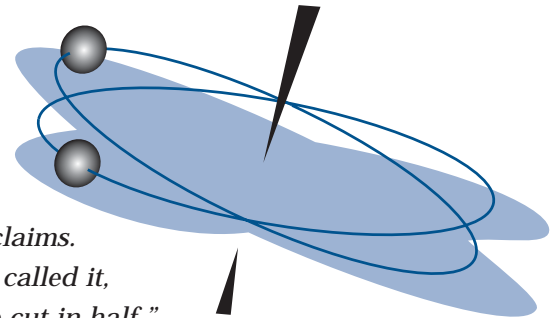


A Process for Aligning Performance Improvement Resources and Strategies

by Ryan Watkins and John Wedman

[voice mail message] “Andrea. This is Sarah. I just got a report showing we are paying an average of \$10 more than our competitors on auto-damage insurance claims. Get that case-based reasoning system, or whatever they called it, ASAP. By the end of next quarter, I want to see that gap cut in half.”



Sarah locked in on case-based reasoning (CBR) as the solution to the insurance claim payment problem after reading an in-flight magazine article about how it was being used to improve medical diagnosis. In her role as a performance consultant, Andrea had supported the concept of CBR when Sarah asked about it, but she had no idea Sarah was in the process of deciding that CBR would remedy the insurance claim payment situation. Andrea now has the double challenge of addressing the performance problem *and* dealing with Sarah’s conviction that CBR will solve the problem. Ready-fire-aim! Sound familiar?

Starting with the initial decisions that lead to the formal identification of a performance problem, and continuing through the selection of an appropriate set of solutions, the performance consultant must navigate (and typically guide others) in the practice of *assessing* needs and assets, *analyzing* performance problems and tasks, and *answering* critical questions. Applied correctly and together, each of these processes generates the data for aligning performance improvement resources and strategies, helping to avoid the “ready-fire-aim” phenomena. Short-circuiting these processes frequently leads to ineffective strategies, wasted resources, or worse—exacerbated performance problems.

Introduction: Alignment of Resources and Tactics

Resource and strategy alignment is a simple principle to understand. To solve a performance problem, the resources and tactics applied to resolving the problem must be both aligned with (targeted toward) the problem and supportive of the organization’s overall strategic direction. Strategies, resources, and tactics are aligned with solving a problem when: a) adequate and appropriate resources are committed to ameliorating the problem; b) mutually compatible performance improvement tactics are applied to the

problem; and c) collectively, the resources and tactics converge on the problem in a timely manner to accomplish useful internal and external results. Aligning of strategies, resources, and tactics is the antithesis of the “spray and pray” approach of employing an array of resources and tactics in the general direction of a problem with little or no evidence that those solutions are the best means to resolve the performance problem.

Alignment of resources and tactics with an organization’s strategic direction results from a series of decisions that lead to the implementation of performance improvement interventions (for example, training, electronic performance support, process redesign, CBR, etc.). By applying the three processes of assessing, analyzing, and answering, the performance consultant can generate the data required to apply the business logic to the performance problems at hand (see Stolovich, 2002). And while many of us may believe that these early decisions are typically made in dark alleys or are knee-jerk reactions, the truth is that more often than not, performance consultants have a greater ability to affect these initial considerations than they realize. At the very least, performance consultants have the opportunity to influence the decisionmaking processes as long as they can demonstrate a clear business logic for the performance improvement tactics that are recommended. These processes of assessment, analysis, and answering generate data for aligning performance improvement resources and tactics, with useful results.

- **Assessing:** Identifying, defining, prioritizing
- **Analyzing:** Examining and investigating
- **Answering:** Finding solutions

Figure 1. The Three Processes Defined.

The extent to which the assessing, analyzing, and answering processes are implemented in a systematic and systemic fashion often depends on the role of the performance consultant in early decisionmaking. If the consultant is solely concerned with order fulfillment and getting a product/service out the door, then the potential for assessing, analyzing, and answering is greatly diminished. However, if he or she is primarily concerned with results, including bottom-line impact for clients, then assessing, analyzing, and answering are paramount considerations. Concentrating on accomplishing results, rather than on implementing solutions, allows the performance consultant to help ensure that the performance improvement resources and tactics align with one another and are applied toward the accomplishment of desirable results that add value for both internal and external clients.

