lean - ISD ℠

lean-Instructional Systems Design via the PACT℠ Processes for T&D

HELPING LEARNERS PRODUCE WORTHY RESULTS

PACT Processes Drive Serious T&D Decisions
by Guy W. Wallace

The PACT Processes include

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

MCD Modular Curriculum Development
New T&D Product Development

IAD Instructional Activity Development
Development of Instructional Activities

CAD
Curriculum Architecture Design™

PACT℠ Analysis

MCD
Modular Curriculum Development™

IAD
Instructional Activity Development™

PACT Project Planning and Management

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Inside

In the last five CADDI newsletters, we've written in some detail about our *lean*-**ISD** approach using the PACT Processes.

Beginning in the summer of 1998, we looked at how Performance Models pin down the real performance requirements and drive each PACT Process.

Next, in the fall edition, we covered the Curriculum Architecture Design process, which creates a framework in which to house the entire T&D product line. A CAD is typically done for single or complex jobs, major departments and functions, or even whole divisions and whole companies (one manageable bite at a time), and it is both a product (the T&D architecture) and a process (a means to get there). CADs don't produce training, but a sequenced list of learning events that support competent performance. CAD is the *macrolevel* PACT Process.

In the winter months of 1998, we drilled down to the *midlevel* PACT Process, Modular Curriculum Development. On one level, MCDs produce *designs* and *specifications* for learning

LEARNING BY DESIGN, NOT BY CHANCE

Strategic and Tactical Planning Systems
by Guy W. Wallace

Recently, someone commented that not every system represented on our clockface model of *learning by design* is found in every training and development organization.

If we looked exclusively for structured, formal systems around each "hour" on the clockface, we'd have to agree. Otherwise, we'd have to say that all of these systems exist in some manner or form, formal or informal, in control or not in control.

Some organizations may not include a formal Governance and Advisory structure, for example. But in some way, the T&D organization is governed—perhaps by multiple customers who demand equal attention for each training want or need. And each T&D organization receives directives, advice, and continuous "recalibration" through one or many sources and processes.

So, in some way or another, human energy units are put into governing and advising the T&D organization. It's just that some methods are more effective than others.

Call Center Consolidation Offers Golden T&D Opportunity for Phone Services Company
## by Peter R. Hybert

It was a golden opportunity for a regional telephone services company. Their business had grown to the point where it made sense to consolidate three separate customer service functions into a single call center location. New and existing employees would need to learn quickly new processes and procedures. This would require designing and developing the right training quickly and efficiently.

But, like many work processes that evolve over time, this CADDI client had few standardized procedures, highly tailored jobs that were specific to individual performer's skills and interests, and little or no formal training.

In addition, many of their services were "bundled" versions of other services. For example, the company sold different long-distance services to college students, local residents, and local businesses. This might have been manageable if the bundled versions were constructed from generic elements, but computer systems prevented this. Ordering long-distance services required the customer service representative to use one system for the university student and another for a local resident. Troubleshooting and repairs used a third system.

In all, there were seven different primary products and five different primary computer systems, each with its own processes and procedures.
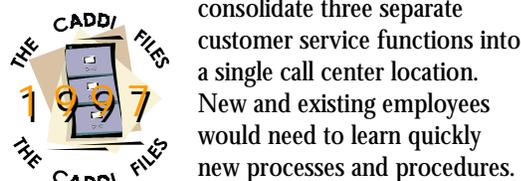
What Makes Teams High Performing?

by Gerry Kaufhold, TeamsWork Enterprises

Years ago while Guy Wallace was applying the Curriculum Architecture Design (CAD) methods to AT&T Network Systems' (now Lucent Technologies, Inc.) product management, it became evident to me that key to the new curriculum's impact on business success would be its ability to develop effective cross-functional product team leaders.

The CAD analysis identified that successful product teams focused on making optimal business decisions, while struggling product teams had members who focused more on their functional organizations' needs and issues. Decisions made by struggling teams tended to recognize individual team members and their organization's influence, rather than being based on issues and requirements and what was best for the business.

This business focus for teams seems to be even more necessary today. To stay competitive, businesses have been driven to flatter, more functionally aligned organizations with individuals having more functional expertise. There is greater pressure to get more done with less, work relationships are more complex, and business issues require cross-functional solutions. In addition, the autocratic style of management is no longer recognized as satisfying workplace wants, needs, and desires.

Although groups working toward common goals have existed for some time, today the focus is on optimizing team direction, effort, and accomplishment. To be successful, team leaders and members must recognize the complexities of the work environment and processes. They must appreciate the diversity of the workforce as reflected in differing cultures, values, knowledge, skills, abilities, and attitudes. The recognition and understanding of what makes teams high performing enables individual members to make the choice

- Unproductive conflicts occur during meetings.
- Discussions occur that sidetrack the team.
- Meetings are poorly attended.
- Decisions are rarely made or made by just a few individuals.
- A few people dominate discussions.
- Task commitments by team members are frequently avoided or not completed on time.
- Functional organization priorities override team requirements and needs.

