Types of Job Aids – for Performance Support

& Guidance in the Workflow

Definition/ Types/ When to Use/ Examples

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Definition: Job Aid

Definition from Joe Harless

JOB AID: A mechanism that stores information external to the user, guides the performance of work, and meets these requirements:

* Can be accessed and used in real time (employed during actual performance of the task).
* Provides signals to the performer on when to perform the task or increments of the task (stimuli).
* Provides sufficient direction on how to perform each task (responses).
* Reduces the quantity and/or time the information must be recalled (reduces access of memory).

Job Aid Types

Note: I’m using 3 categories of Job Aids – from Rummler & Gilbert’s Praxis newsletter (September 1970) – where they called these “Guidance” – to organize them for this Job Aid.

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 the 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 instruction or even a tape recorder strapped to the worker’s belt, telling him exactly what to do.

Guidance, is also 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.
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The Directory Types

The Directory is the simplest and the 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 instruction or even a tape recorder strapped to the worker’s belt, telling him exactly what to do.

Cookbook/Step-Action Table/Step-by-Step

The step-by-step format presents sequenced directions - appropriate when the performer has a linear set of tasks to perform. Can be guidance on paper, via digital means, on video or audio.

Worksheets/Forms

Worksheets/Forms - similar to the Cookbook format in that they guide the user through a linear set of tasks and include places to document responses – useful for when calculations must be performed or or data is captured for possible future reference. Can be provided guidance on paper, or via digital means.

Checklists

Checklists are used to document and ensure that every task is completed, whether in sequence or not. Can be guidance provided on paper, or via digital means.

Algorithms/ Decision Tables

Algorithms/ Decision Tables guide the performer(s) in making decisions in order to complete tasks based on the conditions present. They are “If/Then” statements appropriate to the Output and Task given the conditions that might vary within the Performance Context.

Algorithms/ Flowcharts
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Algorithms/ Flowcharts, like Decision Tables guide the performer(s) in making decisions in order to complete tasks based on the conditions present. They are “If/Then” statements in a visual flow diagram, guiding performers to produce the Output by performing the Tasks, by assessing the conditions that might vary within the Performance Context, that can be answered with simple “yes” or “no” responses. Each decision leads the performer to another decision, and another, until they are stepped through the entire task-set leading to the terminal output,

The Ensampler Types

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.

Sets of Worked Examples

Worked Examples are used to provided multiple examples of the performers’ outputs, on paper, or via digital means. These can include correct and incorrect examples with quick explanations of why some examples are correct and/or incorrect.

The Query Types

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 Query, in the past, was also referred to as a “paper computer” according to Rummler & Gilbert.

Paper Computer Algorithms/ Real Computer Algorithms

The Query systematically guides the performer with a presentation of a rationale, Socratic argument, by presenting a series of logical questions to the user alongside data to back up the preferred answer, given two or more choices. The answers to the questions were captured one at a time without sharing what final decision they indicated was warranted, until the end, when the preponderance of answers selected were shown to the performers indicating the final decision/choice that their answers led to.
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When to Use

Use Guidance/ Job Aids/ Electronic Performance Support Systems (EPSS)/ Standard Operation Procedures (SOPs)/ Quick-Reference-Guides/ Performance Support/ Workflow Learning/ etc. when:

☐ Performance risks & rewards are high – and expecting performers to memorize their tasks is problematic.

☐ Performance is complicated - and expecting performers to memorize their tasks is problematic.

☐ Performance is infrequent - and expecting performers to memorize their tasks is problematic.

☐ Performance would not be inhibited or interfered with - by use of the Job Aid.

☐ Performance is likely to change - and you do not want performers to memorize the tasks.

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