Training That Delivers Results:

Instructional Design that Aligns with Business Goals

The Handshaw Model

Performance Consulting + Instructional Design
**Cost vs Risk Rule**

The Model becomes flexible when you weigh:

The COST of doing a step vs The RISK of not doing a step

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**Handshaw Instructional Design Model**

Proactive and Reactive Consulting Phases
Why use Performance Consulting?

“You all are doing a really good job here. The only thing wrong with training at this bank is that we are developing too much training.”

- Tom LaBonte
  Consultant

“A strategic process that produces business results by maximizing the performance of people and organizations”.

- Dana and Jim Robinson,
  Patti and Jack Phillips,
  Dick Handshaw
### Practice Performance Consulting

<table>
<thead>
<tr>
<th>Proactive Approach</th>
<th>Reactive Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developed over time</td>
<td>Responding to a request</td>
</tr>
<tr>
<td>Strategic</td>
<td>Tactical</td>
</tr>
<tr>
<td>Usually easier</td>
<td>Sometimes difficult</td>
</tr>
<tr>
<td>Can eliminate the need for reactive approach</td>
<td></td>
</tr>
</tbody>
</table>

The “True” Client

The owner of the line of business who is responsible for the performance problem.

- They know:
  - Current business goal
  - Internal and external barriers
  - Strongest and weakest performers

- They Can:
  - Answer questions as you conduct Reactive and Proactive Consulting.
  - Make decisions that affect business results.
The Gaps Map

**Business Need:**

**Gaps**

- **Business Should** (Desired State)
- **Business Is** (Current State)

**Performance Should** (Desired State)

**Performance Is** (Current State)

**Causes**

- **Factors External to Organization**
- **Factors Internal to Organization**
- **Factors Internal to Individual**

Outside Client Control  |  Within Client Control
You must have:

- Access to the “True Client”
- Time to conduct analysis
- The influence to suggest non-learning solutions
- A comfort level with ambiguity
Task Analysis

Procedural Task Analysis (Motor Skills)

Hierarchical Task Analysis (Intellectual / Knowledge)
Task Analysis

Combination Task Analysis

The Value of Task Analysis

Revised Curriculum for Front Line Workers

• Total Development time of 4500 hours

• Task Analysis development time of 270 hours or 6.5% of total budget

• The Task Analysis correctly identified the scope and kept this large project on time and on budget with no real scope creep
Task Analysis

Putting a Golf Ball

Sample Task Analysis

Recruiting – Determining Who to Contact
Sample Five-Part Objective

Task: Recommend the best product mix for a customer.

<table>
<thead>
<tr>
<th>SITUATION</th>
<th>Given a customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEARNED CAPABILITY</td>
<td>the student will be able to recommend</td>
</tr>
<tr>
<td>OBJECT</td>
<td>the best product mix</td>
</tr>
<tr>
<td>ACTION</td>
<td>by asking probing questions, presenting benefits, and handling objections</td>
</tr>
<tr>
<td>TOOLS / CONSTRAINTS</td>
<td>with every customer.</td>
</tr>
</tbody>
</table>
**Sample Five-Part Objective**

**Task:** Turn a customer objection into a sales opportunity.

<table>
<thead>
<tr>
<th>SITUATION</th>
<th>Given an angry customer with an objection</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEARNED CAPABILITY</td>
<td>the learner will be able to convert</td>
</tr>
<tr>
<td>OBJECT</td>
<td>the objection into a sales opportunity</td>
</tr>
<tr>
<td>ACTION</td>
<td>by restating the customer objection, offering alternatives, and identifying a solution that satisfies the customer need</td>
</tr>
<tr>
<td>TOOLS / CONSTRAINTS</td>
<td>with every customer.</td>
</tr>
</tbody>
</table>

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**Handshaw Instructional Design Model**

**Blueprint Phase**

- Proactive Consulting
- Needs/Gap Analysis
- Reactive Consulting
- Learning Analysis
- Design
- Blueprint
- Prototype
- Production
- Implementation
- Field Test
- Learner Tryout
- Proactive Consulting

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The Blueprint Meeting

- Discuss business goals
- Define training goals linked to business goals
- Identify key performance objectives
- Define measurement strategy
- Select instructional strategy and media
- Discuss course outline
- Show samples of learning materials
- Define content for prototype
- Agree on revisions
Formative Evaluation

