Keeping Performance Support Solutions Relevant in a World of Constant Change

Jeremy Smith, Herman Miller

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Keeping Performance Support Solutions Relevant in a World of Constant Change
Jeremy Smith

• Senior Manager, Global Learning Solutions, Herman Miller
• Leadership Council, Performance Support Community
Herman Miller

- Inspiring Designs to Help People do Great Things
- Live, Work, Learn, and Heal
- Herman Miller Design Within Reach – 1 Block!
  Maharam
  Geiger
  Nemschoff
  Colebrook Bosson Saunders
  POSH
- Global Workforce of 7,000+
Our Performance Support Journey

- Eight Years
- Five Solutions
  - Microsoft Office, 2008
  - New Product Introductions, 2009
  - Corporate Competencies, 2011
  - Salesforce, 2013
  - Management Essentials, 2015
- Constant Change!
Constant Change

• What Changes are Occurring in Your Business?

• What are the Challenges Created by the Changes?
Constant Change

- Technology Tools & Applications
  - Supported Applications
  - Authoring & Delivery Tools
  - Cloud, Integrations & Control
Constant Change

• Technology Tools & Applications
  – Supported Applications
  – Authoring & Delivery Tools
  – Cloud, Integrations & Control

• Organizational Structure & Strategy
  – Users, Stakeholders, Partners & Priorities
Constant Change

- Technology Tools & Applications
  - Supported Applications
  - Authoring & Delivery Tools
  - Cloud, Integrations & Control
- Organizational Structure & Strategy
  - Users, Stakeholders, Partners & Priorities
- Policies, Regulations & Business Process
  - Supported Business Process
  - Speed & Awareness
Sustainment Strategies & Tactics

- Design
- Development
- Roles & Resources
- Business Process
- Governance
Design

• Start with Sustainability in Mind!
  – What is the Speed of Change of the Application or Process you are Supporting?
  – Who Controls the Change and how Responsive does the Design need to be?
Design

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• Use Job Task and Critical Skills Analysis to get to Just Enough
  – 5 Moments of Need Certificate Program – Apply Synergies
## Design

**Goal Planning JTA/CSA/LeAP - 6/10/14**  
**Team:** Tulikka, Vikash, Jeremy, Scott  
**SMEs:** Kim Smit & Kristi Cnossen  

**Scope Objective:** Identify tasks and related concepts that WTLs, PSCs and Employees need to do and know to conduct Goal Planning.

<table>
<thead>
<tr>
<th>Groupings</th>
<th>Order</th>
<th>Tasks</th>
<th>JTA</th>
<th>CSA</th>
<th>Order</th>
<th>CSA 1-7</th>
<th>Ops</th>
<th>Prof</th>
<th>PSC/HR</th>
<th>Audience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preliminary Conversations and Planning</td>
<td>1</td>
<td>Review and discuss the previous year’s goal plan</td>
<td></td>
<td></td>
<td>1</td>
<td>3</td>
<td>X</td>
<td>P</td>
<td>X</td>
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<tr>
<td></td>
<td></td>
<td>Discuss strategy and related goals for the current year</td>
<td></td>
<td></td>
<td>2</td>
<td>5</td>
<td>X</td>
<td>P</td>
<td>X</td>
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<tr>
<td></td>
<td></td>
<td>Discuss matrix management roles and process</td>
<td></td>
<td></td>
<td>3</td>
<td>5</td>
<td>X</td>
<td>P</td>
<td>X</td>
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<tr>
<td></td>
<td></td>
<td>Assign manager to matrix management</td>
<td></td>
<td></td>
<td>4</td>
<td>3</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td></td>
</tr>
<tr>
<td>Create Goal Plan and Goals</td>
<td>2</td>
<td>Create Goal Plan</td>
<td></td>
<td></td>
<td>1</td>
<td>2</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Create Goal manually</td>
<td></td>
<td></td>
<td>2</td>
<td>1</td>
<td>X</td>
<td>X</td>
<td>O</td>
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<tr>
<td></td>
<td></td>
<td>Create Goal with help using SMART assistant</td>
<td></td>
<td></td>
<td>2</td>
<td>1</td>
<td>X</td>
<td>X</td>
<td>O</td>
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<tr>
<td></td>
<td></td>
<td>Create Goal though alignment with a WTL Goal</td>
<td></td>
<td></td>
<td>2</td>
<td>1</td>
<td>X</td>
<td>X</td>
<td>O</td>
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<tr>
<td></td>
<td></td>
<td>Create Goal from previous Goal Plan</td>
<td></td>
<td></td>
<td>2</td>
<td>1</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Author Goal name and description</td>
<td></td>
<td></td>
<td>3</td>
<td>5</td>
<td>X</td>
<td>P</td>
<td>O</td>
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<tr>
<td></td>
<td></td>
<td>Define the Goal start date and end date</td>
<td></td>
<td></td>
<td>4</td>
<td>5</td>
<td>X</td>
<td>P</td>
<td>O</td>
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<tr>
<td>Input Goal detail</td>
<td>3</td>
<td>Enter the Goal name and description</td>
<td></td>
<td></td>
<td>1</td>
<td>3</td>
<td>X</td>
<td>X</td>
<td>O</td>
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<tr>
<td></td>
<td></td>
<td>Enter the Goal start date and end date</td>
<td></td>
<td></td>
<td>2</td>
<td>2</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td></td>
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<td></td>
<td></td>
<td>Mark Goal progress and enter measurement text</td>
<td></td>
<td></td>
<td>3</td>
<td>2</td>
<td>X</td>
<td>X</td>
<td>O</td>
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<td>Break the Goal into tasks</td>
<td></td>
<td></td>
<td>4</td>
<td>2</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Align the Goal</td>
<td></td>
<td></td>
<td>5</td>
<td>3</td>
<td>X</td>
<td>X</td>
<td>O</td>
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<td>Add Goal comments and Weight the Goal</td>
<td></td>
<td></td>
<td>6</td>
<td>2</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Link the Goal to development activities</td>
<td></td>
<td></td>
<td>7</td>
<td>3</td>
<td>X</td>
<td>P</td>
<td>O</td>
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<td></td>
<td></td>
<td>Submit and Approve the Goal Plan</td>
<td></td>
<td></td>
<td>8</td>
<td>2</td>
<td>X</td>
<td>X</td>
<td>O</td>
<td></td>
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</table>
Start with Sustainability in Mind!

