



Volume 1
Issue 1

Fall 2002

Pursuing Performance

with EPPIC Inc.

The Enterprise Process Performance Improvement Consultancy Inc.



Achieve Peak Performance

On Watch From the Bridge

Guy W. Wallace, CPT - Forms EPPIC Inc.

Try. Try again.

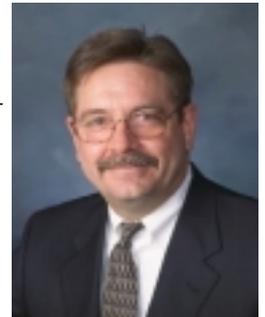
I've started EPPIC after my CADDI partners and I decided to close that business. We're all off on our own now. CADDI was in business just shy of 5 years when the state of the economy and impact to our clients and our workload became too much for us to deal with and still remain friends. CADDI arose in September of 1997 when I and my two partners at SWI- Svenson & Wallace Inc., decided to go our own ways after 15 years together.

Will EPPIC stay a one-man show? I don't know. That's not my inclination, but only time will tell. And already I'm more than a one-person show, as I have the part-time support of one of my former CADDI production specialists assisting me in capturing the data that my consulting efforts generate.

I still do Performance Modeling, benchmarking the best practices of Mastery Performers in facilitated group meetings. And I still systematically derive the enablers with that same group, be they limited to the "knowledge and skills," or expanded to the other enabling human assets from my BIG MODEL (EPPI- see the article on page 3), always dependant on the downstream intent and needs of the client. I still avoid "analysis paralysis" by not getting more data than what's really needed for the next phases' steps.

What happens downstream from this "core analysis" methodology-set, as always, depends.

I've done 72 CADs (Curriculum Architecture Design) projects since the first in 1982. I do have quite a bit of experience applying that methodology to critical corporate needs. Think "systems engineering" before an ADDIE-type ISD effort -which is MCD- Modular Curriculum Development/Acquisition within my PACT Processes for T&D...and applies equally to Learning, and Knowledge Management. CADs are typically applied to critical target audiences in critical enterprise processes. Not everywhere for everyone.



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EPPI—Guy Wallace

S.C.O.P.E. –Part 3
of 4– Todd Packer

EPPIC is an ISPI Advocate

EPPIC has become an **ISPI- International Society for Performance Improvement** Advocate. Guy Wallace is currently ISPI's president-elect, and will become the president at the conclusion of the Spring Conference this next April in Boston. Guy's consulting organizations have always been supportive of ISPI.

Guy has two presentations he'll be doing at the Boston conference, an "encore presentation" titled: "Aligning with the Voice of the Customer at 3 Levels." This session was one of the top 10 in evaluation results at the Dallas conference last spring. The second presentation is based on an article published in ISPI's PI Journal this past August and is titled: "Designing for the Life Cycle: Making Decisions Today that Pay Tomorrow." For more information regarding ISPI and the Spring and Fall conferences, go to: www.ispi.org.



www.ispi.org

We hope to see you there in Boston this next April for the conference!

On Watch From the Bridge *-continued*

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My MCD methods (the ADDIE equivalent) don't have to follow a CAD, but often do. When they don't, they follow the same PACT Processes design rules/guidelines that minimize or eliminate any re-work if a CAD does follow the MCD effort. Where CADs start the configuration of content, to increase reuse and decrease life-cycle costs for the T&D products, MCD efforts finish the job. The design is for development efforts of group-paced, self-paced, and/or structured-on-the-job T&D. Straight or blended. Proven in hundreds of ISD efforts by myself and dozens and dozens of others...I've trained over 150 ISD practitioners over the last decade and many have gone on to win internal and external awards and recognition for their efforts. Including PACT Practitioners working at or for GM, HP and Siemens.

All of this is covered in detail in my award winning book: *lean-ISD*. This book was a recipient of ISPI's 2002 Award of Excellence for Outstanding Instructional Communication. And not only did Dr. Geary Rummler design the cover, he was the first reviewer of the book's content, as a favor to me, and of course to protect himself...as I have always claimed to be a Rummler-ite. I wouldn't/didn't want to embarrass him. So I asked him for his critique. I am thankful he was so gracious.

The PACT Processes for T&D, as covered in my book and many articles, are the results of a failed attempt I was involved with at Motorola's Training & Education Center (MTEC, the forerunner to Motorola University) to capture and reflect the Rummler approach in an ISD Design Methodology. That never happened, but it gave me the desire to "do it" And so I did; as always, with a little help from my friends.

Besides the ISD work, our BIG MODEL: EPPI, guides our efforts beyond ISD efforts for performance-based T&D, or Learning, or Knowledge Management products. EPPI, Enterprise Process Performance Improvement was always intended to be a simple extension of the PACT Methods. We wanted this to enable our PACT Practitioning clients to more easily transition from "Training to Performance" once they had mastered performance-based T&D. For more on the EPPI models and methods, see the article beginning on page 3.

