

Detailed Table of Contents

Preface..... xvii

Chapter 1

Performance Mapping and Gap Analysis: A Sustainable Evidence-Based Process for Driving Real Results 1

Bonnie Beresford, Bonnie Beresford & Associates, LLC, USA

Milica Vincent, Volkswagen Group of America, USA

When the learning and development manager of a financial services firm wanted to improve organizational performance, she stated, “I want to understand what the best performers do, and make the rest more like the best.” By studying high-performing salespeople, the organization discovered behaviors and practices that such performers did that made them more successful than their colleagues. Using a structured performance mapping process, the team documented the unconscious competence of in-role experts. A gap analysis of all performers objectively identified, quantified, and prioritized curriculum and performance support needs. This case study follows the journey of an organization that adopted this evidence-based process and now executes the gap analysis every third year to ensure continued relevance amid organizational and industry changes. The approach has yielded a highly regarded curriculum, the elimination of development costs for unneeded courseware, a reduction in training time, and changes in hiring profiles.

Chapter 2

Building Performance Systems That Last.....25

Joe Monaco, Monaco Group, Inc., USA

Edward W. Schneider, Peacham Pedagogics, USA

LIFTOR is a human performance system that promotes the safe and efficient operation of industrial forklift trucks. The original installation occurred in 1985. In the ensuing 30 years, it was installed at 16 sites. In spite of meeting its design goals, not all of these installations have survived, but because the same problem existed,

and the same system was used to solve it, we can attribute the failures to differences between the sites. Some sites were closed for reasons unrelated to LIFTOR. Others failed because of systemic conflicts, but most of them failed after specific events occurred, such as new managers, new budgeting or contracting policies, or loss of support from corporate headquarters. Most of them could have been prevented by relying less on a corporate champion, and more on good cost-effectiveness reporting, coupled with more systematic training and involvement of front-line managers.

Chapter 3

The HPT Model Applied to a University Technology and Learning Center’s Resource Allocation.....42
Sreeja Sreenivasan Mattookkaran, University of North Carolina at Charlotte, USA
Terri Mestre, University of North Carolina at Charlotte, USA
Barbara Shortt, University of North Carolina at Charlotte, USA
Florence Martin, University of North Carolina at Charlotte, USA

The International Society for Performance Improvement (ISPI) Human Performance Technology model was used as a guideline for this case study and applied to assess and evaluate the resource allocation at the Technology and Learning Center (TLC). This model has proven to be a useful guideline as a process to be followed during the project. A team of instructional systems technology graduate students served in a consulting role on this project to help the TLC allocate resources and redesign processes on how support tickets were handled. The project team conducted performance analysis through extensive stakeholder interviews and extant data review to perform organizational, environmental, gap and cause analysis. Through these analyses, performance issues were isolated, the causes behind them were identified and concluded with the recommendation of interventions to the client.

Chapter 4

The Balancing Act: Interpersonal Aspects of Instructional Designers as Change Agents in Higher Education.....58
Justin A. Sentz, Shippensburg University, USA

Upon hearing a multitude of complaints from faculty members about the required training module prior to teaching online courses at Great Plains University for the first time, the instructional designers at GPU’s North Central Campus decided to work with a faculty fellow to create a local version of the training. Before discussing specific modifications to the training module, the group delved into the interpersonal aspects of the relationship between instructional designers and faculty members in higher education. They suspected that these relationship dynamics had something to do with the shortcomings of the existing training module, and they wanted to

ensure that they addressed them in the new version of the training. The result was a set of recommendations sent to the Provost at NCC that aligned the modifications to the training intervention to the performance problems in the institution, while simultaneously accounting for the interpersonal aspects identified in their discussions.

Chapter 5

Journey to Project Management Program Design: Certification, Alignment, and Quality in Higher Education80

Nancy Crain Burns, Crain Burns Associates LLC, USA

Gabriela Ziegler, Davenport University, USA

Approaching a project can be considered a journey of discovery. Each person involved has a different background and comes to the table with a diverse perspective. The authors use the analogy of a journey throughout the context of the case study. Providing quality education for university students often includes a journey toward the best approach. This journey entails outlining the appropriate curriculum, finding the appropriate content, establishing dynamic learning objectives and aligning the course with student needs and learning styles. After these criteria are met, the university seeks and selects the most qualified faculty members to teach the course(s). When specialized credentialing requirements are involved, the University must take further steps to ensure that each course meets the standards of the certifying body. The context of this journey and enhancement of Davenport University’s Global Project Management Program will include three parts. Part I will review recognition that course updates were necessary to meet changes in the latest revision of the Project Management Body of Knowledge (PMBOK® Guide 6th ED, 2017). The university faculty, staff and a consultant with project management credentials developed a consistent process for making updates and ensuring that changes were made to meet requirements. Throughout the consulting phase, principles of Human Performance Improvement/Technology were followed to develop this process. Part II will exhibit a case study that illustrates successful student certification pursuit after completing the capstone course in the program. Part III will review future opportunities for application of performance improvement principles to other projects.

