

Performance Improvement in the Piedmont

The Official Newsletter of ISPI Charlotte, Vol. 1, Issue 14



Chris Adams



Gary DePaul



Dick Handshaw

99-Seconds & Cracker Barrel Presentations

In the December Chapter Meeting

On December 1st, ISPI Charlotte will host its last evening program of 2011. The program will feature 99-Second Presentations and Cracker Barrel Presentations.

The 99-Second Presentations are short presentations that address topics in Human Performance Technology or Human Performance Improvement.

The Cracker Barrel Presentations are an ISPI tradition that features roundtable presentations delivered by local practitioners. Each presenter will deliver a 15-minute presentation on various topics. The presenters are:

- ▶ **Chris Adams** – “Troubleshooter’s Toolkit- What to do when learning technology doesn’t work”
- ▶ **Gary DePaul** – “Five Behaviors Needed When Communicating With Executives”
- ▶ **Dick Handshaw** – “Re-Framing a Training Request”
- ▶ **Jackie Weathers** – “Applying HPT Principles to Business Processes”
- ▶ **Pam Fulwider** – “Assessments that Work”

President’s Message

Chapter President Guy Wallace reflects on our October meeting and the mission of ISPI Charlotte.

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In Review: Bill Daniels

A review of Daniels’ presentation on “Matrix Management”.

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Member Profiles

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

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From the President

First of all, thank you to all of our attendees at the October evening program and all-day workshop with Bill Daniels! And many thanks to Bill for coming to Charlotte and allowing us to offer both of these programs, especially the workshop at incredibly low prices! Many members may not realize that our price of \$60 for an all-day workshop compares to prices at other chapters of \$159 and \$259. Such a deal!

Coming up next month, on December 1, 2011, is our end-of-the year program with a series of “local presenters” who will each do a “99 Seconds” session followed by three 15 minute Cracker Barrel sessions. Both are staples of ISPI Conferences. The “99 Seconds” session is something invented by Thiagi, and was used to kick-off each International Conference the first evening before the 3-day event began. We will also hand out certificates of appreciation to all who made this year a success, thank the 2011 Board and welcome the 2012 Board. Plus there will be door-prizes for those who stay until the end – at 8 pm.

A note about our schedule for next year - shifts happen – and we are shifting months in 2012. Our programs will now happen in January, March, May, July, September and November. We did that so as to avoid a conflict with the International Conference which is typically in April. See more about our speakers for 2012 elsewhere in this newsletter. Another note: we will also be shifting locations too – for at least part of 2012 – to UNCC facilities in downtown Charlotte. See more about that elsewhere in this newsletter as well.

Have you been published? Did you like it? Want to do it again? If you have been or haven't been published in the past – here is your opportunity to get published in our next Journal. We see that as another part of offering you Professional Development opportunities. As my 1-year term winds down I find myself reflecting on this chapter's start-up, and as a co-founder (along with Dick Handshaw) I am constantly revisiting the what's and why's of ISPI Charlotte.



Our stated goal is: **“Affordable Professional Development with the Top Names in Human Performance Technology.”**

That still works for me. I hope it does for you as well.

Please help us maintain our ability to provide this in our local community of practice. Please tell your professional colleagues about HPT and ISPI and ISPI Charlotte. Go behind the member firewall on our web site and together view one of six past speakers' 90 minute sessions that we have captured on video. Talk to them about what you have learned about what the research evidence says about our practices in improving human performance in the workplace. And think about getting involved in our chapter Committees and/or Board. That's the best way to network for your professional development, in my mind!

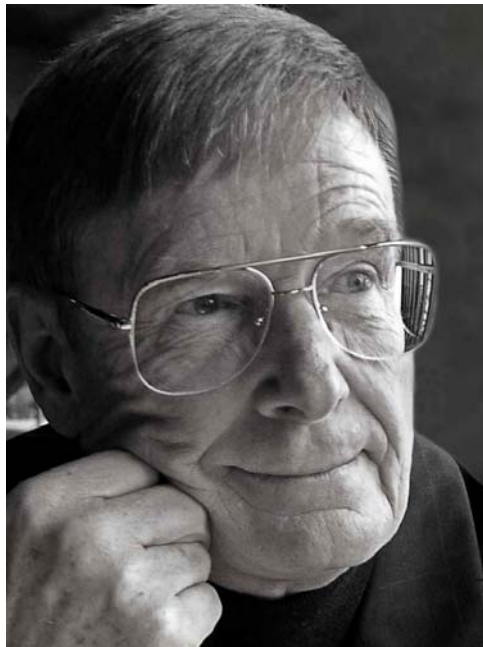
My best wishes go out to the new President, Marc Donelson and his Board for their success, which will lead to our chapter's and our members' success! I will be staying on as the Past President, a non-voting member of the Board, a role intended to provide continuity. I plan on staying very involved with this ISPI Chapter as I have found tremendous value in my participation in ISPI chapters since first joining one in 1979.