The CAD analysis showed that successful teams focused on making optimal business decisions.
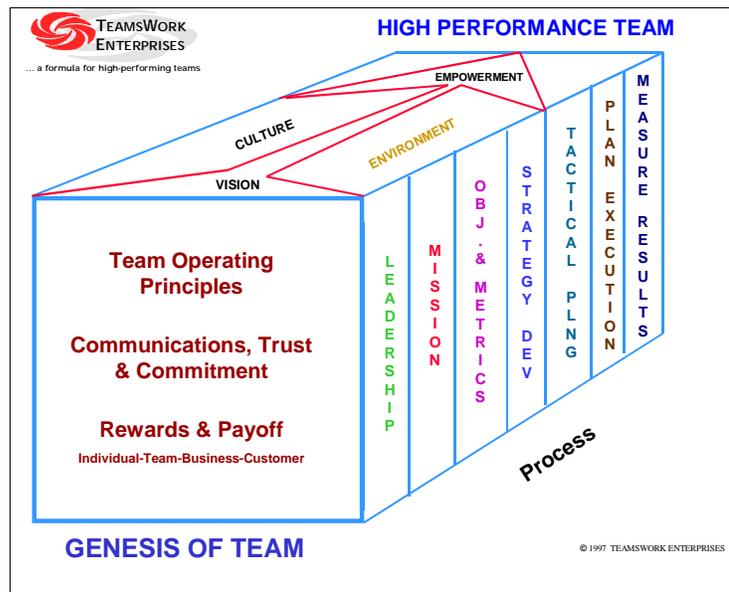
and commitment to be fully engaged team players.

Dysfunctional Teams

But even on good teams, you see some of the following disruptive behaviors.

- Meetings always get started late.
- Meetings lack discipline or specific focus.
- Attendees are poorly prepared to discuss key issues.

On the surface, it could appear that these are just meeting management or organizational culture issues. It goes much deeper than that, however.

These issues are symptomatic of team dysfunction. Just as treating the symptoms of an illness and ignoring its cause may make you feel better in the near term, real performance improvement will not happen until the underlying sources of the problem are remedied.

Update on CADDI Projects

Bandag, Inc.

Guy wrapped up his effort on the Material Flow workshop after an extensive Material Flow process redesign by the clients. We are all hoping that the next deliveries go as well as the original pilot session. Many thanks to Tom Pullias and Rob Mindock for their tremendous help and patience in developing performance-impacting T&D.

H&R Block

Guy recently met with H&R Block to discuss and plan a management Curriculum Architecture Design effort.

General Motors University

In August, Guy and his wife, Margaret, traveled to Germany to expand the Brand Management Curriculum design to include GM's European operations. The effort may later be expanded to include the other global divisions of General Motors.

Guy is joined by Dottie Soelke in continuing to transfer the PACT Processes for T&D to the staff of strategic partners at General Motors University.

While in Germany, Guy and Margaret met the son of good friends Mike and Laura Rutzen. Brian toured the Rhine for an entire day with Guy and Margaret, and understands the real meaning behind the phrase, "Ho hum, another castle."

Siemens Building Technologies, Inc.

A five-day training program on "Selling the Best Total Solution" was piloted during July. The training class used a combination of group discussions, role-plays, and lecture to help students develop an understanding of the components of a "best total solution," its value to their customers, and how to "sell" it to their customers. The students' performance in the final role-play, which required them to develop and deliver a presentation to "sell" a customer the best total solution, proved to us the class was a success, and the high evaluation scores given by the students confirmed it!

Also in July, we piloted "The ABCs of Selling APOGEE," an eight-day training program for Siemens' complete system of building control products, from small control boxes to complete graphical software programs. The class teaches what the products are, how they are used, how they compare with competitive products, and how to configure them into systems to meet customer needs. The challenge was to do this in as little time as possible without it becoming a "data dump" and to do this with nine different facilitators, each of whom had specific technical expertise. Participant feedback and performance in the exercises tells us we were successful.

Work continues on the "Time to Performance" project, as we have expanded the performance-based certification program into the project management role. The clients are continuing to "install" the system in various branch locations for the technician audience. The branch installations are serious change management activities—the system requires that supervisors and employees focus on development and coaching like never before. So far, that is seen as a plus.

A new project will provide rollout and initial training on a new control system currently under development. The audience includes both sales and technical people. Training development and testing and product beta testing will take place at the same time.

Pete is currently working with the product team to develop a detailed plan for the various handoffs and milestones that must be met to keep up with the schedule.

Two MCD projects are just getting underway to produce two weeklong training courses for the sales population. One of the development projects will produce training to teach the installation estimating process. The second development project will teach salespeople how to sell performance contracting projects—high cost, very complex solutions with guaranteed results. ▶▶▶▶

How a 2x4 Helped Turn Piles of Courses into Paths of Learning

by Stephen Muller, SMA Consulting, Inc.

Several years ago, in what now seems like a former life, a friend of mine (we'll call him Blake) managed the training and development function for a Fortune 100 company whose name shall remain cloaked to protect the guilty. No sense burning bridges, I figure. The relatively small division of this company grew from 1,800 to 12,000+ employees literally overnight, the result of a unique merger that only the chronically brave could have conceived.

As Blake tells it, the task of merging four training organizations was a daunting one. The collection of courseware grew by a factor of at least 20 which, even after a merciless pruning, made the job of putting together the obligatory course catalog a major undertaking. Despite his best intentions, the small division's performance-based orientation shifted to what he called the smorgasbord approach to T&D. You know, the "Here's a list of all the possible training dishes the kitchen can create. Eat, feast, be merry!"

