Using guidance materials instead of formal training is one approach to minimizing time and cost without sacrificing results.

Guidance: The Short Way Home

"I know you're understaffed and your budget is already strained. But I've got some men who need training—and fast. What can you do for me?"

You've probably heard this statement—or variations of it—on more than one occasion. And given the less-than-ideal conditions of today's economy, you're probably hearing it more today than ever before.

And indeed, what can the training director with a fixed and often limited budget do to introduce new skills or improve performance in his organization?

Using guidance materials is one approach to eliminating the need for hundreds of hours of conventional training and thousands of training dollars. In fact, over half the time, Praxis analysts have found that guidance is superior to training for increasing worker accuracy, teaching complex tasks and reaching personnel at remote locations. Further, it is often possible to hire workers with modest salary requirements if guidance tools are put to use.

Basically, there are three levels of guidance. In ascending order of complexity they are: the directory, the ensampler and the query.

The directory is the simplest and most familiar form of guidance. Designed to tell a worker how to do a job, step by step, a directory can be a checklist, worksheets, a list of instructions, or even a tape recorder strapped to a worker's belt, telling him exactly what to do.

The ensampler is a more sophisticated form of guidance, used when a job requires judgment rather than structured procedures. The ensampler, in most cases, gives the user a number of examples that he can refer to when making decisions about the task at hand.

The query is used when judgments are so complex or so subtle that instructions and examples will not suffice. Also, the query is helpful for introducing new techniques to people who might be offended by more rudimentary types of guidance.

The form that each of the guidance tools takes is described in the case examples below.

The Directory

Clerks at a large insurance agency were continually behind schedule in entering data for new policies on computer-coded forms. Since recording this data was the first step in adding a new policy holder's personal history to the company's records, the entire organization suffered from the clerical lag.

The clerks' job involved numerous steps, but none of these steps was especially difficult. Specifically, they were required to read a policy application and transfer data from the application to a form that provided for more than 2,000 bits of information. Of course, all 2,000 items did not have to be filled in for every policy. In fact, it was rare that 50 or more items were called for. Nevertheless, the clerks had to be familiar with all 2,000 items.

To compound their problems, the items on the form were coded. For example, the space allotted to date of birth might be called D-17. History of illnesses might be called I-19. Wife's maiden name might be called X-43. And so on.

While these codes were critical for the computer's operation, they had absolutely no significance for the clerks. Therefore, they constantly were referring to the three-volume code manuals the company had designed to bridge the gap between them and the computer.

The clerks' accuracy, for the most part, was quite high. Their speed, however, left much to be desired, since they were forever combing the manuals to find the codes for unfamiliar items.

The company's training department was asked to increase the clerks' form-completion rate. And since the company believed this step
to be critical to overall efficiency, it gave the department carte blanche. Any solution that was workable—from designing a sophisticated and costly training program to doubling the size of the clerical staff (if speed absolutely could not be increased)—would be implemented.

While he could have launched an ambitious and expensive training program, the training director instead designed a template—a card with holes punched in it—that could be placed over each computer form. The template indicated—in English—what each item called for, thus eliminating the need for constant referral to the code manuals.

At a cost of less than $500 (for printing, graphics and the time necessary to explain the template to the clerks) the trainer increased the clerks’ speed by 500% and, as a result, smoothed and speeded the flow of paper throughout the entire company.

What the trainer had actually developed was a directory—a performance improvement tool perfectly suited for routine tasks.

The beauty of directories is that they needn’t even be as complex as a template. A set of instructions, a checklist, worksheets and, in fact, any simple directive that produces the desired result can be used—at low cost—and can improve performance almost immediately.

The Ensampler

While the directory is fine for fairly straightforward, repetitive tasks, its value is limited for tasks requiring judgment and complex discrimination. Here ensamplers—examples that enable the user to generalize about his immediate situation—are helpful in improving performance.

A fine ensampler was designed for the department of Agriculture and used in its correspondence course for secretaries.

The course replaces many complex and hit and referred to style manuals that secretaries were previously given as reference materials.

The ensampler used to aid secretaries in writing telegrams is typical. When a secretary questions proper form for abbreviating a telegram, she simply refers to the ensampler section in her correspondence course and finds:

Abbreviating the Telegram: Original Message: “Our memorandum of April 18 certainly states our problem clearly. We were to agree with the United States Public Health Service, we could not possibly honor our commitments.

Shortened Message: ORMEM April 18 CLEARLY STATES PROBLEM, IF AGREE WITH USPHS, CANNOT HONOR COMMITMENTS.

A short glossary of abbreviations and some general rules about abbreviation accompany the ensampler. But the important point is that the secretary is given a model for her own work. She can follow the general principles demonstrated by the ensampler and apply them to a telegram she must send out immediately.

The ensampler, then, has helped the secretary make some fairly sophisticated judgments about abbreviating telegrams, without forcing her to plod through unnecessary rhetoric.

The Query

The query, better known as the paper computer, is the most sophisticated form of guidance. It is particularly useful for structuring managerial and professional decisions where the skills involved are hard to define.

No one can tell a high-level decision-maker how to do his job, since the input required is often known only to the decision-maker himself. But while it isn’t easy to describe or codify the decision-making process, this doesn’t mean that the process is ideal or mystical. Decision-makers themselves are quick to admit that the thought processes are often unsystematic. Available alternatives are sometimes neglected—with costly results.

Given these two facts about high-level decision-making—its indefinable nature and the absence of a rational system—it would be helpful if a system, if not the input to that system, could be ordered to produce predictable results that would yield a high percentage of success.

