Customization Guide

for Entelechy's Modules and Programs

Version 20050101

Entelechy, Inc.
P.O. Box 878 Merrimack, NH 03054-0878
1.800.376.8368
www.unlockit.com

Table of Contents

Introduction

Why This Customization Guide?

Philosophy

Entelechy, Inc. is one of the premier providers of customized training in the world today. The company was formed with two core beliefs:

- There are key skills and behaviors that form the foundation of good management, sales, customer service, and training practices.
- For training to be effective, it must be customized to address the specific needs of the company and the individual participant.

These beliefs result in Entelechy's core programs, which serve as the foundation for the customization we do for companies. Using the core programs as the springboard allows us to:

- Use proven methodologies and techniques increasing the effectiveness of the program.
- Focus the training resulting in shorter, targeted sessions which reduces participants' time away from their jobs.
- Reduce training development time resulting in cost savings for the customer.

You are getting the same core programs that Entelechy's built through many successful deliveries!

Customization is Key

These programs are MEANT to be pulled, pinched, tweaked, combined, and otherwise modified. You may find that it's more effective to pull a skill and host a brown-bag lunch to cover the skill. Or you may teach your management team how to present a section. Or…

The point is, you need to take an active role in customizing this training to meet your specific business objectives. Refer to the section entitled *Performance Consulting* for more information on linking training to business objectives.

The second point is that you may find that an activity that we've suggested just won't work for your participants. That's okay – in fact, that's GREAT since you're thinking on behalf of the participants and their needs. Before replacing or throwing out an activity, however, please consider WHY Entelechy put the activity in the training in the first place. Activities are CRITICAL to maintain learner involvement. Additionally, and more importantly, often the best way to learn a skill is to DO it and get feedback. Role plays and demonstrations – while sometimes uncomfortable – are often the most effective way for participants to learn.

For More

For additional tips, techniques, and insights regarding training customization and how YOU can ***unlock your potential***, contact us at info@unlockit.com or join us at www.unlockit.com.

Thank you for choosing Entelechy to help you unlock the potential of your employees and organization!

Entelechy, Inc.
P.O. Box 878 Merrimack, NH 03054-0878
1.800.376.8368
www.unlockit.com

Materials Overview

About the Modules and Programs

Entelechy's High Performance modules and programs are designed modularly to better isolate skills and provide an opportunity for participants to practice their skills before learning new ones.

Please refer to *Entelechy's Catalog of Training and Performance Support Tools* for descriptions of the modules and delivery length.

Program Schedule

Programs can be delivered in one of two methods:

1. Each module can be delivered as a standalone module at your discretion throughout your total training program. This approach is recommended.

2. The modules can be delivered consecutively. This reduction in time, when the modules are delivered consecutively, can be accomplished by eliminating redundant *Welcome* and *End-of-Module Feedback* sections. Be sure to incorporate the distribution of the module Office Aids and an End-of-Program Feedback should you decide to deliver the program this way.

About the Materials

Facilitator Guide

At the heart of the program are the Facilitator Guides. They have been created and modified over many successful deliveries by Entelechy and Entelechy's clients. Each module uses its own Facilitator Guide for instruction.

The Facilitator Guides are very comprehensive and contain all of the instruction and verbiage for you to train successfully your first time out. You will find how to prepare for the training, the materials needed for each module, as well as special instructions for the delivery of the module.

Facilitator Guides come in one of two flavors: PowerPoint Notes or Word, each with its own advantages and disadvantages. Obviously, working with PowerPoint will require different techniques than working with Word.

Slides/Overheads

Many instructors use PowerPoint to help guide the instruction and provide additional visual cues to the participants. Each module has an associated PowerPoint file. The overheads for each module are contained in the module's PowerPoint file. Refer to the section in the module where the overhead is to be used for context and more detailed information.

If the Facilitator Guide is a PowerPoint file, the slide presentation is part of the Facilitator Guide; if the Facilitator Guide is a Word file, you will find a separate PowerPoint file for your presentation slides.

Participant Guide and Job Aids

The Participant Guide is intended to serve as a guide for participants in the training. Therefore, the Participant Guides contain "trigger text" to help guide the learner; at the same time, the Participant Guides contain sufficient holes to encourage the participant to follow the instruction.

As with the Facilitator Guide, the Participant Guide will come as either a PowerPoint file (in which case you will want to refer to the Notes View) or as a Word document.

Handouts

Some modules may contain extra handouts that are not contained within the Participant Guide. We've kept these separate for production purposes; you'll want to refer to the module's Facilitator Guide for production details.

Job Aids

Entelechy believes that it is important to help participants take their learning with them. We further believe that – as much as we would like them to – participants will typically NOT use their Participant Guides as reference material! Therefore, we've summarized key learning points and have created job aids to help participants with key concepts and skills. These job aids are to be produced and used separately.

Creating Your Videos and Audiotapes

In some modules, you may see a reference to a videotape or audiotape. Unless specifically indicated otherwise, these are videotapes or audiotapes that you create to illustrate a behavior or set of behaviors. Because the behaviors that are intended to be illustrated are specific to your company and industry, generic off-the-shelf videos are not appropriate.

It's time to stop being shy! Simply take a video camera and make your own videotape. Or grab your tape recorder and make the appropriate recording. Being fancy is not important; having a common basis for discussion IS important.

For help in creating any materials, please contact Entelechy.

What to Customize

Focus on Your Business Issues

The result of any training effort should be improved business results. Improved business results usually means:

- More sales.
- Greater margin for sales.
- Increased productivity.
- Reduced errors.
- Increased customer satisfaction.
- Reduced turnover.
- Increased morale.

Identify what business impact YOUR training is going to have (see the section on Performance Consulting for more detail) and focus your training on addressing that one thing.

As you review the materials, ask yourself, "Will knowing how to do this particular thing help participants achieve our business objective?" If the answer is yes, keep the exercise. If the answer is no or maybe, consider eliminating or modifying the exercise.

Embed Your Products and Services

When you embed your company's products and services in the training, the training takes on a more relevant flavor. Even if you're not teaching products or services, the participants' perception of your training improves when they see references to their company.

A second benefit to embedding information about your company's products and services is that this important knowledge is reinforced.

Third, a company's products and services ARE the foundation of the company. They determine who we hire, how we manage our work, how (and to whom) we sell, and who our customers are. While it sounds obvious, without our products and services, we wouldn't exist as a company. Therefore, there should always be a link in your training to your company's products and services.

As you review the materials, identify where you can add information or references to your company's products and services.

Embed Your Policies and Best Practices

In addition to products and services, HOW your company operates is key to its success and can be leveraged in training. HOW a company operates comprises its policies and best practices.

Policies include all of those procedures that have been outlined and agreed upon by the company's leadership. How we hire, how we treat employees, our pricing, our discounting strategy, how we communicate to the world, how we terminate employees, and hundreds of other procedures are often documented by the company.

In addition to company policies, policies exist in every department in the organization. Sales has policies for discount pricing. Manufacturing has safety policies.

Add relevance and a chance for reinforcement of policy information by reviewing the materials and embedding relevant policy information that supports and augments the training.

Best practices, like policies, illustrate how we should act in an organization. Unlike policies, however, best practices are often unwritten. They are often the stuff that helps the exemplary performers stand out above the rest of the staff. Even though they may be undocumented, everyone – especially management – knows what they are and can describe them to you.

Best practices are those behaviors that illustrate what the best employees do in a given situation or regarding a specific skill. In short, if everyone did these best practices, the organization would be outstanding.

Key to the success of your training is identifying these best practices and embedding them in your training. While Entelechy's training identifies the best practices in the industry, these best practices are sometimes unworkable in a given organization. For example, *Coaching for Performance* is based on face-to-face interaction between a manager and an employee; if your organization's managers ONLY manage remote employees, identify the best practices that exemplary managers demonstrate and embed those in the training.

Best practices removes the sentiment heard in non-customized training, "That's great in theory, but it won't work here…." Furthermore, it ADDS the sentiment you want participants to voice, "Wow, I'm going to try that tomorrow!"

