



CHAPTER EIGHT



Aligning Human Performance Technology Decisions with an Organization's Strategic Direction

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Predictably, the specific roles and related tasks of performance technologists vary from organization to organization. In general, however, the function of the performance technologist is to provide leadership in the development and implementation of interventions that lead to and support the achievement of useful results for individuals and organizations alike. This organizational role can include everything from designing classroom training and evaluating performance reward systems to developing strategic plans and establishing mentoring programs. As a result of these diverse roles and responsibilities, performance technologists are continually being challenged to interpret the strategic goals and objectives of their organization as guides toward their own success and the success of their projects. From decisions regarding which products to recommend to potential clients to questions regarding the most effective delivery tools for training, all decisions in an organization should be aligned, either formally or informally, with the organization's strategic direction.

Organizations, however, are not always clear in their strategic direction. Torraco and Swanson (1995) suggest that "[b]usiness objectives themselves are almost as diverse in nature as the wide range of organizations that articulate them. Business objectives can span long- and short-term time frames, and can focus on broad business issues (for example, diversification in the defense industry in the post-Cold War era) or more specific issues (for example, reduction of employee turnover in company field offices)" (p. 11). While most organizations invest significant amounts of time and money in the development

of strategic plans that outline their ambitions, more often than not these documents are left on bookshelves to gather dust rather than being used by employees as guides for daily decision making.

Consequently, strategic plans typically fail organizations in both their capacity to guide decisions and their accessibility to many employees (Mintzberg, 1994). This situation regularly leaves managers, supervisors, performance technologists, and others in the organization with few tools for defining what results are necessary for success: the accomplishment of results that are aligned with the strategic direction of the organization and its clients. Yet strategic direction remains an essential ingredient in decision making at all levels of an organization. Watkins, Triner, and Kaufman (1996) suggest that strategic plans frequently fail to guide decision making by focusing on processes instead of results. When strategic plans focus on processes, describing what employees should do rather than what results should be accomplished, they lose their ability to guide decisions by disempowering employees. As a result, it is important to determine the capacity of strategic direction to guide decision making in an organization.

While analysis is a frequent starting place of many human performance technology models (for example, Van Tiem, Moseley, and Conway, 2004), in the past little attention has been paid to the analysis of how the decisions that are made throughout a performance technology project can be aligned with the strategic direction of the organization and its clients. For performance technologists, the alignment of their decisions with the strategic direction of the organization should therefore begin with an analysis of the current goals and objectives of the organization, its partners, its clients, and the community it serves.

STRATEGIC DIRECTION

Strategic plans can and should provide practical guides for decision making at all levels of any organization. Nonetheless, most of us have copies of ineffective plans that are now destined to sit on our bookshelves for years to come. This is, unfortunately, far from the most effective way to provide guidance for decision making.

To transform your organization into the one you envision takes more than great strategy and implementation; you also need to make the strategy an integral part of the very fiber of your organization. When we speak of this idea, we usually use the phrase "strategic alignment." Aligning everyone in your organization with your strategy is one of the most important things you can do beyond formulating and implementing great strategies [Bradford, 2002, p. 1].

With most organizations no longer relying on a large number of "middle managers" to provide direction and guidance for decision making, many

employees are increasingly being expected to make critical decisions without clear guidance based on the strategic direction of the organization and its clients. The development of effective strategic alignment therefore begins with useful strategic planning. Strategic plans that provide a clear picture of the useful results to be achieved throughout the organization, without micromanaging decision making, are effective tools for aligning the performance of people with results that add value (Watkins, Triner, and Kaufman, 1996; Kaufman, Oakley-Brown, Watkins, and Leigh, 2003). In turn, strategic plans are most useful when they provide essential guidance for decision making, thereby aligning the actions of the employees with the goals of organizational leaders. As organizations continue to rely on the decision making of employees at all levels, it is becoming increasingly important for all employees to use the strategic direction of the organization to guide their daily decisions.

Unconventional Wisdom

Transforming organizational planning from a process that results in dusty binders on a shelf to one that generates useful guides for daily decision making can be challenging. Regularly, there are competing demands for limited resources, organizational politics, contending interests, institutional cultures, opposing ideas of what clients want, contrasting input from outside clients and suppliers, as well as other obstacles that all chip away at the potential contributions of a planning effort. In the end, through compromise and concession, strategic documents can end up offering little guidance for aligning decisions with the organization's strategic direction.