The query does precisely this. A paper computer designed for a magazine publisher shows how:

The Hungry Home*, a national women’s magazine, was steadily losing advertising reve
Advertising account executives had come to regard it as a lifeless publication, reaching an equally lifeless readership.

By their own admission, account executives lay great emphasis on intangibles: status, mystery and what is known as a "sexy" look. The Hungry Home could claim none of these "assets."

But despite their "pedestrian" world view, Hungry Home's readers were, in fact, super consumers. They spent their money on power mowers instead of season tickets to the ballet, soap powder instead of pate de foie gras. While its readership's buying habits were well-documented and its space salesmen—who were well-trained and diligent—were covering account executives' desks with proof of the magazine's pulling power, Hungry Home failed to shake its uninspiring reputation and continued to lose advertising lineage.

Convinced that if they could get account executives to make rational decisions about advertising they could increase revenues, the publishers asked a consultant to devise a more effective sales presentation.

The consultant's solution was a paper computer—a tool that could guide account executives through a rational argument. The hard data, he said, would inevitably favor buying space in Hungry Home over space in any of its slick competitors. And at the same time, the paper computer would not take any of the decision-making powers away from account executives.

Specifically, the paper computer helped account executives choose between two women's magazines (Hungry Home and its most sophisticated competitor) for placing an ad for breakfast cereal. Without identifying either publication, the paper computer led account executives through a number of statements and questions about media selection. A typical statement read: "The more a magazine's editorial content concerns food, the more likely that readers will see food advertisements." If the statement was reasonable to an account executive he would then refer to a chart that told him what percentage of editorial content was devoted to food in publication "A" and "B".

Based on the data, he selected the magazine that would give the breakfast cereal ad the greatest visibility. He did this by making a mark in a punched out section of the paper computer form (see example above), in effect recording his selection on the last page. Other questions were keyed to data about eating habits, age, income, response to coupons and contests, and other factors media buyers consider during the decision-making process.

The last page of the computer contained all of the account executive's responses, along with an identification of the Hungry Home and its competitor. In most instances, the account executive had chosen Hungry Home as the best medium for the ad.

The Hungry Home paper computer is an excellent sample of what queries accomplish. They help the decision-maker:

* Consider whether a variable, such as editorial content dealing with food, applies to his situation.
* Consider data and decide on its meaning.
* Weigh the cumulative value of various arguments.

The query, then, affects the user's decision by making the decision-making process open and systematic.

Using queries needn't be restricted to factual judgments about personal matters. For example, a query could be designed to help someone select an insurance program for himself when he is faced with alternative ways of spending his money (what does he want now versus what he wants to put away for the future). The input would reflect his life style.

(Praxis is now publishing a paper computer that aids the training director in establishing the value of overcoming performance deficiencies. Inquiries will be welcomed.)
hold a directory in one hand. And a bank teller couldn't handle many customers if he had to refer to a guidance tool prior to each transaction.

In addition to physical interference, guidance sometimes presents emotional and psychological roadblocks for users. Some people resent performing a task by following a "recipe." This doesn't mean that guidance should be discounted completely. It does mean that some supportive training in the theory of a task might be needed. Once reluctant guidance users are given some grounding in theory, they usually accept guidance material enthusiastically.

How can the training director interested in using guidance materials to improve performance in his organization decide whether it is applicable to a specific problem?

The guidelines above will aid you in making a choice between guidance and training and, where guidance is appropriate, will provide a tool for choosing the best guidance technique.

While guidance is certainly not a cure-all for all performance ills, the benefits far outweigh potential drawbacks. For certain types of jobs, especially, guidance materials produce fewer errors than training. For example, laboratory technicians and airline pilots cannot afford mistakes. A good deal of their instruction, then, is better left to guidance than to memory.

Guidance is also valuable for people whose tasks are so complex that they are very hard to learn.

Further, guidance tools are particularly effective for learning how to perform tasks that arise infrequently. The manager who must retrieve information from a computer from time to time, for instance, would find it easier to use an ensampler for making requests from a computer than he would being trained in the theory and applications of computer technology.

Most important, using guidance materials represents a terrific opportunity to cut costs. If a good guidance tool is available, fairly low level and rather low salaried people can be hired to perform a task usually associated with well-trained, high salaried workers. Utility companies could make extensive use of guidance materials for showing high school graduates how to calculate the power needs of commercial buildings. Without guidance, trained engineers have to be employed to calculate those needs.

In short, guidance works. It saves time and money and produces good results. For these reasons, Praxis analysts often consider and recommend guidance materials to clients as alternatives to training. Guidance, Praxis believes, is the short way home.

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GUIDANCE OR TRAINING?*

Use Guidance for:

1. Tasks that involve many simple steps.
2. Tasks that allow instructions to be read during performance.
3. Tasks where small errors in performance can produce significant negative consequences.
4. Tasks that are performed only infrequently.
5. Tasks where accuracy is generally more important than speed.
6. Tasks that are assigned small instructional budgets.

Use Training for:

1. Tasks where speed is generally more important than accuracy.
2. Tasks where reading instructions would interfere with performance.
3. Tasks where small errors are not usually costly.

* Of course, some tasks will meet criteria for both guidance and training. In these cases, the training director must weigh each criterion to choose the appropriate instructional method.

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What Kind of Guidance?

**Directory:** For relatively simple, routine tasks where a worker can be given step-by-step instructions.

**Ensampler:** For any job requiring judgment where examples would aid in making those judgments.

**Query (Paper Computer):** For tasks where judgments are complex and sophisticated, and input data is known only to the user.