Chapter 6

Improving Performance, Self-Efficacy, and Motivation: Structured Online Training and Authentic Learning 109

Victoria Lynn Lowell, Purdue University, USA

George Orren Hanshaw, Azusa Pacific University, USA

Suzy Whitman, an experienced instructional designer and program manager, was hired to coordinate a new online graduate program at a large university. It was Suzy’s responsibility to identify and implement solutions to the rapidly growing program’s

needs. Identifying problems, evaluating the need, thinking through a modification and implementation process, and considering the potential impact of change, are all important steps. In this case study, Suzy needed to identify the problems, determine a solution, and then implement that solution. After speaking with her new supervisor, Suzy determined additional instructors needed to be hired to meet the growing program's needs. Although Suzy did briefly analyze the situation and provide a potential solution, the solution Suzy implemented needed further development to ensure it was implemented in an effective manner.

Chapter 7

Training as the Beginning of a Deeper Conversation: Challenging How It Is Offered and What It Includes 125
Jesse Strycker, Ohio University, USA

A substantial renovation to a historic college and building resulted in a state-of-the-art building, full of new technologies and possibilities for new kinds of technology-enhanced teaching. Technology malfunctions slowed adoption and exploration of these possibilities, but limited communication and training accompanied by institutionally-mandated scheduling system stagnated adoption and innovation further. This case explores these issues and how an unconventional training series has started a deeper conversation about these issues and promoted more pedagogical experimentation.

Chapter 8

Insider Effects: Empathy in Needs Assessment Practice 142
Kim Pinckney-Lewis, Old Dominion University, USA
John Baaki, Old Dominion University, USA

Needs assessment generally refers to the identification of some need or problem to be addressed. The authors aim to demonstrate how empathy, when shaped by authentic affinity or involvement with an organization, can serve the needs assessment experience in a positive way. As part of the chapter, the authors describe their approach and highlight pertinent findings from the needs assessment, which focused on proactive opportunities to enhance outcomes in parent efficacy. The authors also detail accounts of participant experiences within the process, including their interactions with the practitioner and overall experience. Finally, the authors share practitioner reflections on the overall process.

Chapter 9

Sales Improvement Initiative Reveals Need for Performance Improvement Interventions 163

Padmakshi Parkhe O'Neil, Pennsylvania State University, USA

This chapter posits the use of Thomas Gilbert's Behavior Engineering Model to improve human performance in the workplace. The author suggests that it is critical to apply a holistic approach when approaching any human performance improvement initiatives. Sales within an organization is a human performance issue and recurring sales performance problems should be addressed by delving to the root of the human performance issues at hand. It is critical to consider not just the repertoire of human behavior, but also examine the supporting environment, to ensure it provides the necessary impetus to improving performance.

Chapter 10

A Decade's Worth: A Construction Firm's Journey From Recovery to Growth 179

Ria Roy, Independent Researcher, Canada

After witnessing a year-on-year growth of 50% since its inception in 1993, Ziggurat Developers was well on its way to being the next niche, technically sophisticated, and edgy construction company in Mumbai, India. This case takes a deep dive into how winning a prestigious construction contract in the country led to Ziggurat's loss of revenue, cash flow deficits, year-on-year losses, high financing costs, loss of banking, idling of resources, loss of credibility, and high employee turnover rate. Instead of these significant contracts providing a strong foothold in the construction industry, it destroyed Ziggurat and the recovery took a decade. Performance improvement is often the study of how to improve performance when discrepancies are confined to a silo or a subset of functions within an organization. But how do you get back to exemplary performance when you are boxed in and there is no way out?