For each of the three processes there are related theories, models, tools, and techniques that enable the performance consultant to quickly and reliably lead individuals and

teams through the decisionmaking processes, leading to the identification and selection of the most appropriate solutions while conserving valuable resources. These processes, however, require a fundamental understanding of *performance*.

Performance

It is rarely argued today that individual and organizational performance is central to the success of organizations and their clients. But what is performance? And why is a definition of performance so essential to developing a more powerful perspective on the alignment of resources and tactics?

Performance can be defined as the combination of both behaviors (what we do) and accomplishments (what we leave behind) (Gilbert & Gilbert, 1989). Unfortunately, managers, leaders, and others often blur the relationship of performing and performance, focusing too much on the behaviors of individuals and groups and too little on what the individuals and groups accomplish.

Most of us will likely spend the majority of life primarily focused on how things are to be done and how can they be done better. Our focus on *how* is grounded in the confidence that increased efficiency will lead to valued performance (for example, products, outputs, and outcomes). Based on this assumption, we experiment with tweaking discrete variables of behavior, evaluating employees, re-engineering processes, benchmarking the processes of other organizations, or managing the changes brought to the organization...always remaining focused on performing better (Watkins & Leigh, 2001). Unfortunately, we are not necessarily focused on achieving desired results.

Performance is more usefully defined as the value-added results or accomplishments of the individual and the organization, regardless of preferred or mandated behaviors. Achieving performance is therefore a results-driven activity requiring decisions to be based not on preferred processes or activities, but rather required results (see Watkins & Leigh, 2001). This is the type of performance that we want to focus on in our decisionmaking, especially when considering which (if any) interventions may be appropriate for resolving an identified performance problem.

The theories, models, tools, and techniques used to align resources and strategies help ensure that performance improvement initiatives accomplish the value-adding results required in today’s marketplace. The goal of assessing, aligning, and answering is to establish and maintain a focus on the achievement of useful results throughout the performance improvement process. Simply put, aligning all resources and tactics (identified through the analysis process and selected in the answering process) around a focus on the accomplishment of beneficial results (specified

in the assessment process) will lead to the improvement of desired *performance*. In practice, the three processes are inter-related and intertwined (not sequential) and are often carried out in a nonlinear manner guided by an initial assessment of performance gaps.

Mega-Level Considerations	What results does our organization contribute to the long-term success of partners, stakeholders, clients, and client's clients?
Macro-Level Considerations	What results do we contribute to the long-term success of our organization?
Micro-Level Considerations	What results do I contribute to the team or unit in which I work?

Figure 2. Three Levels of Consideration (Source: Kaufman, 1992, 1998, 2000; Kaufman et al., 2001).

Step 1. Assessing Value or Worth

In practical terms, assessment is a process used to determine the value or worth of something (Scriven, 1967). And for performance consultants who are interested in individual and organizational *performance*, assessment focuses on results. We commonly refer to this type of assessment as a needs assessment, though not all processes called needs assessments are focused on performance and results. See Watkins, Leigh, Platt, and Kaufman, for a survey and analysis of needs assessment approaches (1998).

How does one go about determining the value and worth of the full range of results that are (and can be) accomplished by individuals, teams, departments, and organizations? Value is derived from the relationship between current performance and desired performance (that is, results required for continuing success). Only when both have been defined in measurable terms can an assessment of their relative value to the individual, organization, and community of external clients be made. Value is most commonly associated with the estimated costs including nonmonetary costs of closing a gap between current and desired performance, as compared to the costs of not closing that gap.

