613
Ready, Set, Go!
Managing Your Performance Support Process for Success

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What we’ll discuss today...

Situation analysis
• Involves a lot of questioning
• Is not done in a vacuum

High-level implementation plan
• Allow facts to speak to the need

Phased approach
• Smaller, manageable chunks for quick wins and a less daunting project
Ready?
Situation Analysis
What is Situation Analysis

- What must your initiative fix?
- Who is the audience?
- What information is out there?
- What is the training approach?
- What are the performance measurements?
What must your initiative fix?

Identify the problems
• Is work being done incorrectly?
• Are tasks taking too long to complete?
• Are tasks too complex or hard to follow?

Capitalize on previous efforts
• What has worked and why?
• What has not worked and why?
What must your initiative fix?

Take inventory of documentation/knowledge

- Are there clearly defined processes/procedures?
- Who controls and communicates change?
- Is the existing information valid and complete?
- *What do the users say about it?*

Identify all systems used

- Does the version/interface change a lot?
- Is it complex to use?
What must your initiative fix?

Capture the impacts

- Is there a financial/other impact to the business?
- Is there a financial/other impact to employees?
- Does it affect customer experience?
- Does it cause employee turnover?
- Does it address complexity, compliance or change?

Identify the ideal state

- Ask management and workers for their ideal state.
- Do customer complaints offer some insight?
- What are you able to fix?
Who is the audience?

Identify who performs tasks in the problem area

• Are there varying levels of who can do what?
• Is this a new process or system for the users?
• You always want to serve the most inexperienced user.

Identify who will be impacted by your initiative

• Consider everyone downstream and upstream.
What information is out there?

**Formal repositories (sanctioned)**
- Shared drives
- SharePoint
- Intranet & Web sites

**Informal (individual survivor tools)**
- Job aids created by workers
- Workers’ personal experience/knowledge
- **What can be captured and formalized?**
What is the training approach?

Is classroom training always required?

- Differentiate what requires demonstrated [soft] skills and what can be taught on-the-job.

Think in terms of training them in their seat vs taking them out of their seat.
What will be measured?

- Are there service level agreements to be met?
- Do you need to reduce work time?
- Do you need to increase capacity with existing resources?
- Do you need to reduce error rates or monetary impacts?
- What is the desired state that will mean success for your initiative?
Set...

High-level implementation plan
What is a high-level implementation plan?

- Prioritizing the problem areas
- Identifying your external resources
- Preparing for roadblocks (and easy on-ramps!)
Prioritize the problem area

Identify the most important improvement
- Use the answers discussed in the Situation Analysis to help weigh the decision.
  - What area has the most business impact?
  - What area has the most employee impact?
  - Are you losing customers to competitors?

Discuss, as a team, which area might take first priority, second, etc.
- You don’t want to boil the ocean.
- You might need to select one area for initial rollout.
Identify your resources

Who are the SMEs and process owners?

Who will review what you’ve done for accuracy?

Who will you need on your team?
  - Other departments, IT, SMEs, etc.

Are they available during the project timeline?

Use these answers to possibly re-prioritize your problem areas
Prepare for roadblocks...

Are there competing projects for your SMEs?

Are there new software implementations or updates during your project timeline?

Is there buy-in from above and below?
- Make sure you have a sponsor who will be there.
- Make sure they are part of the project meetings.

Use these answers to possibly re-prioritize your problem areas.
...but use the easy on-ramps!

Is the problem area one for which end-users are anxious and receptive to a fix?

Are there internal cheerleaders?

Is there buy-in from upper management?

Use these answers to possibly re-prioritize your problem areas.
Go!
Phased approach
What is a phased approach?

- Mapping the processes
- Creating a development plan
- Taking another look at the priorities
- Planning the roll-out
Map the processes for each area

• Analyze the source material
  – It’s often full of process gaps.
  – It usually has a lot of ancillary information that’s not directly part of the actual process.

• Deconstruct the source material into buckets
  – How-to steps (the actual process)
  – Concepts (policy information, overviews, etc.)
  – Reference (contact lists, interest rates, codes, etc.)
Map the processes for each area

Get the SMEs and map out the how-to steps on a white board

• If there are many ways to do the process, map the most efficient way!
• Don’t rely solely on source material.

The process steps contain the moment-of-need support
Map the processes for each area

- Map if it is a Health Line
  - MC Elig?
    - Yes → Trans to Sales → Close CRM
    - No → Asses Elig
      - Exceed
        - No → Close CRM
        - Yes → Provide plugin
          - Exceed
            - No → Close CRM
            - Yes → Provide plugin
              - Exceed
                - Close CRM
  - Not Elig
    - Close CRM
Create a development plan

Capture everything on a development plan

- Keep the how-to, conceptual and reference information as separate chunks.
- Create a time estimate for building each chunk.
- Use a spreadsheet vs a project tracker as much can be done concurrently (i.e. there are not always dependencies).

Review the overall development time for each process area

Go!
Take another look at the priorities

Re-prioritize

- Select the priorities that have:
  - The resources you need for the timeframe you need.
  - A big win for the business.
- Look at the overall time estimates for each area.
- Try to roll something out in 3 months or less.
- Set incremental roll-outs for 3 month periods.

Set the final priority list and get buy-in

- Provide the reasons!
Plan the roll-out

100+ users: consider a phased roll-out

• Select a test group of 8-12 users.
• Provide training and instructions on their role.
• Select cheerleaders!
• Ask for feedback and act on it.

< 100 users: consider a full roll-out

• Generate buzz with ‘preview’ events.
• Make the kick-off day an event with fun activities!
Post roll-out

Have you met the desired state?

- Set dates for taking success measurements (e.g. 3 months, 6 months, etc.).
- Be sure to measure the success factors you agreed upon at the onset.

Query users and customers for feedback
In summary...

Plan strategically, methodically

- Analyze the situation.
- Create a high-level implementation plan.
  - Prioritize the problem areas.
  - Don’t try to boil the ocean. You’ll have more success taking one harbor at a time.
- Let the facts (and not emotion) rule the day.
- Approach the project in phases.

Relax and repeat with continued success!
~ Session 613 ~
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