These obstacles, and others, can derail well-intended planning efforts unless one begins with strategic objectives that have broad appeal across many stakeholder groups. Instead of starting a planning initiative by discussing the tools, techniques, processes, suppliers, and other details of "how" the results of the organization can be accomplished, effective planning begins with the recognition of shared goals and objectives (Kaufman, Oakley-Browne, Watkins, and Leigh, 2003). The shared goals and objectives cannot, however, be limited to those of the organization; after all, organizations do not succeed without the support of their partners and the ability to make valuable contributions to their clients and their clients' clients.

As a consequence, effective strategic plans begin with some unconventional wisdom that starts outside of the organization (Kaufman, Stith, Triner, and Watkins, 1998; Kaufman, Oakley-Brown, Watkins, and Leigh, 2003). By defining the common goals and objectives both within the organization and among the stakeholders outside of the organization, strategic planning initiatives can begin to define the results that all agree must be achieved.

A Model for Effective Direction Setting

Among his reflections on healthy interpersonal relationships, the social philosopher and business leader Charles Handy (1999) adds, "It seems to be the same with organizations. The healthiest are those which exist for others, not for themselves" (p. 48). For organizations, this pragmatic perspective is applied through strategic planning initiatives that begin with the shared goals of the organization, its clients, the clients' clients, and the community they serve. By starting here, instead of in the details of daily operations, each of the partners can clearly view the common results they can accomplish together.

Kaufman, Stith, Triner, and Watkins (1998) and Kaufman, Oakley-Brown, Watkins, and Leigh (2003) recommend that organizations use an "ideal vision" as a sensible starting place for establishing effective strategic direction. An ideal vision is a tool for defining in measurable terms for the outcomes, or "Mega-level" results, that both internal and external partners can agree upon. Unlike vague vision statements, this vision focuses on the societal contributions that the organizations, together or separately, can make to clients, clients' clients, and others. By specifying only the results that are to be accomplished, the ideal vision can guide the strategic planning process away from the obstacles of preferred tools, techniques, suppliers, or other elements that focus on "how" the results will be achieved.

In place of the debatable preferences for how results will be achieved, the ideal vision clearly defines which results have to be accomplished and how they will be measured. Hence, discussions related to the process elements of the plan, the "how to," are then reserved for a time after the results to be accomplished, the "what," are defined in measurable terms. For sample ideal visions, see Kaufman and Watkins (1999), Kaufman, Stith, Triner, and Watkins (1998), and Kaufman, Oakley-Browne, Watkins, and Leigh (2003).

After coming to an agreement with stakeholders on the shared definition of what results, or "Outcomes," should be accomplished, organizations can then define the results, or "Outputs," they will achieve and how they will contribute to the common objectives previously defined in the Mega-level ideal vision. At this stage in the planning process, organizations define the measurable results they will contribute to their clients, creating a clear strategic alignment of the results they accomplish with the shared goals of the organization and its partners.

Still focusing entirely on the results the organization will accomplish, Kaufman, Stith, Triner, and Watkins (1998) and Kaufman, Oakley-Brown, Watkins, and Leigh (2003) refer to this as Macro-level planning, and the process typically results in a mission statement. By defining measurable results that are to be accomplished by the organization, such as discharging healthy patients or delivering safe and reliable automobiles, the Macro-level planning documents provide unambiguous objectives by which all decisions within the organization

can be aligned. In other words, if an option does not measurably move the organization closer to the accomplishment of the results defined in the mission and vision, then other alternatives should be examined. Performance technologists and others in the organization can then initially look to the mission for clear guidance when making challenging decisions, knowing that it is strategically aligned with the shared goals and objectives defined at the Mega-level.

While an exclusive focus is maintained on the results to be accomplished, the next step in setting effective strategic direction is to align the results to be achieved by individuals, groups, teams, divisions, and projects with those identified at the Mega and Macro levels. Referred to as "Micro-level" planning by Kaufman, Stith, Triner, and Watkins (1998) and Kaufman, Oakley-Brown, Watkins, and Leigh (2003), the objectives defined in this stage of planning provide clear and measurable achievements that all employees can use in guiding their decision making. At this level of planning, organizational leaders should work with employees, clients, suppliers, and other stakeholders to determine what "chain of results" must be accomplished to achieve the results defined in the mission and vision, as shown in Figure 8.1.

