Performance Support

The Short Way Home

by Jos Arets

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From training to performance support?

According to the Praxis analysts, it is. They see guidance as a better alternative to training:

… *'Using guidance materials is one approach to eliminating the need for hundreds of hours ofconventional training and thousands of training dollars. In fact, over half the time, Praxis analysts have found that guidance is superior to training for increasing worker accuracy, teaching complex tasks and reaching personnel at remote locations.'[1]*

Guidance, or performance support, is direct support in the workplace that provides a way for people to work better. in 1978, Gilbert explained why:

'Guidance in general is superior to procedural training on several counts other than lower costs:

1. *The greater the complexity of the task, the more superior guidance is as a technique, because it reduces the probability of error and the need for training.*
2. *Tasks of low-frequency occurrence, or those requiring low rates of performance, favor guidance. For example, we cannot guide someone to play the piano because guidance would interfere with the high rates required. But most tasks are not of this nature.*
3. *Where error-free performance is extremely critical, guidance is favored because memory is not so reliable. Airline pilots, checking a cockpit performing certain tests,are required by law to follow a directory.'[2]*

But it doesn't stop with the acceptance of performance support as an effective solution to organizational performance issues. Between 1970 and 1978, performance guidance was not really known or used in the market. This led Gilbert to this observation:

'There seems to be something faintly disreputable about job aids. The cult of behavior tells us that "really worthy people" don't need such crutches. Performing well without directions gives a person the appearance of superiority. Of course, this is behavioral nonsense. People who can use a guide avoid hours of training and accomplish more as a result; they are simply more competent than those who bumble through on their own. Indeed, the field of guidance tools and job aids is so neglected that I have thought to make a special study of them.'[3]

This could be seen as a cri du coeur (cry from the heart) by Gilbert to view performance support as an alternative or supplement to training. This is entirely in line with a zeitgeist, in which authors such as Gilbert, Rummler and Harless communicate that training may contribute to solving performance problems in organizations, but it is certainly not the only solution. [4]

Into the performance zone

Fast-forward to 1991: Gloria Gery publishes a pioneering book about performance support and the electronic version of this approach (Electronic Performance Support Systems). This is some 20 years after the publication of the Praxis Report[1]. Gery is dissatisfied with the limited impact of formal learning on performance in organizations and sees performance support as a necessary alternative. However, it is required to fundamentally think differently and move from formal training to performance support (see table 1).[5]

Table 1: From traditional training to performance support.

Traditional training	Performance support
Event-oriented; not integrated with the work environment or other performance support tools.	Learning systematically integrated with work; learning and support provided at the moment of need; included, but not limited to, training.
Responsibility on trainer or program to teach.	Learner responsible for performance and required learning to achieve it.
Defined, program-controlled objectives, sequences, processes.	Job-, task-, or learner-defined objectives, sequences, processes.
Measured on volume and learner satisfaction.	Measured on competence of job task performance.
Media-oriented.	Includes learning systems, information systems, job aids, career systems, rewards and incentives, organisation design, procedures, etc.

Gery also talks about the performance zone. This is an interesting concept. It all happens in the workplace and, therein lie the roots of our field.

Due to the rate of growth during the industrial revolution, it was no longer possible to continue training in small groups on the workshop floor. Therefore, the option for a scalable solution was in the form of training in classrooms. Fast-forward again and in the late 1990s and early 2000s, the first steps were taken towards further increasing the scalability of training in the form of e-learning, now commonplace in the world of L&D. This was followed by learning support that fits well into the mindset for improving and scaling e-learning, involving strengthening formal learning both within and outside the workplace.

However, it is important not to confuse performance support with learning support.

Performance support provides assistance so we can work better, and we learn from working. Learning support on the other hand enhances learning as an activity that is distinct from working. Performance support is focused on supporting working. Learning support is focused on improving formal learning. >>

This mainly involves exploiting contextual knowledge, which is usually not found in training courses or e-learning. This might be explained, according to the Praxis report in 1970, as follows:

'One of the superstitions in the training business is that skills have no value unless they are fixed in our memories. Trainers who hold with this notion will obviously discount guidance as a possible alternative to training.'[6]

Performance support is, to date, outside what most L&D departments' offer. In the ATD State of Industry Report, an annual research report into forms of both formal and informal learning, performance support is not mentioned as a separate category.[7]

So, many decades after the work of Gilbert, Rummler and Gery, not much has changed. Despite excellent publications by Allison Rossett[8] about job aids and performance support in the interim, and work by others, performance support is still not established as part of L&D's armoury (see figure 1).