Embed Existing Models and Training

Entelechy's training is meant to build upon other training that you have within your company. When possible and practical, be consistent in your use of terminology and models. For example, Entelechy's training on Social Styles (found in several modules) uses the terms Doer, Speaker, Listener, and Thinker. Another well-known purveyor of social styles training uses the terms Driver, Expressive, Amiable, and Analytic; another vendor uses colors to distinguish the four styles. Use a single model to help participants avoid confusion.

Recognize that vendors have different copyright restrictions on the use of their training materials and models. Many vendors require you to at least ask for their permission to use their models in other training venues; in some cases they may charge you for the use. (Remember, when you buy training from Entelechy, you can use that material when you want, where you want, and how you want within your organization without charge!) Therefore, before you replace an Entelechy model with another vendor's model, please make sure that you have permission to do so.

Use Your Own Measures of Success

Every company has its own measures of training success, including:

- Level 1 – Participant reaction sheets administered to participants after the training.
- Level 2 – Learning measures to determine if participants are "getting it" in training.
- Level 3 – Training transfer measures to determine if participants are using the skills they acquired in class while on the job.
- Level 4 – Business impact measures to determine the relationship of the training to the business.

Leverage your own measures of success. If you don't have any of the above, feel free to contact Entelechy and we can provide you with some that we've found valuable.

Working with the Templates

Overview of the Templates

Entelechy has created Word and PowerPoint templates to ensure that training materials are created consistently from guide to guide and module to module. This makes customization easier.

To effectively use templates and styles in Word, you should be a skilled Word user. Specifically, you should be able to:

- Apply and troubleshoot styles.
- Reattach a template.
- Modify section breaks.
- Modify page numbers in section breaks.
- Use the Paste and Paste Special commands.
- Resize and reposition graphics.

If you AREN'T proficient in the above, this guide will provide some support but you may wish to take an advanced Word class.

Additionally, to work with the PowerPoint files, you should be able to:

- Ungroup and regroup graphics.
- Modify text within drawing objects.
- Use the Paste and Paste Special commands.
- Resize and reposition graphics.

With that being said, the rest of this section is devoted to helping you with some of the more complex facets of the materials you've purchased.

Conventions

Facilitator Guide – Word Format

If your Facilitator Guide is done in Word, you may need the Word template named `Entelechy Facilitator Guide Template.dot`. This template is available by sending a request to info@unlockit.com.

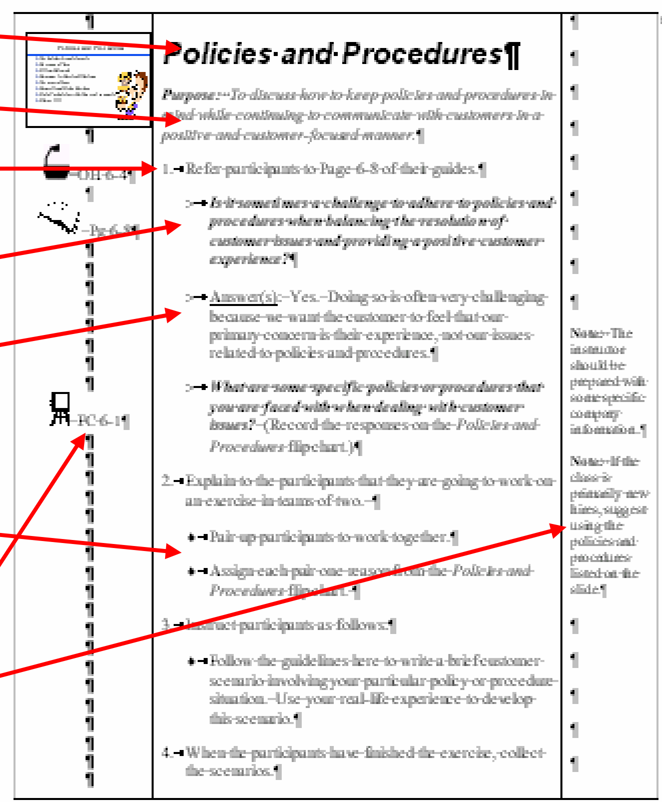
Tip: When all else fails, reattach the template! When the document is shared among users, the document sometimes gets confused regarding which style on which template it's referring to.

Tip: You may wish to share the template with others who are working on the files.

Common Styles

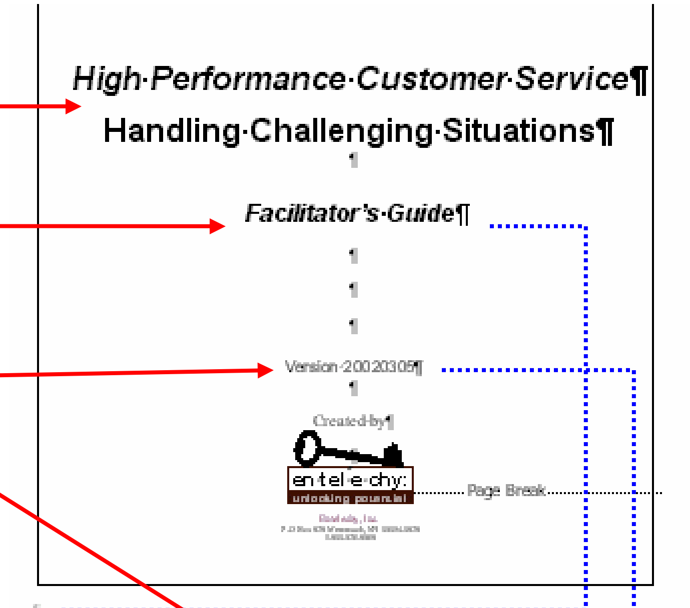
Each element within the Facilitator Guide has a unique style attached to it. Some of the common styles include:

Style Name	Where Used
Titlebar1	The beginning of a topic
Normal	Purpose text at the beginning of a topic and other places.
Indentn	Numbered indent; instructions are numbered for easy reference.
Question	When a question is called for; the bold italics draws your attention to this area.
Answer	Answers begin with Answer(s): for easy reference. (You must type this text and underline it.)
Indent1b	First level of indented bulleted text.
Indent2b	Second level of indented bulleted text (not shown)
Dialogue	Instructor talking point; this text is italicized (not shown).
Block text	Instructor notes in the right hand column as well as many other places.
Icon text	Used in conjunction with the icons in the left hand column.

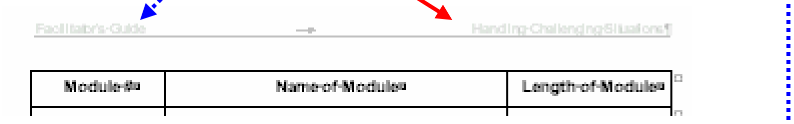


Less common styles include:

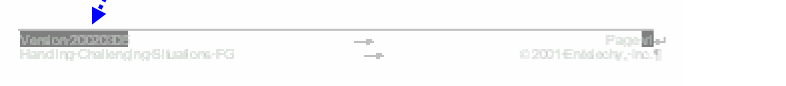
Style Name	**Where Used**
Course title	This style is used only once on the cover page.
Facilitator Guide	This style is used only once on the cover page; it is sometimes referenced in the header throughout the document.
Date	This style is used only once on the cover page; it is referenced in the footer throughout the document.
Header	Used in the header
Footer	Used in the footer.
Title 1	Used in the title page of the module.



Header



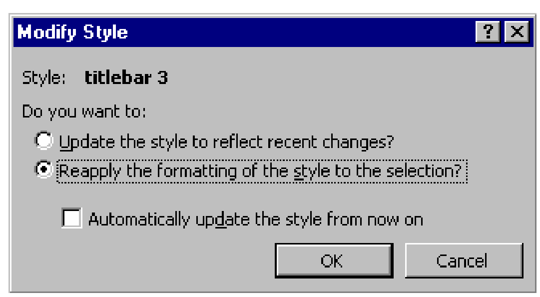
Footer



Working with Styles

Tip: Turn on Show/Hide to display paragraph markers since THE PARAGRAPH MARKER DETERMINES THE STYLE OF THE TEXT!

When you add your text, make sure to apply the associated style. This will ensure format consistency.



You may need to reapply a style. If you reapply a style and are asked whether you want to update or reapply the style (see graphic on the right), CHOOSE REAPPLY or you may alter the style in the template.