Although this troubled him and some of his colleagues, the catalog was appropriately birthed, enhanced by an amazing graphic that described the competencies needed by the workforce. It was a lovely piece of artwork that used a number of overlapping ovals in a shape roughly reminiscent of a flower petal. The instincts cultivated from

Olivia Martin is seven years old and reports to Cathy Martin and her husband, Robert. She lives in the suburbs of Detroit.

Blake's engineering background tried to kick in, but a wave of touchy-feely colleagues helped quell them. After all, they explained, organizations that pride themselves on learning often have large course catalogs.

The Teachable Moment

"I could feel one of those teachable moments approaching," he said. "You know, those special times when the two-by-four smacks you squarely between the eyes while everyone else watches, grateful that they always follow their instincts even if you don't?"

It happened in one of those executive-level presentations when he flashed the flower-power graphic on the overhead. Although glazed-over eyes should have been a clue, he figured these execs had either slept through the '60s or had no appreciation for items horticultural. Blake proceeded to describe the flower petals, each of which represented a section of the catalog: the section with leadership courses, the section with interpersonal skills, the section with computer classes, and on and on.

The presentation was over when the company president (an incredibly insightful man and personal friend) picked up the metaphorical two-by-four that he used to gently send my friend and others in the room an important message. He commented on the graphic and the fact that it could be reproduced faithfully on nearly any company copy machine. "Good observation," Blake thought, "you can never underestimate the power of a good flower graphic." And the president liked the catalog. "Comprehensive," he called it. That was good, too.

Then he asked, "How will this catalog help managers choose the right courses for their employees?" Blake responded with the usual remarks about building competent employees to which a sea of heads waved in clueless unison. "But how do I *use* this catalog?" he asked as a blinding flash of the obvious struck.

The task of merging four training organizations was a daunting one. The collection of courseware grew by a factor of at least 20.

PACT Processes Drive Serious T&D Decisions *(continued)*

Each PACT Process is team-driven and controlled by clearly defined "gates" or checkpoints.

(Continued from page 1)

events and their component parts called modules, lessons, and instructional activities (each of these being increasingly more detailed). On a second level, MCDs produce actual T&D materials to be used by facilitators, participants, and administrators. And on a third level, MCDs can produce materials for communicating and marketing courseware to the right audiences.

In spring 1999 we covered the *microlevel* Instructional Activity Development process. IAD projects generate instructional activities such as

‣ Instructional content
‣ Knowledge and performance tests
‣ Simulation exercises
‣ Performance aids
‣ Desk procedures, both paper and electronic

And this past summer, we looked at Project Planning and Management and how the typical management responsibilities of planning, organizing, and controlling apply to each of the PACT Processes. The savvy practitioner knows from experience that upfront planning and attention to detail at each project phase are keys to successful PACT projects.

Each PACT Process is team-driven and controlled by a series of clearly defined "gates" or

GUY REFLECTS ON
The Origins of 'PACT'

The origins of PACT date to the late seventies when I was working at Wickes Lumber, a building materials retailer in Saginaw, Michigan. We used a version of performance modeling based on work by Tom Gilbert and Geary Rummler—a model that captured the job from the perspective of the real-world insights provided to us by master performers.

In 1981, I joined Motorola's Training & Education Center (MTEC) where I was exposed first-hand to the work of Geary Rummler. One of the efforts we began, but never completed, was a Geary "Rummlerish" ISD process. Finishing that work of creating a systems approach to performance-based ISD became one of the goals in my professional life after leaving MTEC.

In late 1982, I joined Ray Svenson's consulting business, which later became Svenson & Wallace, Inc. (SWI). Our first CAD project used the performance-based approach and was completed in 1982 for an audience of geologists and geophysicists at a major oil company. Dozens of CADs later in 1989, I spent two hours scrawling words on a flip chart in an attempt to develop an acronym to describe the systems approach to ISD I'd been working with. Its key features were

> **P**erformance-based
> **A**ccelerated
> **C**ustomer-/Stakeholder-driven
> **T**raining & Development

Not only did the first letters of these words form the now-familiar PACT acronym, but they referred to the collaboration and agreement that must exist between customers and T&D suppliers—if T&D is going to actually produce results.

PACT Processes work, in part, because they organize ISD customers into teams for decision-making, data gathering, and data analysis. Customers make T&D business decisions and live with the consequences—good and bad. ISD suppliers own and drive the PACT Processes that deliver *lean*-**ISD.**

The systematic collaboration between ISD customers and suppliers in the PACT Processes has had a huge impact on the success of my many T&D projects. And the fact that many of my clients have embraced and adapted the PACT Processes for their own use has been very rewarding. ▶▶▶▶

PACT Processes Drive Serious T&D Decisions (continued)

(Continued from page 6)

checkpoints that keep the project from moving on before all parties are satisfied that outputs are on track and that the needed performance and business results will be achieved. Project Steering Teams guide and direct the overall project. Master performers (and, to a lesser extent, subject matter experts) make up the Analysis, Design, and Implementation Teams.

PACT Processes, when used together, can

‣ Produce a structure or architecture for performance-based T&D for a given job in a logical sequence.

‣ Define the specific learning events that will be sourced (all the training that *will be* from all that *could be*).

‣ Produce designs for learning events so they can be developed.

‣ Actually develop instructional activities, lessons, and modules.

