

DESIGNING FOR PERFORMANCE, PART 2: SELECTING YOUR PERFORMANCE TECHNOLOGIES

Ryan Watkins

Strategic plans and performance objectives define the results to be accomplished, but selecting a suitable set of performance technologies for your organizations requires more than just knowing the intended benefits. The systematic procedures described in the article will guide you through practical processes and valuable tools for identifying potential performance technologies, evaluating alternatives, and developing a system of performance-focused activities that accomplish desired results.

IN THIS, THE SECOND of three articles on designing for performance, you will discover processes, tools, and techniques that can guide your selection of worthwhile performance technologies. Building on the steps described last month in “Designing for Performance: Aligning Your HPT Decisions from Top to Bottom” (Part 1), you can use these resources to evaluate and select appropriate performance technologies that accomplish desired results. The systematic steps for designing, developing, and implementing the selected performance technologies will then be presented in the third, and final, article.

PLANNING FOR PERFORMANCE

For individuals and organizations alike, planning is the essential first step in achieving desired results. Yet, planning by itself is never enough. For intentions to be transformed into results, you have to select the right processes. This is always true, whether you are working to lose weight or working to improve individual or organizational performance. The desire to achieve valuable results remains the same, but the available options vary based on the context. When you choose to lose weight, for instance, you can select from options that include low-carb diets, low-fat diets, yoga, Thighmasters, and even grapefruit

extracts. Equally, when you want to improve organizational performance you might consider a mix of performance technologies such as balanced scorecards, financial rewards, classroom training, coaching programs, and job aids to accomplish desired results.

Subsequently, the design of effective performance systems requires that you align strategic ambitions (that is, the results you and your partners want to accomplish) with practical processes (performance technologies) to accomplish worthwhile results.

PERFORMANCE

During the transition from establishing a strategic plan to selecting and designing performance improvement systems, a continuing focus on performance is essential. Hence, the operational definition you use for performance should be central to your performance improvement efforts. In 1989, Gilbert and Gilbert defined performance as a combination of both behaviors (what people do) and performance (what people leave behind). However, this two-dimensional definition often blurs our focus when we are selecting performance technologies (see Watkins & Leigh, 2001). This blurring occurs because the two-dimensional definition assumes that there is a constant and direct relationship between improving how an

individual, team, or organization performs and the results accomplished. Unfortunately, this is not the case in most situations.

Improving how individuals or groups perform does not guarantee that they will accomplish the desired results. Nor does improving their processes or procedures necessarily improve their performance (that is, results). It is therefore important to distinguish between performing and performance. For performance improvement, you will want to remain focused on the latter (that is, the results to be accomplished) before you make any decisions about how those results can best be accomplished. By applying this results-oriented definition of performance to your improvement efforts, you can better align the processes you select with the products, outputs, and outcomes you desire.

PERFORMANCE ASSESSMENTS

As described in Part 1, the first practical step in translating your strategic intentions into valuable results is to develop meaningful performance objectives. These performance objectives can now be used to guide your decision making throughout the remainder of your improvement efforts. Every decision, especially those related to which performance technologies can be used to achieve results, should be measured by the standards set in the performance objectives.

Performance objectives by themselves, however, do not provide all of the essential information for guiding improvement decisions. The objectives you use in decision making must be related to specific performance assessments. For instance, if your performance objective is to lose weight, then the performance assessment you select might be the weight indicated on your bathroom scale each morning. Similarly, if your organization's performance objective is to improve workplace safety to the point where no employees are injured, your choice of performance assessment could include measures based on OSHA standards or records from your on-site safety officers. In either case the statement about what is to be accomplished is clarified by the addition of practical measures that will tell you when you are successful.

The clarity offered by performance assessments is especially critical when you are deciding which performance technologies should be selected, designed, developed, and implemented in your organization. Together with the performance objectives, these assessments provide the criteria and standards with which to evaluate various performance technologies. With the large number of performance technologies now available (such as mentoring, electronic performance support, incentive systems, e-learning, and

organizational reengineering), choosing the right combination of technologies for your performance improvement system can be challenging. Performance assessments are key for making critical evaluations that identify the performance technologies capable of accomplishing useful results (see Table 1).

As a Human Performance Technology (HPT) professional, you will use the selected performance assessments to evaluate each and every performance technology that is considered a potential ingredient in your performance improvement system. From coaching to training and quality circles to 360-degree feedback, each performance technology alternative should be appraised as an option for your organization, using the same objectives and assessments as those that will be used to evaluate performance technology success after implementation. To provide fair appraisals of each option, it is important that you systematically identify or create the necessary assessments for each performance objective before you begin to identify and review potential technology solutions.

