Preface

Human performance technology (HPT) is a systematic approach for improving performance that takes into account organizational, environmental, and causal analyses in order to make data-driven decisions regarding intervention design, implementation, and evaluation. (ISPI, 2013). Principles of HPT are used in a variety of different industries to solve problems, assist with qualitative improvement initiatives, and identify future business opportunities. Performance improvement technologists take the entire organizational environment into account when developing strategies and interventions to address an organizational need.

This casebook is a collection of 14 teaching case studies that are intended to provide educators, students, and practitioners with an opportunity to see how principles of human performance technology have been implemented in various contexts and industries. Like most fields, students are taught best practices, but are not always privy to understanding the challenges that can occur when attempting to implement these best practices in the real world. Lack of resources, organizational buy-in and timing can all hinder performance, requiring practitioners to work creatively to implement solutions within a limited timeframe. Often times, performance improvement technologists are tasked with implementing multiple interventions (instructional and non-instructional) at the same time. The success of any intervention is dependent on whether or not it meets the needs identified during initial assessment of the perceived performance problem.

It is in the intent of this casebook to provide those with an interest in human performance technology and performance improvement a repertoire of cases where human performance improvement initiatives were employed. Each case provides insight as to how analyses were carried out, the design of interventions, and how organizational culture contributed to the performance problem being addressed. The goal of this case book is to provide educators, students, and practitioners with in-depth case studies, showcasing real-life applications of HPT in a variety of different industries and contexts, that can be used for instructional purposes in human
performance technology and performance improvement courses. The cases featured in this book address how projects were implemented within the following industries: higher education, manufacturing, government, healthcare, and non-profit sectors. Topics addressed within the case studies include the following:

- Conducting performance analyses
- Solving business problems
- Identifying and selecting performance improvement interventions
- Implementing instructional and/or noninstructional interventions
- Implementing change management strategies within organizations
- Employee development
- Instructional design
- Changes in workflow procedures
- Performance support systems

BOOK OBJECTIVE

The overall mission of this casebook is to provide educators in the field of human performance technology, organizational development, educational technology, and business management with a compilation of case studies based on real-life experiences that can be integrated within their classes utilizing a problem-based instructional technique. The goals for this case book are to 1) provide relevant cases that demonstrate how principles of HPT have been employed within organizations, 2) provide examples of how HPT has been utilized in a variety of different industries, and 3) provide a combination of examples that address business problems, quality improvement initiatives and business opportunities. This case book includes 14 cases from educators and professionals in the performance improvement field who have applied human performance technology standards and principles in a variety of different contexts to solve performance problems. Each case highlights the challenges encountered with conducting analyses, designing interventions, and identifying strategies to implement performance improvement plans.

AUDIENCE

The target audience for this book consists primarily of educators and students in the field of human performance technology. The cases included in this book could be of benefit to courses within business management, performance improvement, organizational development, and instructional design and technology programs. Each
case consists of a real-life unique problem or opportunity that was addressed, as well as a detailed account of the steps taken to arrive at a solution. It is the intent of this casebook that educators will be able to utilize this book as a supplemental text to build upon the theoretical textbooks addressing the topics of HPT and provide students with examples of how principles of HPT have been applied to solve real problems in a variety of different organizations and contexts. The cases included in this book can be used as both individual and group assignments in face-to-face and distant learning environments.

**ORGANIZATION**

This book contains 14 cases that span across a wide variety of contexts, including higher education, manufacturing, government, healthcare, and non-profit sectors. Topics range from strategies employed during performance analyses, instructional and non-instructional solutions, and performance support systems. Each case presents a unique performance problem along with a detailed account of the steps taken to arrive at a solution.

Chapter 1 provides a detailed account of how a learning and development manager of a financial services firm conducted a performance analysis to better understand the organization’s high performing salespeople. The project team engaged in gap analysis and performance mapping to conduct an evidence-based assessment to improve training for the firm’s salespeople. A gap analysis of all performers objectively identified, quantified, and prioritized the curriculum and performance support needs. This case study examines an organization that went from simply asking managers what courses their salespeople needed to an evidence-based assessment of real performance gaps. The authors demonstrates how performance assessment was used to reduce overall training costs by focusing on key skills expected of employees.

Chapter 2 explores how a performance technologist encountered several issues while attempting to integrate a feedback system into an organization for sales training participants. The purpose of the feedback system was to identify and resolve problems from current sales training practices. The performance technologist utilized rapid prototyping to educate the sales training workforce regarding the feedback initiatives that were being developed and to see necessary input. This case also emphasizes the challenges and time constraints associated with the adoption of new interventions in the workplace. Each case provides a detailed account of how rapid prototyping was used as a human performance technology intervention.

Chapter 3 provides a rich account of how instructional interventions were not successful with addressing recurrent organizational issues for recruitment and selection firms. A performance technologist was consulted to conduct an organi-
zational analysis to identify the root cause of performance problems and develop noninstructional interventions to solve the problem. This case provides examples of how noninstructional interventions can often be more viable than training solutions. The performance technologist incorporated the development of a communication plan, formal instruction, a knowledge management database, and accountability metrics to ensure organizational and client needs were being addressed. This case provides a detailed overview of how multiple interventions (both instructional and noninstructional) were implemented simultaneously to adequately address the performance problem described.

