

Performance Analysis: Getting It Right the First Time

By Allison Rossett

Using technology to shift learning and references closer to the work is brilliant, except when it is the wrong learning or references. That's true in the classroom and online. Employees reject programs that are extraneous, bloated, or obsolete.



In the classroom, instructors step up and make fixes when the training is not right. An instructor adds an example to make training more relevant. Another reminds the employee of all that he already knows. Yet another instructor provides an opportunity to tackle a problem that is within the employees' abilities to assure a successful experience. And another links the example to the concept, when the faces go blank. Finally, a savvy instructor recognizes that the class, as now written, ignores a new competitor or economic reality. She adjusts to assure that the class is timely.

When we move to on-demand and workplace-based resources and experiences, analysis must supply the anticipatory smarts. Through analysis, we answer these questions: What do our people need? What is top of mind? What is already known? What will add the most value? What must they know by heart? What can they seek as they need it? What might get in the way of performance?

What is performance analysis?

Performance analysis is planning. It is how workforce learning professionals figure out what to do, in a world where you can't do everything, respond to every request, or meet every need. Analysts are charged with taking a fresh, irreverent look at the work, worker, and workplace.



How it works

Analysis protects us from unpleasant surprises. Imagine the following scenario: your organization invested in a new blended program to enable salespeople to sell a new product without analysis. You were enthusiastic about this blended approach because it combined vivid classroom exercises with current technology, including an online resource center and community.

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Four months after rollout, sales disappointed and participation in the online center is slim to none. What's up?

Unfortunately, you missed red flags that an analysis would have unearthed:

- Managers were not keen on the new product.

- Managers were not keen on the online center or community and had little experience with either approach.
- Salespeople shared this resistance to the product, but were somewhat intrigued with an online resource center to answer questions that emerge.
- Salespeople lacked confidence about their ability to talk about and demonstrate the new product.
- Leadership was not entirely certain how they wanted to position the product.
- Salespeople are on the road and not all are equipped to access the online resources.
- Incentives had not been shifted to embrace the new product.



Results

Strategy, cost reduction, systems, "on demand," outcomes, speed—today, those are the words we hear. Expectations are high and grow ever higher. They link us not just to learning, but to what really matters—graduation rates, sales, safety, retention, and service. This is the role we sought when we dubbed ourselves performance consultants, not

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trainers. The only way to play on that team, in that league, is with the insights provided by analysis.

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Resources:

Allison Rossett
First Things Fast: A Handbook for Performance Analysis, 2nd Edition
San Francisco, Pfeiffer & Co., 2009

Allison Rossett and Kendra Sheldon
Beyond the Podium: Delivering Training and Performance to a Digital World?
San Francisco, Pfeiffer & Co., 2001

Richard E. Mayer and Ruth Colvin Clark
e-Learning and the Science of Instruction: Proven Guidelines for Consumers and Designers of Multimedia Learning
San Francisco, John Wiley & Sons, 2003

William Horton
e-Learning by Design
San Francisco, Pfeiffer & Co, 2006

Checklist:

Consider what might have been done to successfully roll out this new product to the global sales force.

What we seek	Questions to answer
The substance of the program	<ul style="list-style-type: none"> What's in? What's out? What must be known by heart? What can be referenced as needed? In these difficult economic times, organizations want to concentrate resources where they will make the most difference. Employees agree. Salespeople have no time for fluff.
Widespread support	<ul style="list-style-type: none"> Involve many sources in analysis. Talk to subject matter experts, to sponsors, and to salespeople and their supervisors. Where appropriate, look to the published literature and to work products.
Optimals: What must be known about the new product and about selling it?	<ul style="list-style-type: none"> What is it that an effective salesperson must know about this product? Features? Functionalities? Comparisons to past products? Competitors? About what must they be fluent? Where can they reach for help if needed? What are the objections? How would one counter?
Actuals: What do they currently know and do?	<ul style="list-style-type: none"> What is already known? Are they familiar with a similar product? Users? The problem the product will address?
Gaps	<ul style="list-style-type: none"> Get clear about priority gaps, derived from the relationship between optimals and actuals. Be very clear about the outcomes that are promised and how they link to meaningful sales and customer focus.
Causes/Drivers: What now gets in the way of sales? If it is brand new, what might get in the way?	<ul style="list-style-type: none"> Do sales team members know enough to sell the product? What more must be known? Must it be known by heart? Is it so complex that it could not ALL be known? Do they value the product? Do they see the benefits? Are they confident? What of their supervisors? What of their customers? Do they have technology to enable access to on-demand resources? Access on the road? Is it dependable? What of the incentive system? Has the organization shifted to recognize sales of this new product? What happens if they don't sell it?
Solutions	<ul style="list-style-type: none"> Given what has been discovered about causes and drivers, what tailored solutions system has the most meaning for rolling out this product to a global workforce? What message must be delivered to executives so that they can sponsor a winning solution system?