CAD, MCD, and IAD processes can also be used individually to produce any of the above. In other words, PACT Processes are fully integrated with each other and fully independent of each other. For example, a client may want a CAD to define all the training for a given job and use the outputs for planning future T&D activities. Another client may need a specific sales-related T&D Event and, using the MCD process, that event can be designed and developed. That same client may have an immediate need for a series of performance tests for one critical job. This is a perfect use of IAD.

Each PACT Process forces serious T&D decisions to be made by the right people in the organization. These decisions are owned by customers, not by training folks. The results produce training that helps learners produce worthy *results* on their jobs. ►►►►

> *Each PACT Process forces serious T&D decisions to be made by the right people in the organization.*

Strategic and Tactical Planning Systems (continued)

(Continued from page 2)

Our model of learning by design is based on a fundamental principle that unless T&D is planned, organized, and managed in a structured, in-control manner, learning will occur mostly by chance (and all the images that word includes). But it's clear that one model and size for T&D operations does not fit all.

Take the one and two o'clock positions, for example: strategic and tactical planning. (We're covering them together because they are so closely tied to each other.)

‣ *Strategic Planning* and its focus on broad business issues and how T&D supports them

‣ *Operations Planning and Management* with its ability to plan, organize, budget, and guide the day-to-day activities in the T&D function for a short (one- or two-year) planning horizon

◢1 Strategic Planning Systems

In the T&D function, strategic planning systems look at critical business needs—the showstoppers and make-or-break problems and/or opportunities—of the enterprise. It does this through two processes: Enterprise Strategic Plans Surveillance Process and T&D Strategic Planning Processes.

The Enterprise Strategic Plans Surveillance Process ensures that the T&D system, including T&D's leadership and its Governance and Advisory Systems, is aware of all the strategic business drivers in the enterprise. It's not that T&D folks sit in darkened rooms in front of learning's crystal ball to figure this out. There's a much better oracle at their disposal: the Governance and Advisory System (the twelve o'clock position on the clockface.)

> *The Governance and Advisory System provides much of the insight needed for T&D's strategic and tactical plans.*

Strategic and Tactical Planning Systems (continued)

(Continued from page 7)

One of the key *outputs* of the Governance and Advisory process is the strategic issues and drivers of their business units or function. These become the *input* to the T&D Strategic Planning process.

T&D folks use this input and their own survey of all the enterprise's component business plans as they plan their own strategies. They then move into the second process and determine (plan and budget) how exactly to achieve the tactics that enable.

T&D Strategic Planning is the drill that plans, assesses, and replans to address its own current lack of capabilities. These strategies may be reviewed and updated annually, quarterly, or at the pace that fits the unique characteristics of the organization.

The criteria for success is simple: *from a performance perspective* does the T&D strategic plan guide, enable, and support helping the other business units/functions to get their targeted business results through their strategic plans?

Operations Planning and Management Systems

Once T&D's strategic plan is completed, it is "operationalized" through three processes.

‣ Annual Operations Planning and Budgeting Process
‣ Quarterly Operations Planning and Budgeting Updates Process
‣ Actual to Plan Deviation Forecasting and Accounting Process

These processes are fairly common in T&D organizations, in part, because the enterprise requires them as standard business practices.

As in other organizations, the Annual Planning and Budgeting Process plans the allocation of limited T&D resources in a manner consistent with the strategic needs of both the enterprise and the T&D system. This annual allocation planning process must take all needs of the T&D organization into account. Failure to address longer term research and development needs might not hurt immediately, but it could spell serious trouble in years to come, for example.

The operational plans need to be reviewed and updated at a cadence unique to each company's business needs and planning/budget cycles and calendar. Quarterly might be too seldom in some high-tech, fast-paced industries, and too often for others. Your situation and business culture will dictate a pace that is sufficient and tolerable.

The goal is to make realistic adjustments to the plans and budgets in a timely manner.

These adjustments could include

‣ Cut the budget and cancel or defer certain projects and efforts.
‣ Add to the budget to address a new business need.
‣ Address a new need without a change in budget, and reallocate other dollars and human resources from some projects to others.

The Actual to Plan Deviation Forecasting and Accounting Process tracks T&D expenditures and the contractual/planned commitments to ensure that the price tag for current and planned efforts are known before the invoices arrive. If asked to "give back" at the end of the third quarter, the T&D system understands its current financial obligations and its ability and the implications of giving back any funds.

The notion that "a dollar not spent is a dollar back on the bottom line" is one for the T&D community to communicate to its marketplace stakeholder. The *corollary* is that a dollar not invested is a greater return deferred or foregone. And if T&D has contractual obligations from a complicated, diverse set of projects and programs, it may or may not be in a position to give back.

Summary

The one and two o'clock positions on the clockface are the systems that plan T&D activities from a strategic standpoint and organize and manage them for day-to-day operations. The formality by which these are accomplished may vary from organization to organization, but it's their effectiveness that makes the difference between the enterprise that learns by design or learns by chance. ▸▸▸▸

Operations Planning and Management processes are fairly common, in part, because the enterprise requires them as standard business practices.

Consolidating Call Centers *(continued)*

Doing it Right

The company saw that its new call center was an opportunity to fix processes and simplify systems. They commissioned a project team to research state-of-the-art systems; redefine processes, roles, and tasks; and design the workspace. Our role was to configure the training so that the staff and center would be ready at the same time.