“Formative – to Improve
Summative – to Prove”

- Thiagi

Learners Are Your
Best Design Consultants

- Develop a prototype that represents the outcome of the Blueprint meeting
- Conduct a Learner Tryout of the prototype and make revisions to strategies and prototype content
- Conduct a Field test and make final revisions
The Value of Formative Evaluation

Revised Curriculum for Front Line Workers

• Tested and measured two different strategies; selected clear winner based on learner input
• Identified functionality changes which affected the entire course
• Functionality changes alone would have cost an additional 80 hours of work

Revised Curriculum for Front Line Workers

• Identified important changes to implementation plans
• Modified key course materials used through much of the course
• Obtained positive feedback from the instructor group who were key influencers
• Formative Evaluation execution time of 150 hours or 2.7% of total budget
Implementation Phase

Implementation

“More training initiatives fail due to poor implementation than for any other reason.”

Dick Handshaw
1. **Reaction**: Measures reaction to, and satisfaction with, the experience, contents, and value of the program.

2. **Learning**: Measures what participants learned in the program—information, knowledge, skills, and contacts (takeaways from the program).

3. **Application**: Measures progress after the program—the use of information, knowledge, skills, and contacts.

4. **Business impact**: Measures changes in business impact variables such as output, quality, time, and cost linked to the program.

5. **Return on investment**: Compares the monetary benefits of the business impact to the costs of the program.

Jack and Patti Phillips
ROI Institute
What Executives Want to See

We currently measure | What Executives Want
1. Reaction - 53% | 22%
2. Learning – 32% | 28%
3. Application – 11% | 61%
4. Impact – 8% | 96%
5. ROI – 4% | 74%

From ROI Institute, Jack and Patti Phillips

Applying Cost vs Risk

Software Upgrade
- Your client is upgrading infrastructure by investing several million dollars in new software systems to support front-line personnel.
- This is a major new initiative for your organization.
- You have been asked by several line managers to develop training for the new systems.

Question: Do you need to reframe the training request through the use of reactive performance consulting?
Applying Cost vs Risk

Software Upgrade

• Your client is upgrading infrastructure by investing several million dollars in new software systems to support front-line personnel.
• This is a major new initiative for your organization.
• You have been asked by several line managers to develop training for the new systems.

Question: Is it necessary to identify the business goal(s) for this major initiative?

Applying Cost vs Risk

Software Upgrade

• Your client is upgrading infrastructure by investing several million dollars in new software systems to support front-line personnel.
• This is a major new initiative for your organization.
• You have been asked by several line managers to develop training for the new systems.

Question: Would you find it necessary to conduct a task analysis?
Applying Cost vs Risk

**Software Upgrade**
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- You have been asked by several line managers to develop training for the new systems.

**Question:** Would you measure business impact or ROI on this project? If so, how?

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**New Sales Process**
- Your client is introducing an entirely new sales process for 1200 performers across the enterprise.
- There is a lot of mistrust and ambivalence among sales managers towards the new process.
- You have been asked to develop a series of instructor-led training programs for this new sales process.

- **Question:** Would you really need to write performance objectives? Why or why not?
Applying Cost vs Risk

New Sales Process

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• Question: Other than task analysis, what other type(s) of analysis should you conduct?

Applying Cost vs Risk

New Sales Process

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• Question: Is it worth the effort to conduct a learner tryout? Why or why not?
Applying Cost vs Risk

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- You have been asked to develop a series of instructor led training programs for this new sales process.

- **Question:** This project has a tight schedule. Do you need to conduct a Blueprint Meeting?
Available Now

Performance Consulting

A STRATEGIC PROCESS TO IMPROVE, MEASURE, AND SUSTAIN ORGANIZATIONAL RESULTS

Dana Gaines Robinson | James C. Robinson
Jack A. Phillips | Patricia Pulliam Phillips
Dick Handshaw

Handshaw, Inc.

- Founded in 1985
- Privately Held
- Based in Charlotte, NC
- Business Overview
  - Training Services
  - Performance Consulting
  - Technology Solutions
  - Professional Development