PERFORMANCE ANALYSIS

Inevitably, you will require a comprehensive system of several performance technologies to accomplish most performance objectives. The accomplishment of performance objectives in your organization may require two, three, four, or even more performance technologies to achieve strategic ambitions. For example, combinations such as (1) workplace redesign and process reengineering or (2) recruitment programs, retention projects, and e-learning resources may be used to create an improvement system that achieves desired results. Although performance objectives and assessments provide criteria for selecting performance technologies, the performance analysis is an essential technique for determining the types and number of performance technologies that you should consider.

Use a performance analysis to systematically analyze each performance objective (or cluster of objectives) and to define the contributing results necessary for success. Because each performance objective will require the accomplishment of a number of prerequisite results to produce the achievement of the objective, use a performance analysis process to identify those results and illustrate their relationships across objectives. The results of the performance analysis will then provide you with a clear chart of the products that must be accomplished to support the attainment of desired performance.

Performance analysis should not, however, focus solely on problems, root causes, or quick-fix solutions. Your performance analysis should also identify factors that will strengthen or increase results. Then you can identify the

TABLE 1		STEPS IN DEVELOPING USEFUL PERFORMANCE ASSESSMENTS
STEPS TOWARD SUCCESS	BRIEF DESCRIPTION	
Step 1: Group objectives	Capitalize on shared measures of performance and reduce redundancies in evaluating potential technologies by systematically aligning performance objectives. Analyze, link, and cluster performance objectives that have related measures. Look for similarities, associations, sequences, and opportunities to share performance indicators throughout all divisions and departments in the organization. For example, identify the three or four performance objectives that will each require workplace safety records as a key element in their measurement and group these together.	
Step 2: Define desirable characteristics	For each performance objective or cluster of objectives, identify a set of desirable characteristics in a performance assessment. For instance, you may want to include in your list financial cost, personnel cost, number of indicators, partner agreement, validity, reliability, or a combination of hard data and soft data. Only assessments that demonstrate these characteristics will be considered as measures for these objectives.	
Step 3: Select or create	Use both the clustered performance objectives and desired characteristics as guides for identifying potential measures of success. Identify several potential measures for each performance objective. Having options is important; without them it is difficult to determine if you have the most appropriate measures.	
Step 4: Verify alignment	In pairing performance objectives with performance assessments, it is easy to lose focus and select measures that are not quite aligned with the desired results detailed in the objectives. Review the complete set of selected assessments to ensure that together they support the necessary measurement of accomplishments of all performance objectives. Without this verification you could end up using inappropriate criteria to select a set of performance technologies and, as a result, end up with less than ideal results.	

Source: Based on Watkins, 2007.

contributing factors (for example, motivation, vision, knowledge, skills, resources) that are necessary for the accomplishment of performance objectives at every level of your organization’s strategic direction. This forward-looking approach to performance analysis defines the building-block results that are necessary for the achievement of performance objectives.

By applying a systematic performance analysis process (see Table 2), you can also identify barriers that are preventing current processes from achieving desired results and improvement opportunities to introduce new, complementary processes. This will ensure that you have a complete perspective of what is required to accomplish your performance objectives. With the results of the performance analysis you can then verify that the performance technologies you consider will achieve the desired results and not just improve performing without improving performance.

At times, the results of a performance analysis will suggest that variations of the current processes can achieve necessary results without adding new performance technologies. More often than not, however, a performance

analysis will identify necessary results that current processes are not able to contribute. Here, use the performance analysis to identify the results to be contributed by selected performance technologies.

For example, your organization might be underusing an employee retention program. A performance analysis can identify supplemental performance technologies (such as current incentive systems, recruitment projects, or training) to assist the program in accomplishing targeted performance objectives. Likewise, the analysis can also identify necessary results that would benefit from the design and development of new performance technologies. You can use the performance pyramid (see Figure 1) to structure your performance analysis efforts.