Cheers!

A handwritten signature in black ink, appearing to read "Guy W. Wallace".

Guy W. Wallace, CPT

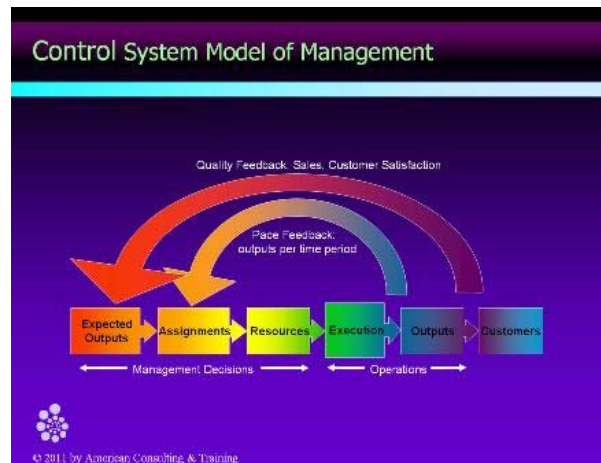
In Review: William R. Daniels



William R. Daniels (a.k.a. Bill Daniels) delivered a highly interactive program on the evening of October 13, 2011 and an all-day workshop on October 14, 2011.

Bill's presentation titled "Matrix Management - More Complicated And Wonderful Than We Thought" captured the audience. He explained that today's business world supplies us with so much information that it is motivating to operate effectively in an environment that provides continuous challenges and ultimately many more opportunities. Research shows that the human mind is more complex and creative than what was originally believed. By leveraging our social networking systems and information technology, humans can accomplish many things not thought possible before.

Bill believes that "matrix management is an essential feature of the culture in which this empowered collaboration takes place." The adjacent image shows the typical workflow process from strategy to execution to delivery.



The arrows demonstrate the continuous feedback from quality measures and customer satisfaction surveys. These loops exist to ensure that organizations are constantly employing appropriate resources to make improvements.

Bill further explained that management is basically a form of information processing and that it is difficult given all of the complexity and uncertainty in today's business world. Today's management processes are highly dependent on the ability to change rapidly and align resources to meet business goals. In short, the more complex the solution, the more complex the processes. Since we have so much information to analyze, we will find ourselves in situations where we cannot make the "right" decisions at all times. We will need to explore new ways to be creative and innovative, and both will require continuous learning.

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Featured Member Profiles

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



Jackie Weathers

Place of Employment: Lowes Home Improvement

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

I've been in the performance improvement field seriously for the past 4 years. Prior to that, I used different methodologies but not from a holistic approach. .

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

Major projects I have worked on include Onboarding, Talent Acquisition, and HR process improvement .

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

The most significant lessons learned about performance improvement are spending the time to think through the approach and planning thoroughly up front is a key to success.



Gary Grant

Place of Employment: TIAA-CREF

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

I got involved in the performance improvement field while working on projects to improve a loan system and a file conversion process. I formally joined the HR, Learning, Development, & Talent Management Department in June 2001.

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

I've worked on many training projects designing, developing, and delivering end-user training. Most of the projects pertained to investment products and services such as mutual funds, annuities, brokerage accounts, and retirement plans.

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

Two of the most important lessons I learned are to complete task analysis and to evaluate solutions.

Featured Member Profiles

Pam Fulwider on “Assessments that Work”



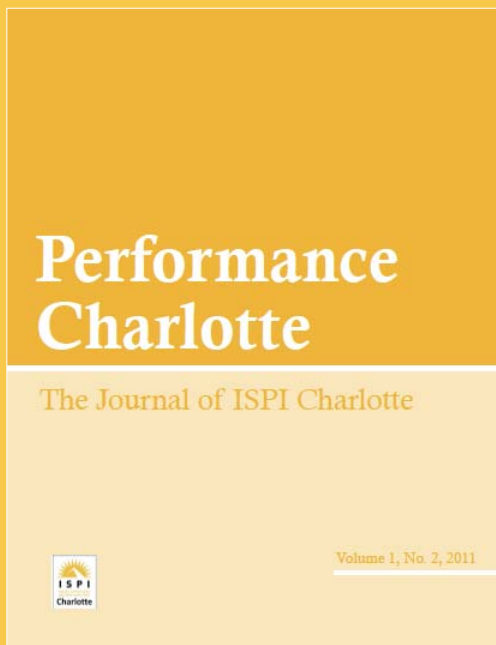
Pam Fulwider & Laura Eller at the October workshop

Synopsis: The discussion begins with a quick overview of pre and post assessment methods. Then addresses some of the research around pre and post assessments, and finally poses questions around assessment validity for measuring knowledge transfer.