More recently, under the influence particularly of Bob Mosher's[9] work, there has gradually been more interest in performance support, but it is still seen as marginal by many. At the same time, the world of L&D has also become interested in the 70:20:10 reference model.[10]

Many L&D professionals see performance support as an effective opportunity to support learning in the '70' part of the 70:20:10 reference model. And they are right. Within the 70:20:10 approach, performance support is a relevant and important solution to strengthen the link between work and learning in the performance zone, but certainly not the only one.
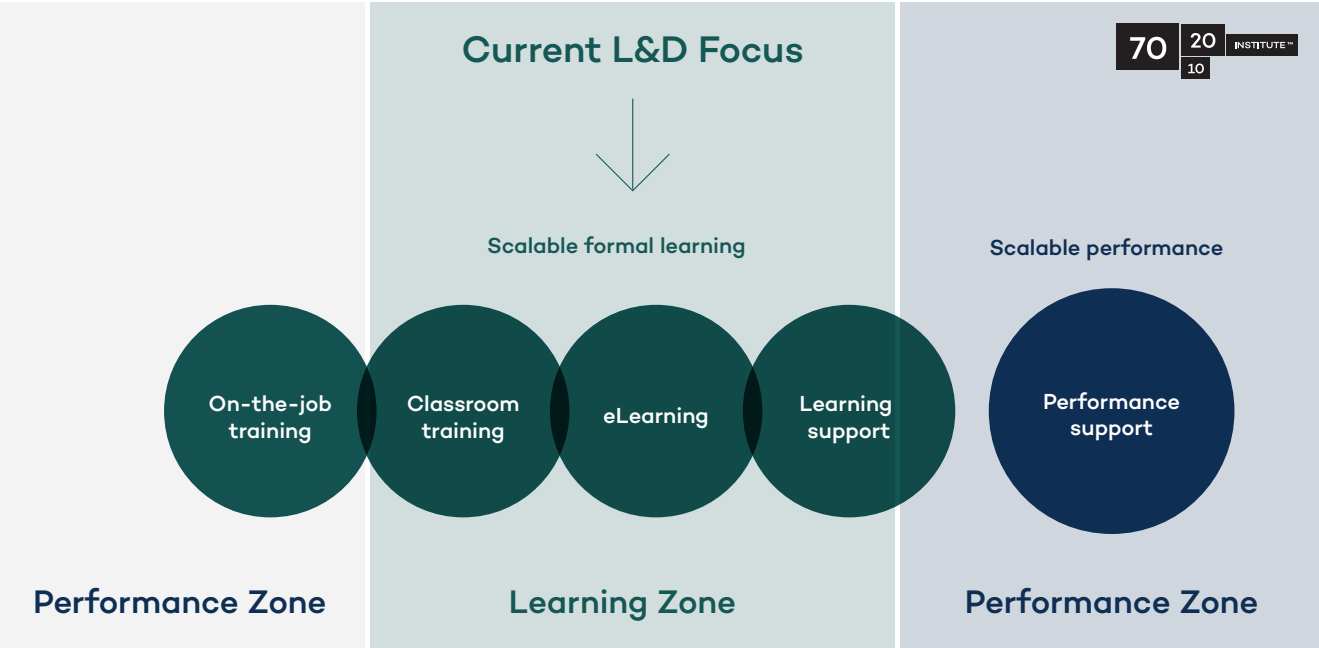

Figure 1: L&D focus on formal learning outside the performance zone - almost no delivery of performance support in the performance zone.

What is performance support?

...*'If you provide people in the workplace with the knowledge and information they need to do their jobs, will they need training?'*

Gloria Gery answered this rhetorical question in 1991 with an emphatic 'NO!' [11]

Her approach suggested the substitution of most (but not all!) training with performance support. This was a brilliant idea. According to Gery's research, providing knowledge within the workflow leads to fewer mistakes, higher productivity and faster acquisition of skills.[11]

At the time, however, the technology required to deliver online performance support was expensive and the idea met with only a lukewarm reception from L&D circles. It has taken decades for the importance of performance support to even begin to be recognized.

Definitions of **performance support**
Various authors have defined it as:

Definitions Electronic Performance Support System (EPSS)/performance support Gloria Gery (1991)

'EPSS (Electronic Performance Support Systems) involve an integrated electronic environment incorporating knowledge, task support, data, tools and the opportunity to communicate, which enables people to learn while they conduct complex tasks in the workplace, with minimal support or solutions by others.'