And then, my latest book, "*T&D Systems Views*" is my attempt to help my clients get a handle and better control ("just enough control" we like to say) on all of the processes internal to a T&D/Learning/Knowledge Management operations. I now have a 3 day workshop to walk a T&D leadership and key member team through a detailed review and assessment of the 47 processes we have identified in the book, and conduct the initial planning for addressing their Top 10 Improvement Targets, based on the potential ROI and Value Add. Please call me if you are interested in knowing more!

Thanks to all of my current and former clients for all of your support of my improvement consulting efforts over the past 20 years! I appreciate your trust and business! I am here to serve your needs!



Besides our ISD work, our BIG MODEL: EPPI, guides our efforts beyond ISD efforts for performance-based T&D, or Learning, or Knowledge Management products to non-instructional interventions such as performance-based selection, appraisal, and compensation.

We specialize in the human-side of process performance



Available from the bookstores at ISPI.org and Amazon.com

lean-ISD: 404 pages regarding the PACT Processes for T&D

The concept of *lean* comes from the M.I.T. study in 1990 that looked at the worldwide automotive industry and practices and compared them all to Japan's lean production system, in the book titled *The Machine That Changed the World*. The *lean* approach is most prevalently applied to engineering and manufacturing processes, but it is not limited to those processes. The goals in these *lean* applications are to

- Use the best of mass and craft production methods.
- Reduce costs and cycle times.
- Improve product and process quality and customer satisfaction.

The application of *lean* to the world of ISD should create a set of common, effective, and efficient processes for the entire ISD process that spans project planning and management, analysis, design, development, pilot-test deployment, and evaluation of T&D.

That's what I set out to do, and I believe that's what I have done. You can be the judge!

EPPI - The Methodology-set for Enterprise Process Performance Improvement

EPPI,SM is my *methodology set* for Enterprise Process Performance Improvement. These methods lead to improvement in Human Asset Management Systems (HAMS), and Environmental Asset Management Systems (EAMS).

The EPPI methodologies bring predictability and control to the very tricky and complicated task of improving complicated, intertwined processes, WHILE ensuring that there is adequate return on the investment and added economic value. Improvements that don't promise to and then later add real value or provide sufficient return-on-the-investments are merely interesting at best, but not appropriate of actual consideration, effort and investment.

There are two stages to EPPI:

1. **Targeting EPPI** - is where a little effort is expended to conduct quick analysis and design efforts in order to build a preliminary "business case" for going after significant ROI. The potential entanglements with other processes are brought to light. Their costs are factored in to the bigger picture of "Total Investments" for "Total Returns." Improvements that don't show enough ROI and EVA "promise" never see the light of day or a nickel more of shareholder equity.
2. **EPPI Intervention Initiatives** - is where the significant ROI promised in the upfront Targeting EPPI efforts, is achieved via structured interventions that fully anticipate all of the entanglements (efforts and costs) involved in addressing what are usually complex situations; especially for those with significant strategic and financial impact.

Improvements that don't promise to and then later add real value or provide sufficient return-on-the-investments are merely interesting at best, but not appropriate of actual consideration, effort and investment

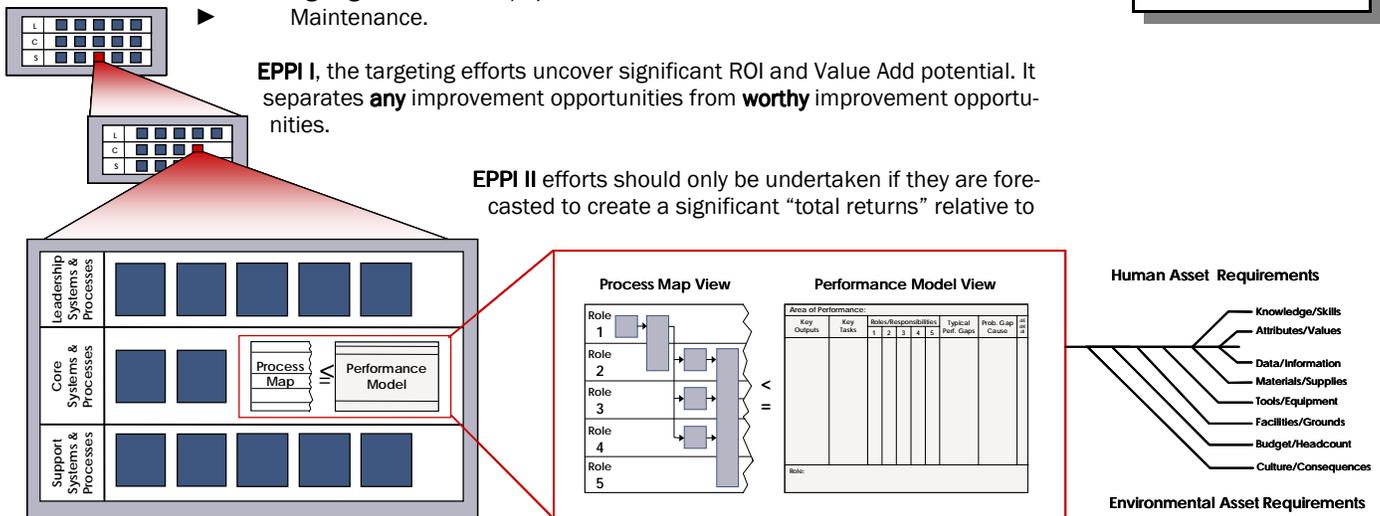
EPPI provides both a "program/project management process" for improvement efforts (see above) and a "data logic" (a data framework) that together guides:

- ▶ Business case development for the improvement effort
- ▶ Program/project planning
- ▶ Analysis
- ▶ Design
- ▶ Development
- ▶ Trial/testing
- ▶ Revisions
- ▶ Implementation/rollout
- ▶ Ongoing administration/operations
- ▶ Maintenance.