Bio: Pam is the Climate Sector LMS Manager who is responsible for the global deployment of LMS to Ingersoll Rand's Trane Commercial and Thermo King business units. In this role, she is able to coach individuals who wish to offer training through the LMS on ISD topics and methods.

Pam is currently working on an enterprise wide project to define a standard L1 evaluation protocol. She recently completed her MS in Instruction and Performance Technology from Boise State University.

Members' Opportunity to Publish with ISPI Charlotte



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

Case Study Thiagi's 4-Door Model

The case study describes how Sun Microsystems invested heavily in providing instructor-led classroom training for its sales teams but the organization was not successful in meeting its goals. After implementing Thiagi's 4-Door Model, Sun Microsystems experience success in meeting its goals.

What is Thiagi's 4-Door Model?

The 4-Door Model to eLearning is a simple instructional design model that helps training and non-training professionals build eLearning programs. The four doors are: the Library, the Playground, the Café, and the Evaluation Center.

How is the 4-Door Model Useful?

Using the 4-Door Model allows learning professionals to design and develop a learning environment that does not restrict learners to a specific order. With the 4-Door Model, learners have the flexibility to move in and out of each door until they are confident that they can perform what they are expected to do.

To read the case study in its entirety, please visit www.elearningguild.com/showFile.cfm?id=3783

January 2012 Chapter Meeting

Calhoun Wick – “Learning Transfer Guaranteed to Improve Performance”



Learning Transfer is defined as putting learning to work in a way that improves performance. This interactive session will introduce the Six Disciplines of Breakthrough Learning that insure improved performance is achieved. Participants will have opportunities to apply the principles and tools in a series of exercises and discussions. Real-world examples will be provided.

We will show how the Six Disciplines support the ISPI standards and allow performance improvement professionals to put these standards into practice.

ISPI Charlotte 2012 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>
January 2012	Calhoun Wick
March 2012	Gary DePaul & Panel
May 2012	Toni O'Driscoll*
July 2012	Carol Panza
September 2012	Miki Lane

*Tentative, subject to change.

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

Book Review: “The Six Disciplines of Breakthrough Learning” by Wick, Pollock, Jefferson and Flanagan - published by Pfeiffer

Reviewed by Guy W. Wallace, CPT, Published in Pursuing Performance - Fall 2006

I highly recommend this book, subtitled: *How To Turn Training And Development Into Business Results*. If your enterprise were to adopt the six disciplines then you would indeed be contributing to the bottom line and thereby “protecting and improving the enterprise” instead of being just a cost center.

The six disciplines are systemic, meaning all must exist in a coordinated fashion in order to achieve the business results desired and the ROI projected. In short – the six disciplines are, in my words:

D1—Define Outcomes in Business Terms...using ROI and other business metrics and terms instead of “instructional objectives” so that management can compare the results with other investment opportunities

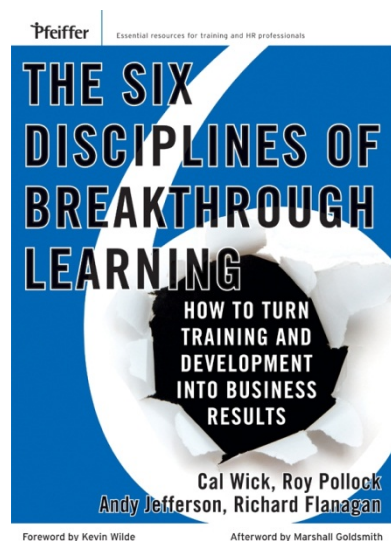
D2—Design the Complete Experience...to ensure the successful transfer you must design more than the main Event and consider the needs pre and post of both the learner and their management

D3—Deliver for Application...and making the performance relevance clear, answering WIIFM (what’s in it for me) for the learners, with high-fidelity applications of the information and concepts presented

D4—Drive Follow-Through...is actively managing the transfer via on-the-job applications experience and monitoring and feedback by the learner’s management/peers as well as by the instructors/coaches

D5—Deploy Active Support...by providing tools and resources during and after the learning Event as well as establishing a learning culture at the top of the enterprise

D6—Document Results...is just what it says, documenting the successes and failures in the business terms of D1 to continuously improve the learning culture and processes, and help the enterprise make better, informed, experience-based decisions regarding future investments in T&D and Learning



The book is an easy, quick read for its 210 pages.

