

Performance-Based Instructional Analysis

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Let me start with the premise that “People are on the Payroll to Produce Worthy Outputs.”

And that leads next to what I had learned from Rummler & Gilbert back in 1979 that Worthy Outputs are Worthy Inputs – downstream – to Internal and/or External Customers – and that the Outputs produced and the Tasks Performed need to meet the balanced requirements of all Stakeholders.

If you aren’t focused on helping your Learners become better Performers and helping them to produce Outputs better, faster, cheaper, and safely – **then what are you doing?**

This isn’t new, of course. It wasn’t even new in 1979, when I was first handed a binder of Praxis workshop materials from 1972. Then, Praxis was the consulting firm of the late Geary A. Rummler, Ph.D., and the late Thomas F. Gilbert, Ph.D., two of my most influential mentors, the former directly and the latter indirectly.

From them, I learned to focus first on the Output requirements, including how they were measured. Next, we would determine the deltas between top performers and the average and poorer performers to see what might be leveraged and what that might be worth.

The first thing Performance, Inc., does in making a performance analysis is determine and describe the ideal or desired performance of the employees or job in question. They do not start by describing all the activity the employees engage in, but rather by identifying the major accomplishments or outputs (the results of the activity) of the job.

Then, the performance requirements, expectations, or standards for each output are identified and recorded. Next, the actual performance is compared to the desired, thereby identifying areas that require further analysis and action.

Suppose a perceived Performance Problem or Opportunity was driving us. In that case, we might stop our analysis efforts and move on to the subsequent Output looking for some Gap worthy of addressing, where the Returns would be significantly more than the Investment costs of addressing it might be.

If we were conducting a project to address the needs of new hires, we would continue with our Analysis.

Our subsequent analysis efforts would determine the Behavioral Tasks performed to produce the Output. And then, we would clarify all of the roles and their responsibilities task by task.

After that, we'd conduct a Gap Analysis wherever an Output's Measures and Standards were not being met to determine the possible Causes.

Our captured data would look like the following example, adapted from a project back in 1986.

The ABC Company Account Representative Performance Model							
Area of Performance: 1. Territory Planning							
• Key Outputs - Measures	Key Tasks	Roles/ Responsibilities			Typical Performance Gaps	Probable Gap Cause(s)	dE dK dI
		1	2	3			
<ul style="list-style-type: none"> • Territory plan - Includes all components - Territory map - Territory/customer matrix - Product/market matrix - Prospect list 	<ol style="list-style-type: none"> 1. Review, update, or create a territory map 2. Review customer records and classify by size and type 3. Follow up on all <ul style="list-style-type: none"> - Sales leads - Referrals - Cancellations and determine sales (new and account maintenance) cycle times 4. Using customer records and the territory map, create a <ul style="list-style-type: none"> - Territory/customer matrix - Product/market matrix - Prospect list 				<ul style="list-style-type: none"> • Plan is incomplete or no plan is developed • Plan not adhered to or not updated when changes occur 	<ul style="list-style-type: none"> • Don't know how • Don't take the time • Not demanded by management • No demand/expectations to plan or to use it from management • Territory conditions are constantly changing 	dK dE dE dE

Codes: dE = deficiency - Environment dK = deficiency - Knowledge/skill dI = deficiency - Individual attribute/value
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Once we had pinned down the Performance, we'd shift our efforts to deriving the Enabling Knowledge & Skills. I evolved the Categories of Enabling Knowledge & Skills from the eight I used in the early 1980s to the following 17.

Knowledge/Skill Category Definitions

Knowledge/Skill Category	Definition of the Knowledge/Skill Category	Knowledge/Skill Item Examples
1 – Company Policies/ Procedures/ Practices/ Guidelines	Any rules the Company/Enterprise expects employees to follow when performing their jobs. These are the Enterprise’s documents on what they want done or not done. They are internally imposed. Typically, these keep the organization in line with government regulations. Not following them will lead to sanctions for the employee, which may include loss of job.	<ul style="list-style-type: none"> • Purchasing policies • Code of conduct • Progressive discipline • Holiday scheduling and compensation
2 – Laws, Regulations, Codes, Agreements, and Contracts	Laws or regulations from the government that basically govern the way you do your job. Any federal, state, or local laws or codes that drive our need to be compliant. Anything externally imposed that has the “power of the law” and would equate to jail time or fines if broken.	<ul style="list-style-type: none"> • EEO regulations • FDA regulations • EPA regulations • Union agreements • Supplier/vendor contracts
3 – Industry Standards	Industrywide agreements that allow the Enterprise to be competitive. These are not imposed by regulatory agencies or policies and do not have the power of the law, but the power of the industry.	<ul style="list-style-type: none"> • QS 9001 • ANSI • Dairy Association • PAL Video Format
4 – Internal Organizations and Resources	Internal departments, support groups, or other staff that help you accomplish work and/or are conduits to external entities.	<ul style="list-style-type: none"> • Print Shop • HR • Engineering • Purchasing
5 – External Organizations and Resources	Outside agencies, companies, and professional or external sources you can use.	<ul style="list-style-type: none"> • ISPI • ASTD • Sales Force • J.D. Powers • AMA • Accountants • EPPIC
6 – Marketplace Knowledge	Industrywide views regarding <ul style="list-style-type: none"> • Knowledge of customers: types of customers, specific companies, customer types, the economic buyer or user of your product. • Knowledge of competitors: who are your competitors regarding a particular platform or product line. • Knowledge of competitive products. 	<ul style="list-style-type: none"> • Ford, GM, Chrysler, Toyota – Enterprise and competitive products • Pioneer, Sony, Panasonic, Zenith – Enterprise and competitive products

