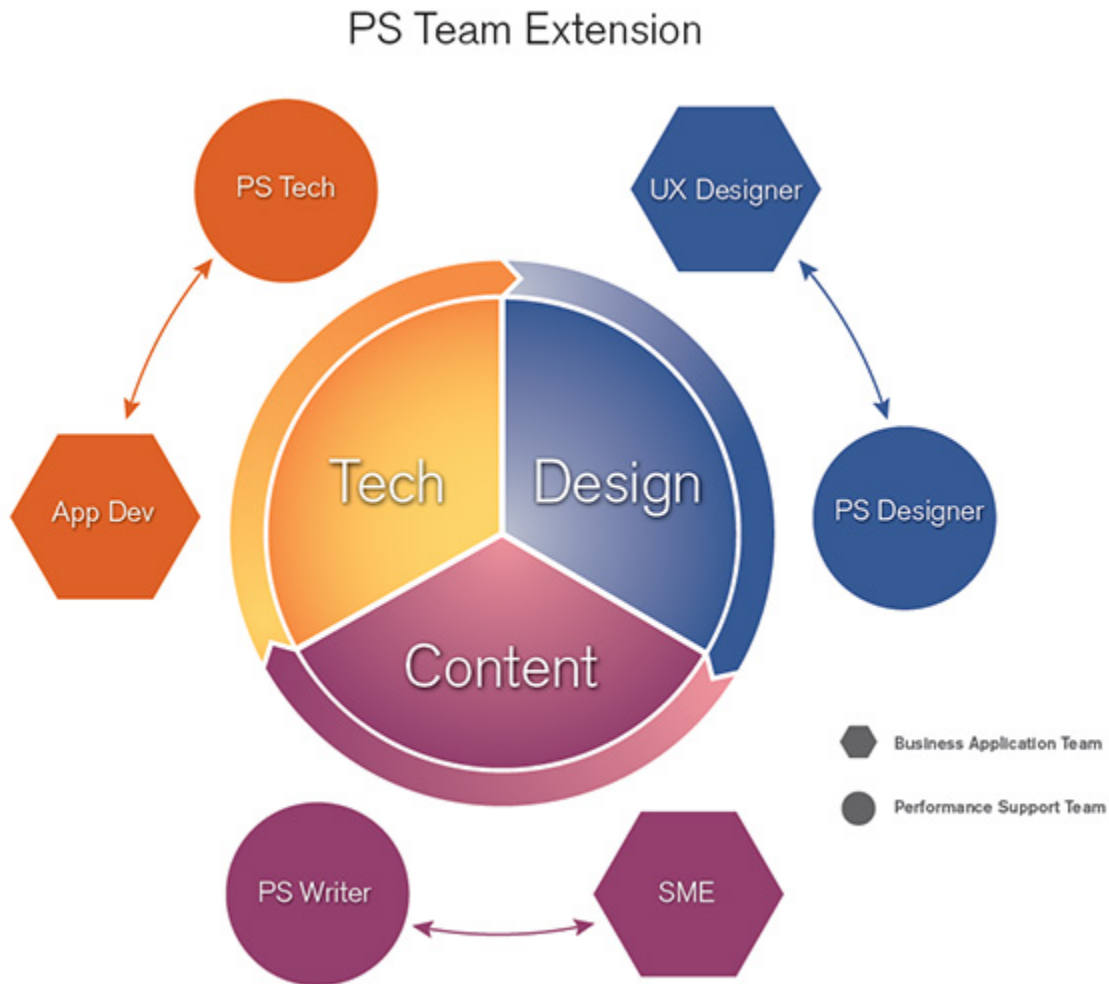


Figure 3. The extended performance support team

The specific roles and responsibilities that the performance support team owns versus those the extended stakeholders own may vary on a project-by-project basis. For example, a performance support designer may take on limited user-experience designer responsibilities, whereas the performance support systems engineer may take on some application development work. In contrast, when trained and supported properly, the extended stakeholders may also perform some of the corresponding roles of the performance support team. In particular, the responsibilities of the performance support content writer may be shared or transferred to the subject matter expert. This is particularly true after deploying a performance support project that requires ongoing maintenance. Barring high content volatility or volume, it is generally better to enable subject matter experts to sustain performance support content.

In the case of *The Group*, the PS team worked closely with subject matter experts to train and enable them on content creation and maintenance. During the pilot stages of a project, the systems engineer provides training and orientation to subject matter experts on the PS content authoring tool, which also initiates the relationship between the PS team and SME.

Next, *The Group* focuses on aligning the PS team and business stakeholders to the same language. For example, the simple term “process” can often mean different things to different application developers and business stakeholders. As a result, the PS team conducts a rapid-task-analysis (Gottfredson & Mosher, 2012) training session to help identify the business workflows and decompose them into component tasks. The primary object of the rapid task analysis is to generate a structured hierarchy for PS content. However, as a byproduct of this process, user experience designers, software developers, and subject matter experts become aligned to the same language.

In addition to content, the PS team works with the software development team to capture PS usage. This data provides future insight to determine areas of high application usage, user experience design issues, or opportunities to optimize performance support content.

The final step

While these four steps are necessary and vital, they are not sufficient to complete the paradigm change from training to performance and to establish the new paradigm as the norm. In tomorrow’s spotlight, we will address the work needed to drive consistency and rigor for projects, and to guide the extended team in succeeding projects.

From the Editor

To go further in your exploration of performance support in the real-time workflow through structure, coaching, and documentation, join us at The eLearning Guild’s [Performance Support Symposium](#), coming up June 10 – 12 in Austin, Texas! The Performance Support Symposium is the only conference dedicated to the topic of performance support and the goal of delivering small amounts of information directly into workflows when and where it is needed to enhance on-the-job performance.

When you register for Performance Support Symposium 2015, you will also receive admission to all sessions at mLearnCon 2015, co-located with the symposium. [mLearnCon 2015](#) is North America’s leading mobile learning conference and expo, focused on applying mobile technologies in the context of learning and support, the strategies for integrating these technologies into the training mix, and the best practices for designing, developing, and delivering mobile content.

Registration for Performance Support Symposium 2015 includes access to the mLearnCon 2015 Expo, an outstanding opportunity to explore a highly focused collection of key vendors offering leading learning technologies, tools, products, and services for mobile applications!

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