And while the authors are consultants and have products and services related to their content for sale (who doesn’t?), this book stands alone with enough value for ISD practitioners, managers and stakeholders without you making a purchase from them. But given the concepts, information and simple but useful tools presented in the book, I would imagine that their products and services would be of great value as well, although I am just guessing here.

Reach Cal Wick, Roy Pollard, Andrew Jefferson and Richard Flanagan at their firm: Fort Hill Company via the web at:

www.forthillcompany.com

Financial Updates and Other Important News

SPREAD THE NEWS WITH YOUR HR DEPARTMENT!! HRCI Re-certification Credits Available Beginning in January 2012

Good news! We have partnered with ISPI HQ to begin offering recertification credit through the Human Resources Certification Institute (HRCI). HRCI is the credentialing arm of the Society of Human Resources Management (SHRM). Beginning in January 2012, members and guests who attend our programs and workshops and possess the PHR, SPHR, or GPHR certifications may be eligible HRCI credit.

This program has been submitted to the HR Certification Institute for review. HRCI General Credit is Pending.

Please share this news with your company's HR department as we now offer one of the lowest-cost options in the Charlotte Region for HR professionals to re-certify. Ultimately, this value-added member benefit should aid us in our efforts to recruit a larger membership and to increase our meeting attendance rates. Feel free to visit our website next month for qualifying programs.

Many thanks to the efforts of Ursula Smith, VP of Finance and Maurice Coleman of ISPI International's Certification and Accreditation Governance Committee for working together to offer this member benefit. And many, many thanks to ISPI International for absorbing the HRCI \$45 fee for each activity submitted.

BRING CASH FOR UNCC UPTOWN PARKING AND HOW TO GET A REFUND FOR PARKING TOKENS

One of the benefits of our new location at UNCC Uptown is that you no longer have to use a parking token. Instead, you will have the opportunity to pay \$4-\$5 in cash for the parking lots adjacent to the building. Each of these lots has a cashbox where you will pay, in cash, when you park. There are not attendants at these lots, to please bring the exact amount.

Some of you may still have UNCC parking tokens in your possession. Please feel free to bring your parking tokens to our January meeting for a refund. Refunds will be issued at the registration desk.

And don't forget to bring \$4-\$5 cash to park at the UNCC Uptown facility.

PAYPAL - Has your credit card expired?

Please be sure to update your credit card expiration dates in PayPal before your credit card expires; otherwise PayPal will cancel your account.

UPDATING YOUR CONTACT INFORMATION

Any changes to your name, employer, phone number or any other contact information? If so, now is a good time to let us know. Thankfully, members can easily make updates to their contact information in a few easy clicks. Here's how - You can easily log on to <http://ispicharlotte.org/> and go to EDIT PROFILE to make corrections to your contact information. For more information contact online-services@ispicharlotte.org.

NEED A RECEIPT/PROOF OF PAYMENT

It's almost tax time and some of you may have deleted your email receipt of payment for dues or the professional development services you receive through ISPI. Thankfully, getting a duplicate receipt is easy!

If you paid electronically, just log on to your www.paypal.com account to download a receipt. If you paid manually or need assistance just contact Ursula Smith, VP of Finance at 980-202-2421 or finance@ispicharlotte.org.

December Chapter Meeting New Location

The next Chapter Meeting will be held at the uptown UNCC location.

Date: December 1, 2011

Time: 5:30 p.m. to 8:00 p.m.

Place: UNCC

Address: 320 East 9th Street, Room 1104
Charlotte, NC 28202
Corner of 9th & Brevard

UNCC Uptown Parking

Parking tokens will no longer be sold at the registration desk. Parking is available in lots surrounding the UNCC building. One such lot is at 707 N. Brevard St. This is at the corner of 11th. St. and Brevard St.

General Rules for Parking in Lots:

- ▶ Park in numbered spaces.
- ▶ Pay the box (usually \$4.00-\$5.00) in the numbered slot corresponding to your spot.
- ▶ Bring exact change; there is no change machine on site.
- ▶ Pay every time you enter the lot; you cannot leave and come back without paying again.

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