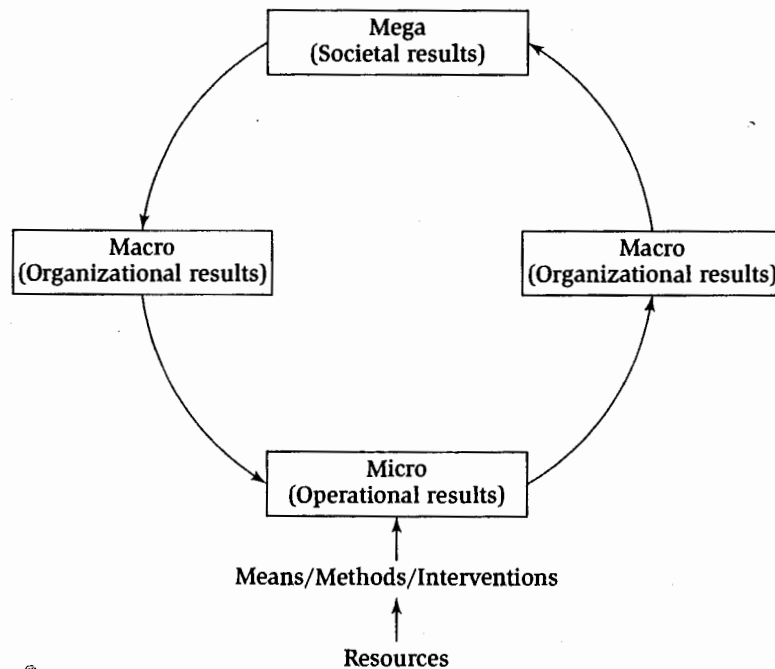


Figure 8.1. Chain of Results.

Source: Based on Kaufman, Oakley-Browne, Watkins, and Leigh, 2003.

First, the results to be achieved must be defined at the Mega level with partners internal and external to the organization; then results must also be defined at the Macro level, for the organization as a whole, and the Micro level, for the individuals and groups within the organization. Only then does effective strategic planning move to determining the "Processes," how these results will be accomplished, and "Inputs," what resources are necessary for implementing the processes. The complete framework can then be used by decision makers to ensure that the choices they make are adequately aligned with the strategic direction of the organization and its partners. After all, decision makers at all levels of an organization should be able to use the strategic direction established by the organizational leaders as guides in making daily choices. This is not to say, however, that strategic plans should make the decisions.

Strategic plans that do not provide clear and specific directions for making the decisions can frustrate employees. Yet effective strategic plans do not dictate how jobs are to be done, nor should they. Effective plans avoid describing the desired number of training hours employees will receive on new software systems, the skill requirements of newly hired workers, or the processes for creating a meaningful mentoring system. Instead, they provide clear statements about what results are expected, how success in accomplishing those results will be measured, and how the results are aligned with the organizational objectives as well as the goals of partners, clients, and clients' clients. By offering this guidance, without dictating processes or micromanaging, strategic plans can provide a guiding perspective for performance technologists and all employees in helping to define the results that are essential for success.

Consequently, aligning the strategic direction of the organization and its partners with the results to be contributed through effective performance technology interventions is essential. After all, if the processes a performance technologist implements, such as a training curriculum or rewards system, are not adequately contributing to the Micro-level results they are to achieve in order to support the organization in achieving its Macro- and Mega-level objectives, then the success of the project is in jeopardy.

Fortunately, the strategic direction established by the organization can provide indispensable input for the design of almost any performance technology. Moving forward with performance-improvement processes, such as performance analysis; cause analysis; intervention selection, design, and development; intervention implementation and change; and evaluation, can be risky without a clear analysis of how the performance intervention is linked and aligned with the strategic objectives of the organization.

Analysis of Strategic Direction

Too often strategic plans offer only vague, confusing, or contradictory guides to planning and decision making. Some plans are hidden between the

revenues and expenditures pages of the annual report, while others seem to put forward only "pie in the sky" slogans or axioms that have little direct impact on the decisions employees have to make each day. As a result, a systematic analysis of the plans to ascertain the strategic directions they embody is essential.