EPPI, like the PACT Processes, is based in large part to the derivative Rummler methods I first learned back in 1979

EPPI I, the targeting efforts uncover significant ROI and Value Add potential. It separates **any** improvement opportunities from **worthy** improvement opportunities.

EPPI II efforts should only be undertaken if they are forecasted to create a significant "total returns" relative to



the "total investments" required. Then get on with it! Not for the sake of improvement alone, but for the sake of the shareholders and the stakeholders.

EPPI, like the PACT Processes, is based in large part to the derivative Rummler methods I first learned back in 1979 at Wickes Lumber's Training Services organization in Saginaw Michigan, where I worked
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EPPI by Guy W. Wallace-continued

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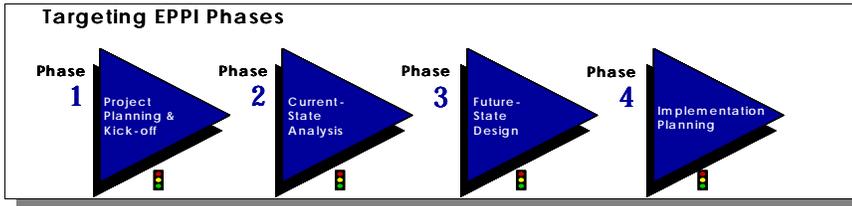
for both Geary Rummler's brother-in-law, and along-side two people who had worked with Geary's brother, Rick Rummler. That's why I still claim to this day to be a Rummler-ite. And you should be too!

Geary can be reached via his web site at: www.performancedesignlab.com

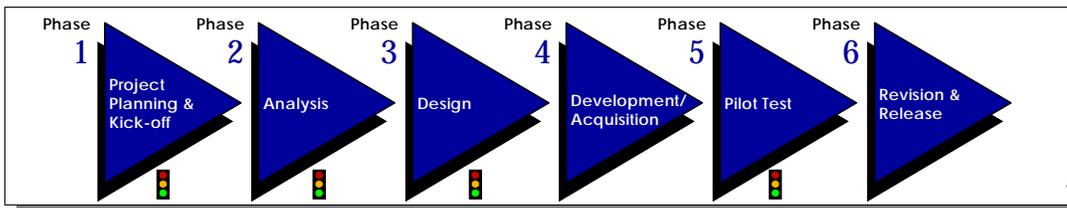
Targeting EPPI is a model we have been evolving and using in our consulting practice since 1982. It has been *proven in* on many projects with Fortune 500 concerns in the hundreds of projects we have conducted during the last 20 years. Additionally, we have published articles on various aspects of this methodology, as well as on project results, since 1984.

EPPI Stage 1 is used for complex, enterprise-wide assessments before launching into an improvement effort. **Targeting EPPI** is conducted either formally or informally following a 4 phase approach:

The final results of a **Targeting EPPI** effort, is a implementation plan accounting for both anticipated investments and returns, a business case with an ROI forecast. This portion of **EPPI** allows management to employ both "command and control" and "empowerment" methods to accomplish improvements that impact the bottom-line.



EPPI Stage 2 is the improvement project, undertaken and endorsed by management that has seen the details of the **Targeting EPPI** assessment of returns and investments. **EPPI Intervention Initiatives** can be simple or complex. They can range from single changes to multiple changes: from changing a policy, or a tool; or to changing the process, and the selection systems, and the training system, and the compensation system, and the data systems, and the tool systems. But all of the **EPPI II** change efforts were anticipated and their "investments" valued against the "returns" calculated.



Targeting EPPI

Stage 1 - Targeting EPPI is about the systematic, and quick, analysis, design and implementation planning for targeting worthy Stage 2- Enterprise Process Performance Improvement Intervention Initiatives.

Ultimately the targets for improvement initiatives will involve the process(es) themselves, or the human assets within the targeted processes, the environmental assets, or two of the three or all three. Targeting EPPI is systematic. And if done correctly, only the high-payback problems and opportunities will be addressed.

Targeting EPPI focuses attention on the important improvement initiatives that must be conducted in parallel and in the end, work together. Some call it *working on various fronts*. Others call it *multitasking*. Some post-Targeting EPPI initiatives are related, others are not. Once an EPPI effort has been completed, promising improvement targets are funded and planned, then pursued using various improvement methods appropriate to the *intervention type*.

