

Summer 1998

lean-ISD

lean Instructional Systems Design
via the PACTSM Processes for T&D

The CADDI Newsletter

Summer 1998

Vol. 1, Issue 3

We at CADDI are very busy working on interesting and fun projects with our clients. We continue with the technology transfer of our PACT Processes for T&D with General Motors University (known inside GM as the MC and MI Processes for Training). We continue with CAD and Qualification Systems design and development projects with Landis & Staefa, and T&D development efforts continue with AT&T and Bandag. And we've completed a new CAD project with BankAmerica. Please see page 5 for project updates.

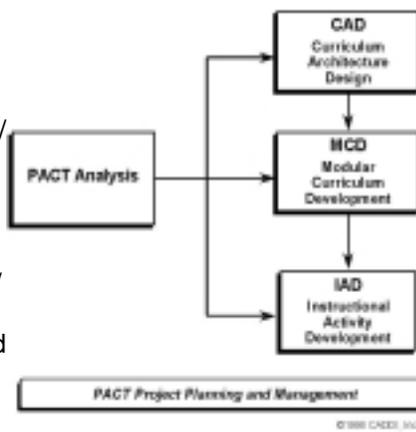
Performance Models . . . a means to many ends

The heart of the PACT Processes for T&D, the drivers that keep all of the T&D at each of the three levels of PACT *performance-based*, are the Performance Models (PMs) that lead to *performance-based* Knowledge/Skill Matrices (K/SMs).

PMs are the means to the ends of identified knowledge/skills.

Analysis of both the performance requirements and the enabling knowledge/skills is done quickly and effectively in this team-based methodology, and then the data drives the design at the macrolevel (CAD), midlevel (MCD), and microlevel (IAD) of the PACT Process.

The intent of the Performance Modeling effort is to pin down the requirements of the performers within the scope of the intended project and create PMs. The goal of the



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The new CADDI Web Site

The newly updated CADDI Web site is up and running. Deb Arndt, CADDI consultant, has been overseeing the buildout with external contract resources CADDI uses for our work overflow.

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Selling the PACT Processes Overcoming Objections

CADDI has proven the success of the PACT Processes via projects within a variety of organizations focused on many different job functions. Despite this success, our T&D customers oftentimes have difficulty overcoming their customer's skepticism and objections to the process. To bring a PACT Process project into their organization requires commitments of people and dollar resources, both of which have to be negotiated with another individual (or individuals) within an organization. To help us better understand what some of our customers' customer's objections are, Randy Kohout of BankAmerica and John Swinney of Bandag, Inc. provided their insights as customers and practitioners of the PACT Processes.

"The biggest objection we have experienced
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From the CADDI Project Files . . .

MCD for Web-based Delivery

Kelly Rennels, CADDI consultant, has been very busy managing an MCD PACT Process for T&D project for AT&T. This Modular Curriculum Development project focused on customer service reps comes right on the heels of her CAD effort for the same target audience. Currently in the midst of the pilot testing, the MCD project should wrap up soon. Modules of T&D for that effort are intended for reuse in the next MCD for another CAD (Curriculum Architecture Design) also done late last fall.

Both MCD and CAD are CADDI, Inc. proprietary ISD methodologies/processes.

The MCD effort Kelly is managing has created Web-based training and development for call center personnel for delivery via the company's intranet. The overall CAD design includes new Web-based T&D, along with some existing group-paced T&D. The entire CAD will take a learner approximately 15 days to complete over the first 30 days on the job.

Pilot testing for the Web-based T&D began within ten weeks of the project start date. The prior CAD effort helped reduce cycle time and cost.

The call center customer service reps' CAD effort was completed in the second half of 1997 and generated Performance Models and Knowledge/Skill Matrices for call center personnel at the first tier of technical support. The MCD began in February 1998 and leveraged the analysis outputs from the CAD. This saved an enormous amount of time (avoiding the dreaded analysis paralysis of all of our clients).

The analysis and design effort for the MCD was conducted in a three-day meeting with designated master performers and subject matter experts. The development of the T&D was done in two "waves." The first-wave development cycle was approximately eight weeks, and the pilot testing was completed within ten weeks of the analysis/design meeting. The second wave of development took approximately five weeks, overlapping slightly with the

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The PACT Processes for T&D

Performance-based
Accelerated
Customer-/Stakeholder-driven
Training & Development
lean-ISD

Visible & Predictable

We Have Moved!!! Please update your files



The CADDI crew has taken up new quarters in historic, scenic, downtown Naperville, Illinois. Please visit the next time you are anywhere close to us in the far western suburbs of Chicago.