Knowledge/Skill Category	Definition of the Knowledge/Skill Category	Knowledge/Skill Item Examples
7 – Product/Service Knowledge	The products the Enterprise produces or the services the TMC Enterprise provides. The Enterprise products or services that you need to know about to do your job. The depth you need will depends on the type of job you have.	<ul style="list-style-type: none"> • Widget X • Consulting on Y
8 – Process Knowledge	Formal or informal processes that cut across two or more organizations within the TMC Enterprise. (Note: the Enterprise needs to define). If there is a policy or procedure covering this, then it need not be rewritten in this category.	<ul style="list-style-type: none"> • New product development • Sales forecasting • Product distribution
9 – Records, Reports, Documents, and Forms	Any documents that you need to read, interpret, and/or complete.	<ul style="list-style-type: none"> • T&D time reports • MHDS • Expense reports
10 – Materials and Supplies	The materials and supplies consumed in the performance of work.	<ul style="list-style-type: none"> • Color print cartridges • Fuses • Resistors • Lubricants • Flip chart • Easels and paper
11 – Tools/Equipment/Machinery	Any tool or piece of equipment that you need to use. <ul style="list-style-type: none"> • Machinery: fixed and large • Equipment: movable and medium-sized • Tools: flexible and small 	<ul style="list-style-type: none"> • Forklift • Overhead crane • Enterprise vehicle • Road grader • Floor jack • Power drill • Hand drill • Micrometer • Oscilloscope
12 – Computer Systems/Software/Hardware	Any type of computer, peripheral, hardware or software.	<ul style="list-style-type: none"> • The T&D Employee Participation Records/LMS database • Spreadsheet software • Laser printer • Scanner

Knowledge/Skill Category	Definition of the Knowledge/Skill Category	Knowledge/Skill Item Examples
13 – Personal/ Interpersonal	Personal development knowledge or skills applicable to individual contributors.	<ul style="list-style-type: none"> • Interviewing skills • Proactive facilitation skills • Time management • Project management • Creativity • Verbal communications • Written communications • Presentations • Negotiations
14 – Management/ Supervisory	Knowledge or skills that are truly unique to a supervisor or manager that usually have legal implications.	<ul style="list-style-type: none"> • Employee counseling • Progressive discipline • Termination • Hiring
15 – Business Knowledge and Skills	Industry trends that equate to a business challenge. Any business challenges that become business strategies or business initiatives driven by business strategies.	<ul style="list-style-type: none"> • ROI • EBIT • RONA • EVA • Current TMC business strategies
16 – Professional/ Technical Knowledge/ Skills	Any knowledge particular to the profession being analyzed.	<ul style="list-style-type: none"> • Adult learning theory • Financial analysis theories • Electrical engineering symbols
17 – Functional Specific Knowledge/ Skills	Any information that is specific to the functional area being studied.	<ul style="list-style-type: none"> • The Sales Division T&D philosophies • Materials organization mission

The Enabling Knowledge & Skills would be captured on a set of documents that I call Knowledge & Skill Matrices. Here is an example.

TMC Sales Reps Knowledge/Skill Matrix												
Knowledge/Skill Category: 6. Marketplace Knowledge												
K/S Item	Link to Area of Performance							Select/ Train	Criticality H/M/L	Difficulty H/M/L	Volatility H/M/L	Depth A/K/S
	A	B	C	D	E	F	G					
Marketplace Segments	X							T	H	L	M	K
TMC Competitors	X							T	H	M	M	K
Exclusive TMC Products	X							T	H	L	M	K
Other TMC Products	X							T	H	L	M	K
Co-Branding	X							T	H	M	M	A
SW Regional Differences	X							T	H	L	M	K
NE Regional Differences	X							T	H	L	M	K
SE Regional Differences	X							T	H	L	M	K
MW Regional Differences	X							T	H	L	M	K
Territory Assessment	X							T	H	H	L	S
Codes: <u>Link to Area of Performance</u> <u>Criticality/Difficulty/Volatility</u> <u>Depth of Coverage</u> A = Territory Planning E = Sales Follow-Up H = High A = Awareness B = Account Planning F = Reports & Admin M = Medium K = Knowledge C = Customer Call P&P G = Personal Dev L = Low S = Skill D = Customer Call Conduct												

Nailing down these two sets of Analysis data allowed me to address my two other standard types of Analysis:

- Target Audience Analysis
- Assessments of Existing Content for its ReUse Potential

Your approach to and the outputs produced from your Instructional Analysis will likely vary based on your downstream design and development approach.

My hope is that you might see some value from a focus on the Outputs of Performance just as I have since beil was taught this back in 1979.

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