EPPI is intended to be robust to other improvement approaches, from SPC and TQM, to ISD and HPT, to Six Sigma and many other improvement approaches and methodologies. We wish to create a model for getting those specific efforts up and running only when they make *systems sense*. We wish to promote a *systems view* approach to the planning for and the management of Enterprise Process Performance

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Targeting EPPI is a model we have been evolving and using in our consulting practice since 1982. It has been *proven in* on many projects with Fortune 500 concerns in the hundreds of projects we have conducted during the last 20 years

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EPPI by Guy W. Wallace-continued

(Continued from page 4)
Improvement.

Four Targeting EPPI Phases and Three Key Analysis Tier Views

In Targeting EPPI there are four phases and three key Tier Views. The three Tier Views are either used directly within each of the four phases, or they influence the thinking and planning of the activities within a phase. We will cover the Tier Views first and then the phases where they are used.

Targeting EPPI Tier Views

The EPPI Tier Views are intended to systematically map the enterprise processes and target improvement efforts with a clear understanding of all potential impacts to other enterprise systems and processes. The three Targeting EPPI Tier Views are

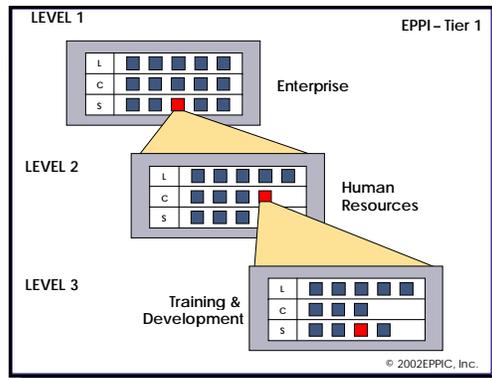
1. Map the Enterprise and Its Systems/Processes to Target Tier 2 View Efforts
2. Map the Processes and Model the Performance to Target Tier 3 View Efforts
3. Derive the Human and Environmental Enablers to Determine Gaps and Target Improvement Efforts

Targeting EPPI Tier 1 View: Map the Enterprise and Its Systems/Processes to Target Tier 2 Efforts

This is where the enterprise's organizational systems and processes are mapped by the "functional owner" to target improvement areas. Again this could be driven by an unbalanced balanced scorecard or based on any current, current or forecasted results for the key business's metrics that are deemed unacceptable (a problem), or have been determined as candidates for improvement due to benchmarking efforts (an opportunity).

All enterprise processes related to the initial target can be mapped into their "home" functions and their systems and processes categorized as: leadership, core, or support (L-C-S).

This step is akin to first creating and then reviewing a schematic in a troubleshooting routine to determine the probable cause for an electrical short. This effort concludes when the probable targets for the enterprise's problems' root causes are determined and targeted for further analysis. Those targets and any entanglements identified are addressed in the next Tier Views created.

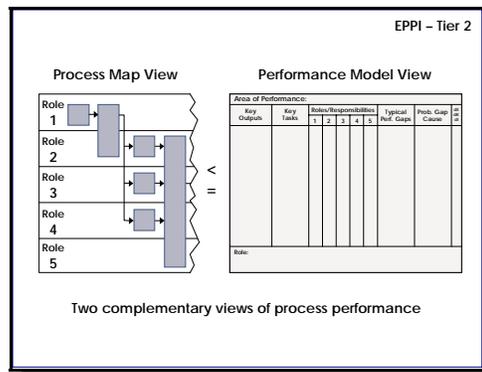


EPPI Tier Views are intended to systematically map the enterprise processes

Targeting EPPI Tier 2 View: Map the Processes and Model the Performance to Target Tier 3 Views Efforts

In this Tier 2 View, those targeted functional systems and processes for the probable root causes are both process mapped and performance modeled. This level of detail is needed to target where in the current, status quo system/processes the next Tier 3 Views should be created. And it should allow an assessment and analysis of the other intertwined processes that may be affected/need to be affected by any improvement effort undertaken.

If Process Maps exist, they can be used to generate more detail via the Performance Model. The Performance Model captures both "ideal performance" and a gap analysis against that ideal, for the Areas of Performance, the chunks, of the process.



EPPI, Is intended to extend the PACT Processes for T&D into more than just another ISD process, to facilitate our clients moving from Training to Performance!

We use Process Maps to identify the big chunks, and then the Performance Model to add details.

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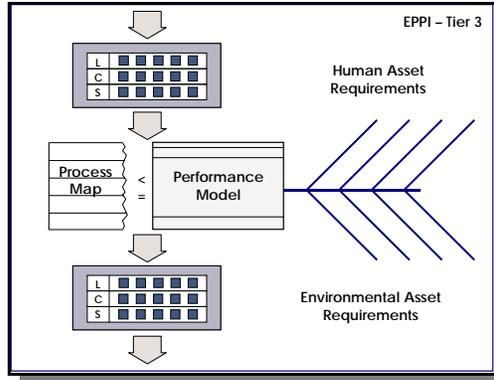
EPPI by Guy W. Wallace-continued

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Targeting EPPI Tier 3 Views: Derive the Human and Environmental Enablers to Determine Gaps and Target Improvement Efforts

This is where all of the necessary *enablers* for those process performances are both determined and assessed. EPPI categorizes all enablers including *human assets* and *environmental assets*. Anyone familiar with the Ishikawa diagram (cause & effect or fishbone) should be able to relate to this old Quality tool. And the techniques used with it

Once the needs and deficiencies in the process design itself, and/or any of the necessary human or environmental “enablers” are determined, the impact to process performance for addressing those can be determined.