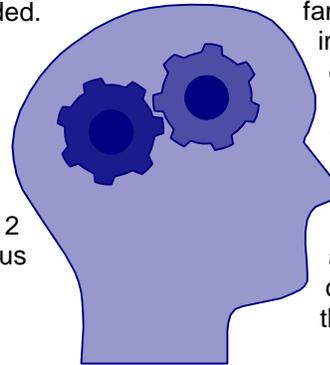
Feedback from the Chicago ISPI conference was great. 12 of 31 ISPI feedback forms suggested that our *lean-ISD* presentation be an *Encore Presentation* next year.

powerful tool! Would make an excellent one-day workshop . . .” “Excellent, as good as last year’s.” “I personally enjoyed the group exercises.” Also, 6 out of 27 recommended “Encore.”

Summer updates to the CADDI Web site include AoPs— This article delves into the Performance Modeling framework of Areas of Performance

lean-ISD via The PACT Processes for T&D . . . on the road

◆ Our session at the February Training '98 conference in Atlanta on “*lean-ISD*” went well but wasn’t well attended. Several of our existing clients showed up, which is always encouraging, but we didn’t seem to create much of a draw on the afternoon of the last day—we hate when that happens. The feedback—the 12 that we received from the 30-plus attendees—was mixed. Some thought it had immediate applicability to their jobs, and several didn’t think so. We may have attempted to put too much of this new-fangled concept into a 90-minute presentation. Oh well, we all live and learn via the feedback! Thanks to all of you who did share with us!



Think *lean-ISD*

Our three sessions at the March ISPI conference in Chicago went much better.

◆ Pete Hybert, partner, co-delivered with Dottie Soelke on “Determining the Value of a Performance Opportunity.” Feedback was very positive. “A very

◆ Pete and Guy Wallace, partner, delivered a session on *lean-ISD* and the feedback was extremely favorable. To quote several of the attendees: “Great tool! Content excellent. Would love more time applying this tool in extended practice session.” “Great session—fantastic job! Perhaps too much information for 90 minutes even for an overview.” “Nice sharing. Presenters didn’t sell. Good job!” This feedback made our day!

◆ For our third session, Pete and Guy hosted several of our client companies who shared their experiences and lessons learned regarding their applications of the PACT Processes for T&D.

Presenters included John Swinney, Bandag, Inc.; Gretcha Flinn, Marlene Frederick and Regina Plapp, Eli Lilly and Company; Christine Westall and Linell Jones, Hewlett Packard; and Louise Leone and Ellen Foster, Imperial Oil. Feedback from the attendees was very positive. “Excellent pacing, engagement, and variety.” “A great format for learning more about a product and company.” “Wow! I want to do this!”



Pictured above from L-R:

Back row: John Swinney, Guy Wallace, Linell Jones, Marlene Frederick, Louise Leone, and Pete Hybert
Front row: Gretcha Flinn, Christine Westall, Regina Plapp, and Ellen Foster

Selling the PACT Processes Overcoming Objections

(Continued from page 1)

regarding using the CAD Process is the difficulty our business partners have freeing the subject matter experts and exemplar performers to participate in the Analysis Team focus group meeting. We ask for those key performers who are both needed to do today's work and who are the most capable to identify the kind of performance that will be the design basis for the business training and development we have been asked to build," Randy said. "At Bank of America, it has been the track record in the past year with our 'Retail Branch CAD' that has been the key to overcoming this objection. We consult with our business partners from a value perspective—identify the options, the costs of each option (including the option of doing nothing), and the benefits of each option. Most service partners are then able to see the real value of the CAD process and are willing to 'free-up' their best people."

"We have used the detailed Analysis and Design Reports from our previous CAD projects to show prospective sponsors just how complete and detailed the information they will be getting is to their business," Randy added. "Once the sponsor sees what can be derived from a few days' investment of their key performers, they are more likely to appreciate the value of the proposal. Additionally, when the sponsor realizes the 'Analysis Report' not only specifies training and development deficiencies but also flags deficiencies of the work, environmental, and individual attributes needed for successful job performance, they understand that there is more to improving work performance than training."

"We have also found that we can often reduce the cost of training program development by leveraging training and development modules already developed for other businesses that had similar

"Once the sponsor sees what can be derived from a few days' investment of their key performers, they are more likely to appreciate the value of the proposal."