To do this, we used the Curriculum Architecture Design (CAD) process to analyze the work, derive the enabling knowledge and skills, and design a modular training architecture. We then went directly into the Modular Curriculum Development (MCD) design process and created a detailed course design model and development plan that would allow subject matter experts to create and deliver training quickly.

Of course, we used teams of carefully selected employees to do this.

The Challenges Were Fourfold

By far, the biggest challenges were technical: multiple products, roles, and processes that required us to break everything into small pieces. For example, we couldn't teach how to place an order using XYZ system because not everyone would need to know that. Instead, we would need to teach a generic order placing process and then offer separate modules on how to use the XYZ system, the ABC system, etc. Separate modules would also be needed for each product. The modules would be put together to create a training

Team	Role Description	Notes
Project Steering Team	Set the priorities and direction for the project.	The PST was co-led by two vice presidents—the Call Center VP (Operations) and the Skills VP (T&D).
Analysis Team	Help define detailed tasks for "future state," and identify potential problems/change issues.	This team included customer service specialists from each location and function.
Design Team	Work with the designers to group outputs, tasks, etc., into training modules and events and sequence them according to how they are needed on the job, in addition to a logical learning sequence.	This team was the process redesign team.
Project Work Team	Conduct and document all the project activities. Provide expertise from the supplier perspective— training and testing approaches that will be effective and feasible to administer.	This team was a partnership between CADDI and their internal training team (called the "skills group").

The biggest challenges were technical ones: multiple products, roles, and processes. This meant breaking everything into small pieces or "chunks."

event based on the audience need. Exercises based on actual customer scenarios would pull it all together.

Audience demographics presented a second set of design challenges. Existing employees had never been formally trained on existing processes. These employees and new personnel would become the initial audience for the training and would need to come up to speed quickly. Longer term, however, an audience of "onesies and twosies" would emerge as attrition and growth occurred. From a design standpoint, the lessons and modules had to

CAD Phase 1 — Project Planning & Kick-off; CAD Phase 2 — Analysis; CAD Phase 3 — Design; CAD Phase 4 — Implementation Planning — CADDI/Client

MCD Phase 1 — Project Planning & Kick-off; MCD Phase 2 — Analysis; MCD Phase 3 — Design — CADDI/Client; MCD Phase 4 — Development/Acquisition; MCD Phase 5 — Pilot Test; MCD Phase 6 — Revision & Release — Client

CAD Implementation Planning Phase was combined with detailed MCD Project Planning

One standard template was designed for multiple MCD development efforts

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For budgetary reasons, our client would be creating the presentation, documentation, performance tests, and simulations for the project. For us, this meant creating standard templates and tools that client teams could use in their development process.

lean-**ISD**^{SM} via the PACT Processes for T&D

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Thank you.

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Thank you.

Consolidating Call Centers *(continued)*

work in group-paced, self-paced, and coached formats.

A third design challenge was a "tool" issue. The "legacy" computer systems were not user-friendly and, though they would be replaced, this would not occur until after the new center became operational. This meant keeping "tool training" in separate modules so that the design would be robust to changes.

Finally, due to a limited budget, the development of all presentation, documentation, performance tests, and simulation materials would fall on the call center design team members who had little training development experience. To make this work, we had to create a design that was easy to develop, for example, relying heavily on standard templates. And, we had to plan the module development schedule so the critical training would be ready before they opened the doors of the new center (and the rest not very long afterwards).

The Results

Once we completed the CAD and launched into the Analysis and Design Phases of the MCD process, we turned the remaining phases over to our client. We didn't design everything—we designed one of the training paths at a detailed level. Our clients then cloned and modified the template to develop the training for all the paths. The upfront work needed to clearly define the lesson and module structure paid off in the end— using the templates and tools provided, our client was able to develop 15 days of training within six weeks.

Lessons Learned

Each CADDI project offers some unique challenge, twist, or learning opportunity. Like most ISD practitioners, we try to apply what we learn to future projects.

Chunking

One of the significant learnings in this project was how important "chunking" can be when content is complex (or befuddling). In this project, we had to roll up our sleeves, make lists, and develop

matrices until we understood the items (the various computer systems, for example) and their relationship to performance. Despite the fact that the task seemed overwhelming, it was still finite! If there were ten or one hundred products, once they were written down, people could react to them. Sooner than later, we had a list that worked and could be used as an organizer for some portion of the curriculum architecture.

Learnability

"Design fors" is a concept from the engineering world in which requirements are derived from downstream considerations. A computer designed for "installability" would be easy to set up. If it were designed for "serviceability," it might be easy to open and replace the parts.

Jobs designed for "learnability" might limit the amount of knowledge and skill needed during an employee's first few days or weeks. (In fact, the entire career path could be designed around a natural development curve.) It would also include additional support as new employees come up to speed. This could include the use of learning coaches, time designated for learning (which could be used for observing others, self-paced readings, browsing through work reference materials, as well as for attending training classes), or interviews with other performers.

In the case of the call center, procedures needed to be well documented so they could be learned and used properly. We selected a paper-based reference approach because customer service representatives needed to be able to use their computers for interacting with the data processing systems. Later, as systems were upgraded, they could decide to convert to an automated, electronic performance support system (EPSS).

