How to Kick-start Performance Support in Your Organization

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Today We Will...

- Define a successful PS adoption
- Set the 5 steps to kick-start PS
- List the PS project activities (your checklist)
The Performance Gap

End Users

Actual Performance

People
- Employee Knowledge Gap
- Human Error

Applications
- Complex Applications
- Mismatch between Applications and Processes

Business Processes
- Business Process Complexity
- Compliance Risk

Ongoing change

The Performance Gap

Desired Performance
Bridging the Performance Gap

The Performance Gap

End Users

Actual Performance

Training Documentation Incentives

Desired Performance
Bridging the Performance Gap

End Users

Actual Performance

Desired Performance

The Performance Gap

Performance Support
Successful PS Adoption

• Move the “business needle” positively
• A direct impact on users behavior (No transfer)
• When users are asking for this type of solution and prefer it over other solutions
Get the Right People on Board

- Project lead
- SME
- IT lead
- Content developers
- End users

The “Performance Support” League
Get the Right People on Board

Checklist

- We understand the system
- We understand the business process
- We understand the end users
- We are excited about PS
- We have an influential sponsor
Discover a Business Pain

- Identifying the needs (the pain)
- Areas of pain:
  - Complicated / long business process
  - A critical error
  - Lack of knowledge
  - Lack of skills
  - Rare business process
  - Change
  - Users Insecurity

- In Mission -
Discover a Business Pain

Checklist

- We know what is the pain
- We understand that this is a real business pain
- The solution business pain will produced valuable
- We understand what is the desired behavior from end users
- We understand how to measure success
Set the Infrastructure

- Technology infrastructure:
  - System installation (all components)
  - All environments
  - User Identification
  - Distribution of content (on click)

- Knowledge Infrastructure
  - Procedural knowledge
  - Declarative knowledge
Set the Infrastructure

Checklist

- We have identified all the environments in which the PS system need to work on, test on and build content on.
- We have defined the user groups and set it in the PS system
- We have a working end to end PS system in all environments for all users needed
- We have freedom from the shackles of IT required to start the project
- We have mapped all the knowledge required
Design the Performance

Choose the performance support approach:

- Navigation
- Validation
- Error Prevention
- Knowledge Transfer
- Information Optimization
- Automation

Project lead  Content developers

- In Mission -
Design the Performance

Navigation
Support the user, with in-application instructions to reach the target area in the system.
Design the Performance

Validation
Support the user, by verification of data entry with corporate policies and create real-time alerts
Design the Performance

**Error prevention**
Support the user, by identifying their mistakes and blocking in their mistakes
Design the Performance

Knowledge Transfer
Support the user, by providing only the relevant knowledge in the relevant place and time (context)
Design the Performance

**Information Optimization**

Support the user, by providing information that is critical to complete the task and is not available immediately.
Design the Performance

Automation
Support the user, by freeing the task from permanent and routine actions or “fixed” decision-making
Design the Performance

Offer a solution that directly affects business results

Performance Support

- Navigation
- Validation
- Error Prevention
- Knowledge Transfer
- Information Optimization
- Automation
Design the Performance

Checklist

- We have chosen the **best** approach
- We know **exactly** when to get involved in the business process
- We are aware of what will be the exact user experience
- We have designed a solution that users will be glad to use
- We have approval of operations for the solution
Achieve Business Value

- Measure: condition zero and after effect
- Effect depending solution approach
- Look after effect in:
  - New employees
  - Rare Processes
  - Processes with high error cost
  - Training programs
- Feedback: Users, Leadership and Sponsor
Achieve Business Value

Checklist

- We have tested all scenarios
- We have tested in all environments
- We know how to measure the effect
- We have the zero state data
- We can see a direct line between our solution and business results
<table>
<thead>
<tr>
<th>Business Value</th>
<th>Right People on Board</th>
<th>Business Pain</th>
<th>Infrastructure</th>
<th>Performance</th>
</tr>
</thead>
<tbody>
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Get the job done!

PERFORMANCE

- Navigation
- Validation
- Error Prevention
- Knowledge Transfer
- Information Optimization
- Automation
KEEP CALM AND REDUCE BUSINESS PAIN
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A Practical Playbook

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