



Performance Architecture

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Let us introduce ourselves. This is the first in a series of regular columns we will be writing about improving the performance of people in the workplace. Like other contributors to BPTrends, and like its loyal readers, we value the importance of processes in contributing to productivity and business results. We believe that by also considering the people and the work environment in addition to the processes – that is, the worker, the work, and the workplace – we can paint a more complete picture of the challenges and opportunities for improving organizational performance.

This article is adapted from Chapter 1 of *Performance Architecture: The Art & Science of Improving Organizations*; Roger Addison, Carol Haig, and Lynn Kearny; © 2009 ISPI; “Reprinted with permission of John Wiley and Sons, Inc.”

The Performance Technology Landscape

At the start of a meeting about the declining performance of the 300 customer care managers in the field offices of a statewide insurance company, the attending stakeholders “knew” that the customer care managers lacked skills and knowledge and required training. By the meeting’s end, they were not so sure. The presenting problem was that the customer care managers could not delegate, but during discussion several concerns unrelated to skills and knowledge surfaced.

The two performance consultants attending the meeting quietly gathered information for further investigation. Not surprisingly, several issues arose from the work that the customer care managers were responsible for, such as certain lower level tasks usually performed by an entry-level employee. Since so many field offices were short staffed, many customer care managers were simply doing this work themselves because they found it faster than showing an employee how to do it.

Typically, customer care managers were responsible for customer service research such as locating a missing policy payment or comparing coverages available among several policies. In recent years, operational processes like these had been removed from the field offices and centralized into regional processing centers to provide faster results and gain economies of scale. The processing centers had service level agreements (SLAs) with the field for the tasks they performed, but they were missing their deadlines regularly. Many customer care managers had faced irate customers because some research took longer in the processing centers than it had in their offices, and in frustration, these customer care managers conducted duplicate research simply to serve their customers better.

The customer care managers were working extensive hours, doing simple tasks best handled by junior staff, duplicating complicated research work in the name of customer service, and struggling to keep up with their own work while trying to fill staff vacancies. No wonder they were burning out and taking stress leave for extended periods.

The two performance consultants reached agreement with the stakeholders to conduct a full-scale analysis of the situation with a focus on work, process, and practices issues. They named the project Service Fitness and went off to plan their analysis.

They began by compiling a list of the issues they had heard about in the meeting:

- Duplicate research activities in field offices and processing centers
- Customer care managers working extensive long hours
- Number of customer care managers out on stress leave
- Numerous customer complaints

The consultants further assumed that the customer care managers experienced considerable task interference because they were doing so many tasks in addition to their regular responsibilities. They identified the processing centers' inability to meet many of their SLAs as a Critical Process Issue, flagging this as a potential driver of other difficulties the customer care managers were experiencing.

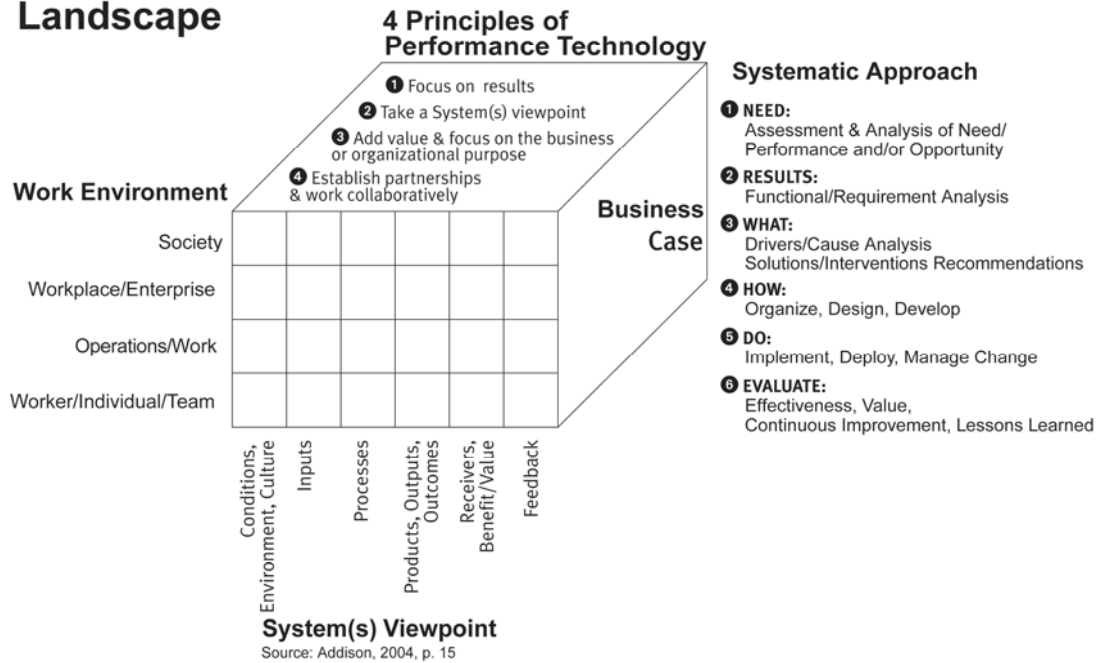
Mapping the field and processing center organizations was the next step the consultants chose. They wanted to see where the work of these two groups intersected and to understand how they were staffed and managed. Finally, the consultants planned a data review and field office and processing center visits to gather information and observe work processes and practices firsthand. They thought that the combination of all these activities would give them a complete understanding of the issues facing the customer care managers. (Addison, Haig, Kearny, 2009, p.35.)