Occasionally styles don't seem to "take". That is, you highlight the text and select a style to apply yet nothing changes. Try changing the selected text to a completely different style and then applying your desired style. Sometimes Word needs a nudge!

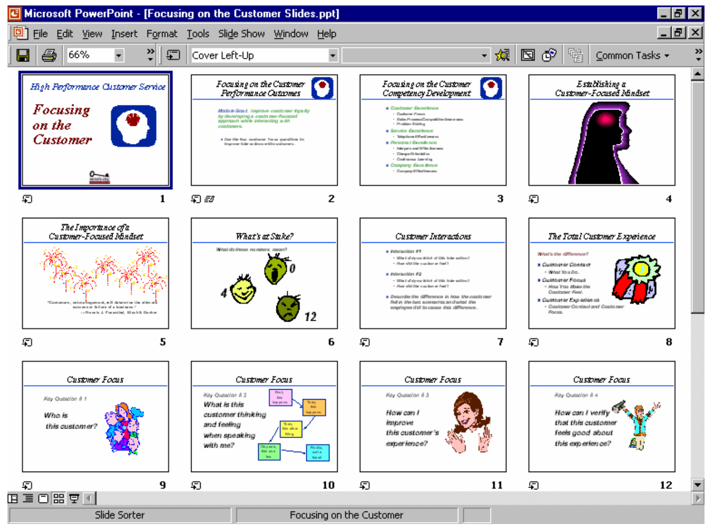
Tip: Use the formatting copy command SHIFT+CTRL+C to copy a format into the buffer; use the formatting paste command SHIFT+CTRL+V to "paste" the formatting – including the style – to the desired location.

Pasting Graphics

The bulk of the facilitator guide is in table format. As a result, pasting graphics is a multi-step process – one that can throw you for a loop if you're not familiar with pasting graphics in tables.

Consider using the Paste Special option when pasting graphics; select picture or bitmap when prompted. This prevents Word from trying to interpret your graphic as a drawing object and proactively trying to "fix" your graphic.

Pasting a Slide Thumbnail



A slide thumbnail is what you see when you display a PowerPoint file in Slide Sorter view (see the graphic on the right). In this view, you can copy the thumbnail from PowerPoint and paste it into your Word file.

Tip: Add PowerPoint slide thumbnails to give you a visual representation of the slide; however, remember that graphics add to the file size and lots of slide thumbnails add lots to the file size. If you are emailing files, you may want to consider NOT adding thumbnails.

Steps:

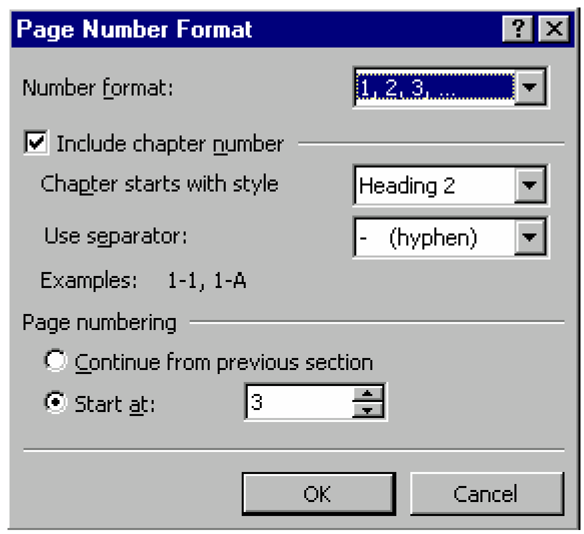
1. Click on the slide thumbnail in PowerPoint. Copy it to the buffer (CTRL+C).
2. Switch to Word.
3. Position your cursor in the middle column someplace (it doesn't matter too much where you position your cursor).
4. Select Edit, Paste Special. Select Picture. The slide is pasted and is very large! Don't worry we'll fix that!
5. With the graphic handles still appearing, select Format, Picture (or alternately double-click on the picture). The Format Picture dialogue box appears.
6. Click on the Layout tab and select In Front of Text. Your (still large) graphic now appears in front of your text. Now let's make it smaller.
7. Resize the graphic by using the corner handles. Make it about the size that fits into the left hand column.
8. Move the graphic over to its appropriate spot in the left hand column.

Note that we've had problems with pasting thumbnails as anything but pictures. You may have different luck/experience.

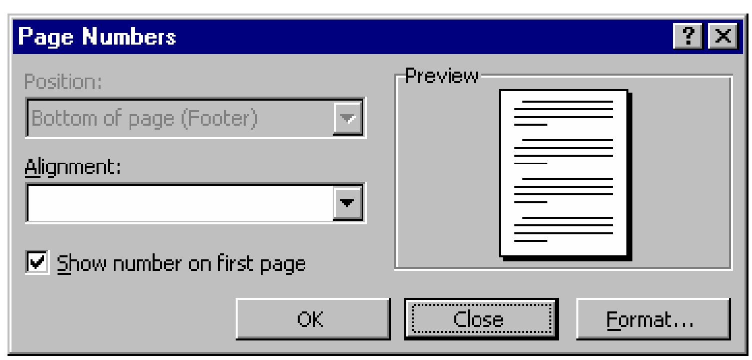
Section Breaks

Section breaks allow you to change the footers to reflect the new module or appendix. However, section breaks and footers are a bit confusing. Here's what we've learned:

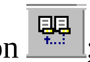
- Often it's simpler and faster to copy a section break – and the text before and after the section break – than it is to try to create and format a section break. For example, if you want to add a second appendix to a guide, you may find it easier to copy the existing appendix INCLUDING THE PAGE BREAK PRECEDING THE SECTION BREAK and paste it to the end of the document; then you can simply delete/change the Appendix B contents.
- To change the page number in a section footer, follow these steps:
  1. Go to the footer.
  2. Position the cursor before or after the page number field.
  3. Select Insert, Page Numbers…. This brings up the Page Numbers dialogue box.
  4. Click on Format. This brings up the Page Number Format dialogue box (see the graphic on the right).
  5. Click on Include chapter number if you want to include the chapter/module number with the page number. Usually you DO want to include the chapter number
  6. Select Heading 2 (or the style associated with the chapter style) and use a hyphen to separate the module number from the page number.
  7. Start the page numbering at 3 since the module cover page is page 1 and the blank page following the cover page is page 2; while this is the first page of this section, it is the third page of the module.



  8. Click OK to return to the Page Numbers dialogue box (see the graphic on the right).
  9. IMPORTANT!! Click Close to save your changes to the format without inserting another page number. If you click OK, you will insert a second page number! Not a good thing.



- The section break at the end of the section contains formatting for the section!! This is illogical from a human perspective since we assume that we determine formatting at the beginning of a section. However, in Word, formatting is always found at the end (the end of a table cell, the end of a table, the end of a paragraph, etc.). Therefore, if you delete a section break, the formatting from next section will apply to the section.

- When you are in the Footer view, you will have see the Same as Previous option ; this option should typically NOT be selected since the sections – although they may be part of the same module – should be treated independently.

Participant Guide – Word Format

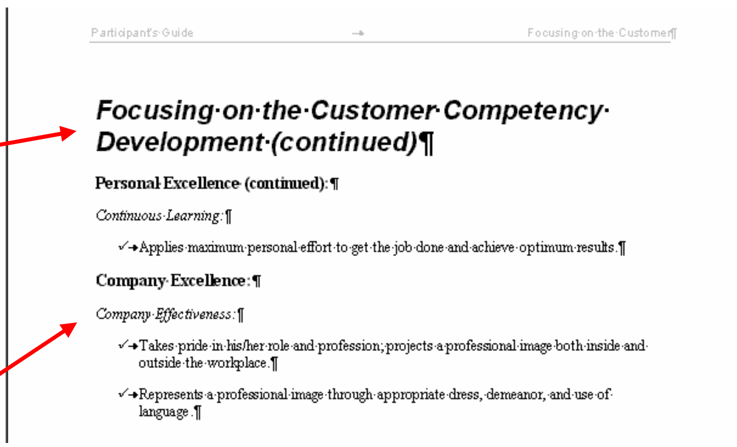
You will need the Word template named `Entelechy Participant Guide Template.dot`. This template is available by sending a request to info@unlockit.com.

