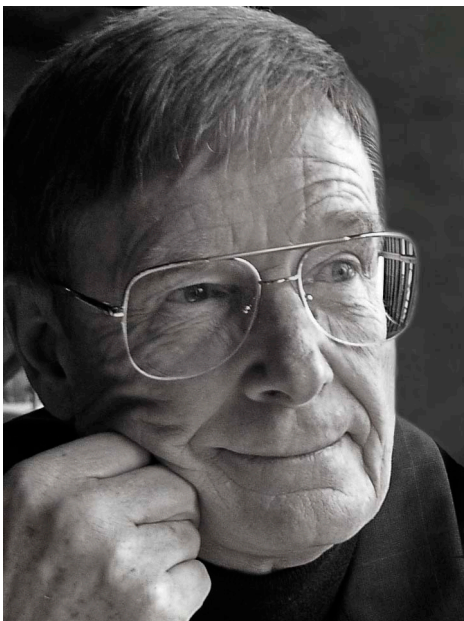




Performance Improvement in the Piedmont

The Official Newsletter of ISPI Charlotte, Vol. 1, Issue 13



“Don’t design or deliver anything until you have helped your client define the expected performance outputs. Then make sure the client is making those expectations clear to the performer.”

– William R. Daniels

Focusing on Management Practices in the Workplace

William R. Daniels presents at October meeting

Join ISPI Charlotte on October 13th for our fifth evening program of 2011 titled “Matrix Management: More Complicated and Wonderful Than We Thought” presented by William R. Daniels.

The fundamental issue is always, “How are we going to control the use of organizational resources?” Cross-functional communication has always been an organizational necessity, and it has always been a problem. The practical solutions have evolved from real world failures and successes. We have a pretty good definition of the management practices that are required and are beginning to understand the hidden cultural assumptions that either support or prohibit the necessary behavior changes.

William R. Daniels has been designing management and organizational development programs for 30 years and is the 2005 Recipient of the Thomas F. Gilbert Distinguished Professional Achievement Award from the International Society for Performance Improvement. He also has been a member of the Board of Directors for the International Board of Standards for Training, Performance and Instruction.

We are also inviting you to join us the following day on October 14th for Bill’s one-day workshop entitled “All Crossed-Up in Cross-Functional Relationships: Learning Matrix Management Skills”. During the workshop participants will experience an all-day simulation in use for transferring these underlying cultural assumptions and key management practices.

President’s Message

Chapter President Guy Wallace reflects on our August meeting and preview’s Bill Daniels’ presentation in October

Page 2

Management Changes

Daniels discusses possible changes in management that could occur over the course of our careers.

Page 5

Member Profiles

Learn more about ISPI Charlotte members in our Featured Member Profiles section.

Page 6



Chapter Financial Notes

Our mid-year financials are now available for members on our website. Just log in and go to the Members Center to choose "Financial Report".

PAYPAL

REMINDER: Please remember to update your credit card expiration date and credit card number in Pay Pal. Pay Pal may terminate accounts with invalid expiration dates.

UNCC has increased the fee for parking tokens to \$10.00. As a result of this increase, the price to purchase discounted parking tokens through ISPI Charlotte is now \$5.00. Parking tokens can be purchased in cash before each meeting at the registration desk.

Student members should present proof of college registration to Ursula Smith, VP of Finance, by October 1st to continue to receive discounts on membership fee, evening programs and workshops.

From the President

First let me start by thanking our 3 speakers from our August Program who arranged their personal vacations so that they could visit us in Charlotte – and give us a 3 for 1 deal. Thank you Jeanne Farrington, Clare Carey and Mary Norris-Thomas for sharing tools and tips for HPT Myth Busting – something we all need to do a much better job of for ourselves, and for our stakeholders.

Note that we have gone to an online Program Evaluation versus the paper version we had been using. We are also working on next year's Program – which will be introduced soon. I hope that those of you who

attend our programs will share your feedback with your elected and appointed leaders. We wish to provide you with the type of programming that you feel you need for your professional development!

Some of you may have been participating in, or maybe just

"lurking" about, in our chapter's first summer Book Club effort – where we are reading and reviewing our next speaker's book: "Change-ABLE Organization: Key Management Practices for Speed & Flexibility." Check that out effort on the chapter's Facebook page – a link may be found to that site on our web site's home page.