The R (return) can be calculated for the I (investment).

Again, the concepts, models, tools, and techniques for creating these three Tier Views are used in each of the four phases of Targeting EPPI.

Stage I-Targeting EPPI Phases

In EPPI's first stage, the Targeting Stage, the four phases are intended to quickly get to the point to where a target, and its other entanglements (processes upstream and downstream that will be involved in any change effort) are clearly identified. Then the “I” of investments can be more accurately forecasted and compared with the “R” of potential returns.

If the ROI isn't significant or sufficient, skip the improvement efforts of EPPI's Stage II. You wouldn't spend/invest your own money for negligible or null returns. Don't do that for the shareholder.

Either Improve or protect the enterprise, or both. Back to Stage I's four phases.

Targeting EPPI Phase 1: Project Planning & Kick-off

In this phase, the Targeting EPPI *plan* is created, and a Project Steering Team has been recruited, oriented, and met with in order to review and then amend, approve, or kill the planned effort. The three Tier Views are used here to influence the overall planning efforts of the four phases and are begun here (as appropriate to the specific effort and the teams involved).

Tier 1 Views might begin here in Phase 1 and may also end here, depending on the size, scope, and breadth of the enterprise; otherwise, Tier 1 Views would be completed in Phase 2 by a designated Analysis Team.

In Phase 1, the Project Steering Team deliberately targets Phase 2 efforts based on current business results and perceived future opportunities and threats.

Targeting EPPI Phase 2: Analysis of the Current State

The *current state* is determined, mapped, and targeted in this phase using Tier 1 Views guidance (if completed earlier in Phase 1; otherwise, Tier 1 Views are completed here). Then targeted Tier 2 Views and Tier 3 Views efforts are completed, as outlined above and specific to the original plan.

The results of the analysis meeting(s) are shared in a “gate meeting” with the Project Steering Team. They will review the data, assess the target problems/opportunities determined by the Analysis Team, and agree upon the specific targets for the succeeding Phase 3 efforts.

Targeting EPPI Phase 3: Design of the Future State

In this phase, the *future state* is determined and targeted using both the models and data from the Phase 2 efforts as starting points. The same core teams would be used with some additional members

(Continued on page 7)

Either Improve or protect the enterprise, or both. If the ROI isn't significant or sufficient, skip the improvement efforts of EPPI's Stage II

EPPI by Guy W. Wallace-*continued*

(Continued from page 6)

to broaden and/or deepen the team's expertise, as necessary. This team produces "Improvement Specifications" where the potential "Return" is calculated. The "Investments" required are only guessed at here, and detailed more formally in the next phase. The Project Steering Team is brought together again to review and assess the data and to select specific targets for the Phase 4 efforts.

Targeting EPPI Phase 4: Implementation Planning

Here the specific implementations are planned for any post-Targeting EPPI process improvement interventions—where the missing/deficient enablers are put in place/fixed, or the process is re-engineered and then the enablers are righted. This phase may need to plan multiple sets of project efforts, some of which will need integration efforts between them to ensure their effectiveness post-rollout.

EPPI uses teams of designated personnel to accomplish specific roles

EPPI Teams

EPPI uses teams of designated personnel to accomplish specific roles. Overviews of each team and their functionality are presented next.

Project Steering Team

A Project Steering Team (PST) is brought together to review the implementation plans and to select Targeting EPPI projects. The PST recruits the best from the functional/organizational ranks and helps them leverage the process performance situation to their best advantage.

The PST will target/focus the collective follow-on improvement efforts. They are the only ones close enough to provide an understanding of what else is linked to the current situation and what else may be impacted and/or need to be impacted. Then proactive planning will be conducted to address *everything* necessary to make the targeted improvement ultimately effective.



Analysis Team & Analysis Review Teams

An Analysis Team (AT) of Master Performers, representing the current state, and Subject-Matter-Experts, representing the future state, is brought together to *quickly* define performance and the enabling assets, both human and environmental, and define typical gaps and probable causes.

Analysis Review Team(s) (ART) of additional Master Performers (again, representing the current state) and additional Subject-Matter-Experts (again, representing the future state) is brought together to *quickly* review the outputs of the Analysis Team and to critique that work.

Design Team & Design Review Teams

A Design Team (DT) is brought together to work with the analysis data and *quickly* create specifications and then detailed designs for the improvement interventions.

Design Review Team(s) (DRT) is brought together to *quickly* review the designs to provide feedback prior to development efforts.

Implementation Planning Team

An Implementation Planning Team (PST) of representatives from key stakeholder groups and processes, is brought together to *quickly* review the designs and develop implementation plans for the testing and roll out of the interventions. They also address any and all other process "entanglements" that may be anticipated by this broadly represented team.