Many of the same tips covered in the previous section on the Facilitator Guide apply here. The tips will not be repeated here.

Common Styles

Each element within the Participant Guide has a unique style attached to it. Some of the common styles include:

Style Name	**Where Used**
Titlebar1	The beginning of a topic (not shown).
Titlebar1 cont	Use this style when the topic continues on a second (or third) page. The “cont” styles are not picked up in the Table of Contents and prevents having the same entry from appearing over and over again.
Normal	Used throughout the guide. You can apply different attributes (e.g., italics, bold) and formatting (e.g., bullets) as you see fit.


Participant's Guide → Focusing on the Customer

Focusing on the Customer Competency Development (continued)

Personal Excellence (continued):

Continuous Learning:

✓ Applies maximum personal effort to get the job done and achieve optimum results.

Company Excellence:

Company Effectiveness:

✓ Takes pride in his/her role and profession; projects a professional image both inside and outside the workplace.

✓ Represents a professional image through appropriate dress, demeanor, and use of language.

Working in PowerPoint

Some of the materials are provided in PowerPoint format. Many instructors find PowerPoint to be especially useful because one file can contain both the slide presentation and the notes for the facilitator or participant.

PowerPoint Views

PowerPoint has several different views that are important to you in customizing and using Entelechy's materials that are created in PowerPoint:

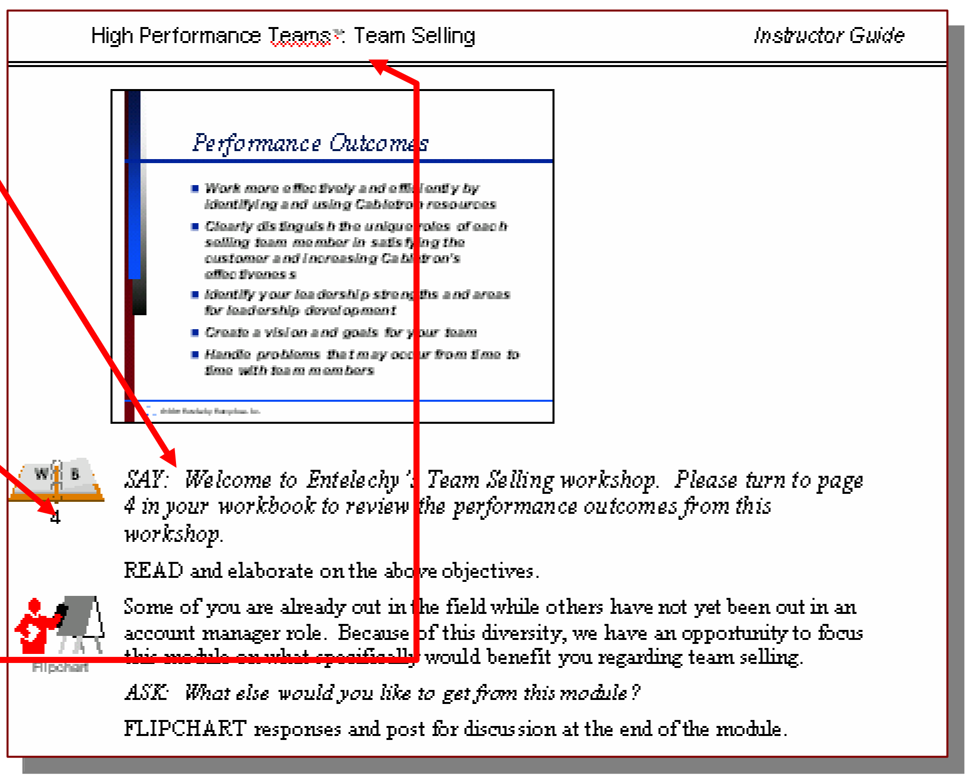
- Slide View: In this view, you can edit the content of the slide.
- Slide Sorter View: In this view, you can delete, hide, or rearrange slides easily.
- Notes View: In this view, you can modify the information that is contained on the page. The slide is displayed as a graphic and is NOT modifiable in this view. Note that Notes View may be only available as a selection from the top menu bar by clicking on View.
- Slide Master: You can edit the way ALL slides will appear by selecting View, Master, Slide Master.
- Notes Master: Likewise, you can change the way that all of the notes pages will appear by selecting View, Master, Notes Master.

Editing the Facilitator (or Participant) Guide - PowerPoint

In Notes view, you can edit the text by clicking in the text box.

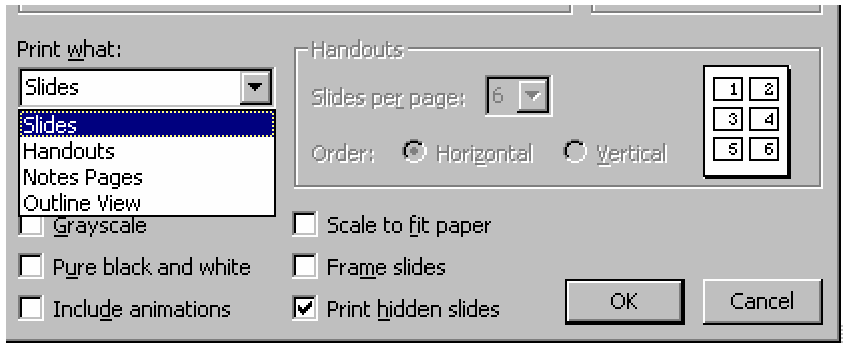
You can also edit the text in the icon by clicking on top of the text. For example, if you wanted to change the workbook reference from page 4 to page 5, simply click on the 4.

If you want to modify master elements (those that appear on every page), you'll need to select View, Master, and Notes Master to access and change master elements.



Printing in PowerPoint

To print from PowerPoint, you must select the appropriate item to print.



On the Print dialogue box (available by selecting File and then Print), you will see a drop-down selection under the title, **Print what**.

To print overheads, select **Slides**.

To print the facilitator notes or participant notes pages, select **Notes Pages**.

For More Information

Consult the PowerPoint help file for more information or contact Entelechy.

Performance Consulting

Introduction

Since its inception in 1992, Entelechy has approached training from a business – rather than a training – perspective. The reason we've adopted our business-based performance consulting approach is for one reason: We have all experienced training that was irrelevant, boring, and generally a waste of time.

Irrelevant training comes from the assumption that one size fits all: selling to business executives is the same as selling to end-users; customer service in the data storage business is the same as the niche clothing retail business; Excel training for school teachers is the same as for accountants. Irrelevant training comes when the training does not explicitly make the link between the content and how the skills and knowledge are used by participants on the job.

Boring training comes partially as result of irrelevant training (discussed above); my attention is bound to wander if the training doesn't address my particular need. Boring training also comes about when an inappropriate training delivery method is used. We've all seen classroom time used by "unlicensed hypnotists" who can magically put everyone to sleep. We've all seen web-based training that over promises and under delivers. The fact is that each delivery method has best uses and worst uses; designing training requires matching method with content.

For more information and help with YOUR performance challenges, contact Entelechy in any of the following ways:

Phone: 1-800-3POTENTial (1-800-376-8368)
Email: info@unlockit.com
Fax: 1-603-424-6361

Or visit Entelechy's website at www.unlockit.com.

Training Versus Performance Consulting

The difference between training and performance consulting is subtle but critical. Whereas a trainer focuses on skills and knowledge, design, and delivery, the performance consultant focuses on business and on-the-job performance. The performance consultant is "in the trenches" figuring things out.

The trainer's role is to provide the best training possible. Interactive, engaging training, complete with assessments, engaging graphics, and a training environment conducive to learning. The performance consultant sees his or her job as improving on-the-job performance by whatever means possible – usually the cheaper and quicker, the better!

The trainer is concerned about filling classes (butts in seats), scheduling, and making sure that the training is enjoyable so participants encourage other participants to attend. The performance consultant is worried about retention – reducing turnover; the performance consultant is worried about taking the person away from the job for any reason.