Our next speaker - William R. Daniels - will be here on October 13th presenting an evening Program on Matrix Management: More Complicated and Wonderful Than We Thought" – and the next day, on the 14th he follow up with an all-day Workshop on "All Crossed-Up in Cross-Functional Relationships: Learning Matrix Management Skills."

Our evening Program with Bill is \$15 for members taking advantage of the *early bird registration rate* - and the workshop is \$60 for members taking advantage of that early bird registration rate.

I hope you can appreciate that our chapter's pricing is "low, low,

low" – especially when you look at what the ISPI Front Range Chapter (in Denver CO) is charging for a workshop with Thiagi: \$229.00 for their members registering early (30 days early) – compared to our price of \$60.00 when he was here in October of 2009.

In related chapter news we've published the results of our Member Survey on the chapter web site – which had more participation than last year – but still represents only about 10% of our membership. We need your voices in helping us plan programming and operate the chapter.



Next in chapter news: our nominations and elections processes for 2 Board positions are coming up. The President-Elect (PE) will serve in that capacity in 2012 – and will then become President for 2013, and will serve as our Past President in 2014. Our second elected position is that of the VP of Finance.

Those are the only two elected positions of the chapter – all other Board positions are appointed positions – at the discretion of the President. Our Practice as a chapter is that the incoming PE helps in selecting the incoming Board AVPs – Associate Vice Presidents – for their two-year term. In their second year they become the SVPs – Senior Vice Presidents.

And here is a reminder to hold some dates – please note that ISPI will be celebrating its 50th Anniversary in Toronto next April – and you'll need your Passport to attend that Conference. Check out your Passport now – or apply online today – and put these dates on your calendar: April 20-23.

On that note about dates - I'd like to inform you that in 2012 we are switching months – so that we may avoid competing with the ISPI International Conference that is most always in April.

Cheers!

Guy W. Wallace, CPT

An Interview with William R. Daniels

What was the most rewarding performance improvement experience you've had?

Twenty five years of continuous contractual work with Intel Corporation for assistance in managerial and organizational development. One design project at a time, we have trained and coached thousands of supervisors, managers, and executives. The longevity of the relationship has permitted long-term evaluation and improvement of our work. It has been the primary “laboratory” for my business. We have also been well paid when we got things right.

What was the most frustrating performance improvement experience you've had?

My partner Peter Lenn and I have developed a remarkably effective method of improving project management—huge, immediate improvements in project efficiency and quality. But it requires a change of mind in upper-level management of engineering and new product-development. Getting their attention is very “challenging”—a bit like having to knockout your panicked, drowning victim so that you can haul them ashore.

What is one piece of advice you would give to someone new to the HPT field?

Don't design or deliver anything until you have helped your client define the expected performance outputs. Then make sure the client is making those expectations clear to the performer. Once you've accomplished that, you'll find you've become a management coach instead of a training designer. In my experience, more than 80% of performance problems are solved by clarification of expected performance outputs. This is not new. It was the first thing I learned from HPT experts. But it took me five years to take it seriously. Then I started making a living as an HPT consultant.

What was the greatest learning experience you've had?

I had been part of designing some wonderful, ISPI award-winning training programs before I realized I was teaching the wrong thing. Improving supervision was not about “**how** to communicate” but “**what** to communicate.”

This came from an evaluation contract we had with a major California city. We did pre and post evaluations with three-camera video testing. We were sure we had transferred our “communication skills” to the workplace. But it was not making the difference we assumed it would make—i.e., no significant improvement in employee productivity.

This caused me to discover that my “systematic approach” was starting with process instead of outputs. Starting from outputs, my work got simpler, much less expensive for clients, and shockingly more productive.

When did you have your a-ha moment when you knew HPT was for you?

Fortunately, it came early in my career. Bob Carleton took over the training department in my largest client's organization and told me I had a year to improve the supervisory training program I was delivering or I would have my contract terminated. “Who is this guy?” I wondered. Pretty soon I was attending ISPI meetings.

What is the greatest marketplace opportunity for those in performance improvement (PI) professions that you see emerging looking out to the next 2-3 years?

An appropriate use of information technology is the immediate crisis. We're still using these tools as “page turners.” Reading is not the answer. Imagery and interaction is the gift—massive information transfer at the speed of light. We now have the ability to help people find the **demonstration** and **guided practice** they need exactly when they are most ready to learn. In the US alone, we have millions of unemployable adults who need this tomorrow, and two generations behind them who are finding out that their “education” isn't adequate. What a great time to be in HPT!