To the performance consultant, assessment is a process whereby individuals and organizations can approximate the value of various discrepancies between current and desired results. These determinations of value directly inform decisionmaking regarding the prioritization of gaps in performance and can be derived from the costs of addressing the gaps in performance versus the costs associated with ignoring the gaps (Kaufman, 1998; Kaufman et al., 2001). Without systematic assessment, performance improvement interventions may not close these discrepancies in the areas most vital for the long-term health and well-being of the organization, the individuals that comprise the organization, or the external clients and partners who are served by the organization.

Often, in well-meaning attempts to develop rapid responses to organizational distress calls (for example, "we have to have training in..."), performance consultants respond by recommending solutions they know a great deal about developing, but without fully defining or understanding what gaps in performance exist or how those gaps are prioritized within the organization's long-range strategic direction. Frequently, this results in training and other performance

interventions that can waste scarce resources or even exacerbate the performance problem with inappropriate solutions that drain resources from functional subsystems.

The assessment process is complex and can be approached from several perspectives. Three assessment perspectives are described below: strategic direction, needs, and assets.

Assessment of Strategic Direction

Today, committing to the success of one's organization requires an additional commitment to the success of one's clients and those clients' clients. In effect, this involves committing to the creation of results that add value not only to the conventional bottom line of one's own organization, but that also contribute to the long-term success of the community in which the organization functions (Kaufman, 2000; Popcorn, 1991).

The interdependent relationship of individual, organizational, and societal success is now more apparent than ever. No longer can organizations, private or public, enjoy long-term financial success without making some level of contribution to the benefit of their clients and shared communities. This new reality of organizational life is likely to be partially due to the increased competition for consumer dollars, growing environmental awareness, and a society in which legal attacks on organizations are an everyday occurrence. Whatever the cause, performance improvement efforts must be sensitive to the strategic direction of the organization in the broadest possible context. The systemic nature of this approach ensures that all decisions lead to positive consequences—not just for the organization, its employees, and stockholders, but for the shared community in which with the organization and it partners exist as well (see Figure 2).

Many of us have been told for years that the only goal for a business is financial profit. The limits of a tunnel-vision focus on financial profit is clearly evident in images of corporate executives in handcuffs being taken to prison for financial improprieties. Thus, when making decisions (including those regarding the usefulness of any performance improvement initiative) it is important to ensure that we are committed to delivering organizational contributions that also add value for external clients and society, now and in the future. This alignment of strategic directions at multiple levels

of an organization, both internal and external, is essential for performance improvement initiatives to have the desired impact. Consider that if human resources is headed in one direction, finance in another, and the external clients in a third, the potential benefits of any performance improvement initiative are quickly diminished, since meeting the three divergent goals is unlikely. By starting with assurances that all goals and objectives are aligned with a unified strategic direction focusing on both internal and external results, decisions regarding performance improvement can be aligned and linked within an organization as well as with the requirements of clients and clients' clients (Kaufman et al., 2003).

When conducting an assessment of strategic direction, some individuals will likely want to focus primarily on the destination (what results should be accomplished), with the assumption that there is adequate data defining where the organization is currently. And others in the organization will want to focus primarily on describing the current status of the organization (what results are now being accomplished), with the assumption that everyone already knows where they are headed and what results are required to get there. Unfortunately, neither perspective is sufficient, and often very little is formally known about either. The long-term goals and objectives of an organization (as well as those of its partners, clients, and employees) are an indispensable component to any assessment. This helps define both the indented direction ("what should be") as well as the starting points ("what is"). By identifying and defining discrepancies between these two at the strategic level, assessment offers data necessary to align performance improvement tactics with an organizational strategic direction.

Assessment of Needs

The assessment of strategic direction provides a fundamental element required for moving the assessment process from visions and goals to defined performance gaps. *Needs* can be defined as discrepancies between current performance and required performance. Performance in this context is defined by the results of individuals, organizations, and communities, rather than the activities and interventions that may lead to performance.