Chapter 11

Improving Classroom Management and Teacher Retention: A Needs Assessment.....201

Jill Stefaniak, University of Georgia, USA

Jilian L. Reynolds, Old Dominion University, USA

Tian Luo, Old Dominion University, USA

This case explores how a needs assessment was conducted at a middle school experiencing high rates of teacher turnover. Pamela Frost, an experienced instructional designer, was assigned to assess the situation and identify opportunities

to improve professional development opportunities for the teachers. As a part of a needs assessment, Pamela gathered data to address needs pertaining to classroom management challenges, teacher attrition rates, and establishing relations with the local community. This case explores how Pamela gathered data and triangulated her findings to determine what interventions were needed.

Chapter 12

Using Training to Address Excessive Turnover in a Fast Food

Organization.....227

Jill Karen Jinks, University of Georgia, USA

Karen E. Watkins, University of Georgia, USA

The purpose of this case is to present a story about an effort to address a threatening business problem for a company in an industry that relies on low-wage, minimally-skilled employees. The industry is characterized by high turnover that makes training efforts difficult. The designers and developers had to be flexible, creative and innovative in creating their project plan and instructional intervention. The dynamics of the organization were fluid. The team had to consider these dynamics in selecting their approach. They had to be comfortable with using approximations and assumptions in developing the inputs for their design and development decisions. Ambiguity and uncertainty were constants for the team members.

Chapter 13

Capitalizing on Franchisee Know-How: A Restaurant Chain Engages in

Benchmarking248

Denise M. Cumberland, University of Louisville, USA

Kathleen E. Gosser, University of Louisville, USA

While the current labor market is a dream for aspiring future employees, the low unemployment rate and the pervasive availability of hourly jobs makes it much more difficult in the quick service restaurant industry for employers. Hiring and retaining a solid team is a common concern across the industry; often it is easier to hire than to retain. Entry level employees are easily persuaded to work for a competitor for very little added pay. This current phenomena requires organizations to find differentiating tactics to retain their workforce. This case study explores a franchise restaurant chain in their quest to become an Employer of Choice in this very competitive industry. Franchise consultants were hired to explore best practices. The authors detail how a benchmarking tool was used to secure the information as well as the outcomes of the study. Specific actions are cited that can improve the retention of hourly employees in the quick service restaurant industry.

Chapter 14

Leading Edge Training for Leading Edges: Experiential Learning to Improve Human Performance and Product Quality270

George O. Hanshaw, Purdue University, USA

Victoria Lynn Lowell, Purdue University, USA

Ruben, the learning and development manager for Aerosector, was tasked to help the composite manufacturing team increase their production rate and lower the defect rate for the manufacturing of composite leading edge parts for a newly designed aircraft. Initially, it took approximately 28 days to build one of the parts, and the defect rate for the parts was over 30 percent. Ruben put together a cross-functional team to devise a solution that would decrease the production rate of the parts to 15 days or less and reduce the defect rate to less than 0.5 percent for non-repairable defects and less than 2 percent for repairable defects. After performing a gap analysis, the team came up with the solution to build a training class utilizing experiential learning to quickly increase performance in the shop and meet the build requirements.

Chapter 15

Creating Unlimited Business Opportunities for an Insurance Sales Force Through Design Thinking.....287

Inno Man, COXO Community, Hong Kong

David Chung, InnoEdge Consulting, Hong Kong

New insurance agents approach their pool of close friends and family members because these people have a high level of trust in them and therefore their rate of closing should be higher. As the size of their client pools is a critical survival factor and trust cannot be built rapidly, one major reason that agents quit their jobs is that they deplete their pools. For resolving that industrial deadlock, the company developed a social sales model through design thinking to help insurance agents build trust among their prospective customers. After implementing a pilot project in Hong Kong in 2018, the agents enhanced their abilities of social influencing, lead generation, and deal closing. Following the successful pilot project, the company continues to transform its business and leverage its social sales advantage in Asia.

Chapter 16

“But I Know How to Google”: Motivating Volunteers in an Information Literacy Module.....305

Kirsten Hostetler, Old Dominion University, USA

Kim Pinckney-Lewis, Old Dominion University, USA

An up-front analysis is crucial to ensuring a need is learning-related and the resulting intervention actually meets that need for learners. The current case study explores how two instructional designers adopted a systems approach for their performance analysis, with a major focus on learner analysis as a means to understand the underpinnings of the social system within the client organization, which more clearly revealed potential motivations of the learners. As a result, the two designers delivered an eLearning module that 1) combats an actual gap in knowledge and skill, 2) is relevant to the intended audience, and 3) is compatible with the organizational culture and infrastructure.

Compilation of References 334

About the Contributors 351

Index..... 358