- What is the Speed of Change of the Application or Process you are Supporting?
- Who Controls the Change and how Responsive does the Design need to be?

Use Job Task and Critical Skills Analysis to get to Just Enough

- 5 Moments of Need Certificate Program – Apply Synergies

Know that Implementing PS Often Redefines a Business Process

- Take an Outside-Looking-In Perspective – Management Essentials
Design

• Start as Simply as Possible, Iterate & Add Complexity Over Time
Design

Management Essentials

TALENT ACQUISITION
- Hiring
- EEO
- Interviewing
- Onboarding

DEVELOPMENT AND GOAL PLANNING
- Goal Planning
- Development
- Plans
- Performance Reviews

TOTAL REWARDS
- Vacation
- Compensation
- Payroll
- Benefits
- Recognition
- EBIDA

POLICY AND GUIDELINES
- Hourly Attendance
- Absence Pay
- FML
- FWA
- WTG
- Substance Abuse
- EHS
- Harassment & Discrimination

EXITING THE BUSINESS
- Retirement
- Layoffs
- Separation
Design

Introduction to MyTalent Performance

- MyTalent Performance Talent Profile
- MyTalent Performance Goal Plan
- MyTalent Performance Development Plan
- MyTalent Performance Performance Review
- MyTalent Performance Self-Review
Design

• Start as Simply as Possible, Iterate & Add Complexity Over Time
• Define Layers of Detail and Criteria for Applying them
Design

• Start as Simply as Possible, Iterate & Add Complexity Over Time
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• Carefully Consider the Long Term Impact of Design Decisions
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• Define Layers of Detail and Criteria for Applying them
• Carefully Consider the Long Term Impact of Design Decisions
• Matrix Solutions Thoughtfully
Development

- Choose a Client-Friendly Authoring Environment
Development

- Choose a Client-Friendly Authoring Environment
- Consider Single Source Publishing and the Reusability of Content Objects
Development

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Development

• Choose a Client-Friendly Authoring Environment
• Consider Single Source Publishing and the Reusability of Content Objects
• Capture the Bare Minimum
Development

• Choose a Client-Friendly Authoring Environment
• Capture the Bare Minimum
• Consider Reusability of Content Objects
• Think Long Term when Embedding or Linking to Assets
Roles & Resources

• What is your Learning Team(s) Structure?
  – Centralized
  – Decentralized
  – Federated
  – Other

• How ‘Matrixed’ is your Organization?
Roles & Resources

• Who Drives the Strategy?
Roles & Resources

• Who Drives the Strategy?
• Who Creates the Design and Evolves the Design?
• Who Owns Project Management?
• Who Owns Development?
Roles & Resources

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• Who Owns Project Management?
• Who Owns Development?
• Who Provide Integration and Testing?
• Who Communicates to the Business?
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- Who Monitors Change?
- Who Decides When a Change is Appropriate?
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- Client
- Learning
- Supplier
- IT Team
Roles & Resources

• Roles and Resources Change Throughout Phases
  – Prototype
  – Pilot
  – Launch
  – Maintain
Roles & Resources

- Roles and Resources Change Throughout Phases
  - Prototype
  - Pilot
  - Launch
  - Maintain

Prototype → Maintain
Learning → Client
IT
Supplier
Business Process

• Create a Change Intake, Review & Approval process
Business Process

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• Automate Processes Including Workflow
Business Process

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• Automate Processes Including Workflow
• Develop a Cadence and Process Appropriate to the Speed of Change
  – Technology cycles
  – Business cycles
  – Employee cycles
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• Automate Processes Including Workflow
• Develop a Cadence and Process Appropriate to the Speed of Change
  – Technology cycles
  – Business cycles
  – Employee cycles
• Create Operating Agreements / Contracts for Process, Roles, and Resources
Governance

• Drive the Strategy and Equip Clients to own the Solutions
• Provide and Manage the Supply Base
• Monitor for ‘Homegrown’ Solutions
• Be the Steward of Corporate Resources
• Maintain an Outside-Looking-In Orientation for the Business
Contact

• Performance Support Community
  – performersupport.ning.com

• jeremy_smith@hermanmiller.com
Thank You & Evaluation

• Thank You for Attending!

• Please Complete the Evaluation via the Conference App