Performance Modeling

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What is a Performance Model

A Performance Model is a report which outlines a job/process/role's

- Key Results Areas
- Results
- Tasks
- Knowledge & Skill Items

![Diagram showing the hierarchy from key outputs to must know & do to accomplish tasks/outputs]
Example of Performance Model

Job = Quality Analyst

- **Key Result Area**
  (5-10/job)

- **Results**
  (1-x/key result area)

- **Key Tasks**
  (1-x/result)

**Knowledge/Skill Items**
(by category)

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1. **Customer Satisfaction Assessment**

<table>
<thead>
<tr>
<th>Results</th>
<th>Key Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Survey Implemented</td>
<td>- Identify customer survey implemented</td>
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<tr>
<td></td>
<td>- Distribute survey</td>
</tr>
<tr>
<td></td>
<td>- Collect survey</td>
</tr>
<tr>
<td></td>
<td>- Summarize data</td>
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<tr>
<td>Customers Interviewed</td>
<td>- Identify customer interview</td>
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<tr>
<td></td>
<td>- Set-up schedule</td>
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<td></td>
<td>- Conduct interviews</td>
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<td></td>
<td>- Summarize data</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>K/S Item</th>
<th>LI</th>
<th>nk</th>
<th>age</th>
<th>T/S</th>
<th>Imp</th>
</tr>
</thead>
<tbody>
<tr>
<td>MS Word</td>
<td>x</td>
<td>x</td>
<td></td>
<td>S</td>
<td></td>
</tr>
<tr>
<td>Survey Pro</td>
<td>x</td>
<td></td>
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<td>T</td>
<td>H</td>
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Key: S/T = Select vs Train
Imp = Importance

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Create a Performance Model When...

Use a Performance Model when you need to define a job/process/role including

- the key results
- the key tasks
- the skills and knowledge items

Use the Performance Model as a foundation for developing:

- candidate selection criteria
- training curriculum requirements for both new & experienced staff
- a certification process
- pay-for-skills criteria
  (pay is based on demonstrated skill sets)
Who participates

Sponsors:
- Owners of the project
- Ultimate end-user of training products

Analysis Team:
- Provide real world input based on experience as
  - Master Performers
  - Supervisors
  - Process Support Staff

Project Manager/Facilitator
- Manage the project
- Facilitate the analysis/design process

How to Create a Performance Model

Steps:
- Establish a Project Steering Committee
- Select the analysis team members
- Collect target audience demographics data
- Conduct analysis meeting to create Performance Model
  - orient analysis team
  - define key result areas
  - identify results and tasks
  - define knowledge and skill categories
  - identify knowledge and skill items, link and characterize
- Review Performance Model with Project Steering Committee & get approval
Benefits of Curriculum based on Performance Model

General Benefits
- More implementation support
- Training will have more impact on performance
- Minimize gaps & overlaps in training
- Facilitate prioritized development
- Training modules which can be shared between curriculum paths
- Job-based curriculum paths which can be customized to meet the individual contributors needs

OP Curriculum Project
- Decreased time to proficiency from 10 months to 3 months
- $1.25 million ROI (return on investment)

Requirements for Success

Steering Committee
- Appropriate members
- Engaged

Project Manager/Facilitator
- Performance analysis skills
- Project management skills
- Consulting skills

Process Definition
- Stable job process -or- clear decision making process for defining job output/tasks

Support Resources
- HP - Christine Westall, Americas Education (TN 345-8588)
- Vendor - Guy Wallace, Partner, SWI, Naperville, IL (708)416-3323
Order Processing Improved - A Case Study
Hewlett Packard and Darryl L. Sink & Associates

> Business Problems
In February 1992, Hewlett Packard (HP) decided to consolidate Order Processing (OP) from 11 sites to 3 sites. The consolidated sites would begin operation in August 1992. Because of the complexity of the job, the old training process (on-the-job mentoring) historically took 10-12 months to bring a new Coordinator up to speed. Since management expected that 50-90% of the staff at each site would be new to Order Processing, this training process could not meet the business need. Thus training became a critical success factor for the consolidation.

> Training Objective
The primary audience was all employees new to OP. The secondary audience was experienced OP staff. The goal for the training project was:
• To create a formal training program which enables employees to process 80% of their orders independently and all of them accurately.
• To pilot the training products within 6 months (August 1992)
• To design for maintenance and reusability

> Project Deliverable
A 5 week training program was developed. The curriculum was composed of 70 modules in 20 courses covering everything from a job overview to detailed order processing procedures. The materials developed included the following:

- Performance Model
- Curriculum Map
- Student Guide (3 volumes)
- Leader's Guide (3 volumes)
- Training Database
- Procedures Manuals
- Assessment Tests

> Project Methodologies
The project was divided into 3 phases: I-Analysis & Curriculum Design; II-Module Design & Development; and III-Assessment. In Phase I, 12 HP staff used Svenson & Wallace's methodology to create a Performance Model and Curriculum Map for OP. In Phase II, HP hired Darryl Sink & Associates to create the courseware, the training database and the Procedure Manuals. Because of the timeline (2 1/2 months to pilot) 6 DSA instructional designers had to work in parallel with 28 HP subject matter experts to create the materials. In Phase III, 8 HP staff developed the assessment tests based on the Performance Model and the courseware.

> Project Results
This training curriculum cut the time to proficiency for a new Coordinator from a 10 month average (old-OJT approach) to a 2-3 month-average (new approach). It also decreased the amount of time that a mentor spends coaching a new Coordinator by 80%. This increase in staff productivity saved HP $13,970/trainee. Thus the breakeven point for the training was 48 students. In 1993/94, HP has put 160 students through all or part of the curriculum, for an ROI of $1.25 Million.

This development effort won an award for HP and Darryl Sink - and was based on the Curriculum Architecture Design conducted by Guy W. Wallace of SWI - Svenson & Wallace, Inc.