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Austin, TX • June 8 – 10, 2016
Adopting an EPS Strategy?

Readiness – Set - Go

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Founder & Principal

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... a Workforce Capability Consultancy
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Shifting To a Performance Paradigm

Dynamic Learning & Performance Ecosystem

Sustained Workforce Capability @ the Point of Work

May 27, 2016
Organizational Implications

- Cultural Blind Spots

“If I’d asked what they wanted, they would’ve said faster."

― Henry Ford

Training Drives Performance
Organizational Implications

• Plan on Leading Change
  – Transformational...or just a “Tweak”?

“There is nothing quite so useless, as doing with great efficiency, something that should not be done at all.”
  – Peter Drucker

START SMALL...PROVE IT...then SCALE
EPS
[Captured in Context]
Dynamic Performance & Learning Ecosystem

Workforce Capability Architecture

ACCESS

EPS

DISCOVERY  METHODS

MEASURES

P & L Discovery:
Performance Consulting
"Intentional" Agile Design, Development & Delivery Methods

ACCESS DISCOVERY METHODS MEASURES

Embedded Performance Support Discipline (EPS)

Evidence of Impact

P&L Assets – Right
People – Right
Time – Right
Amount – Right
Format – Right

To/From Right Devices & Business Applications

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Dynamic Performance & Learning Ecosystem

Workforce Capability Architecture

Dynamic Performance & Learning Hub
Access to Short-Form Learning,
Business & Performance Support Assets
[MOOC Engine]

Electronic Performance Support System Technology
[EPSS]

Performance & Learning: EPS Readiness Assessment

Single-Source Documentation
[EPSS Authoring]

Learning Record Store
[LRS - xAPI]

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Linear Journey to Competency
Learner-to-Performer Continuum

Point of Entry

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learn New</td>
<td>Learn More</td>
</tr>
<tr>
<td>First Time Learning</td>
<td>Enhance Knowledge</td>
</tr>
</tbody>
</table>

Prepare Learners

Point of Work

<table>
<thead>
<tr>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply</td>
<td>Change</td>
<td>Solve</td>
</tr>
<tr>
<td>Remember or Apply Knowledge</td>
<td>Something Changes</td>
<td>Something Fails “Plan B”</td>
</tr>
</tbody>
</table>

Sustain Performers

Five Moments of Need originally developed by Dr. Conrad Gottfredson

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"Intentional" Design – Paradigm Shift
Learner-to-Performer Continuum

Sustain Performers
Point of Work
3
Apply

4
Change

5
Solve

Prepare Learners
Point of Entry
1
Learn New

2
Learn More

Performance Support Asset Creation
• PS Assets for Point-of-Work
• Contextual Delivery in Workflow
• On-Demand 2-Clicks or 10-Sec
• Single-Source Documents - SSD
• Source PS Content for Training

Training/Learning Asset Creation
• Agile Design/Dev/Deliv
• Short-Form Learning
• Embed PS in Learning
• SSD-Based Simulations
• Technology to Access PS

Five Moments of Need originally developed by Dr. Conrad Gottfredson

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Reasonable Scope

[... Vs. Boil the Ocean]
Assessment Scope

Assessment Targets

• Ecosystem-Wide
• Business Unit Focused
• Project Level **
• Training Requests
Assessment Scope

People

• Primary Audience & Role(s)
• Secondary Support Audience
• Tertiary Support Audience
• Dis-Associated Audience
  • Vendors – Agents – Customers
Assessment Scope

- Task-Related Workflows
- Cross-System Workflows
- Escalation Protocols
- L&D Workflows – Design/Dev/Delivery
- Maintenance, Updates, Curation
Assessment Scope

Content

- Legacy Content
- Re-Usability – Re-Purpose Potential
- Task-Specific Related Information & Data
- Accessibility & Feedback Loops
- User-Generated – Hacks, Cheats, Apps
Assessment Scope

Technology

- System Inventory – *Enterprise & Stand-alone*
- Migration Roadmap – New, Changes, M&As
- Content Repositories & Roadmap
- Mobility Integration & Roadmap
- Collaboration Platforms & Roadmap

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Assessment Scope

Measurement

- Current Costs of Doing Business
- Sources of Relevant Performance Data
- Key Performance Indicators (KPIs), $$$s
- Alignment of Performance w/ Competencies
- Utilization of Performance Dashboards
Deliverables