The formality and duration of the performance analysis can vary and should be related to the criticality (that is, short- and long-term costs and consequences) of the performance objectives. For example, a seven-week analysis to determine the desired characteristics of colored paper for the office copier is likely more extravagant than required. Similarly, a weeklong performance analysis

TABLE 2		STEPS IN IDENTIFYING PERFORMANCE TECHNOLOGY OPTIONS	
STEPS TOWARD SUCCESS		BRIEF DESCRIPTION	
Step 1: Conduct a performance analysis		Performance analysis is more than just detailing the problems or shortcomings in an organization. To improve performance, look beyond current problems, failures, or challenges. Use systematic performance analysis to examine what results must be achieved for desired performance objectives to be accomplished. Begin by examining a variety of contributing factors and their interactions to determine what processes can contribute to the accomplishment of useful results. Explore all of the performance factors that lead to desired results, noting that missing or failing factors can jeopardize success. This process allows you to identify performance technologies that both address current problems and capitalize on future opportunities.	
Step 2: Identify potential technologies		<p>Look for processes, tools, techniques, or resources that (a) accomplish the useful results defined in the performance objectives, (b) achieve the necessary results as measured by the performance assessment, and (c) address each of the contributing factors required for success. Review the current literature in fields such as performance improvement, organizational management, computer science, psychology, human resource management, and other associated disciplines.</p> <p>Find multiple performance technologies from which you can select the appropriate set of solutions for meeting identified performance objectives. Your list of potential performance technologies should be quite long, because each performance objective will have multiple options. You can use the performance pyramid (see Figure 1) to organize and cluster your HPT options.</p>	
Step 3: Evaluate your options		<p>Use the criteria of each performance objective (or cluster of objectives) and the measures of each performance assessment to evaluate the alternative performance technologies. Most often your performance objectives will require a number of performance technologies to achieve desired results. Routinely, favorite or preferred solutions will end up not being part of the improvement effort after they have been evaluated based on the performance objectives and assessments.</p> <p>Use the planning, assessment, and analysis results from each of the previous steps to justify your selections. Data and systematic processes will help you defend the set of selected performance technologies and gain vital support for the accomplishment of useful results.</p>	
Step 4: Select a set of technologies		Most often, single performance interventions cannot address each of the contributing factors to performance or accomplish all the necessary results for most organizations. Work with your organizational partners to select the set of performance technologies that will best accomplish the defined objectives. Often this process requires some level of compromise among the partners, because priorities will have to be established. When selecting solutions, be sure that the selected performance technologies will work in combination to accomplish the required results (and not contribute to performance problems in other parts of the organization).	

Source: Based on Watkins, 2007.

before moving forward with a million-dollar e-learning purchase is not likely to be adequate for practical decision making (see Watkins & Wedman, 2003; Harless, 1975). Use prioritized performance objectives and their relationship to the strategic directions of your organization and its partners to develop a performance analysis plan.

PERFORMANCE TECHNOLOGIES

For performance technologies to accomplish valuable results, you must identify, evaluate, and select the right mix of activities. Fortunately, a large number and great

variety of performance technologies are available to today's organizations. From electronic-based technologies (such as e-learning, podcasts, PDAs, and online performance support tools) to concept-based technologies (such as needs assessment procedures, strategic planning frameworks, and coaching models), you will have numerous performance technologies to evaluate when selecting the set of solutions that will help you and your organization accomplish desired results.

To begin, use the results of the performance analysis to define the components of a complete performance improvement system that must be addressed through



Source: Figure is based on similar graphic in Watkins, 2007; Watkins & Wedman, 2003; Wedman & Graham, 1998.

FIGURE 1. THE PERFORMANCE PYRAMID WITH ASSOCIATED PERFORMANCE TECHNOLOGIES

the performance technologies you select. Use the performance pyramid to identify the building blocks that should be included in your system (such as strategic direction, skills and knowledge, motivation and self-concept, or expectations and feedback). Use a systematic and comprehensive process to identify the many performance technologies available for accomplishing each performance objective (or cluster of objectives). The list of potential performance technologies should not be limited to those used in your organization in the past or to those suggested by internal or external clients. When looking for potential technology solutions, talk with employees who currently perform related tasks, interview outside businesses that may have had similar experiences, read journals and magazines from multiple disciplines, and take careful notes about each performance technology that may be of value. Identify at least two potential performance technologies for accomplishing results related to each building block of the performance pyramid.

Each potential performance technology should then be evaluated against the criteria established in the performance objectives and assessments. Use these as standards for making the often difficult choices among the various options that are available. It is especially important to be systematic in your evaluation. The data used to evaluate each option, and the orderly processes you apply in making your decisions, will be essential when you are justifying your choices and persuading colleagues to fully support the chosen performance interventions.

It is also useful to review the demands that new performance solutions will place on those responsible for their implementation. Their capacity to apply the selected performance solutions should be a factor in your decision, along with their motivation and support for the challenges and changes related to the introduction of any new performance improvement system.

