

# Performance Support

## Overview

An important solution for training and learning design is performance support. Role specific instructions available at the moment of apply has been shown to improve on the job performance (source: <https://www.5momentsofneed.com>). In this project example, the business consulting analysis indicated that this approach would be an effective solution for the business need.

## Project Role

Designer  
Technical Lead  
Project Manager

## Challenges

- **Class time:** Reduction of classroom cadence and duration to address need for more classes while maintaining current trainer count and to reduce time employees spend in the classroom.
- **Process documentation gaps:** Learners must take large amounts of notes during class to rely on after training for task reference. Email relied on for process change communication.
- **Discoverability:** Reference materials for the role is available but is difficult to find quickly due to advance user organization and jargon used for keyword searches.
- **Complex processes:** Proficiency ramp up time for new hires lengthy since process is complex with several decision points

## Requirements & constraints

- **Technology:** Performance support platform was purchased for implementation
- **Role:** Leadership team selected pilot job role to test methodology and platform
- **Timeline:** Predefined delivery timeframe of 3 months

# Define

New hires and fully proficient employees cannot locate up to date task procedures for reference efficiently. Employees would like to spend less time on fundamentals and more time on hands on practice in the classroom. Employees struggle with performing end to end task flows consistently resulting in errors.

# Solution Goals

Implement performance support methodology which solves for "moment of apply" as first priority:

- Provide employees visual process map guidance through task from start to finish
- Allow employees to drill down in content for additional detail as needed
- Design quick access guide to navigate in 10 seconds or less
- Modify classroom learning design to prioritize hands on practice by leveraging performance support tool step by step guidance

# Research

## Class feedback

Prior to the beginning of the project, feedback from previous class attendees was gathered to understand pain points in role documentation.

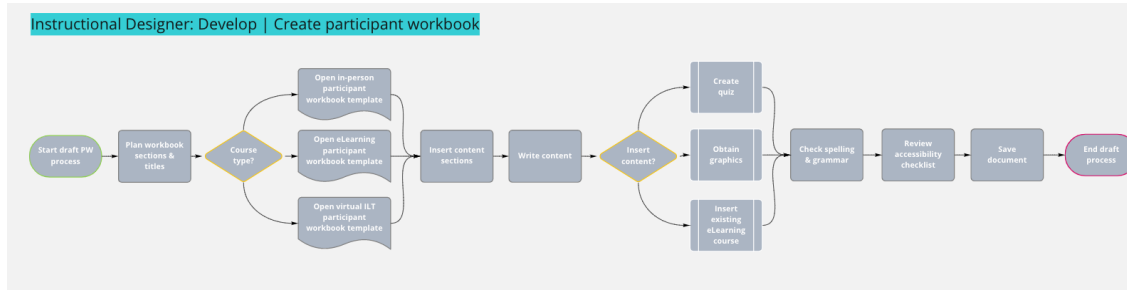
## Task assessment

After the project kickoff, the first step was to assess the job functional role for high level task groupings. Then the team met to fill out each task grouping with individual tasks in each category.



## Process mapping

Each task identified in the task assessment was mapped end-to-end in Visio diagram maps. Each map was reviewed by the business and training leads and signed off on for accuracy.



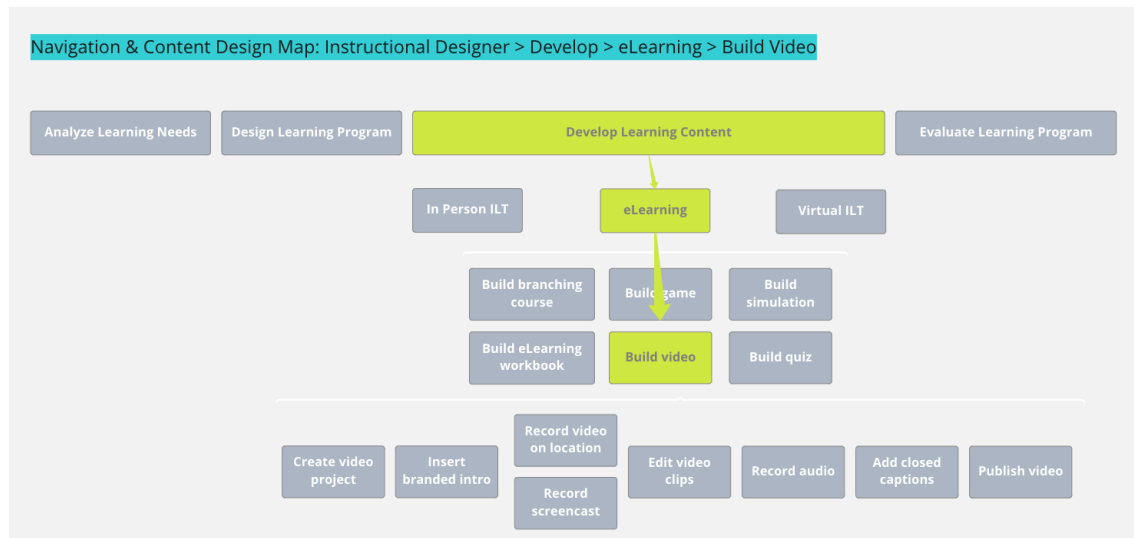
## Documentation inventory

All role specific and general documentation was identified and catalogued. Role specific documents were flagged for conversion to the new platform. Documents owned externally were linked from the platform.

# Design

## Design Sessions

After process mapping sessions, the project team worked together to organize, group and design the navigation for each process, identifying the detailed procedure documents required for each process map. Each procedure document was catalogued and assigned to a technical writer.



## Card Sorting

After a list of all content was identified for the project build, a card sorting activity was conducted with a range of end users: new hires, trainers, and subject matter experts. The results were analyzed to form the information architecture of the new platform for the role.

## Prototyping

The performance support tool customizable screens were prototyped:

- Dashboard landing page design
- Process drill down map designs
- Detailed procedural instruction design
- Site contents design

## Reviews

Prototypes were reviewed by project team end users, leaders, and peers for feedback periodically throughout the project. As the project releases progressed, the optimal review session cadence was:

- Kick off demonstration of the tool and design
- Design sessions results individually reviewed by small group of end users and project lead

- Each high level function tested after draft completion
- Final end to end testing performed prior to release
- Post release feedback review bimonthly

## Iteration

Focus groups were held to review effectiveness of design. Feedback was incorporated into second iteration of the design to include:

- Additional white space in documents
- Simplified process map designs
- Modernized & branded dashboard for quick access documents and apps

Several testing sessions were planned throughout the project: individual documents, maps and overall platform.

## Results

- Average of 20% reduction in classroom time
- Completed pilot and full implementation for two business partners
- Established performance support project implementation playbook
- Positive feedback from new hire end users