Based on the above definition of need, then, we can develop a definition of needs assessment for performance consultants. A needs assessment is a process by which gaps between *what-is* results and *what-should-be* results are defined and prioritized based on the cost to meet the need versus the cost to ignore the need (Kaufman, 2000). This process of needs assessment provides decisionmakers with the information necessary to make rational judgments as to which needs must be addressed, and in which order (Watkins et al., 1998). Additionally, resources can then also be allocated based on these determinations. Without adequate assessment data, decisions regarding the development

and implementation of interventions are left to fads, arbitrary concerns, office politics, and other risky tactics that may waste resources and fail to accomplish required results.

An airline, for example, may envision a future in which their profits are six to seven times those stated in their current annual report. Yet without considering the safety and well-being of their clients and clients' clients (which would include passengers, those shipping packages, and most all of us on the ground in one way or another), the airline may be tempted to focus exclusively on the financial bottom line at the cost of safety. Such a mindset leads to choosing vendors only on the basis of the lowest bid on maintenance contracts, pilot training, food preparation, baggage handling, or other passenger safety-related services. At first no harm may be done, but as this frugal attitude works its way through the organizational culture, the safety and well-being of passengers can quickly become a secondary consideration, leading even the most professional of employees to make decisions without considering their overall repercussions.

Through integrated needs assessments (see Kaufman et al., 2003) the airline could align its goals of additional profits with the accomplishment of value-added results for clients. After all, it's unlikely that an airline without a strong safety record will stay in business for long. Furthermore, through prioritizing gaps in results so they are aligned with both organizational goals and external client requirements, management could provide a clear direction and set of expectations for each airline employee as he or she carries out the work. This could help ensure that actions of baggage handlers, for example, are clearly aligned with the expected results at the individual or team (Micro), organizational (Macro), and customer or community (Mega) levels.

Assessing needs can be challenging and time consuming. Consequently, we suggest that a "layered" approach be employed, allowing assessment to be an ongoing activity, not a prerequisite activity (Tessmer & Wedman, 1995; Wedman & Tessmer, 1993). By continuing to provide decisionmakers with needs assessment data throughout the year, organizations can maintain their focus on accomplishing useful results. Empowered decisionmakers throughout the organization are more likely to move forward in a common, aligned direction.

Assessment of Assets

Results can only be accomplished through the use of resources (human, physical, financial, etc.) within organizational processes (manufacturing, designing, developing, creating, writing, etc.). An assets assessment is conducted to determine an organization's capacity to close the gaps identified within a needs assessment. An assets assessment seeks to define and prioritize inconsistencies between the current and desired capacity. Whereas a needs assessment focuses on the gap between *what-is* results and *what-should-be*

results, an assets assessment focuses on gaps between current resources and processes and those that are required for the accomplishment of the results defined in the needs assessment (see Triner et al., 1996). Taken together, needs and assets assessment activities can provide an organization with a complete perspective that aligns all that the organization uses and does, with useful results (see Figure 3).

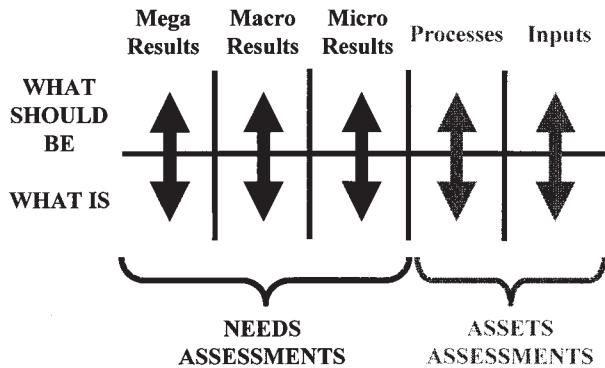


Figure 3. Needs and Assets Assessments as They Relate to the Organizational Elements Model (Based on Kaufman, 1992, 1998, 2000; Kaufman et al., 2001).

It should be noted that an assets assessment can be difficult to conduct because indicators of capacity are often masked. For example, an organization may wonder if there actually is a human resource shortage or if performance problems are due to standard operating procedures that are getting in the way of work. Another organization may be divided as to whether a faster machine is required or if higher-quality raw materials make for a more cost-effective solution. In these dilemmas, the influence of context cannot be overrated. Two organizations with seemingly equivalent resources and processes may not have equivalent capacity due to factors inside and outside their organizations (for example, organizational culture). Put another way, industry standards can be helpful in assessing assets, but contextual factors must also be considered.