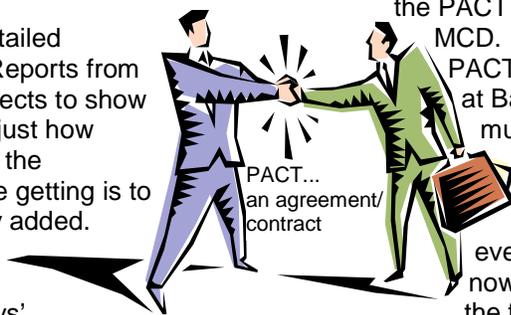
performance needs. We have found that work completed.

in the past has been shareable and provides a nice jump-start to new projects. CADDI has also proven to be flexible in tailoring the process for our business partner's needs. When the performance requirements changed for a specific job family we had evaluated a year ago, we returned to the data originally collected; validated it; added the new performance, knowledge, and skill requirements; and quickly redesigned their curriculum."

For BankAmerica, "Demonstrated speed, flexibility, efficiency, and effectiveness all have helped our prospective business sponsors better assess the value of the process and helped with their overall decisions to invest the time and expertise of their best people."

At Bandag, Inc., John Swinney has utilized the PACT Processes for CAD and MCD. "Two main objections to the PACT Processes we encountered at Bandag were that it takes too much time and it is costly," John stated.

"As with a lot of companies, everyone wants everything now, so we had to carefully sell the features and benefits of this process. In doing this, we showed what the PACT Processes could do for Bandag and allowed our customer to make the decision. Because of this approach, there were few objections—they saw that it was worth the effort. It also becomes costly to bring people together in a group versus working one on one. We were able to convince our 'customers' that the process works more efficiently when you bring a group of people together and that this is also a way to reduce total calendar time, addressing the other primary objection. We are currently in the middle of our project, and the customer's response to the data so far has been quite positive."



lean-ISD

The PACT Processes are *lean* because they shorten cycle times, reduce incurred expenses, and improve the quality of the outputs. The PACT Processes are *lean* due to their use of teams, templates, tools, and a defined ISD process. PACT provides a common process—a common approach for the conduct of ISD by T&D professionals.

The PACT Processes for T&D
enable visible/predictable *lean-ISD*:
Instructional Systems Design/Development

The
PACT
Processes
include:

CAD
Curriculum
Architecture
Design –
Systems
Engineering of T&D
Product Line

MCD
Modular
Curriculum
Development –
New Product
Development of the
T&D
Products

IAD
Instructional
Activity
Development –
Development of
Instructional
Components

PACT is Performance-
based, Accelerated,
Customer-/Stakeholder-
driven T&D

CADDI Applications News Update Current PACT Process projects

- ◆ Kelly Rennels is managing the post-pilot-test phase of a PACT Process MCD project for a maintenance and customer care organization at AT&T. See the article on page 2 for more information about that project.
- ◆ Kelly and Pete Hybert are continuing the development of multiple CAD projects and the development of qualification instruments (one of our many PACT Process IAD outputs) for Landis & Staefa. Guy Wallace has recently joined the fray at Landis and will be conducting a CAD for Sales Engineers.
- ◆ Guy just finished working with BankAmerica on a CAD for Financial Relationship

ISPI - International Society for Performance Improvement ... and what it means to CADDI

CADDI continues its involvement with the ISPI Awards of Excellence program. Pete Hybert takes over from Guy Wallace as the committee chairperson.

Pete and Jennifer Corman (who really does all of the committee work) are searching for volunteers to serve as subcommittee chairs or evaluators for the seven committees. The following are the committees for 1999:

- Managers.
- ◆ Guy and Deb Arndt are working on an MCD project to develop T&D and a certification process for Bandag's dealers' Production Managers.
 - ◆ Deb, Guy, Pete, and Kelly are continuing in the support of our technology transfer project with General Motors University. Guy recently completed his involvement on a CAD project (known as MC within GM) with General Motors University for Global Dealer Auditors. Pete has been supporting several CAD and MCD projects for Quality and Communications professionals at GM. Kelly delivered our PACT Analysis workshop solo for a group of 8, and Pete and Guy did the same workshop for 16 participants. Deb and Guy delivered our PACT Process Project Planning & Management workshop, as well as our MCD Design workshop, both for 16 participants. Then Guy and Pete delivered the CAD Design workshop for 16 participants.

- ◆ Performance Aid
- ◆ New Systematic Application
- ◆ Human Performance Intervention
- ◆ Research/Student Research
- ◆ Instructional Product or Intervention
- ◆ Instructional Communication
- ◆ Chapters of Merit

If you are interested in getting involved and getting something and giving back, please call Pete (oops . . . Jennifer). Thanks.