EPPI's Stage I "Targeting EPPI" leads to worthy improvement intervention initiatives in Stage II.

EPPI's Stage I "Targeting EPPI" leads to worthy improvement intervention initiatives in Stage II

In our next issue: More on EPPI Stage II - EPPI Intervention Initiatives.

S.C.O.P.E.: Discover Your Performance Excellence—Part 3 of 4

By Todd Packer

Series Re-Introduction

Welcome back to our exciting new approach to assessing and improving organizational performance! This is S.C.O.P.E.: Strategic Creative Organizational Performance Excellence. A goal as well as a tool, both an outcome and a process. Through creative problem-solving, the author will demonstrate a four-part model of observation and analysis that can guide practitioners through the complexities of modern workplaces to identify obstacles and opportunities.

Each article will highlight one facet of S.C.O.P.E., through the metaphor of "scope:" microscope, periscope, telescope and kaleidoscope. The use of metaphor in organizational analysis is supported by the literature in the field (see (Marshak, 1996) and (Morgan, 1998)) as well as by the author's experiences. Human performance technologists, instructional designers, managers and trainers can benefit from this multidisciplinary approach. Let's shed light and focus our efforts upon areas of performance that are often elusive as we investigate the separation between current state and desired state. Scope out the gap, as it were.

Introduction: Oh, my virtual heavens...

"Thoughts slide out of thoughts, like an old brass telescope,
Lubricated with ambiguity, bent by time..."

—from Allen, Fergus "Thoughts Slide out of Thoughts" from *The Brown Parrots of Providencis* (1993)

Lost in cyberspace, again.

Somehow in the rapid advance of technology that brought us the Internet, we continue to struggle with losing time and orientation. I find myself spending hours roaming about the world wide web, seeking information with meaning, getting distracted without a map.

Valuable information that can improve an organization is available out there...I know it...yet it can be frustratingly elusive, jumbled, unfocused.

A structured means by which we can fathom the depths of information and identify valuable, meaningful resources from the Internet can advance our understanding of workplaces. Because of the competitive nature of search engines, directories and repositories of data, though, we each must develop a unique, meaningful and effective collector of information.

The telescope is a powerful metaphor for this type of analysis.

Now, take a break from the e-niverse (although you are possibly reading this as an electronic newsletter!), to learn about the transformational power of a tube, some glass and endless possibility unleashed.

Point and Click: A Brief Telescope Introduction

"The relationship between the telescope and our understanding of the dimensions of the universe is in many ways the story of modernity ...the pivotal division between the world we inhabit today and the world of our ancestors was the invention of this instrument." (Panek, 1998) p. 4

A tube with two pieces of glass. Point it towards the vast celestial sphere. Find some new detail that challenges your assumptions and sparks new searches. Something clicks, falls into place, and your understanding and your awe increases.

Simple, yes? Too simple. The national government in the Netherlands tells Hans Lipperhey in 1608 he can't patent it because it's too easy to copy, though Lipperhey is often credited with the first to offer a design in print. Three years later, a Greek poet and theologian, John Demisiani, at a dinner in honor of Galileo, named it *telescopio*, from the Greek "to see at a distance." Over the next few centuries, astronomers refined, expanded and transformed not only the instrument itself, but our ability to see our universe. From so simple, so obvious a combination, we have expanded our view tremendously. (For a

Your four-word
takeaway:

Search, discover,
reveal, transform.

"The relationship between the telescope and our understanding of the dimensions of the universe is in many ways the story of modernity ...the pivotal division between the world we inhabit today and the world of our ancestors was the invention of this instrument." (Panek, 1998)

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S.C.O.P.E by Todd Packer *-continued*

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great history of telescopes, see Panek, 1998)

The power of the telescope is that it can observe objects and phenomena from a great distance. Even more profound, since the telescope gathers light that travels over time across great distances, we can see into our past from the light that reaches our eye. A vast array, the universe, is brought into a format that we can perceive and analyze in our hands.

Despite different designs, telescopes share four properties:

1. They can help the observer see things at a distance in greater detail
2. They have light reflecting and/or refracting elements typically housed in a tube (although modern telescopes use electronics, radio waves and other technologies)
3. The observer views objects and areas typically much larger than themselves yet can be mapped and understood on a scale meaningful to the observer
4. They help the observer see the same object over a period of time and gather additional information about its position in relation to the observer and to other meaningful objects

You can use the telescope idea to observe the external processes beyond organizations that impact on organizational functioning:

- Market trends
- Competitive intelligence
- Academic research on organizational management
- Social, cultural, historical and political forces
- Significant local, regional and global events
- Threats and opportunities

The Crystal Question: So what's out there?

'O telescope...instrument of much knowledge, more precious than any scepter! Is not he who holds thee in his hand made king and lord of the works of God?" Johannes Kepler, quoted in (Panek, 1998) p. 60

Let's dispense with the wondrous history of the Internet. Suffice to say, a lot of people put a lot of stuff so others can get it through computers connected. So, how do you get the best and most valuable for what you need to improve your organization?

For a quick glance at organizational dynamics, I recommend that practitioners ask a simple crystal question (for more on "The Crystal Question" see (Packer, 2001)), one asked by astronomers from the dawn of human curiosity: What's out there?