What is the greatest marketplace risk for those in PI professions that you see emerging looking out to the next 2-3 years?

“Training” and “education” are being cut to the bone everywhere, and probably will be for the next ten years. The institutions related to these terms are rigidly antiquated and highly ineffective. If PI

Interview with Daniels, con't.

professionals seek employment in these institutions, they will find that they are hiding their light under a thorny bush. Seek the small, local alternatives to these monster institutions. That's where you will have a chance to demonstrate rapid increases in effective human performance, and you will be adequately rewarded. It's a wide-open market.

What advice would you offer to PI professionals to help them improve their relationships with clients and customer (internal and external)?

Become a master active listener. Get your client to talk 80% of time and guide them—with their own question—to the discovery of the change they want and are willing to make—with as little help from you as possible. Then get someone else to quote the exorbitant consulting fee you deserve when you've learned to do this.

A lot of energy and dialogue has taken place in the last two decades about the importance of demonstrating and measuring the value of PI projects. In your opinion, what has resulted from this dialogue and energy around the measurement and evaluation of training and other PI efforts?

The biggest finding, I believe, is the discovery that evaluation is systematically resisted. It is not just a HPT problem. Our clients don't "know how" to monitor the performance of their organizations, let alone the individuals who cause their success or failure. This is most obvious in the

salaries being paid to executives in all American institutions—there are no evaluation metrics that can justify such compensation.

In fact, everyone hates to be evaluated by anyone other than themselves. I think I get the best results when I focus on giving people self-monitored feedback systems based on rather short, immediate outputs. For instance, I've seen enormous improvements in productivity and morale from introducing a simple system of "to-deliver lists."

How should the PI thought-leaders move the profession as it relates to measuring and evaluating PI projects and initiatives?

We need to get much more realistic. The right metrics emerge from getting people to ask, "What do we actually hand off to other people—what are the outputs our customers actually use?" Be prepared for the personal offense of discovering that 80% of what you are doing with other people is at best pass-time activity for them, if not actual wasted time. Then figure out how to give them more of the 20% that really matters.

If you were not in HPT, what would you be doing?

At my age, it's too late to escape the HPT way of life. But I am looking for new ways to apply it. I'm exploring methods for liberating people from the "culture of poverty" that thrives in America.

Review of Daniels' *Group Power* Series

Although you may have read this summer's ISPI book club offering, *The Change-ABLE Organization*, you may not be aware that its author, William R. Daniels, is also author of the popular *Group Power* series: *Group Power I: A Manager's Guide to Using Task Force Meetings* and *Group Power II: A Manager's Guide to Conducting Regular Meetings*.

Both books, though small, belong on the bookshelf of anyone who ever runs a meeting or participates in one. They are excellent summaries of a variety of facilitation techniques to surface and resolve group conflicts, manage group problem solving, drive brainstorming sessions, and otherwise make the time spent in meetings harvest results.

One intriguing concept that Daniels covers is *group inclusion*. He advocates having a group inclusion activity at the beginning of each meeting, to ensure that the group understands that all will be heard. Types of activities might include simply asking each member to introduce him- or herself and explain expectations for the meeting, or might be a more complex getting-to-know-you icebreaker, depending on the team's background and purpose.

Daniels gathered a variety of techniques from many different organizations, consultants, and theorists. The results is a timeless pair of books to remind you of many effective ways to ensure that groups achieve their best results.

by Emily Stevens

How Will Management Practices Change During Your Career?

by William R. Daniels, MBA

The next 15 years will fly by! The world around us will continue to change in dramatic and unpredictable ways--some changes for the better and just as many for the worse. I want to raise the question: "What does it mean for managers?"

The basic function of management is not changing: decide what to do with the resources you control or influence to deliver the outputs your part of the organization has promised. This management function is an ancient social necessity, and it is not getting any less necessary. The metrics for measuring whether or not you are managing well is not changing either. It is efficiency, i.e., how much bang are you getting for the buck?

What *is* changing is our ability to learn and communicate. Information technology will continue to provide the big solutions that present us with the big new problems. We will take on new levels of uncertainty and complexity never before recognized as possibilities for control. Our organizations will be facing an environment richer with opportunity and turbulent in both technology and competition. The volume of knowledge and the speed of its transmission will continue to grow at explosive rates. So the challenge for management is: *how to process all the information relevant to management decisions*. Role confusion, conflict, and overload--the great stress makers at work--will continue to rise, as always, with this increasing complexity and uncertainty. For many managers, the levels of stress are already physically and psychologically dangerous.