Step 2. Analyzing Contributing Factors

Analyzing is the second resource and strategy alignment process within performance improvement initiatives. Analysis can be a painstaking process that leads to indecision, or it can be a useful exercise that further ensures all resources and strategies are aligned with improving performance and accomplishing useful results.

A pragmatic definition of analysis is simply the examination of an element (such as a performance discrepancy, a process, or a resource) to determine the factors contributing to its existence. In chemistry, an analysis may provide information regarding the chemical makeup of a solution. In performance improvement, we can examine a variety of elements and their interactions to determine what factors

cause them. An essential tool in improving individual or organizational performance, a performance analysis examines the likely factors leading to a discrepancy between current and desired results. Rossett suggests a comprehensive definition of performance analysis:

Performance analysis is partnering with clients and customers to help them define and achieve their goals. Performance analysis involves reaching out for several perspectives on a problem or opportunity, determining any and all drivers toward or barriers to successful performance, and proposing a solutions system based on what is learned, not on what is typically done (Rossett, 1999, p. 13).

The scope and purpose of various approaches to performance analysis vary greatly, from those that address performance with an individual performance perspective to those that are concerned with an organizational performance (Rossett, 1987, 1999; Robinson & Robinson, 1995; Gilbert, 1978; Mager, 1997; Witkin & Altschuld, 1995). In addition, there are approaches that connect individual and organization performance with that of the greater community (Kaufman, 2000; Kaufman et al., 2001). It is likely that a combination of approaches will offer the best inputs for long-term success when addressing performance issues. Training, job aids, process re-engineering, and other individual performance interventions should not be seen as singular solutions if their capacity to improve performance can be magnified greatly when implemented in combination together or with other tools of the performance consultant.

Most approaches to performance analysis share techniques, tools, and procedures common to evaluation. The typical performance analysis, for example, may include a combination of data collection through observation, focus groups, individual interviews, and questionnaire-based research to gain a better understanding of the underlying factors contributing to a performance discrepancy. And, as with many evaluations, the data-collection process in a performance analysis typically attempts to consider the data from several sources and methods in order to derive conclusions and recommendations for decisionmakers. Performance analysis differs from program evaluation, however, in that the prior is completed *before* a project or program is implemented. Performance analysis determines factors that are likely causes of performance discrepancies. Program evaluation, in turn, examines performance to determine if the intended results were accomplished.

Decisions regarding the formality and duration of the performance analysis should be related to the criticality (that is, short- and long-term costs and consequences) of the decisions that must be made. Eight weeks of analysis to determine the optimal brand of paper for the office copier is

likely more extravagant than required, while a week of analysis before moving forward with a million-dollar multimedia development project may not be adequate for practical decisionmaking.

Performance analysis can be formalized to include extensive task analyses, or it can be conducted informally through routine observations of individuals or groups performing. For example, a few years ago a consultant was asked by a large fast-food chain to develop a series of electronic performance support tools that could provide on-the-job training for employees. By observing the workflow in just two franchises, the consultant quickly realized that performance was not lower than desired due to lack of employee knowledge or skills. Rather, a variety of motivational and performance environment issues were likely responsible for the unacceptable performance levels. Unfortunately, the client only wanted to discuss the development of multimedia for on-the-job training, creating a business dilemma for the consultant. In this example an ounce of analysis would have been worth a pound of objectives (Harless, 1975), if only the client would have listened.

Step 3. Answering Problems and Finding Solutions

The third process in the performance improvement alignment trilogy answers two key questions:

- What do we do now that we have information from the assessment and analysis?
- How do we implement solutions that will accomplish required results?