Even with the best-written strategic plans it is often necessary to sift through the strategic plan's goals, objectives, and ambitions to determine which elements will have the most impact on the success of current and future performance initiatives. It is necessary to look beyond vague statements of triumph such as "number one in our market" or "first in quality" to identify the actual objectives that will define success. Since many strategic plans are not written as guides for employee decision making but are designed as marketing materials or quickly assembled platitudes to include in the annual report, asking the right questions requires thoughtful consideration.

When reviewing organizational plans, questions that are often useful include

- Are the strategic objectives of the organization that include Macro-level results aligned with clients and clients' clients' Mega-level results?
- Which organizational initiatives will have priority in the next five to ten years? How can performance technology support these initiatives?
- Which strategic objectives will performance technology initiatives contribute to the most?
- Can a direct or indirect relationship be demonstrated from the impact of performance technology initiatives that yield Micro-level results to the strategic objectives of the organization that yield Macro-level results?
- In light of the strategic objectives, how will the performance technology's impact on on-the-job performance be evaluated?
- In light of the strategic objectives, how will the performance technology's impact on organizational performance be evaluated?
- In light of the strategic objectives, how will the performance technology's impact on clients and clients' clients be evaluated (see Watkins, Leigh, Foshay, and Kaufman, 1998)?

Typically, the answers to each of the questions are not found in any single strategic planning document. Most performance technologists will have to survey a variety of organizational documents with information about visions, missions, annual progress, strategic plans, and so on, and possibly interview organizational leaders in order to find answers to these important questions. Meeting with clients, suppliers, and other partners that are not within the organization can also be valuable in seeking answers to these questions. Additionally, Robinson and Robinson (1996) recommend the

following steps in developing a well-informed analysis of an organization's strategic direction:

- Read the annual report of the organization and work to understand it.
- Discuss with managers and others the ratios used to measure the operational health of the organization in order to compare current performance of the organization against goals.
- Identify the primary forces outside the control of the organization that will challenge the organization's ability to meet its business goals.
- Discuss the strategies and actions being taken by competitors and the implications of those actions for the organization.
- Skillfully use the business terminology of the organization [pp. 12-13].

Even when the appropriate resources for answering questions are identified, it typically pays to read "between the lines." Since many of the planning documents for an organization are public, and often available to both shareholders and other partners, the true objectives of the organization may be somewhat obscured in vague goal statements or concealed in what is not said. For example, while annual reports are often among the most valuable documents for answering questions about an organization's strategic direction, they are also often written in a manner that paints only a positive picture for shareholders. As a result, close scrutiny of financial investments, asset liquidations, or other changes in the organization often can reveal objectives that may not be written in the text of an annual report. Such scrutiny is important in helping the performance technologist find links from the strategic direction of the organization to the performance technology project.

When possible, it is most beneficial to establish a direct relationship between the results of a project and the strategic objectives of the organization and its clients; for example, project X brought about change Y. However, performance technologies are often more subtle in their contributions, and indirect relationships must be identified and demonstrated. Consequently, it is important to recognize that most performance technology projects cannot take credit for all of the success an organization has in achieving its objectives, nor can they take all the blame when performance discrepancies continue. Identifying the often unique definitions of *success* for each project is therefore an essential task for the performance technologist.

DEFINING SUCCESS

- The *success* of any performance technology is ultimately defined by its ability to accomplish useful results for individuals and organizations alike. Sounds straightforward, does it not? Yet defining the *success* of performance technologies quickly becomes convoluted and challenging as we begin to analyze the criteria for *success* brought to the project by the multiple partners, sponsors, and

clients that are necessarily drawn into any and all performance-improvement projects. For example, in a performance technology project there will likely be multiple players involved in the design, development, implementation, and evaluation of the technology, as well as the workers, supervisors, clients, clients' clients, and other stakeholders evaluating the results long after the project has concluded. Individuals and teams in each of these groups will have different perspectives on the success of the project.

Success is therefore difficult to define and accomplish; consequently, performance interventions that are not adequately aligned with the strategic directions valued by key partners stand little chance of being considered *successful* from these multiple perspectives. Generally, partners and stakeholders in projects will have both unique and shared criteria in defining *success*. As a result, for the performance technologist, recognizing and attending to the multiple strategic goals and objectives of the partners and stakeholders in the project are critical, and since it is unlikely that any performance interventions will completely meet the demands of each of these perspectives, prioritizing these various criteria for *success* is important.