While the information revolution should empower managers, I think it can only do so by first humiliating them. One of the humiliating experiences is the fact that you simply cannot know enough to make a perfect decision. As soon as you have made your decision, somebody else will point at some part of the database already in existence that you did not access. They will make a good case for the fact that your decision was made in ignorance. Your accuser may be one of your subordinates as often as it is one of your peers, your boss, or your customer (if you can figure out from day-to-day who is playing these roles). It is a setup for constant negative feedback about your performance as a manager. Over time it shatters many managers' self-esteem.

Another humbling experience is that you are forced to acknowledge that you are not autonomous. This goes against every person's basic need to feel in control. But, in fact, you depend on other people whose control needs are also trying to avoid your control. You cannot get the management job done by yourself, and all significant accomplishments to which you do contribute can never be truthfully attributed to you alone. You can be singled out for criticism, but you cannot be singled out for praise. You, alone, do not cause anything important to happen. But remember: Humility is a virtue! Nearly all the sages of history indicate that humility precedes wisdom and true empowerment. Be glad to have so much to be humble about! Think of it this way. As managers, we are accelerated toward emotional maturity--we finally get beyond the adolescent stage of hard-won independence to the interdependence of adulthood. (We might even become capable of intimacy--scary as it is!)

One of the great employments for people mature enough for interdependence is group work. Group work is what can happen when a few interdependent people think together in a meeting. Group work thrives on huge databases, diversity and conflict of opinion, as well as the ability of the members to commit to cooperation even while continuing to disagree. Because the human mind is still the biggest computing capacity known on earth, harnessing five to nine minds for collaboration is, in fact, the best way to use information technology for making management decisions.

Group work is a well-known feature of organizational success. Fifty years of research never fails to at least find a correlation between group work and organizational success, and some of the most sophisticated research makes a strong case for group work as an essential cause of that success. Yet, only about one out of five organizations is making good use of group work--the ones that grow faster than their markets and competitors.

I believe group work will be the biggest new skill acquisition for managers during the next 15 years. But it is not just an issue of skills; it is also an issue of emotional maturity. It is a management practice available to those who first learn humility and interdependence.

Featured Member Profiles

Each month we will feature a few members as a way to continue our chapter's networking.



Dick Handshaw

Place of Employment: Handshaw, Inc.

How and when did you get started in the performance improvement field?

I started in 1977 in the Masters program in Instructional Systems Technology at Indiana University. My business practice and use of Performance Improvement began when I met and began working with Jim and Dana Robinson in 1995.

What are some of the major clients with whom you have worked OR major projects on which you have worked?

I have worked on everything from mainframe based training to video-based simulations. I really don't know how many projects or how many major clients, but it runs well into the hundreds by now. The new work that I am just beginning in the last year or two is very exciting and gratifying for me. I am speaking at more national conferences and local

training associations, as well as with our current clients. I am teaching people what I have learned about instructional design and performance improvement over the years.

What are the most significant lessons that you have learned about performance improvement?

One of the most significant lessons I have learned about performance improvement is that it is not enough to just be right when advising a client. You will only be able to make a positive change if you can help your client discover the best course of action. And in order to be comfortable with that, you have to be very comfortable with ambiguity.



Emily Stevens

Place of Employment: Citigroup

How and when did you get started in the performance improvement field?

In 1982, I received my MS in ID and went to Arthur Andersen/Accenture for my first job.

What are some of the major clients with whom you have worked OR major projects on which you have worked?

Shortly after my husband and I published *Designing Electronic Performance Support Tools*, I designed a major performance support tool for Bank of America call centers.

What are the most significant lessons that you have learned about performance improvement?

Analyze, to pinpoint the right solution(s). Get managers involved. Push for both learning and development. Don't forget reference. Measure. And have some fun!

Fall Member Referral Contest

The Fall 2011 Member Referral Contest starts September 1st!!!

When: Contest will run September 1st through October 31st, 2011.