Where We Work

Welcome to the territory of the performance improvement professional. We inhabit a place of great mystery to many, and yet, with careful explanations, examples, illustrations, and stories, much of what we find on the Performance Technology Landscape is familiar to others in our organizations who may be technicians, supervisors, executives, or front-line workers. Here on the Landscape we de-code performance issues and structure solutions to improve the results workers achieve in their jobs.

As the designated architects of improved performance in our organizations, we rely on a body of experience, proven approaches, and documented successes to help our clients provide an environment in which workers can meet and exceed expected performance results. The Performance Technology Landscape is our guide to designing and building Performance Architecture. Performance Architecture comprises evidence-based designs, plans, models, and tools that guide the integration of the worker, work, and workplace to improve performance in organizations.

Fig. 1.1 Performance Technology Landscape



The PT Landscape functions as scaffolding for human performance technologists, providing a base from which to view the ways we can build improved human performance and increase value to the client organization. A closer look at the PT Landscape calls out four critical components of effective results: Principles of Performance Technology, Work Environment, System Viewpoint, and Systematic Approach.

Principles of Human performance technology

Performance improvement professionals adhere to four principles in our work, often expressed as RSVP+:

R – Focus on **Results**: Use our knowledge of the business to help clients link their performance improvement initiatives to business needs and goals, and initiate such projects by specifying what the end result is to be.

S – Take a **System** viewpoint: Consider all aspects of the organization's performance system when we analyze a situation, including competing pressures, resource constraints, and near and long-term anticipated changes.

V – Add **Value**: Produce results that make a difference, both in how we do the work and in what we produce.

P – Establish **Partnerships**: Work with clients and other performance improvement professionals to share skills, knowledge, creativity, and successes to produce the intended results.

+ – **Remain solution-neutral**: The + in RSVP+ reminds us that as ethical performance consultants we stay focused on the client's needs/requirements and remain solution-neutral, recommending what is best for the client's situation regardless of our solution preferences or personal expertise.

Using RSVP+

These principles can serve as valuable guides for performance consultants. For example, results are most often expressed in terms of profits or growth, such as increasing profit or growing market share by a specific percentage. It is important to link our results to critical business, process, and individual measures.

What is the system in the client organization you work with? Is it a series of functional silos? For initiatives to become part of the organization's fabric, processes must be aligned across the system. Take a look at industry leaders, such as Hewlett Packard, where project teams from functions and locations around the world come together, often virtually (Friedman, 2007, p. 207).

What is the quality of the system? We know that a bad system is pervasive and will override the best performer's efforts. The same bad system will overwhelm a good customer's legitimate complaints, enabling resolution of the complaint but without changing the system (Rummler, 2004, p. xiii). Know the environment into which you plan to introduce change.

Partnerships are critical. When you look around your organization you will find lots of people trying to improve performance in their own areas. Consider the power of a broad group of stakeholders partnering for the same goals. Today, if an organization isn't thinking horizontally, it is not innovating.

Organizations get what they measure, and they measure what is of value to them. Don Tosti recommends that we align our practices with the organization's values (in conversation with Don Tosti).

And, finally, RSVP makes a wonderful frame on which to construct an elevator speech to describe your work. Try creating several short statements that touch on each of the principles and see what you can build (Haig & Addison, 2007).

By thinking systemically, we are able to identify and work with all the linkages in organizations as we strive to improve performance (Addison & Haig, 2006, p. 39).

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