For example, if after an analysis a performance consultant concludes that an instructional intervention is a necessary part of a performance technology solution, then there will be competing perspectives on the success of the project, including the following:

- *Learners*: For the performance technologist to be successful from the perspective of the learners, content such as lectures, activities, assignments, exams, and so on should have an engaging graphical interface, be easily navigated, facilitate interactions, and provide the necessary experiences for the required certification, as well as offer skills that can be used on the job the next day.
- *Client organization*: For the performance technologist to be successful from the perspective of the client organization, the time spent by employees in training must result in the transfer of knowledge and skills to on-the-job performance that adds value and improves the ability of the organization to serve its clients.
- *Clients' clients*: For the performance technologist to be successful from the perspective of the clients' clients, training must lead to more efficient and effective processes that reduce costs and lead to higher-quality products from the client organization.
- *Training facilitators*: For the performance technologist to be successful from the perspective of the training facilitator, the instructor-guide directions must be clear, a range of customizable features to meet the instructor's teaching preferences should be included, and course materials should include assessments for measuring learner performance.

- *Manager of performance technology projects:* For the performance technologist to be successful from the perspective of his or her manager, he or she must provide services to a growing number of clients, maintain professional skills through training and workshops, produce products that can be accepted by clients ahead of deadlines, and reduce costs where possible to increase profitability.
- *Organizational leaders:* For the performance technologist to be successful from the perspective of the organization's leaders, the technology process must be cost effective, ensure that services can be offered to a substantial market, provide services to a growing number of clients, and illustrate the latest uses of technological innovations.

With increased pressure to shorten turnaround times, to use quick-design models, and to develop rapid prototypes, addressing the various criteria for *success* from each of these perspectives has become increasingly challenging for performance technologists. Many approaches to performance improvement fail to include the valuable input from diverse external stakeholder groups in the initial design decisions and front-end analysis, and as a result performance interventions are typically developed to meet the criteria for success defined by a very limited number of project partners.

For instance, if in the previous example the consultant had focused only on the criteria for success defined by the client organization, then project decisions would have been at risk of failing other important partners in the project, including learners, the supervisors of learners, and the leadership of the technologist's own organization. Consequently, including multiple perspectives of *success* in the planning of any project is vital. To do this, technologists should (1) identify the essential partners and stakeholders in the project who will have a perspective on its *success*, (2) determine the criteria they will use to measure the *success* of the project, and (3) prioritize those criteria based on the cost of meeting the criteria versus the cost of not meeting their criteria. Table 8.1 recommends a useful format for identifying and prioritizing the criteria of *success* from multiple perspectives.

It is not expected, however, that any performance technology can meet the criteria of *success* applied by all stakeholders. After all, most projects have numerous partners and stakeholders that have their own priorities, making it next to impossible to define a single set of measures that will be the standards for *success*. For the performance technologist, this complexity offers the opportunity to both help the partners determine shared objectives and assist in the prioritizing of criteria that will be used to measure *success* as a project progresses. As a result, it is good practice for the technologist to work with partners and stakeholders from the onset of a project in determining what criteria for defining *success* are appropriate and measurable.

Table 8.1. Format for Assessing Multiple Perspectives on Success.

<i>Stakeholder</i>	<i>Criteria of Success</i>	<i>Priority</i>	<i>Achieved (yes or no)</i>
For example, supervisors of training participants	Worker will operate equipment using the latest safety measures	High	Yes
	Worker will demonstrate new safety measures to other workers	Low	No
	Worker will alert management to emerging safety hazards	High	Yes

Adding measurability to criteria, such as a reduced process time of three minutes or increased warehouse capacity of 45 percent, is another important task for most performance technologists. Without clear and specific guidelines as to how results will be measured, making decisions based on strategic objectives is difficult at best. In addition, having agreed upon measures for *success* defined at the beginning of any project can pay high dividends when it comes time to evaluate *success*. Last, with measurable criteria for *success* in hand, performance technologists can then work with partners and stakeholders to negotiate the strategic alignment among the groups and prioritize the results to be achieved.

How Is Your Success Defined?

Following are some essential questions you should ask at the beginning of any performance technology project. The answers to each question will help shape the strategic direction of the project and guide decision making by defining the multiple perspectives of *success*.

- Which partners and stakeholders will be in a position to make a judgment on the *success* of the project?