Who: All active *ISPI Charlotte* Members

How: It's easy! All you have to do is encourage your friends and colleagues to join *ISPI Charlotte*. During online registration, have the new member enter your name in the "Referred by" field. The *ISPI Charlotte* members with the most referrals* during the contest period will be eligible to **win!**

Prizes: The two members with the most referrals* during the contest period will be awarded *free December meeting* registration (value \$25 each). **Referred members must complete registration and membership must be paid in full*

If you have questions, please contact membership@ispicharlotte.org



Members' Opportunity to Publish with ISPI Charlotte

Performance Charlotte

The Journal of ISPI Charlotte



Volume 1, No. 2, 2011

Be a part of the ISPI Charlotte Journal

This winter ISPI Charlotte will publish its third e-journal filled with articles from some of the year's presenters and others in the field of performance improvement.

In addition to the "big names" in the performance improvement field, we want our Chapter's journal to be a place that showcases our *own* talent. Please submit your own works to be published. This is a great opportunity to be published and to share your expertise with a large community of practitioners.

Here are the basic requirements for submission:

- **500-1000 words** (we will accept longer pieces, but this is a suggested length)
- **Topics:** ISD, performance technology, or any other issue related to performance improvement. We also accept reviews of case studies and your own stories about your work in our field.
- **Deadline for submission: December 30, 2011**

For more information or if you have questions, please contact Andy Tucker, VP of Publications at publications@ispicharlotte.org

Web Resource

There are a number of valuable online resources available to assist in our profession. The Fort Hill Company website offers tools and resources to improve performance.



Competency Model

www.careeronestop.org/CompetencyModel/default.aspx

The Competency Model Clearinghouse website is a good resource that provides information on how to create a competency model specific to the industry that you are serving. By educating clients on the fundamentals of competency models, a groundwork is laid for helping them define the talent they need in their organization.

The Competency Model Clearinghouse uses pyramid shaped building blocks to show the progression of abilities from the ground up. This provides insight to the organization and their employees as to what knowledge and skills are required to get to the optimal level of performance.

The purpose is to draw distinction between the various departments within the organization. For example, in a financial services company, the competency model for the call center should look similar but have different requirements than the competency model for the operations department. Performance consultants can use the competency model to help identify gaps and training needs for employees who desire to move up in the organization.

by Gary Grant

Call for Chapter Board Nominations

President-Elect and VP of Finance

The Charlotte Chapter is seeking nominations for the President-Elect and the VP of Finance board positions. Submit your nomination to nomelect@ispicharlotte.org with a 200-words or less candidate biography & brief statement of why the candidate wants the position. Include a color photograph of the candidate.

All members in good standing are eligible for these two Board positions, and members can nominate themselves. In October, you will receive your electronic voting ballot.

We intend to distribute candidate statements and photograph to members. Both positions will start January 1, 2012. The VP of Finance is a one-year commitment.

The President-Elect position is a three-year commitment:

- Year 1: President-Elect
- Year 2: President
- Year 3: Past President

2011 election timeline

- October 15: Nominations due
- October 20-31: Election period
- December 8: Election results announcement (at end-of-the-year event)
- December 9-15: Email members election results

ISPI Charlotte 2011 Speaker Schedule

Here is your guide to next year's ISPI Charlotte speakers. Mark your calendars now and plan to attend these meetings that will certainly enhance your own professional development.

<i>Date</i>	<i>Presenter</i>
October 13, 2011	Bill Daniels (evening program)
October 14, 2011	Bill Daniels (workshop)
December 1, 2011	Panel: TBD

Please register for these meetings online at www.ispicharlotte.org.

December 2011 Meeting Format and Information

99 Second Presentation

99 Seconds is a special type of presentation that lasts for, you guessed it, 99 seconds or less. Topics can address any topic related to Human Performance Technology or Human Performance Improvement. Surely, there's something you can present for 99 seconds.

Cracker Barrel Presentation

This fun and highly energetic ISPI tradition features roundtable presentations given by our local practitioners. The presenters will deliver a 15-minute presentation at their table on a topic of their choice. After the presentation, the presenters will remain at their table and the attendees will select a new presentation at a new table. This format is repeated for three rounds of presentations.

If you are interested in presenting either a 99-second or the Cracker Barrel presentation or have additional questions, please contact Pam Fulwider at SVP-Programs@ispicharlotte.org

2012 ISPI Charlotte Speaker Schedule

Here is a preview of the 2012 speaker line-up

January – Cal Wick: Learning Transfer to Improve Performance

March – TBD (evening program and day-long workshop)

May – TBD

July - Carol Panza: Organizational Mapping

Sept - Miki Lane: HPT for Supervisors and Managers

Nov – Year-end Meeting: Membership highlights and presentations

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