	Training	*Performance Consulting*
Focus	**Skills and knowledge, design, delivery**	**Job performance and associated needs**
Role	**Provide superior training**	**Improve job performance**
Challenges	**Filling classes; making training enjoyable**	**Keeping people on the job; making training effective**

The performance consultant is NOT worried about a bigger picture; the performance consultant is worried about the ONLY picture – performance and how to increase it. Training becomes one of the many tools the performance consultant uses to increase performance. Other tools include mentoring, coaching, quick-and-dirty job aids, an email clarifying the expectations, a discussion with the manager about the need for change of seating, etc.

There's a saying: To the hammer, everything looks like a nail. To a trainer, every problem looks like an opportunity for training. For a performance consultant, training is only one of many tools available to address performance problems.

Are YOU a trainer or a performance consultant? Take Entelechy's Performance Consulting Self-Assessment to find out if you have what it takes (available from Entelechy).

Performance Consulting: Benefits and Challenges

There are many benefits associated with taking a business-based performance consulting approach to performance improvement. Often, the direct result is that you – and the organization – will see quicker results. Maybe what's needed is NOT training, but a simple email clarifying what's expected of everyone.

The results may be more permanent. Performance consultants fix problems – they do not focus blindly on symptoms. Fixing a symptom usually creates additional performance problems.

Importantly, you will begin to be perceived as more than a trainer; you will be perceived as a business partner. Your contribution to business improvement is by helping employees perform to the company's expectations and to their fullest potential.

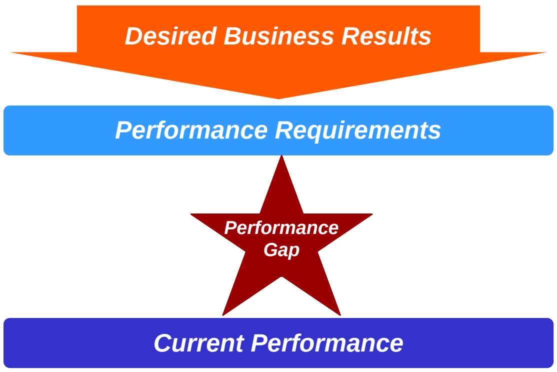
That's not to say that performance consulting is without challenges. One of the seminal books on the subject is <u>Performance Consulting: Moving Beyond Training</u>, by Dana Gaines Robinson and James C. Robinson. They begin their book by acknowledging the significant challenges trainers have to overcome in order to become performance consultants, the first of which is perception:

> Organizations do not ask us to deliver what they need; they ask us to deliver what they believe we can provide…. And what we are asked to provide – training – is often ineffective, unnecessary, and expensive. Occasionally it is even harmful. We do just what we are asked to do – deliver training. We do not do what we are not asked to do – improve human performance in the workplace.

Changing your business card to read Performance Consultant is not enough; you must broaden your own knowledge of business and performance to gain the credibility you will need as performance consultant. And get ready to get dirty; messing around with the many variables impacting performance is messy and extremely rewarding!

Business-Based Performance Consulting

Step #1: Desired Business Results



The first step in performance consulting is to clarify the desired business results. Why is it important to clarify desired business results?

Our goal as performance consultants is to increase business. This usually means:

- More sales (or more profitable or larger sales).
- More profit (which means greater efficiency or effectiveness).
- More productivity (which means more widgets produced and doing things faster and better).
- Less turnover (which means increased morale and motivation).

For example, let's say that we are an inbound customer service center with a primary focus on answering customers' questions. Upper management may wish to increase sales and see the service center as the place with the most potential for increasing sales. The desired business result would be to increase the number of sales in the customer service center.

To clarify the desired business results, we may need to:

- Interview the client.
- Attend planning and other business meetings.
- Read planning and other business documents.

Step #2: Define Performance Requirements

Once business results have been clarified, the next step is to identify the performance requirements. For the organization to achieve the desired business results, people have to perform in a certain way (which is different than how they are performing today).

Continuing with the customer service center example, to increase the number of sales in the customer service center (the desired business result), we believe that each rep should position a product or service that may be appropriate and of value to the customer. This performance requirement may have a number of supporting performance requirements including:

- Listening for clues that would link to additional products or services (which itself would require product and service knowledge/information).

- Probing and listening.
- Positioning appropriate products and services.

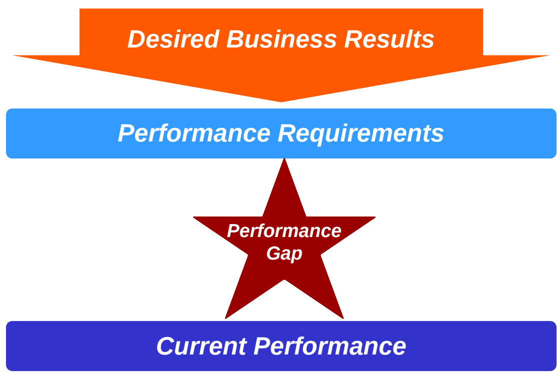
The premise of performance requirements is, “If we were to effectively do all these things, we would achieve our desired business results.”

We identify performance requirements by:

- Interviewing managers.
- Interviewing and/or observing exemplary performers.
- Research of other companies.

Once we’ve identified performance requirements (which will ensure that we achieve our desired business results), we are ready to move to the next step.

Step #3: Identify Current Performance



Once desired business results and performance requirements have been identified, the third step is to identify current performance: how employees are currently performing.

We can identify current performance by:

- Monitoring employees
- Interviewing managers
- Reviewing the results of employee work (cases, reports, forms, etc.)

At this point, we are not only looking at the end result of the performance, but we are looking at the elements that contribute to the performance. What is the work environment like? Are expectations clear? Do people have access to information needed to complete the task? Is the connection slow?

We are also looking at ranges of performance. Is everyone working at about the same level? If some people are working more/better/faster than others, what’s the cause?

And we’re beginning to see some of the obstacles that people have in performing as required. And that leads us to our last step in performance consulting.

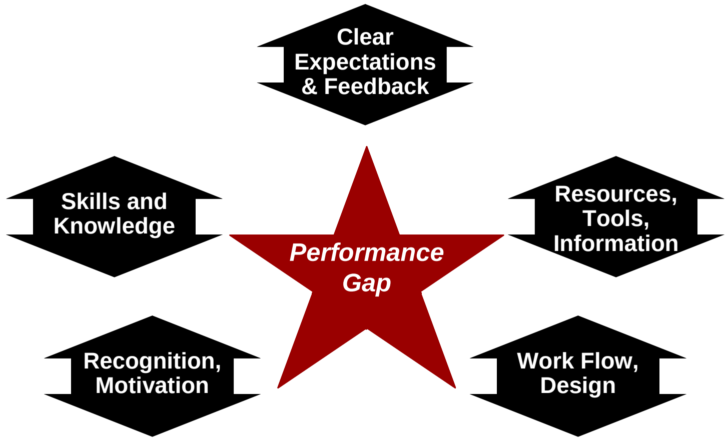
Step #4: Identifying the Performance Gap

We know now the desired business results, the performance that is required for us to achieve our goal, and what performance currently looks like. The fourth step is to identify the gap – and the reasons for the gap – between current performance and required performance.

There are many possible reasons for the gap, each with its own "best" ways of addressing the gap.

When we analyze the performance gap – what people aren't doing and why they're not doing it – we look at the five main elements that impact performance.