Specifically, for a work situation, find the link between what's going on inside and what's happening outside an organizational setting. Who else has dealt with a particular problem? What are other people saying causes the results you are seeing? Where have others found answers to situations similar to yours?

Unfortunately, unsystematic approaches to using the Internet to probe the data-rich information universe, is like looking at a night sky to find a single star. Time consuming, exhausting work that strains your eyes, pains your neck and keeps you up all night.

You need a tool to make it easier. That's where a telescope comes in. However, since your "organizational universe" and "observer position" are unique, you get to design your own!

You can use a Telescope job aid and find your S.T.A.R. (Search—Track—Adjust—Result)

The Internet is only one form of external universe, though. You can use your Telescope tool on other

WYDSIWYG: What You Don't See Is What You Get

As with any successful organizational intervention, how you evaluate the information collected will dictate the value of the tool that you use. Some criteria that may be useful for evaluating the Telescope metaphor include:

1. In observing specific examples of organizational phenomena, are you able to observe aspects that have not been seen by others?
2. Are the causes for gaps in performance made more or less clear by your analysis of what you observe?
3. Can others in the organizational setting use similar tools to observe similar phenomena?
4. Can you convey your analysis in terms that have both symbolic and literal value and meaning for the key decision-makers in the setting?

Any tool for observation and analysis has profound limitations. Throughout this series, I hope to convey a new way to look at organizational dynamics with CPS, with the caveat that these are adjuncts to, not replacements of, the standard tools in use for performance analysis and improvement. Successful interventions benefit from a wide array of perspectives and tools from internal and external experts.

Metaphors can have a downside, too. It can be quite tempting to embrace a single approach because of its power to illuminate one aspect of performance, while ignoring other approaches. A diagnostic metaphor without organizational meaning and value can at best be a waste of time for organizational members and potentially result in costly delays in improving performance (as well as discrediting the practitioner).

Skilled practitioners balance their roles as observers, advisers and participants to help individuals ethically achieve organizational goals. Mistakes can and probably will happen, and a tool that worked quite well when observing one phenomenon becomes useless when applied to another. Make sure you have organizational checks and balances so that you do not get so wrapped up in your analysis you ignore the needs of organizational

How A Metaphor Can Become A Tool

These constituent elements of the telescope, or any organizational metaphor, can be mapped onto a tool—basically a set of questions tied to tangible, observed phenomena—for organizational analysis. As a guideline for the practitioner assessing barriers to performance and valued capital in specific work settings, the "SCOPE Creed" could read:

1. Observe specific accessible details
2. Expand upon the specific
3. Measure behaviors and phenomena that are tangible (but not necessarily immediately apparent)
4. Measure analytically (i. e.; deduce/induce conclusions from observations in a fashion that others can follow)

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external environments through methods such as:

- Interviewing experts outside the organization
- Observing behaviors at trade shows and professional meetings
- Conducting library research and reading periodicals, books and other sources
- Collecting impressions and quotes from non-members on an organization

The industry of market research is premised on the investigation of consumer and competitive behavior to improve product development and sales strategy. Performance improvement specialists can integrate this view of the external with observations of internal patterns to augment their analysis. Sometimes, entirely new realms for exploration are uncovered by looking beyond the organization and discovering new ways of solving challenges and finding opportunities.

But the critical challenge remains. You can find more information than you can handle, but if it offers no meaningful value, than your time and effort have been wasted. To make external, telescopic research valuable to key stakeholders, you must not only answer "What's out there?" but also "So what?"—i.e., "What value does that information have for improving our organization today?"

A case example:

For a project to design a program for monitoring hate crimes, I gathered information via the Internet and computer-based databases on Ohio hate crime incidents and resources. Since I was using a variety of search engines and article databases, and I wanted a general survey to guide future searches, I created a form whereby I could track which words and phrases generated valuable results. Similar to adjusting sets of lenses in a telescope, I would find that words by themselves may not prove as meaningful as combinations. For example, "race" would bring up everything from race relations to horse races, marathon competitions and political campaigns. Combining "race" with "violence" narrowed the search to meaningful findings. More comprehensive information could have been gathered if the same search items are used over a period of time. The data collected augmented a report sent to organizational leaders to justify the need for a new program to expand services (internal) and to continuously monitor additional incidents (external).

Never-ending Space, Ever-ending Time

"...time marches on, leaves' flesh imprinted with maps of spider-web

sites, that spread across the body's internet, as songs peeling across this embezzled air tantalize us with history of our continued failure."

From Troupe, Quincy "Choruses" (1999)

"Social, professional, and informational contexts are largely based on information technologies that transmit information faster than people can think (Simons, 1985), across spaces that were formerly impossible." (Kaufman, C. and Lane, P. (1996), p. 138)

The history of telescopes is marked with trial and error, conflict, failure and triumph, and the constant revelation of vast new regions for investigation that have transformed our concept of our place in the universe. So take heart when your efforts for scanning the knowledge nebulae bring you nothing but frustration. If you take time to refine your search instrument, you will have a powerful, insightful and sophisticated tool for gathering information.