Allison Rossett and Lisa Schafer (2007)

'A helper in life and work, performance support is a repository for information, processes and perspectives and guide planning in action.' A helper in life and work means the information is delivered custom-made for the individual whenever it is needed (professionally as well as personally). By facilitating storage, it is possible to have 24/7/365 access to usable and relevant information. Situations demand specific reactions or behaviour of the end users, without mistakes, faults or blunders. It is possible to use performance support as preparation or support during the execution of a task (sidekick).'

Marc Rosenberg (2013)

'A tool or other resource, from print to technology-supported, which provides just the right amount of task guidance, support, and productivity benefits to the user- precisely at the moment of need'.

Performance support: a case study

Our definition of performance support is as follows:

'A tool to support critical tasks in the workplace around the moment of need, with only as much contextual knowledge and information as is needed to work more productively and safely, and to the required standard of quality.'[10]

The most important elements of this definition and concept are:

Critical tasks

These are the tasks conditional to achieve organizational objectives and results. Performance support in organizations will be developed and delivered based on these critical tasks (not all the tasks). This guarantees the business alignment of L&D. Some people also use their personal types of performance support to remember mistakes and prevent them from recurring, or to achieve a high level of quality.

Around the moment of need

Many people say performance support must be available at the moment of need. This seems obvious, because that's when it adds the most value: at the moment of need, performance support can ensure that tasks are carried out seamlessly. An electrician repairing a high-voltage mast or a surgeon carrying out an operation can't simply stop work to look for a particular tool. However, in cases such as these, performance support is required before, during and after the carrying out critical task: so, performance support is required around the moment of need.

Contextual knowledge and information

The performance support only needs to provide the specific knowledge, background information and guidance required to complete the critical task to the required standard. Nothing more.

Desired results:

In consultation with L&D, managers determined the following results were necessary:

- 100% compliance with standards
- Clear work instructions
- As little training as possible
- Direct workplace support for critical tasks

Task analysis and creating work instructions:

In preparation for the creation of a performance support solution, the L&D team carried out a task analysis, based on the JCI standards, Dutch legislation current protocols, and work instructions. L&D worked in close collaboration with content workgroups regarding critical tasks. For example, the Primary Process Workgroup included exemplary performers from the workplace and content specialists. The work instructions were co-created with workplace professionals, who used formatted documents to do this.

Afterwards, the instructions were turned into learning materials by performance master builders (a key role in our 70:20:10 Methodology™), validated by workplace professionals and finalized by a line manager from the primary process.[10]

Title: Patient's identity

Purpose: Ensure that treatments and examinations are carried out on the correct patient

Process description:
Patients must be identified before:
- Giving medication, blood and blood products, and taking blood and other samples
- Carrying out treatments or procedures that may have an undesirable outcome for the patient (e.g. a specific diet)

Input: Task, examination or treatment to be carried out

Output: Care, treatment or examination of the right patient

What	Who	How
Patients who are able to communicate: Identify by asking their name and date of birth.	Care assistant, carer, care manager, elderly care specialist.	• Compare name and date of birth with those in the care plan/instruction/ medication summary. • If they are the same, carry out the task, examination or treatment.
Patients who are unable to communicate: Ask a colleague/family member for the patient's name, or compare them to a recent photo.	Care assistant, carer, care manager, elderly care specialist.	• Compare the patient's name and photo with those in the file or instruction 　○ Use a photo that is less than on year old. 　○ Make sure it is visible in the file. • If the name and photo are the same, carry out the task, examination or treatment.
If the patient is not correctly identified, find out where the problem lies.	Care assistant, carer, care manager, elderly care specialist.	• Investigate what may have gone wrong. • If you can resolve it yourself, do so, for example if you have taken the wrong medication from the trolley. • Produce a safety incident report, e.g. the medication is incorrectly labelled.

The value of performance support

An important part of the value of performance support is that it happens before or during the performance, often with a minimum of training. This delivers instant measurable value as the improvement occurs immediately. It benefits both the organization and end users, who feel more competent and work with more confidence.[12]

Performance support and working are one and the same thing
Users are supported while they carry out tasks in order to achieve the desired performance. Effective performance support means it is no longer necessary to stop work or leave the workplace for training or support.

Key Benefits:

Performance support reduces the need for formal training
Without the distraction of training, performance support makes the relevant knowledge and information available in the workplace. Smart architecture drastically reduces the desire and need for training of all kinds, including orientation programs, management training and customer service courses.