Focus on application, from simple to complex

A nice, clean training program might attempt to teach all products and services first and follow with processes, policies, and computer systems (in that order) to embed all the enabling knowledge and skills before getting into application exercises. This approach—clean and logical as it is—works as well as teaching a child to play the piano by

Consolidating Call Centers *(continued)*

(Continued from page 12)

forcing them to play scales for two years before letting them learn an actual piece of music.

A better path starts with the basics and applies them in simple situations. For the call center, this meant using customer scenarios to teach and practice new knowledge and skills. Although this is not as *efficient* as a data dump, it is more *effective* because the learning transfers to the real job completely. Once the basics are mastered, learning can shift to more complex performance tasks.

The Future

Although our client's company was purchased by another regional telecommunications organization

and the new consolidated call center was put on hold, our client has benefited from the program. In addition to delivering it to existing audience members and new hires, the training course has been used as a design platform for two additional three-week programs. And, in the future, they are likely to realize one of the goals of the original plan—to migrate the content to an intranet delivery platform and further support individual performance. ▶▶▶▶

An expanded version of this article can be found on our Web site at www.caddi.com

What Makes Teams High Performing? *(continued)*

(Continued from page 3)

It is important to note that less than desired team performance applies to organizational teams in the same ways it applies to task teams. Although reporting hierarchies may be different, the effectiveness issues surrounding people who work together to achieve common goals are the same for organization and task teams.
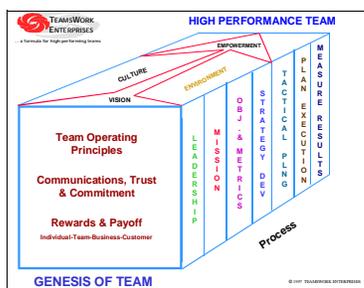
Team effectiveness can be represented as three separate surfaces of a cube shown in the High Performance Team Model. The top of the cube reflects all the influences that are, to a large degree, external to the team but have a major impact on what the team will commit to accomplish. The company culture, the environment in which the team functions, a vision that provides a direction for the total organization including the team, and the extent that the team is empowered to act, all have a direct bearing on how the team will engage itself to develop and accomplish meaningful goals. For example, a team

that has been charged with a specific task but recognizes that the organization never acts on team recommendations or decisions is not very likely to commit itself to achieving meaningful results.

The side of the cube illustrates a process for team accomplishment that is supported by effective leadership. Teams that have a process orientation are more likely to have all team members contributing and participating in all process phases. This engagement of all team members includes

▸ Establishing the team's mission
▸ Setting the objectives and metrics
▸ Strategic and tactical planning
▸ Executing the plan
▸ Measuring its results

To a large degree, these differentiate high-performing teams from lesser functioning teams. Their involvement in the process creates ownership, synergy, and commitment to the achievement of the team's goals and objectives.

The front of the model describes the behavioral and motivational foundation for team performance. It deals directly with how the team will function by defining the rules by which team members agree to operate and communicate. All team members have a voice in defining and

What Makes Teams High Performing? *(continued)*

"operationalizing" the team's values and activities in a way that demonstrates respect, trust, and commitment. These team principles, values, and characteristics are the glue that takes a group of people working together and transforms them into a "high-performing team."

Members of high-performing teams recognize the rewards and payoff not only for themselves and the team but more importantly, for the business and the customer, whether internal or external. The benefit does not stop there, however. As teams begin the journey to becoming high

performing, team members become culture change agents by modeling high-performance team behaviors outside of their team—behaviors that value individuals and their contributions to the organization. As these behaviors are recognized and reinforced, they begin to permeate the organization, resulting in a culture change that values high-performing team behaviors.

In summary, recognizing that high-performing teams are the result of many influences and factors is the first step in the journey to achieve improved business effectiveness through teams. The next step is assessing where your team is regarding each surface of the model. It is critical to look beyond the symptoms of "status quo team performance" to recognize those factors that are supportive of—as well barriers to—becoming a high-performing team. Once you understand your team's strengths and weaknesses, you can begin planning and implementing prescriptive remedies for change. Although high-performing teams don't occur overnight, the improved business effectiveness resulting from a supportive, high-performing team culture makes the investment in this effort well worthwhile. ▶▶▶▶

*Gerry Kaufhold is a partner in **TEAMSWORK ENTERPRISES,** which specializes in helping organizations and teams become high performing by providing pre- and post-team effectiveness assessments, prescriptive team development experiences, and transition to the job support.*

Award Winners

Gerry Kaufhold and Guy Wallace were recipients of an ISPI (then NSPI) Award of Excellence in 1989 for Best Instructional Product (finalist) for NS1251: Product Management Process Training. That effort returned 474% ROI for Network Systems (now Lucent).

More information on NS1251 can be found at www.CADDI.com in the fall 1998 issue of the *lean-**ISD*** newsletter and in the Past PACT Project Revisited Series: "NS1251 Product Management Process Training."

Helsinki Firm to Use CADDI Article in Training Course
by Deb Smits

We were pleased to receive an E-mail request from Suvi Makynen of Lexpert, Ltd. in Helsinki, Finland for copies of Pete Hybert's article "Using Quality Principles to Improve the Contracting Process" that was published in AQP's *Quality Progress Journal.* Suvi's organization asked to use Pete's article as a required reading for a course they were developing.

We want to thank Suvi and Lexpert, Ltd. for asking permission to use Pete's article. We were happy to provide them with an adequate number of original color copies of the original manuscript. CADDI enjoys sharing our intellectual property with clients

and colleagues, but we do request that our copyright be protected.