But with our advancements comes a cost. Kaufman and Lane in looking at consumer struggles with managing multiple media in the home, re-emphasize our shifting experience of time influenced by technology. Sometimes this shift does not mean efficiency, and our time-saving devices can force us to spend time in non-valuable activities. Too many hours with your nose stuck to a monitor can isolate you from the vital dynamism of the work setting you seek to improve.

Use your tools wisely to avoid strain and you can find wonders subtle and profound. Not just for email and games, our computers, thanks to telecommunications, grant us a window into an unprecedented

(Continued on page 11)

The power of the telescope is that it can observe objects and phenomena from a great distance.



Groan. Creative Problem-Solving. Why?

CPS...

Works fast (Hypothesis: When the language used to get out of a problem is the same language as what was used to get in, things inevitably slow down—CPS gives you new language to deal with the same problem)

Saves dough (The use of current resources in new ways reduces the need to buy more)

Makes dough (A commitment to ideas that work makes innovation profitable)

Looks good (People who use CPS are generally happier, less stressed, more committed to work, willing to perform beyond expectations and have fun while improving their work and world. Thus participants, products and processes look good.)

Similar to adjusting sets of lenses in a telescope, I would find that words by themselves may not prove as meaningful as combinations

S.C.O.P.E by Todd Packer -*continued*

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info-cosmos. Explore with focused vision, fellow organizationaut!

And when you need a break from the vastness of data space, we can return to the vibrant display of human behavior at work. So bring your kaleidoscope and we'll see you in new, brilliant ways in our final installment next time...

[Note: Poems in this article were found through the electronic library "Literature Online" © Chadwyck-Healey Ltd., accessed on location at the Cleveland Public Library.]

S.C.O.P.E.

What is it?	Verb	Definition
Strategic	Plan	A current state and an ideal state are identified with a commitment to bridge the gap based on investigation and informed intuition in specific sequential stages
Creative	Create	Opportunities and obstacles are identified through the manipulation of materials, information and ideas (inputs) to create meaningful and valuable outputs
Organizational	Manage	Constituent elements of the process towards the ideal state are guided with expertise and an awareness of each element's impact on the entire process
Performance	Do	Tasks identified as critical for reaching the ideal state are enacted by specific members ethically motivated to optimally use their capacities and resources
Excellence	Achieve	The ideal state becomes the current state and this is assessed by a standard and communicated to process members and stakeholders in a language and with rewards that have meaning and value in (and possibly beyond) the organization

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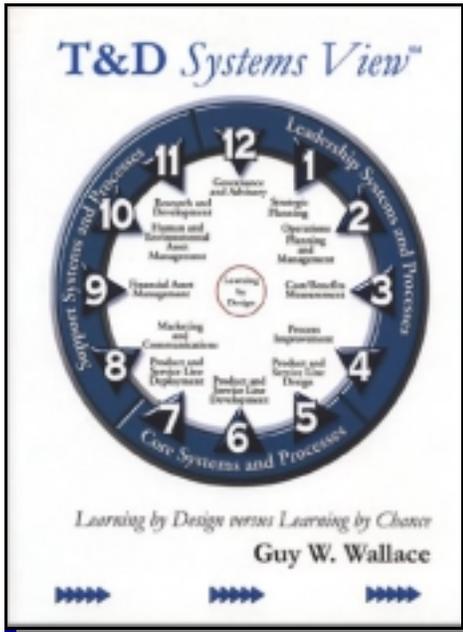
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- University of South Carolina Beaufort Library Bare Bones 101: A Basic Tutorial on Searching the Web <http://www.sc.edu/beaufort/library/bones.html>
- Information on invention of telescope, with guide Mary Bellis, from About.com <http://inventors.about.com/library/inventors/bltelescope.htm>

Would you like help with training creatively, defining your vision, and making complex performance improvement efforts clear for decision-makers as well as participants? Then contact Todd Packer today!

As an independent applied creativity consultant, Todd Packer can help you safely, strategically, and successfully explore organizational mess. His unique, innovative, and customized techniques reduce stress, improve morale, generate solutions quickly, and achieve measurable outcomes.

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T&D Systems View—The Book *available from Amazon.com*

Guy Wallace has done it again! After demystifying the ISD process in his “lean-ISD” book he tackles the corporate training and development system and puts it in a business-focused perspective. Whether you are in-house or serving as a external consultant you will find Guy’s model an invaluable tool for enterprise training and development.

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Miki Lane—MVM Communications

Stuff of Interest on our Web Site

We can’t promise that it’s up already, but please check out our web site soon for the following:

- An **EPPI white paper**— on our **BIG Model for Improving Performance of Enterprise Processes**
- A **PACT Processes for T&D white paper**— on our **PACT methodologies**
- **Balancing Stakeholder Requirements**— an article originally published by The Journal for Quality and Participation in March 1995
- **Guy W. Wallace’s Professional Bio**: 25 pages of details from his 20+ years in pursuit of performance improvement



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Guy W. Wallace’s Consulting Clients—20 Years in Pursuit of Performance

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