This process unites assessment and analysis data to identify a range of potential resources and strategies. Unfortunately, in traditional solution-selection processes, these data are too often ignored or distorted, leading to wasted resources and ineffective strategies. Many organizations fall back on the resources and tactics they have used previously and feel most comfortable implementing, even after formally identifying performance discrepancies and their causes. This is not to say that such solutions always miss their mark; a few do impact performance, but the majority do not lead to increases in performance. Instead, they may only keep the organization on a path of inefficiency and/or ineffectiveness. For example, it is estimated that less than 10% of what is taught in conventional training is applied in the work place (Stolovich, 2000). As a result, even when training may be an apparent quick fix for an organization's performance problem, the use of appropriate assessment and analysis techniques by the performance consultant can lead decisionmakers to select performance improvement interventions that have far greater impact and ability to accomplish necessary results.

Generating Solutions

If the old standby solutions cannot be relied on, how do performance consultants use data generated through assessment and analysis to identify possible remedies to organizational problems? The data provided by the assessment and analysis processes are the drivers of success in selecting the appropriate solutions. Potential solutions should be matched with the likely causes identified in the analysis process.

For example, if employees have the knowledge and skills for accomplishing the required results but lack the adequate tools for implementing those skills in an efficient manner, then recommended performance interventions should target the access and use of necessary tools rather than additional training. In addition, all potential solutions must be aligned with both the organization's strategic direction as well as the required results specified in the assessment process. The solutions that best align with the assessment and analysis data can be explored for their likely return on investment (Kaufman et al., 2001), while those that do not align well can be removed from consideration, thus saving resources.

How can performance consultants ensure that assessment and analysis data are being used *and* protect against the tendency to select from among solutions that are well known and comfortable? Fortunately, there are frameworks for exploring alternative solutions to performance problems. One such tool is the Performance Pyramid (Wedman & Graham, 1998; Wedman & Diggs, 2001), a useful template for examining the relationships among several essential elements for any performance improvement program or project (see Figure 4 on page 14). The Performance Pyramid is a visual representation of the various considerations that are involved in the selection of an appropriate solution or set of solutions.

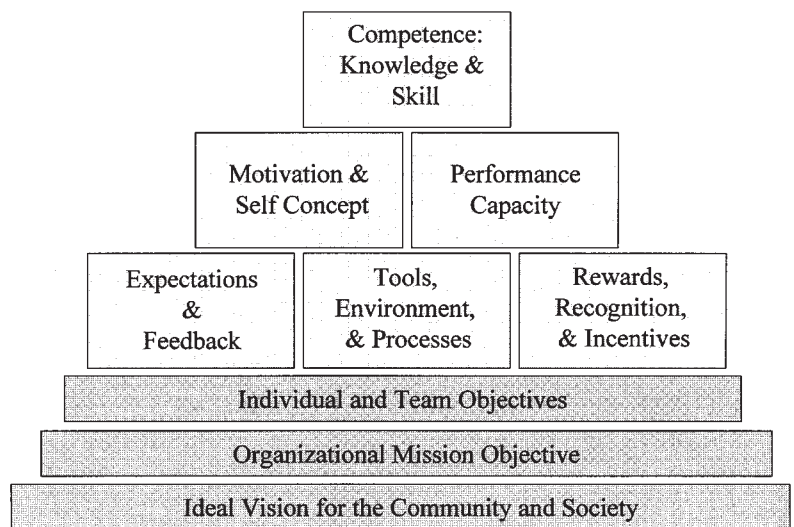


Figure 4. Performance Pyramid With Integrated Strategic Planning.

Consistent with our emphasis on alignment, the Performance Pyramid rests on the premise that significant accomplishments result when three major elements are aligned: vision, support system, and resources. The solutions used to address the performance issue must be consistent with these three dimensions and must be supported by the data derived from the assessing and analyzing processes. Vision is closely akin to the concept of strategic direction. It represents the common direction and goals of the organization, as well as its internal and external clients. It is particularly useful to consider vision in three dimensions: societal, organizational, and individual or team results.