[State of the Ecosystem]
## Assessment Deliverables

<table>
<thead>
<tr>
<th>Current State</th>
<th>EPS Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PEOPLE</strong></td>
<td></td>
</tr>
<tr>
<td>• Detailed Findings</td>
<td>• EPS Recommendations</td>
</tr>
<tr>
<td>• Benchmark Practices</td>
<td>• Performance Benefits</td>
</tr>
<tr>
<td>• Identify Opportunity Gaps</td>
<td>• Projected Business Impact</td>
</tr>
<tr>
<td><strong>PROCESS</strong></td>
<td></td>
</tr>
<tr>
<td>• Detailed findings...</td>
<td>• EPS Recommendations...</td>
</tr>
<tr>
<td><strong>CONTENT</strong></td>
<td></td>
</tr>
<tr>
<td>• Detailed findings...</td>
<td>• EPS Recommendations...</td>
</tr>
<tr>
<td><strong>TECHNOLOGY</strong></td>
<td></td>
</tr>
<tr>
<td>• Detailed findings...</td>
<td>• EPS Recommendations...</td>
</tr>
<tr>
<td><strong>MEASUREMENT</strong></td>
<td></td>
</tr>
<tr>
<td>• Detailed findings...</td>
<td>• EPS Recommendations...</td>
</tr>
</tbody>
</table>
Assessment Drives Adoption Roadmap

~ Pilot EPS ~
* * *
Proof of Concept & Business Case

~ Operationalize & Standardize ~
* * *
Skill-Building & Integration of Repeatable Best Practices, Documented Workflows

~ Scale ~
* * *
Integrate Into Organizational Culture To Drive Full Adoption

CRAWL - WALK - RUN - FLY
## Performance Support Implementation Maturity Model & Roadmap

<table>
<thead>
<tr>
<th>Enablers</th>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Level 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learning &amp; Development</td>
<td>No formal Instructional Design (ID) training</td>
<td>Basic ID skill set using traditional development models</td>
<td>Intentional design &amp; develop extended blend PS solutions that integrate seamlessly with formal learning solutions</td>
<td>Use industry best practices &amp; principles of agile instructional design methodology and EPSS content development</td>
</tr>
<tr>
<td>Team Competencies</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Content Development</td>
<td>MS Office/Document-based (Word, PowerPoint, PDF)</td>
<td>Web-based (HTML, SharePoint)</td>
<td>Multi-media (video, audio, Flash, etc.) multi-modal support (desktop, tablet, mobile)</td>
<td>EPSS authoring tool, single-source authoring, integrated workflow and content management</td>
</tr>
<tr>
<td>Tools &amp; Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery Methods</td>
<td>Document-based including both physical and digital job aids</td>
<td>Stand-alone, Blended web-based &amp; ILT integration</td>
<td>Integrated passive brokering to isolated Performance Support solutions</td>
<td>Integrated, active, context-aware and embedded PS solutions</td>
</tr>
<tr>
<td>Technology</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Management</td>
<td>Project management is ad hoc</td>
<td>Basic project management processes are defined</td>
<td>Project management process is documented and standardized</td>
<td>Project management processes are ingrained and automated and continuous improvement is measurable</td>
</tr>
<tr>
<td></td>
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</tr>
<tr>
<td>Governance and Measurement</td>
<td>No formalized oversight structure with little-to-no measurement</td>
<td>Portfolio specific focus only with Level 1 and 2 Kirkpatrick measurement strategies</td>
<td>Isolated business unit collaboration with Level 3 Kirkpatrick project-based impact measures</td>
<td>Strategic governance board and ongoing business impact measurement and reporting enabled by PS infrastructure</td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
<tr>
<td>Organizational Change Management</td>
<td>Pilot stakeholders and project teams</td>
<td>Siloed stakeholders: IT, L&amp;D, ID, targeted/project based frontline learners</td>
<td>Generalized stakeholders: front-line learners and business units (including leaders/ management)</td>
<td>Enterprise-wide stakeholder adoption</td>
</tr>
<tr>
<td>Focus</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

Current Practice Level: [ ]
Target Transition: [ ]
Modified from original development by the Performance Support Community Leadership Council – 2015

Email gary.wise@humanperformanceoutfitters.com to join the PSC
A Parting Thought...

Pursue a State of Readiness First...

Don’t Miss the EPS Boat!

May 27, 2016
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