If you would like original copies of any of our articles or presentations featured on our Web site (or others you know we have published, written, or presented), please contact us for further information. You can request copies of the original manuscript of these publications via fax at (630) 355-9818, via E-mail at CADDI-Inc@worldnet.att.net, or by phone at (630) 355-9800.

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(Continued from page 5)

"We had created a wonderful catalog of all the foods from the smorgasbord," Blake told me. It was a friendly catalog alright. Alphabetical listings, subgrouped by course number with multiple cross-references. In the world of computers, it would be called user-friendly—for the *training organization!*

The Business of Getting Results

"Several days later," he continued, "I ran into his president friend in the hall and, in what seemed like an 'oh, by the way' at the end of the conversation he said, 'Hey, don't forget what business you're really in.' I attempted to look all-knowing, when he bailed me out with a simple, 'Getting results.'"

That orientation to the business of T&D has stuck with me. Getting results—the business of performance-based training—is what it is about. And how often we forget that in the somewhat isolated-from-the-business world. In our efforts to systematize and make T&D run smoothly, we attempt to be user-friendly. Unfortunately, we can become user-friendly to ourselves and not to our customers who must use our products.

Take course catalogs, for example. I'm not opposed to course catalogs because they can serve a real purpose. But any manager who is thumbing through one is likely to be in the choosing/selecting/narrowing-down mode. If she is thinking "performance" (instead of merely "learning") she'll be thinking, "I need to get improved performance in the area of making cold sales calls for this new salesperson." The question is, does the catalog help?

Paths Not Piles

Maybe, but probably not. Too often, catalogs are bunches of courses—call them "piles"—that require someone (usually the harried manager) to sort through them to find a

match the way he did with his disorganized sock drawer that morning. The fact is that new employees need something different than seasoned employees do. Survival skills (where to find product information and pricing, for example) should come first. Selling to multinational customers can come in the afternoon.

Another way to look at this is that performance-based T&D could be built around and designed to facilitate the journey an employee takes from being new to being a good performer. *Journey* implies a road or pathway to performance.

That's the concept behind the PACT Processes' T&D Paths. These paths (also called development paths or learning paths) take piles of courseware and other development interventions and organize them into logical sequences of learning events based on when someone needs to perform a task or know something. T&D Paths are visual: they represent learning events graphically. They are sequenced: A before B, and D after C. They are user-friendly: event titles are descriptive of the content, the length and availability of the event is shown, and phases are clearly labeled. In short, the learner or manager can easily navigate the path because it's user-friendly.

> *Too often, course catalogs are unfriendly "piles" of courses. Performance-based T&D should be based on the journey a new learner takes on the way to becoming a good performer.*

An example T&D Path for a TMC Store Manager (CADDI's own mythical retail division). The T&D Path depicts the possible T&D learning events in a suggested sequence.

Turning Piles of Courses into Paths of Learning (continued)

The goal, of course, is to get the new employee up-to-speed as quickly as possible. Properly constructed T&D Paths do that. As the word implies, paths have beginnings, middles, and ends that suggest a logical sequence of learning. In laying out a path, master performers, not T&D professionals, consider *what* a new learner needs to generally know and *when* he or she needs it.

> *T&D Paths can and should be customized for the learner. The Planning Guide makes that possible.*

Employee Name John Smith
Store Manager Karen Jones

TMC Stores
Individual T&D Planning Guide

Learning Cycle Phase	T&D Event Number	T&D Event Title	Employee Needs for Specific Assignment	Employee Needs T&D ✔	Priority for Employee's Dev H/M/L	T&D Events to be Scheduled ✔	Planned Completion Dates MM/Q/YY	Actual Completion Dates MM/Q/YY
1	04	TMC Orientation	✔	✔	H	✔	4/1	4/15
1	32	TMC Policies and Procedures	✔	✔	H			
1	02	TMC Management Processes	✔	✔	M			
1	29	Laws, Regulations, and Codes Impacting a TMC Store						
1	05	TMC Field Operations	✔	✔	H	✔	5/1	5/10
1	20	TMC Inventory Control Systems User Skills						

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Here's how store manager Karen Jones of TMC Stores may use a T&D Planning Guide for new employee John Smith. The guide helps prioritize learning activities, schedule them, and track them through

For example, a new accounting clerk might need to know basic administrative processes within the first week of taking a new job but could wait several weeks to learn about the company's 100-year history. A new tour guide, however, needs the new company orientation on the first day but could wait several weeks to learn about administrative processes. If the new tour guide transferred from a different job in the company, he or she might not need an orientation to the company. One size and path does not fit all!

Because T&D Paths are *suggested* sequences of learning events, they can be customized for a particular learner through the use of a planning tool. Just as a path suggests "beginning, middle, and end," planning suggests evaluating each

learner's job assignment and current knowledge and skill against the sequence to determine if starting at the beginning of the path is the right place to begin. For example, if an employee already has the knowledge and skills provided in the first five learning events, it makes sense to begin with event number six. The planning tool provides the mechanism to make that evaluation and to track progress through the jungle of all that training that is out there. ▶▶▶▶

Stephen Muller is a certified CAD practitioner who has worked with CADDI on projects for AT&T and Siemens Building Technologies. When he's not working with his own company's clients, he writes music, cycles, and watches the cows graze in Iowa where he lives.