MCD for Web-based Delivery

(Continued from page 2)
first wave, and pilot testing will begin soon. The Web-based T&D uses a variety of methods to provide the learner with the required knowledge and skills. Learners can read introductory information at their own pace, exploring related on-line reference materials and on-line support using hyperlinks throughout the lessons. Quizzes have been included in several places for learners and their learning coaches to test progress and learning. The T&D also includes structured, OJT opportunities for learners to have real-world practice, with the support of a learning

coach or an experienced agent. The CADDI team is very pleased with the project outputs, and pilot feedback from the target audience and several other "expert" reviewers has been very positive. We are looking forward to finalizing and publishing the final version soon.

For information, please call Kelly. Although we will not share the proprietary information of our client, we are always willing to discuss the project approach alternatives and lessons learned.

We believe there is always a performance context for all viable T&D.

Performance Models . . . a means to many ends

(Continued from page 1)

Knowledge/Skill Analysis is to derive systematically the enabling K/S items and document them on our K/SMs.

It doesn't matter if the T&D to be addressed is the seemingly "un-pin-down-able," nebulous, hip topic of "Diversity Appreciation." There is a business application for *diversity*. So the first thing to do is to start by being declarative of our PACT intent. Call the project/product "Applying Diversity at The ABC Company" and then model it! Otherwise, why bother if we are not going to affect people's performance? Isn't that why we care about diversity in the first place, to affect people's behavior?

We believe there is always a *performance context* for all viable T&D. And if we can't pin that down, it's probably best to reinvest the shareholders' equity in something else with a more tangible return. Or we should just burn their money in the parking lot because that's still cheaper in the long run

The New CADDI Web Site

(Continued from page 1)

"We are excited about the CADDI Web site's new look and feel," said Deb. "The CADDI Web site is intended to be a wealth of information for clients interested in what we can do, as well as a place for existing customers and PACT Practitioners to visit to get new ideas, discover how to handle certain situations, and share ideas and experiences."

In "What's New," you can check out our new office site, a recap of the 1998 ISPI Conference, and upcoming speaking engagements. In "Products & Services," we provide information about PACT Process projects we can conduct, public PACT Process workshops we will be providing later this year, and PACT Process technology transfer projects we can conduct. PACT Practitioners will soon have their very own place to call home on our site. This section will identify certified PACT Practitioners, contact information, testimonials, and articles

than developing and deploying T&D that has no real affect on performance.

The PM is the device used to capture the *ideal* performance requirements, plus it provides the vehicle to generate and then capture the *gaps* from the ideal performance. The K/SMs are the device used to capture the enablers that lead to our ideal, high-performance state.

Other "ends" beyond T&D for which the Performance Model provides a "means" include

- ◆ Recruitment and selection systems
- ◆ Performance management systems
- ◆ Organization and job design efforts
- ◆ Pay for knowledge or skills or performance systems



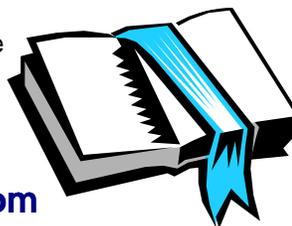
Guy's article "Managing Human Assets" (written with former partners Ray Svenson and Karen Kennedy) on the CADDI Web site covers this in greater detail. Please check it out.

they have written about their experiences with the PACT Processes.

A bulletin board will soon be available for customers and practitioners to share comments, ideas, struggles, and how to overcome the predictable objections our prospects raise when they first learn about the methodology.

Check out the new look and establish a bookmark or favorite site mark. Visit us at the turn of each season—when we routinely upload new content!

**www.
CADDI.com**



Summer updates to the CADDI Web site include

NS 1251: "Product Management Process Training" project history—

This was a finalist in the 1989 ISPI Awards of Excellence program for Best Instructional Product

Facilitation of the PACT Process requires a different approach to facilitation . . . it *is not* the passive, reflective approach required in some settings!

The PACT Process facilitator requires a strong, proactive, leading approach to the conduct of almost all of the meetings within the PACT Processes for T&D. See our Web article for more details.

PACT Process Facilitation Guidelines and Rules
by Guy W. Wallace

Our experiences in facilitating more than 1,000 meetings while conducting our projects has taught us many lessons and given us many insights along with the bruises.

There are many knowledge, skills, and attributes/values of successful facilitators.

The diagram below presents many of those knowledge, skills, and attributes/values for facilitation of the PACT Processes and for many other, but not all other types, processes, and methods of facilitation.

As with many things in life, one size does not fit all. It almost always “depends.”