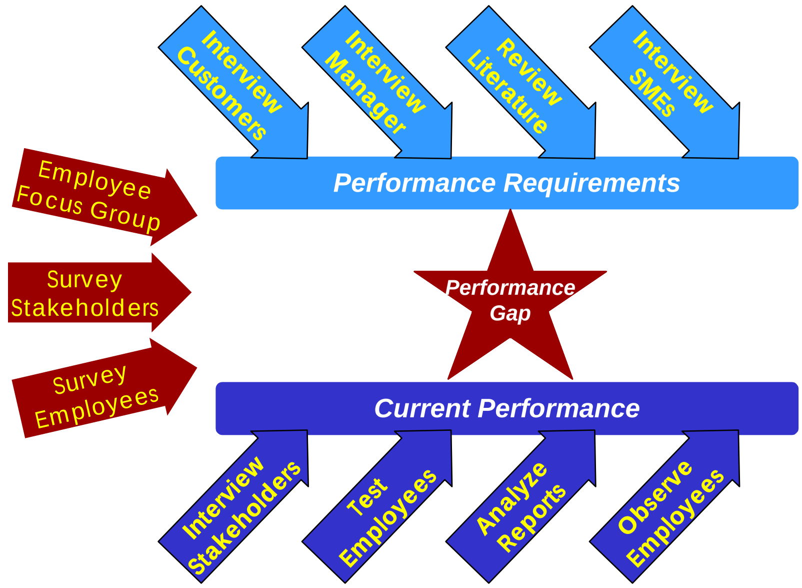
- Clear expectations and feedback: Sometimes the reason people aren't performing as desired is that they didn't know they were supposed to – expectations were never clearly set. Sometimes they may have done it as they were supposed to but no longer are doing it – they were never given feedback.
- Resources, tools, information: These are the things people need to perform. Sometimes it's a faster computer or a job aid. Sometimes it's information, or easier access to that information.
- Work flow design: Sometimes performance isn't as it could be simply because the way the work is carried out could be improved. For example, reducing the number of hands involved sometimes improves performance.



- Recognition and motivation: We all work for different reasons but most of us like to be recognized for doing the work well. We become motivated to work harder. Sometimes the simplest solution to increased performance is a pat on the back.
- Skills and knowledge: Sometimes, performance can only be improved by increasing the capability of the people performing the job. Training – including instructor-led training, web-based training, computer-based training, and self-paced training – can all be effective in increasing the skills and knowledge of employees.

A trainer is focused on the skills and knowledge element; performance consultants see performance as being impacted by all five elements.

Gathering Information



A critical skill in all four steps in the performance consulting process is gathering information. Before we look at information gathering tools, let's first look at what information we want to get (performance requirements, current performance, reasons for the performance gap) and the source of the information (customers, employees, managers, stakeholders, others).

The best source of **desired business results** (not shown in the graphic) is obviously upper management. Most often their direction comes in the form of presentations, announcements, and policies. Sometimes you may have the opportunity to interview them for additional insight.

The best sources of **performance requirements** are customers and managers. Sometimes literature or subject matter experts (SMEs) can also provide guidance in this area outlining what others find – or know – to work best. The poorest (most potentially inaccurate) sources of this type of information are employees.

The best sources of **current performance** information are monitored employees and the examined results of the employees' work. Call reports, sales orders, forms, and productivity data, are examples of employee work that can help you determine current performance AND possible reasons for the current performance. Managers and customers may also provide accurate information about current performance although the information is often based on isolated incidents rather than trends. The poorest source of this type of information are interviewed employees.

The best sources of **performance gap** information are employee focus groups and managers – and your own insight. The poorest source of performance gap information is customers.

Because we can use data gathering techniques regardless of the source and type of information, let's look at the data gathering techniques, their uses, and advantages.

Interviews

Much of the performance consulting information is gathered through interviews. Interviews – for the sake of our discussion – range from informal conversations to formal planned interviews. We use questioning and listening skills to get the information we need.

Here are some good questions:

- Describe the problem. What do you observe?
- What should it be? What would you like it to be?
- What's the impact? On you? On them? On others?
- If everyone did it well enough, often enough, what would it look like? Be specific.
- How much? How many? How often? How good?
- Do the employees know that they are expected to perform the desired behavior? How do you know? How was it communicated?
- Do they know the consequences of not performing?
- Do employees have the tools, resources, data, etc. needed to perform?
- How do employees get feedback regarding their performance?
- Have they been given specific feedback of when this was performed well? When it was not? When was the last time they were given specific feedback?
- Is performance in this area demanded by management? Are there positive and negative consequences for performance? What are they?
- Are there people who do it well? Do they do it every time it is appropriate?
- Could they do it if their lives depended on doing it?
- Have they done it before and now stopped?
- What do you recommend? Why?
- If we fixed it, are there other problems that might arise?

Surveys

Behavior	Importance Very Low				Very High	Need for Training Very Low				Very High
1. Selling to small groups in Commercial	0	1	2	3	4	0	1	2	3	4
2. Selling to mid-sized groups in Commercial	0	1	2	3	4	0	1	2	3	4
3. Selling to Executive Accounts in Comm.	0	1	2	3	4	0	1	2	3	4
4. Identifying the Decision Maker	0	1	2	3	4	0	1	2	3	4
5. Identifying needs	0	1	2	3	4	0	1	2	3	4
6. Using brokers in selling	0	1	2	3	4	0	1	2	3	4

Surveys are often used to determine the magnitude of a problem or need or to generate ideas.

Advantages

- Surveys can help gather data from a large number of people.
- Quick to administer.
- Relatively easy to compile.
- Quantifiable data useful to justify or prioritize training needs.

Concerns/Issues

- Easy to muck with (make too big, add irrelevant questions).
- Must be piloted; what you think is clear may not be clear to others.
- Easy to fudge self-assessment inventories (i.e., responses to "How skilled are you in this area?" may result in highly suspect data!).
- Easy to overuse.

Guidelines

- Make the survey as short as possible.
- Pilot the survey to make sure 1) you are clear in your instructions and statements/questions, and 2) the results will help you as intended.
- For self-assessment inventories, provide anonymity.
- Show respondents how their input will be used.

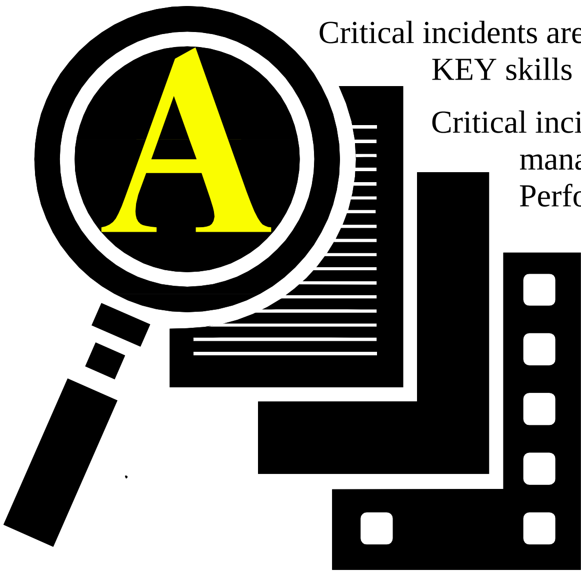
Critical Incident

Still stuck? Sometimes in an interview, even your best questioning and listening techniques result in "fuzzy" performance requirements or current performance.

In this case, ask the person to describe a scenario to illustrate what they're trying to describe. For example, if we had two reps, one good and one bad, and a customer called, how would each respond?

Continue probing: "What do you mean by 'more effectively'? What would I see?"

Build a list of behaviors and ask, "If they could do these things, would that address the problem?" Then survey the potential participants to see which of the objectives they can already do.



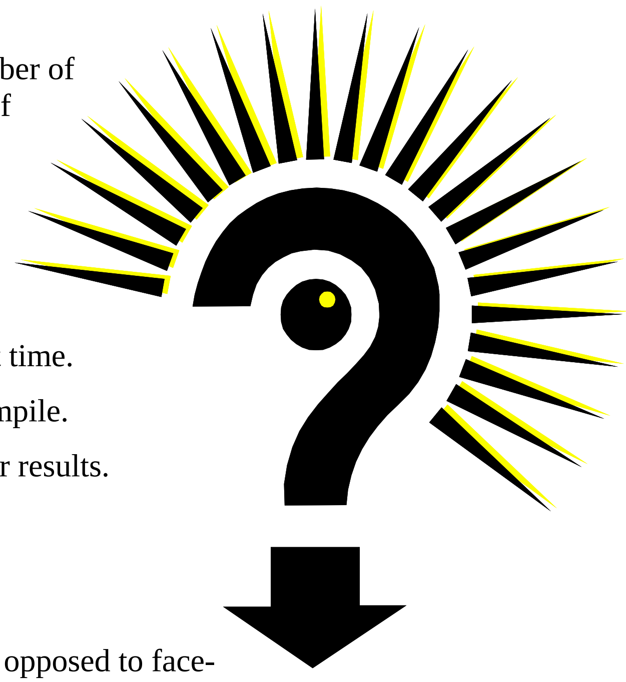
Critical incidents are a subset of interviewing and are helpful for identifying the KEY skills and knowledge required for superior performance.