Chapter 4 moves us into the health and safety industry exploring how human performance technology principles were utilized to address frequent forklift injuries for an organization. The case provides a detailed account of how interventions were implemented over the course of 30 years as well as the challenges associated with the adoption of new policies and forklift safety measures over time. The authors emphasize strategies used to embark on changing an organization’s longstanding culture and the development of training program that is still being used today. Furthermore, a detailed account is provided regarding the development of a training program and how it evolved into a performance management support system to prevent the recurrence of similar performance problems and safety issues in the workplace.

Chapter 5 describes how a federal government agency utilized a user design process rooted in general systems theory to develop a workplace curriculum. The case emphasizes how a participatory approach was used to engage key stakeholders in the process. The authors discuss how the utilization of a user design approach to developing instructional interventions aided in the adoption and diffusion of the curriculum. Several user-driven tools are available to organizations that adopt user design processes. Potential advantages of a curriculum developed through user design include better adoption and diffusion of the curriculum and improved engagement of the users in the workplace.

Chapter 6 shifts the focus to the nonprofit sector and the implementation of a Community of Practice to engage member organizations. The case serves as a non-instructional intervention that was developed to improve and formalize communication and collaborative efforts among nonprofits in Central Illinois. The case describes in detail how the development of the Community of Practice promoted positive change and led to a smooth adoption process among member organizations. Intentional efforts to facilitate nonprofit network activities and productivity led to meaningful outcomes in this community and members’ performance. This case study serves as a non-instructional Human Performance Technology (HPT) example for consideration by organizations seeking to support informal learning among nonprofit employees and stakeholders in order to improve and sustain members’ performance.
Chapter 7 provides another example of how human performance improvement technologies were applied in the nonprofit sector. The authors provide a rich account of how they conducted a tiered analysis to identify performance gaps through gap, organizational, environmental, and causal analyses. The case outlines how the findings from the analyses were used to develop an instructional intervention as well as the effects the training had on the organization. After providing background information about the organization and its service standards, the case study describes the existing performance gap regarding the standards and the consultants’ response to the client’s initial request for training. The authors describe the performance analysis the consultants conducted as well as a detailed account of the training that was develop and the effect of the training on the sponsoring organization.

Chapter 8 shifts the focus to e-service learning and how a performance technologist conducted organizational and performance analyses as part of a needs assessment to identify opportunities to develop basic adult education classes. Faced with the need to completely redesign their existing adult basic education program, a non-profit agency reached out to an instructional design and performance improvement consultancy that matches nonprofits with instructional design students in service-learning projects. The resulting 100% virtual e-service-learning collaboration among volunteer college students, their faculty sponsors, and other advisors provided the non-profit with educational resources to support the organization. The author provides a detailed account of the process that was followed to identify content to be addressed through the development of instructional materials. This case study provides a unique look at how a service-learning project was transformed into an e-service-learning collaboration among instructional designers of varying backgrounds.

Chapter 9 explores how a group of performance technologists conducted a systematic evaluation to identify program needs for a college advisory program. The case provides a detailed account of how data was collected from multiple sources and triangulated to identify the programs strengths and areas for growth. By following a systemic evaluation process, the evaluation team investigated five dimensions of the program and collected data by reviewing various program materials and conducting surveys and interviews with multiple constituents. The use of a tiered evaluative approach allowed for the performance technologists to provide evidence-based recommendations to their client.

Chapter 10 shifts our focus to medical education and how the development of a knowledge management system was developed to assist medical students conduct information searches. The knowledge management system was designed and developed to provide a repository of medical information resources and tools that medical students could access while engaging in problem-based learning activities. This case provides a detailed account for how the need for a performance support system was identified and customized to meet the students’ needs.
Chapter 11 provides another account of how human performance technologies can be applied in the healthcare industry. To overcome the challenges, a semantic search within the chart was implemented as a solution for physicians to retrieve relevant results given the conceptual semantic pattern. This case provides a detailed account of how an electronic performance support system was developed to assist healthcare practitioners to improve their use of electronic health records within a hospital. The authors discuss the importance of training and change agents within an organization and explain the need for alignment between instructional and non-instructional interventions.

Chapter 12 shifts the focus to leadership development through the design of an organizational competency operating system. Performance consultants embarked on a systematic organizational development process to identify client needs for leadership development support. The case provides a detailed account of how the performance consultants improved performance through hiring practices, behavioral interview training, job tools and performance support, enhanced job descriptions, and aligned performance expectations and appraisals.

Chapter 13 provides a detailed account of how a performance technologist applied human performance technology standards to FITC’s organization performance. This case study demonstrates how HPT practices were applied in an international setting at multiple levels of an organization. The author provides a detailed account of how the development and use of instructional and noninstructional interventions were implemented throughout several years. In addition, the author discusses how the organizational culture was instrumental in rebranding the interventions to create as preserve the organization’s cultural identity.

Chapter 14 explores the application of the behavioral engineering model and front-end analysis techniques were applied to a Fortune 500 company. While many models and processes have been published on behavioral engineering, this case highlights how multiple techniques can be used in tandem to solve a performance problem. The author provides a detailed account as to how these performance improvement tools were modified and adapted to address the existing performance problems and develop customized interventions.

CLOSING REMARKS

Organizations, regardless of industry, are in a never-ending search to improve performance and identify opportunities to expand their operations. Depending on the industry, project, and organizational constraints, there are many ways performance improvement technologists may approach any given project. This casebook, focusing on human performance technology business decisions, provides students with
opportunities to see how principles of human performance technology are applied in a variety of real situations. The cases featured in this book provide examples of various types of projects that utilized principles of human performance technology and how interventions were implemented in a variety of industries such as higher education, governmental, manufacturing, non-profits, and healthcare.

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REFERENCE