You can also improve the odds of accomplishing desired results by involving both internal and external partners in selecting the appropriate mix of performance

technologies. Share your identification and evaluation processes, along with the criteria established through the performance objectives, with each of your partners. Next, encourage them to champion aspects of the initiative that affect their division or organization. They can then help guide the individual interventions to the achievement of useful results.

Finally, before you begin to design, develop, and implement any performance technologies, you should again confirm that the selected mix of performance technologies is adequately aligned with the desired results of your organization and its partners. Verify that each performance technology is clearly linked to the results of the performance analysis and the performance objectives established at the individual or team, organizational, and societal levels. You can use a simple table to make sure that each selected performance technology will make a valuable contribution to the performance improvement system (see Table 3).

PERFORMANCE IMPROVEMENT SYSTEMS

Performance objectives define the results you wish to accomplish based on your analysis of the strategic ambitions of your organization and its partners. Accomplishing these results is then left to the set of performance technologies that you select for implementation. This set may be a combination of performance appraisals and coaching for some performance objectives and a combination of training, new equipment, and incentives for others. No matter which performance technologies are included in your final set of solutions, it is your responsibility to ensure they work together to achieve the desired results of your organization and its partners.

The development of a set of performance improvement technologies involves not only the selection of appropriate single interventions but also the development of a comprehensive system. As you move ahead with the design, development, and implementation of the multiple performance technologies in your system, you should work to avoid suboptimization (that is, the improvement of performance in one subsystem at the expense of performance in other subsystems or in the system as a whole). At each step on the path toward improved performance, verify that the decisions you make are developing a comprehensive system that will accomplish desired results.

Performance improvement systems are only as strong as their weakest performance technology. You would not, for instance, want to develop costly training and performance appraisal technologies only to learn later that reaching the desired objectives also requires an intervention aimed at performance capacity (such as an updated recruitment program or new resource allocation plan). Developing a complete performance system requires that you continually review your decisions from multiple perspectives and apply systemic tools for selecting appropriate technology solutions.

NEXT STEPS TO SUCCESS

The performance technologies selected for the performance improvement system in your organization must be aligned with those factors known to contribute to achievement of useful results. The performance analysis provides a systematic process that can both define the necessary results and guide your search for potential performance technologies. From balanced scorecards and

TABLE 3 VERIFY SELECTED PERFORMANCE TECHNOLOGIES ALIGN WITH PERFORMANCE OBJECTIVES		
PERFORMANCE OBJECTIVES	CONTRIBUTING FACTORS TO SUCCESS	SELECTED PERFORMANCE TECHNOLOGIES
Objective A	Competence: knowledge and skill	a. E-learning b. Job aids c. After-work educational programs
	Expectations and feedback	a. Balanced scorecard initiative b. Quarterly performance reviews
	Motivation and self-concept	a. Mentoring b. Career counseling

Source: Based on Watkins, 2007.

coaching programs to training and job aids, the performance technologies likely to produce useful results can then be evaluated, compared, and prioritized using grounded criteria and standards established for each performance objective. This systematic process for identifying options and evaluating their value is an essential step to the achievement of useful results.

The selection of performance technologies based on assumptions, organizational politics, or someone's favorite solutions is never advisable. These and other nonsystematic processes reduce your chances of accomplishing desired results on a consistent basis. In contrast, the findings of a systematic selection process can align technologies with performance objectives, justify your decisions, and improve performance (Watkins, 2007).

Although selecting the appropriate performance technologies is a critical step toward accomplishing desired results, the selected technologies still have to be designed, developed, tested, and implemented for desired results to be achieved. You will also want to use systematic processes for designing and developing each of the performance technologies in your system. Managing the development of a performance system, therefore, requires skillful coordination and leadership to create a synergistic system where desired results are achieved effectively and efficiently. In the third, and final, article in this series on designing for performance, you will find guides for producing performance technologies that accomplish results in your organization. 🏠

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RYAN WATKINS, PhD, author of *Performance by Design: The Systematic Selection, Design, and Development of Performance Technologies That Accomplish Useful Results*, is associate professor of educational technology at the George Washington University in Washington, DC. Ryan is also the author of four other books, including the best-selling *75 E-Learning Activities: Making Online Courses More Interactive*, and the *E-Learning Companion: A Student's Guide to Online Success*. In addition, he is the author of more than 60 articles and chapters. Recently Ryan was a visiting scientist with National Science Foundation, and he has been an active member of ISPI for the past decade. Ryan may be reached at www.ryanwatkins.com or email him at rwatkins@gwu.edu.