- Which partners and stakeholders are within the organization and which are external to the organization?
- How will you prioritize the differing perspectives among the partners and stakeholders?
- Are the criteria used by the partners and stakeholders conflicting?
- Can the objectives for the performance technology be prioritized and agreed upon by the partners and stakeholders?
- What informal criteria will you use to assess the *success* of the performance technology, such as team building, office morale, or promotions?

Making Decisions

As it is in many professions, decision making is at the foundation of nearly all human performance technology processes, from front-end analysis to summative evaluation (Chermack, 2003). As a result, most performance technology models include the use of performance data to support many of the decisions that have to be made during their application. For example, Van Tiem, Moseley, and Conway (2004) include the analysis of work, worker, work environment, and organizational environment as data are collected to support decisions related to "need or opportunity." Likewise, many performance technology projects rely on data collected through (1) interviews with groups including direct recipients, supervisors, managers, clients, and the clients' clients, (2) performance data regarding current and desired results at all levels of evaluation, and (3) estimates of return on investment of alternative interventions to support their decision making.

Furthermore, deriving the goals and objectives that drive the perceptions of a successful project also commonly requires the review and analysis of the strategic plans of the partner organizations and other stakeholders. In these documents, the performance technologist should identify long-term strategic objectives that can guide his or her decisions throughout the project. For example, if an organization's client is planning to grow international markets by developing new manufacturing facilities in Asia, then the performance technologist should survey the capacity of potential interventions to meet these requirements. Efforts to select one or more appropriate interventions could then include one or more of the following: cultural impact of proposed solutions, translation of training materials, and differing return-on-investment projections based on the costs of performance solutions in Asian markets. All of these would be useful considerations for performance initiatives if they are evaluated from a variety of perspectives on *success*.

HPT IMPLICATIONS

Like few other processes in an organization, performance technology projects regularly have the unique opportunity to align individual performance and decision making with the strategic objectives of an organization and its clients. Robinson and Robinson (1996) affirm that "someone in the role of performance consultant thinks in terms of what people must do if business goals are to be achieved" (p. 10). Yet sometimes the alignment of decisions with the goals of the organization is assumed, and other times performance is "suboptimized" when decisions are aligned only with personal or project goals instead of broader organizational objectives. Unfortunately, each of these paths increases the odds that the performance technology will not contribute the required results and that the project will not be perceived as a success from one or more perspectives. To neutralize these obstacles to success, our decisions at each phase of a performance technology project should be based on an analysis of the strategic objectives of the organization and its partners.

Table 8.2 illustrates a variety of questions that a performance technologist will typically ask at some point during the development and implementation of a performance intervention. Using the four major phases of the human performance technology model presented by Van Tiem and others (2004), the table offers

Table 8.2. HPT Considerations for Strategic Alignment.

<i>Sample Decisions in Leading an HPT Project</i>	<i>Suggested Steps for Strategic Alignment</i>
Phase One: Performance Analysis	
Which of the organization's strategic objectives are not being accomplished?	Review the strategic plan of the organization to verify the objectives. If objectives are not clear, work with the organization to develop an effective strategic direction.
How are the organization's strategic objectives measured?	Identify criteria currently being used to measure the achievement of strategic objectives. If measurable criteria are not associated with objectives, then work with the organization representatives to define the results they want to accomplish.
How are the organization's strategic objectives aligned with those of clients and clients' clients?	Review the strategic plans of clients and clients' clients.

(Continued)

Table 8.2. HPT Considerations for Strategic Alignment. (Continued)

<i>Sample Decisions in Leading an HPT Project</i>	<i>Suggested Steps for Strategic Alignment</i>
How are the organization's strategic objectives aligned with other internal departments or projects?	Determine the strategic objectives of internal departments and projects.
What are the gaps in individual or group performance?	Use the strategic objectives to establish the desired performance as a benchmark for evaluating current performance.
How should individual or group performance be measured?	Select measurement criteria for individual or group performance that are aligned with the objectives of the organization and its partners
What results are required of the project for the organization to be successful in accomplishing its objectives?	Use the strategic objectives of the organization and its partners to define the results to be accomplished by the performance technology project.
Phase Two: Cause Analysis	
What current programs or projects are associated with the performance gap?	Expand your view of organizational structure and initiatives with a review of the current programs and projects associated with the performance.
Which future initiatives may be associated with the performance gap?	From the strategic plan, identify future initiatives that may have influence on the performance gap or that may be affected by the performance gap.
Are causes of the performance gap also associated with the accomplishment of other strategic objectives of the organization?	Review the organization's strategic objectives to determine other objectives associated with the causes of the performance gap.
How are the organization's suppliers (that is, partners), associated with the causes of the performance gap?	Review the strategic objectives of the partner organizations in relation to the performance gap.
Are the performance objectives at the individual or group level associated with the performance gap?	Analyze the performance objectives at the individual or group level to determine if misalignment is a cause of the performance gap.