Performance support leads to fewer mistakes
Performance support provides task clarity and standards, and thus reduces error rates.[13] This also applies to situations in which tasks often change as a result of improvement or innovation. [14]

Knowledge and information are just a few clicks away
People no longer need training when they can find the information they need with just a few clicks of a mouse.

Performance support is simple
Not too much, too little, or at the wrong time: performance support enables users to concentrate on the task in hand: simplifying performance.

Last... But not least

There is no doubt that performance support is increasingly appearing on L&D's agenda. However, that has not yet been translated into large-scale application, as the State of Industry Report shows.[7]

Still today's L&D services, for the most part, consist of formal learning solutions. In comparison with the Praxis Report of 1970, progress has only been made on a limited scale.[13]

With this knowledge in mind, the time has come for L&D to expand its current formal learning solutions portfolio to include performance support as part of its core offering. To get into the performance zone and align with the core business, figure 2.

Our 70:20:10 Methodology™ does not create a one-sided focus on either formal learning or on performance support. We believe it is necessary to connect formal, informal and social learning in a smart way. In our practice this is almost always a one-and-one approach: both formal learning solutions and performance support: fitting within the 70:20:10 reference model. [15]
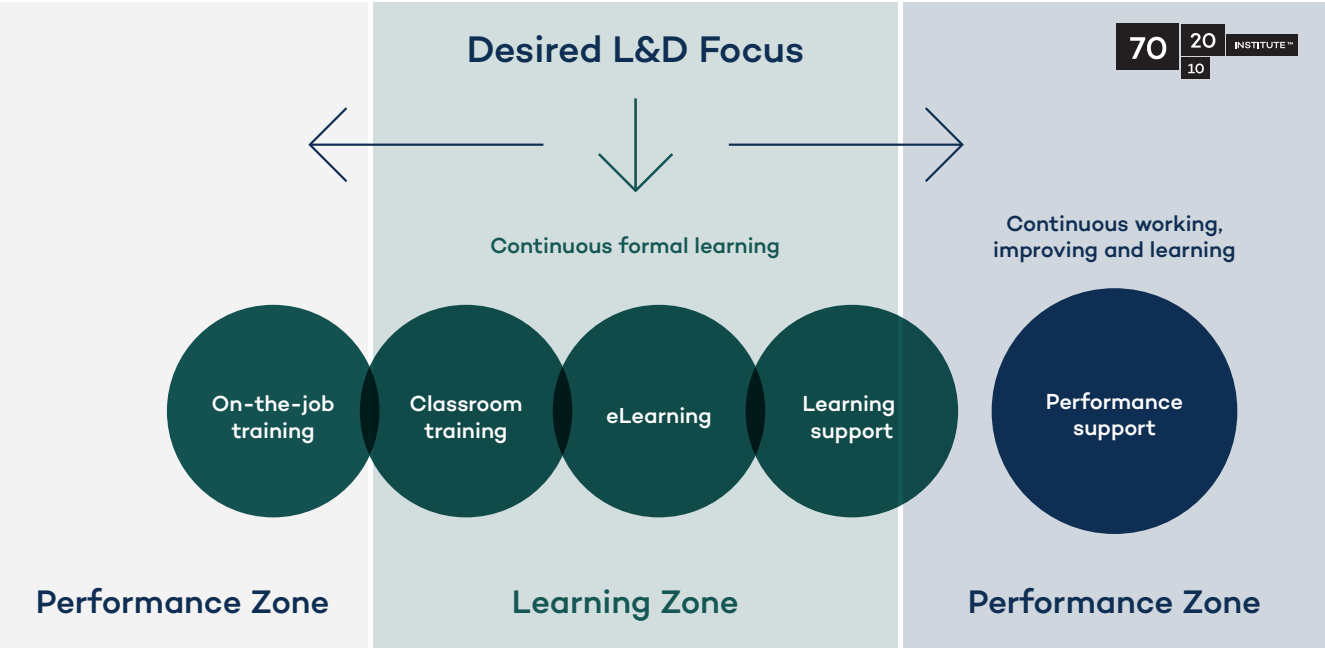
Figure 2: L&D expanding services with performance support into the performance zone.

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If you are ready to get started on your journey, let's have a conversation.

You can contact us at:
Web: 702010institute.com
E-mail: info@702010institute.com
Phone: +31 (0)43 356 14 44