Critical incident technique is a fancy way of describing the line that managers, customers, and others draw in the sand at Performance Beach. Critical incident asks the questions, "What was the one thing that was most important?" "What was the last straw?"

Use top performers: "What one or two things do you do that account for your superior performance?"

Use poor performers (or their managers): "What one or two things do they do – or not do – that contribute to their poor performance?"

Focus Groups



A focus group is an effective way to interview a number of like people at once and collect a significant amount of useful information in a short time. Focus groups are especially useful for determining reasons for the performance gap.

Advantages

- Lots of information can be gathered in a short time.
- Quick to administer and relatively easy to compile.
- Group discussion can sometimes lead to better results.
- Priorities can be determined at the same time.

Concerns/Issues

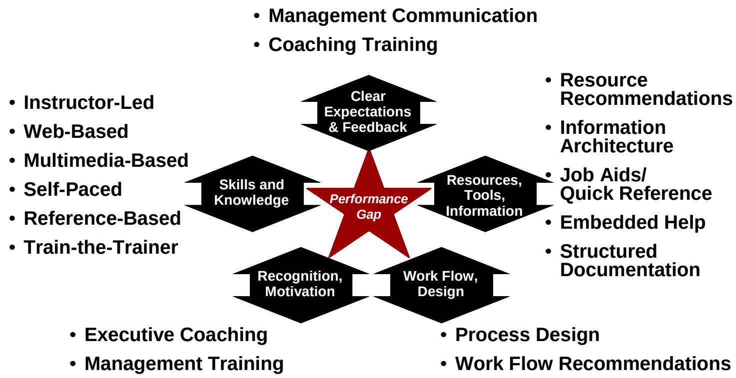
- Logistics (suggestion: try teleconferencing as opposed to face-to-face).
- Group discussion can sometimes lead to "group think".
- More expressive people tend to dominate the discussion.
- Easy to overuse.

Guidelines

- Make the focus group as focused and structured as possible to ensure 1) representative discussion, and 2) broadened idea generation.
- Use a balance of group discussion and individual questioning.
- Show participants how their input will be used.
- Assure anonymity.

Designing Performance Solutions

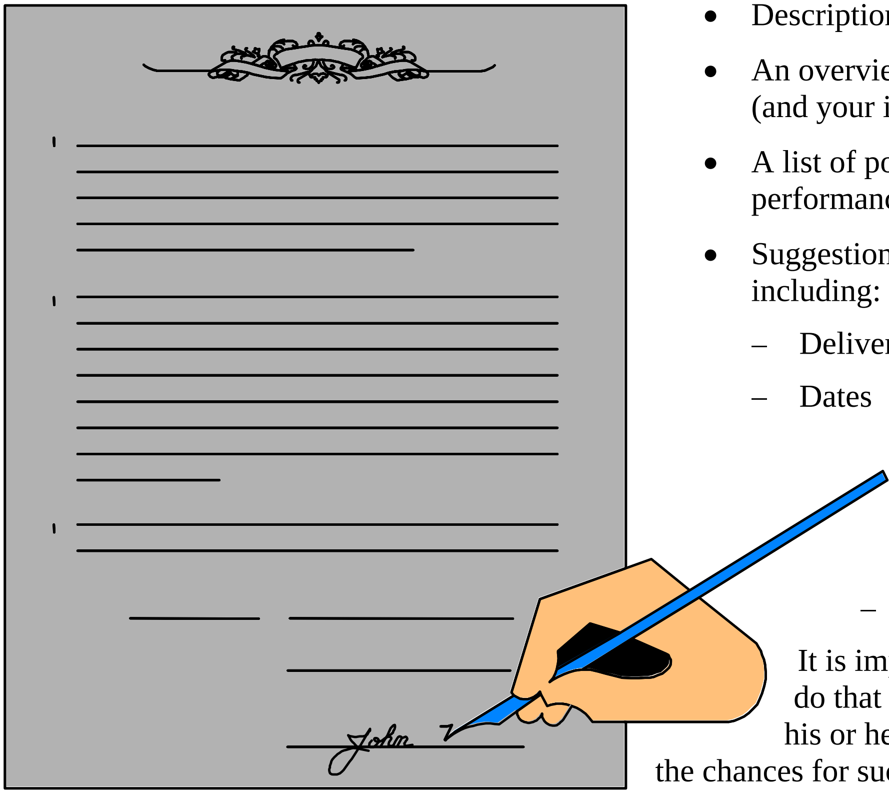
When designing performance solutions – NOT JUST TRAINING – consider solutions that specifically address each of the five elements impacting performance:



- **Clear expectations and feedback**: Management communications are critical to performance. Sometimes the communication need is a well-crafted document or memo. Sometimes it's a well-designed presentation delivered live or via the web. Sometimes it's a matter of increasing the communication or coaching skill of the manager to help him communicate more effectively with employees.
- **Resources, tools, information**: Suggest resources that will help increase performance. Create job aids and quick reference tools that are especially suited for quick refreshers or to ensure that no steps are missed. Perhaps people perform a task infrequently; rather than force them to memorize the steps, a job aid ensures higher performance. Similarly, structure information – typically found throughout the company in many departments in many formats – employees need so they can access the information they need to do their jobs easily and quickly.
- **Work flow design**: Sometimes performance isn't as it could be simply because the way the work is carried out could be improved. Based on your analysis, recommend improvements to the work flow; sometimes simple changes to who does what can have a significant positive impact on the end result.
- **Recognition and motivation**: Provide executive coaching to help individual executives increase their leadership capability – including their ability to infuse a culture of performance throughout their management team. "Catch someone doing something right – and tell them!"
- **Skills and knowledge**: Often, people need training in order to perform better. Training is appropriate when skill or knowledge needs to be engrained so the processes or principles can be applied in a variety of situations. Training – including instructor-led training, web-based training, computer-based training, and self-paced training – can all be effective in increasing the skills and knowledge of employees. Build training that ensures that participants are able to immediately apply their skills on the job tomorrow and over time. Follow a proven instructional design, include abundant experiential activities for skill building, provide opportunities for practice and feedback, and embed your company's products, services, policies, and other unique details to ensure that the training is transferable to the field.

Developing an Implementation Contract

It is important to create an implementation contract between you and your client. An implementation contract should include:



- Description of the required performance.
- An overview of the current performance (and your information sources).
- A list of possible reasons for the performance gap.
- Suggestions for addressing the gap including:
  – Deliverables
  – Dates
  – Timelines
  – Responsibilities
  – Expected results
  – Contingencies

It is important that the client has work to do that will require some commitment on his or her part. Without the commitment, the chances for success of your activities greatly diminishes. Most likely, there are activities and responsibilities that fall into your client's area. These could include some type of communication, review of the job process, acquiring additional equipment, providing recognition and feedback to employees, etc.

Creating Measures of Success

The result of your efforts is improved business results: an increase to the business bottom line – which happens to be the top line of the performance consulting model!

How will you determine if your interventions had the positive impact that you thought they would? The time to think of making this link is before you implement the solution. The time to consider evaluation is now.

How would you, for example, determine if training a) transferred from the classroom to the job, and b) had the positive impact you hoped it would? To determine if the skills and knowledge are being applied on the job, you could:

- Observe employees: Are they doing what they were taught? Are they using the new tools? Are they using the job aids? Are they using the new skills effectively?
- Ask the manager to observe employees and provide feedback to you.
- Review the documents and reports that you used to determine current performance. Has performance – as indicated in these artifacts – improved?

End-of-course feedback forms (i.e., smile sheets) don't indicate whether business results improved; even in-class tests and assessments only tell you whether participants can answer specific questions or whether they can demonstrate a skill in class. The proof of the pudding – as we mix our metaphors – is when the rubber meets the road. You – as performance consultant – MUST get performance information directly from the source.

The benefit from this final step is that you close the performance consulting loop (you started here, remember!) AND you build credibility with your client. Additionally, if your performance solution DOESN'T work – and they sometimes don't – you are the first to know and address it!