Our PACT approach to group facilitation is not always the right approach any time



The Knowledge/Skill/Attribute/Value Requirements for the PACT Analyst

The key knowledge, skills, attributes, and values for the analyst include

- Group process and facilitation skills
- Conceptual and concrete thinking abilities
- Articulate, strong verbal communications skills
- Flip chart writing skills
- Active listening skills
- Systems thinking
- Problem solving
- Decision-making
- Handling conflict

facilitation is required. You must first determine the situational lay of the land and then decide if you should be proactive (even confrontational, if required) or reactive and more laid back in your approach with the group.

There are many judgment calls required by the PACT Process facilitator. Thinking on your feet is just one of the “all-day-long” requirements.

Group dynamics, organizational politics and culture, the specific topics or situations you are dealing with in the group meeting, and the outputs/outcomes you are striving for all have to be taken into account in determining which style to use.

And then there are the meetings where you plan to start off one way, and then are forced

to switch back and forth in your styles/ behaviors. You do what you need to, exactly to the plan you proactively created, or not. Tricky, eh? It’s a jungle out there!

The general guides and rules for facilitating our PACT Processes for T&D include

- 1 Go Slow to Go Fast
- 2 Be Declarative
- 3 Write and Post Stuff
- 4 Redundancy by Design
- 5 Key Communications Behavioral Types
- 6 Review and Previews
- 7 Write It Down and Then Discuss
- 8 Use of Humor
- 9 Controlling the Process and Participants
- 10 Legibility Rules for the Flip Chart Pages
- 11 Beware of Group Think and Push Back
- 12 Assigning Parking Lot Valets



The PACT Process Facilitation Guidelines and Rules are expanded upon in the new article by Guy now available on the CADDI Web site at

www.CADDI.com

Please check it out!



For all back issues of “lean-ISD” please see our Web site at **www.CADDI.com** Please check it out!

CADDI Crewmate Profile: Guy W. Wallace

Guy Wallace, one of CADDI's two founding partners, has been involved with corporate training and development since 1979, when he joined Wickes Lumber's training organization in Saginaw, Michigan after graduating from the University of Kansas.

At Wickes he learned Performance Modeling and K/S Analysis and how to apply it to training design and development projects. The approach he learned originated with the work of Tom Gilbert and Geary Rummmler. Guy helped develop 24 video-based training programs in his first year for Wickes' 275-plus lumber centers.



Guy then spent two years at Motorola's Education & Training Center (MTEC), the forerunner to Motorola University. While at MTEC, Guy had several opportunities to work on numerous projects with Geary Rummmler, as well as projects with Neil Rackham of Huthwaite (of SPIN® Sales model fame). Guy developed MTEC's first quality tool training for manufacturing supervisors.

Then in late 1982, he joined Ray Svenson at R.A. Svenson & Associates. In his first project, he developed the formal, performance-based CAD *process* with Karen Kennedy on a project for Exxon's Exploration Geologists and Geophysicists. Guy then specialized in CAD projects for 15 years. In 1989 he *engineered* the PACT Processes for T&D, which included CAD and MCD, and they then evolved to include IAD.

Guy later became a full partner of SWI (Svenson & Wallace, Inc.). Guy's luck at getting interesting project assignments gave him many opportunities to apply the

performance-based approach to T&D that he learned at Wickes.

In late 1997, CADDI, Inc. evolved from SWI. Guy and SWI associate Pete Hybert, along with seven other SWI'ers, became the CADDI Crew.

Guy has conducted more than 65 CAD projects since that first effort in 1982. He has also been involved in more than 35 MCD projects. He has facilitated more than 300 meetings of various natures, most focused on either training development or process/performance improvement efforts. Guy has published one book (another two are in process), and more than 12 articles. He has presented more than 25 times at local and national conferences and won an ISPI finalist award in 1989 for Best Instructional Product.

Guy is very active in ISPI, having served as Conference marketing chairman three times during the 1980s and on the Awards of Excellence Committee for the past six years. He also has presented at 12 of the 15 conferences he's attended since his first in 1980.



Guy lives in the far western suburbs of Chicago with his wife, Margaret, and his two stepchildren, David (18) and Daniel (13).

Guy and Margaret enjoy spending time in downtown Chicago when they can get away, going to the movies, and golfing nine holes in a short but demanding/narrow course near their home. They also enjoy water and snow skiing and SCUBA diving. Margaret promises to go on Guy's second sky-diving outing, which will be her first.

For more
information
about
Guy
Wallace,
or any of the
CADDI
Crew,
please
check out
the
CADDI
Web site
at CADDI.
com

And then please
let us know
what you think.
Thank You.