What Will You Find on a T&D Path?

Words tell a story. And some words tell bigger stories than others. Take the word "class," for example. *Class* suggests going somewhere to learn something—probably in a formal, structured setting. Now consider the words "learning event." A learning *event* suggests a range of activities that could help someone perform his or her job better.

A learning event might consist of watching a video or using a checklist while observing a master performer at work. Another event may have the learner view a company policy, take a performance

test, or attend a class. One event might include all of the aforementioned. Any or all of these activities could (and should) be found on a T&D Path if they support worthy human performance. A T&D Path and the Individual T&D Planning Guide are outputs of CAD Phase 3.

Because the purpose of a T&D Path is to create a worthy performance (not learning for the sake of learning), it consists of activities that are linked to the knowledge and skills needed to support performance. It's much more than a list of classes.

CADDI Celebrates Summer Lake Michigan Cruise

Olivia King found this year's cruise less "snoozy" than last year's. (See fall '98 newsletter.) Her father is Mark of Siemens Building Technologies, Inc.

Jordan King, Kelly Rennels Smith, and Dana Wegge mugged for the CADDI camera but denied any plans to audition for *Pirates of Penzance.*

About 40 CADDI crew members and guests enjoyed a leisurely Saturday afternoon cruise on Lake Michigan.

CADDI Business Manager Weds

In a July 31, 1999 ceremony at Christ Church of Oak Brook, CADDI business manager, Deb Arndt, married Chad Smits. The couple honeymooned in Negril, Jamaica.

Chad is the dispatch/driver manager with Ozinga West Suburban RMC, Inc. in Lisle. They live in Bartlett, IL.

Photo courtesy of Élan Photography

Which to Choose?

This page contained page one of an out-of-date contest to vote on the cover of our now published book, *lean*-**ISD**. If you wish to view a copy of these pages, please E-mail CADDI at CADDI@caddi.com with your request. Please reference the volume and issue number of this publication—Volume 2, Issue 4.

Thank you.

Which to Choose?

This page contained page two of an out-of-date contest to vote on the cover of our now published book, *lean*-**ISD**. If you wish to view a copy of these pages, please E-mail CADDI at CADDI@caddi.com with your request. Please reference the volume and issue number of this publication—Volume 2, Issue 4.

Thank you.

Dottie Soelke Joins the Naperville Team

When Dottie Soelke joined the CADDI crew in August, she did so as a seasoned veteran of more than 40 PACT projects. And how does she feel about rejoining her former colleagues? "It's kind of like coming home," she said. Dottie, CADDI's newest senior consultant, will work on and manage CAD, MCD, and IAD projects in her new job.

While with SWI Consulting the past 19 months, she focused on strategic planning for T&D; curriculum design; process design, development, and training; and project management. "On the surface, these sound similar to my new CADDI responsibilities, but they were at a much more macrolevel," she said. A lover of detail at heart, Dottie finds herself in tune with the PACT Processes, which provide both detail and macrolevel views.

The entire CADDI crew is pleased to be working with Dottie once again!

"I'm a firm believer in Guy's 'trust the process' mantra," she said. "Clients are occasionally somewhat leery of learning and using processes, but they become converts when they see results—oftentimes very quickly."

One of the most memorable MCD projects for Dottie was for Sphinx Pharmaceuticals, a division of Eli Lilly and Company. The 1996 SWI ● Svenson & Wallace, Inc. project required developing training to help chemists transfer an innovative technology for finding new potential drug compounds. "The scientists needed to standardize and document Sphinx's unique combinatorial chemistry process and teach it to chemists in other pharmaceutical companies," Dottie recalled.

The challenge was in finding agreement on how this would be done. "The MCD methodology was a perfect fit," she said, "and the content was very interesting."

She is also the author and co-author of several publications and presentations, one of which, "Low-Tech Project Management," describes how using simple project management tools can provide visibility and status information without the need for hardware-/software-based solutions. Matrixed task/resource schedules on flip charts or whiteboards with moveable tasks on color-coded sticky notes or magnets are examples of what Dottie calls low-tech project management tools.

"Clients need to know how their project is progressing. While hardware/software solutions are appropriate tools for managing large and/or complex projects, they are often too expensive, too time-consuming, and just unnecessary for simpler, smaller projects. If your goal is to keep your project visible but hold project management costs down, a flip chart or poster works better than an inch-thick report no one has the time or desire to read," Dottie said. "My approach is 'simpler can be better.'"

Dottie joined SWI in 1990 where she managed its production group until 1993. At that time, she moved to the consulting side of the business. She worked on CADs, custom courseware development, developing qualification instruments, and writing administrative manuals for qualification systems and organizational capability assessment systems.

Prior to working at SWI ● Svenson & Wallace, Inc., Dottie was Applied Learning International's (ALI's) manager of authoring services for more than three years. While with ALI (now National Education Training Group), she managed development of CBT and multimedia training products. During that time, she was able to reduce programming cycle time by nearly one quarter while her staff grew from 7 to 35.

Some of Dottie's favorite pastimes include attending plays (she's a Steppenwolfe Theatre season ticket holder), reading fiction (especially on the beach), swimming, and doing needlework.

Dottie, a Chicagoland native, and her husband, Bob, have two sons and are long-time Naperville residents. ▶▶▶▶