The second major element of the Performance Pyramid is the support system. The support system consists of a foundation (that is, organizational culture) and six performance support blocks (expectations and feedback, tools, environment, processes, etc.). Accomplishments will suffer if the foundation does not support attaining useful results, if one or more of the performance support blocks are missing, or if the blocks are not aligned with each other. For example, insurance adjusters who are trained to process claims in a manner that is not viable given the available tools will discover that they have a performance problem when they attempt to carry out their work in the field.

Each building block is interlinked with the success of the other blocks, so, for example, without adequate tools, environment, and processes (lower-level blocks), the likelihood of success with interventions related to motivation and self-concept (higher-level blocks) is greatly reduced. Let's again consider employees who do not have adequate tools; they will obviously not be able to perform the tasks related to their jobs efficiently. As a result, performance interventions that attempt to address motivational or self-concept issues (without first addressing the lack of adequate tools) are less likely to be successful.

Although the strength and veracity of this framework has yet to be formally examined through empirical research, the foundation and building blocks of the Performance Pyramid do provide a conceptual framework for codifying and organizing assessment and analysis data, examining inter-relationships, and ensuring multiple factors are being considered in answering the question, What do we do now that we have assessed the problem and its causes?

Resources constitute the third major element of the Performance Pyramid. Clearly, resources must be adequate to sustain the support structures, or accomplishments will suffer (Wedman & Diggs, 2001). More precisely, resources allocated to support structures must be equal to or greater than the cost of implementing the solutions (Leigh, 2000). The information gathered and applied in identifying performance discrepancies (that is, assessment) becomes an essential guide for determining which solution(s) will meet

the performance requirements. These performance standards will also guide future evaluations, as they establish measurable objectives. Likewise, the information obtained through performance analyses will also guide decision-making when selecting answers. Before they are implemented, all performance interventions being considered should have demonstrated their ability to address the likely causes or factors leading to the performance discrepancies as identified through the analysis procedures (see Clark & Estes, 2002, for a discussion of "active ingredients" in performance interventions).

In addition, decisionmakers exploring the feasibility of potential solutions should estimate the return on investment of each potential performance intervention. Though actual financial figures are often difficult to determine before the implementation of the program or project, even rough estimates can be very useful in guiding decisionmaking (Kaufman et al., 1997, 2001; Graham, Wedman, Tanner, Monahan, 1998).

Creating Change

Selecting an appropriate solution is only part of successfully defining the answers to performance issues in today's organizations. The interventions suggested by the Performance Pyramid will most likely necessitate changes in business practices and organizational culture for internal and external clients. The impact of these changes requires a change management plan that relates the information collected during the assessment, analysis, and answer processes to the implementation requirements of the individuals and small groups that need to accomplish useful results (Kaufman & Lick, 2000-2001).

Successful change management relies on the support and commitment of key individuals within an organization. Organizing and developing the support required for performance improvement is an ongoing responsibility that includes creating the infrastructure capable of sustaining the performance initiative. These would include developing support systems for ongoing assessment and analysis of performance discrepancies, evaluations, and continuous improvement initiatives related to the selected solution.

Summary

The role of performance consultants during the initial decisionmaking stages of any project or program can and should set a results-focused agenda for future decisionmaking. By formally assessing both needs (gaps in results at the societal, organizational, and individual/team levels) and assets (processes and resources), decisionmakers can ensure that all elements of a project or program link what the organization uses, does, produces, and delivers with value-added results for both internal and external clients. This alignment

of strategic direction with performance discrepancies is the foundation of success and provides the groundwork for the performance analysis.

In completing a performance analysis, the underlying reasons for gaps in results are identified. These factors may include a variety of elements, such as ineffective or inefficient processes, deficient or inadequate resources, lack of knowledge or skill, unsuccessful rewards systems, or a variety of other performance-related issues. As performance consultants help decisionmakers determine the causes of performance discrepancies, their role becomes one of exploring a diverse set of solutions that addresses each of the primary causal factors identified through the analysis. These answers offer the organization a menu of options for addressing the performance problems. By serving as the guide in the alignment of assessment, analysis, and answers, performance consultants can assist organizations through the critical decisions that are required at the beginning of any performance improvement project or program. 🌟

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