Earning the Right

If you're a trainer who sees the value in acting as a performance consultant, you may be asking yourself, "How do I earn the right to proactively address business needs?"

Face it, you may be considered a phenomenal trainer in the eyes of your manager and others throughout the organization, but you may never have been considered a business partner or consultant.

Suggestions for building credibility and value include:

- Do your own research; learn about the business!
- Start small and training related (perhaps a job aid).
- Make subtle distinctions between training and non-training issues (educate the client).
- Do well in training (if you can't do YOUR OWN job well, you will not have much credibility at someone else's job).
- Follow-up to the training to uncover business issues.

As you can see, being a great trainer is a subset of the overarching role of performance consultant.

Style Guide

Introduction

E-mail or email? Role-play or role play? Two spaces between sentences or one? Periods after bulleted statements or not?

A style guide is a collection of decisions that you've made that pertain to use of formatting, style, bullets, grammar, and word choice. Style guides help ensure consistency from developer to developer and from module to module. And style guides help you avoid the decision-making process each time you develop training.

Use the following style guide as the basis for your own creation.

Entelechy's Style Guide

Acronyms

All acronyms should be written out the first time they appear in a module. After the first occurrence, you can use the acronym. Spell the acronym out and follow the spelled out version by the acronym in parentheses ( ).

Example: Call Center Professionals (CCP)
Instructor Guide (IG)

Bulleted Lists

The following rules apply to bulleted lists:

- Typically a bulleted list consists of more than one item.
- If all items in the list consist of only one or two words, no period is required after items.
- If at least one item in the list is longer than two words, all items should end in a period.
- Lists are introduced by a sentence or phrase that ends in a colon (:).
- Initial cap the first word of each list item.
- Do not place a blank line between the introductory sentence or phrase and the first bullet item.
- Avoid constructions where list items are connected by punctuation and conjunctions. Instead, each list item begins with an initial-capped word and ends in a period — unless the items are short, then no period is required.

Example 1 — Simple list:

The four styles discussed in *Developing the Mindset* are:
- Doer
- Listener
- Speaker
- Thinker

Example 2 — List with longer items:

Materials Needed:
- VCR, remote, and extension cord.
- Extra copies of the precourse.
- Sufficient copies of the Participant Guide.

Continued Pages

When one slide requires multiple pages of instruction or text, the sentence *Continued on the next page*., will be used in the bottom-right corner of the first page. The sentence *Continued on the next page*., is typed in 8-point, italicized and ends with a period.

Diversity

All of Entelechy's materials need to reflect social diversity whenever possible. This includes graphics, videos, exercises, and case studies.

Em Dash

Use to set off sentence elements. Use an em dash to:

- Set off a parenthetical phrase within a sentence that deserves more emphasis than parentheses imply. Use two em dashes, one on each side of the phrase.
- Set off a phrase at the end of a sentence for emphasis. Use one em dash.

  Example:

  Entelechy was formed in June 1992 to address the increased sophistication of today's sales management in expecting — and demanding — high levels of performance from their sales teams and individuals.

Do not use an em dash in place of a bullet or other typographic symbol to set off items in a list.

The shortcut key for an em dash in Microsoft® Word for Windows™:

Alt + Ctrl + Num - (Num Lock on, Use "–" key on Number pad)

En Dash

Use to connect elements, especially numbers. Use an en dash:

- To indicate a range of numbers such as dates or pages.

  Example:

  Time Estimate: Allow 25 minutes for Pages 7–9.

Do not use spaces on either side of an en dash.

The shortcut key for an en dash in Microsoft® Word for Windows™:

Ctrl + Num - (Num Lock on, Use "–" key on Number pad)

Gender Pronouns

Pronouns need to match the noun they represent. This can become an issue of gender when the noun you are representing can be either a male or a female. Try to avoid sentence constructions that require a singular pronoun, but when it cannot be avoided use *his or her*, rather than *his/her* and rather than choosing either *his* or *her*.

Examples: Ask customers for their phone numbers.
Ask the customer for his or her name.

Items in Series

When you have a series of items in the text, use a comma after each item including the one that occurs just before the conjunction.

Example: *Developing the Mindset*, *Enhancing the Skillset*, and *Providing the Right Products* are the three modules in our *Customer Service* program.

Nested Lists

An item in a bulleted list that requires a subordinate list is called a nested list. Instead of using bullets in the subordinate list, use hyphens, and format the subordinate list so it is indented from the bullet item that it supports. Numbered lists should only be used when sequence is important.

Example:

Debriefing:

- How did it go?
- What went well?
- What needs work?
- Did you:
  - Demonstrate Empathy, Patience, Respect, Confidence, and Knowledge?
  - Use the following Four-Step Process:
    1. Acknowledge.
    2. Question to Clarify.
    3. Present Resolution.
    4. Checkback.

Notes

One way to emphasize important information in the text is to call it out as a note. Notes are formatted with a Notes: label, which is initial-capped, underlined, and followed by a colon. The colon should be followed by two spaces and a complete sentence or sentences. If the note is critical, it should be separated from text on the page by inserting a blank line before and after the note.

Example:

Note: You should not give them any detailed information initially when setting up the exercise. Let them question you to clarify.

Numbered Lists

In general, bulleted lists are used. However, if sequence is important, use numbered lists.

Example:

Review the instructions below:

1. Fill in your scores from Column C in the appropriate space.
2. Add them across to get the Focus-Factor Total for each skill category.
3. Circle the three highest numbers.
4. Write these three skills on Page 9 in your guide.

Page Layout Standards – Instructor Guide

Refer to *Instructor Guide Development Notes*.

Page Layout Standards – Participant Guide

Refer to *Participant Guide Development Notes*.

Quotation Marks

Avoid using quotes around a term or word. If you are trying to set the word off from other text for emphasis, consider putting the word in italics or boldface type — use this method sparingly. If the word is a term that is unique to the client environment, refer to the rules for *Terminology*.

Examples: Correct: Participants will be using their *new* Customer Focus skills.
Incorrect: Participants will be using their "new" Customer Focus skills.

Recommended Questions - Instructor Guide

When recommended questions are provided in the Instructor Guide, precede the question with the Ask: label, which is initial-capped, boldface, and followed by a colon. Two spaces and the recommended question should follow the colon. The recommended question should also be in boldface type. The Ask: label should only be used when the whole class is being questioned. See also *Sample Answers – Instructor Guide* in this document.

Example: **Ask**: **What is Customer Focus?**
Answer(s): How you make a customer feel.

References to Other Sections

If you refer to another module or program, the module name or title should appear in italics.

Example: Refer participants to the *Developing the Mindset*, which is in a previous section of this guide.

Sample Answers – Instructor Guide

When sample answers are provided in the Instructor Guide, precede the answer with the Answer(s): label, which is initial-capped, underlined, and followed by a colon. Two spaces and the sample answer should follow the colon. See also *Recommended Questions – Instructor Guide* in this document.

Example: **Ask**: **What is Customer Focus?**
Answer(s): How you make a customer feel.

Spacing after Punctuation

Two spaces will be used after colons, periods, question marks, and exclamation points. One space will be used after a semi-colon.

Template Standards

Entelechy will generally follow the same design and layout themes during development while still achieving *customization*. Ask your program manager for the template to use for this project.

Terminology

We at Entelechy acknowledge that we may use some Entelechy specific terminology. These words have evolved into our company culture and have been adopted as common terminology amongst the employees. Entelechy specific terminology that is used in the text of a module will be defined under the heading **Terminology:** of the *Instructor Guide Conventions* page of that module.

Trademarks

All trademarks ™, registered trademarks ®, copyrights ©, or service marks ℠ that are used within the Instructor Guide or Participant Guide must be acknowledged. This is to be done on Page 2 of both the Instructor and Participant Guides. The first time the trademark item appears in the text it should be followed by the appropriate symbol. Use of the trademark after the first occurrence does not require the use of the symbol (™, ®, ©, ℠).

Shortcut keys in Microsoft® Word for Windows™ to symbols:

™ = Alt + Ctrl + T

® = Alt + Ctrl + R

© = Alt + Ctrl + C

℠ = No shortcut key available. Type the text in uppercase and superscript. The font should be one that matches your text.