Table 8.2. (Continued)

<i>Sample Decisions in Leading an HPT Project</i>	<i>Suggested Steps for Strategic Alignment</i>
Phase Three: Intervention Selection, Design, and Development	
Which performance technology interventions can accomplish the required results?	Use the strategic objectives of the organization and its partners to define the results that must be accomplished by eligible performance technology interventions.
What criteria related to the required results will be used to evaluate alternative performance technology interventions?	Align the measurable criteria for evaluating alternative interventions with the measurement criteria used to assess the accomplishment of strategic objectives.
How does the selected intervention influence the accomplishment of the organization's strategic objectives in other departments or units?	Verify that the selected intervention will assist in the achievement of the organization's strategic objectives in other departments or units.
Are the specific decisions associated with the design of the intervention going to accomplish the necessary results?	Use the measurable criteria for measuring both project objectives and the organization's strategic objectives to determine if specific design decisions are going to achieve necessary results.
Are development plans consistent with the organization's strategic objectives?	Review the strategic plan of the organization to ensure that development plans are aligned with current and future initiatives.
How much time and how many resources should be devoted to this project?	Review the prioritized strategic objectives of the department and organization to determine the relative priority of the project in relation to other projects.
Phase Three: Intervention Implementation and Change	
Are implementation strategies consistent with the organization's strategic objectives?	Review the strategic plan of the organization to ensure that implementation strategies are aligned with current and future initiatives.
What revisions to the original design of the intervention are necessary?	Determine if revisions will better support the achievement of the project's objectives and the accomplishment of the organization's strategic objectives.

(Continued)

Table 8.2. HPT Considerations for Strategic Alignment. (Continued)

<i>Sample Decisions in Leading an HPT Project</i>	<i>Suggested Steps for Strategic Alignment</i>
Can the organization's strategic objectives be used to promote the value of the changes brought with the performance technology intervention?	Coordinate the alignment of the selected intervention with the strategic objectives of the organization, its clients, and clients' clients.
Phase Four: Evaluation	
Is the performance technology project successful from the perspective of the organization?	Determine the impact (that is, the measurable results of the project on the achievement of the organization's strategic objectives).
Is the performance technology project successful from the perspective of the organization's clients and the clients' clients?	Determine the impact (that is, the measurable results of the project on the achievement of the clients as well as the clients' clients' strategic objectives).
Is the performance technology project successful from the perspective of your partners in the design, development, and implementation of the project?	Determine the impact (that is, the measurable results of the project on the achievement of the strategic objectives of others associated with the project).
When and how should the performance technology intervention be revised?	Review any changes to the strategic objectives of the organizations, its clients, and the clients' clients, and continue to measure the impact of the intervention.
Are there unanticipated strategic benefits from the project?	Review the strategic objectives of the department and organization for new opportunities to accomplish useful results.

examples of how performance technologists can use the strategic directions of organizations and their partners to guide the decisions in each of these phases.

SUMMARY

The success of performance technologies is regularly assessed by their ability to achieve measurable results that are aligned with the strategic direction of the organization and its partners. As a result, the daily decisions made by performance technologists and others should be based, at least in part, on an understanding both of the strategic objectives set by the organization, its clients, and

the clients' clients and of the criteria each partner will use to define *success*. Through effective planning at the Mega, Macro, and Micro levels (Kaufman, Stith, Triner, and Watkins, 1998; Kaufman, Oakley-Brown, Watkins, and Leigh, 2003), performance technologists can support this type of pragmatic decision making by guiding the development of strategic plans that offer clear and measurable descriptions of what results are to be accomplished and how those results are aligned with the objectives of the organization's partners. In addition, through the analysis of criteria used by each of the multiple partners to define *success*, performance technologists can better prioritize and use strategic objectives when making decisions. Together, these processes can support performance technologists in aligning their daily decision making with the strategic directions of the organization and its partners.

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