

Learning Uncut Disruption Series
Guy Wallace – Practical Guidance on Performance Support
Hosted by Michelle Ockers



Michelle Ockers:

Welcome to today's episode of the Learning Uncut Disruption series, bringing you practical guidance that you can use right now from leading practitioners on things that you as a learning professional may be using for the first time or scaling up your use of. And today we have Guy Wallace talking with us about performance support. Welcome, Guy.

Guy Wallace:

Thank you, Michelle. I'm pleased to be here.

Michelle Ockers:

Delighted to have you. Can you introduce yourself and your body of work around performance support to our guests?

Guy Wallace:

Sure. My name is Guy Wallace, again, and I'm a performance analyst and an instructional architect. I've been in the ISD world since 1979 and I've been a consultant since 1982. So I'm a grey beard, but you can't see that on an audio podcast. My specialty has been performance-based curriculum architecture design, and that produces what's known as performance-based training and development paths. 20 years later, they became known as learning paths. But the intent is to take one or more jobs and analyse the performance requirements, derive the enabling knowledge and skills, and then plan a path of learning for that particular job.

Guy Wallace:

But because most people that have the same job title may have different job assignments, that also includes planning guides that personalize the training and development plan or path to that individual's job and accounts for their incoming knowledge and skills. Within all of that, performance support, or what's been known in the past as job aids, has always been central to that.

Michelle Ockers:

I feel like this is going to be hard to have a short discussion. As you said, Guy, you've already mentioned three or four things I'd like to dig into more.

Guy Wallace:

Please go ahead.

Michelle Ockers:

All right, so let's start with analysing performance requirements. It feels to me like that's one of the early things you need to get right before you figure out what's the best approach to support someone to improve their performance. What are your tips for analysing performance requirements? How do you go about doing that?

Guy Wallace:

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Well, it is central. I mean, your performance support or job aids, or whatever you want to call these things, is only going to be as good as your performance analysis, quite frankly. As I approach that, if you're looking at a single smaller task set, that's one thing. If you're looking at an entire job and trying to figure out what's all the performance support that might be required, you're going to have to have some way to basically carve that up. I use a device called areas of performance, where you chunk out the entire job so you can analyse it in detail and not miss anything. Not that you're going to address everything with a formal response, but you need to begin with the end in mind. You need to understand what are the outputs of performance and what are the key measures for those things. That's central here.

Guy Wallace:

It goes beyond task analysis. That's one thing I didn't like about task analysis back in the day, that it was sans output. So you begin with the output and then you can begin to understand and capture what all the tasks are. Now, my big worry about that is that what the research shows is that an expert, a subject matter expert as we like to call them, or a master performer, as I like to call them, they and all of us really are operating on non-conscious knowledge. And so what the research says is that an expert will miss up to 70% of what a novice performer needs. And so one big issue is relying on one subject matter expert or even a group of them. So they're not going to give you something that's very complete.

Guy Wallace:

But that's who we tend to use. We can do observations, review documents, and we can interview people, but we've got to be wary about that. And if we're doing observations, we can see the observable behaviours, but we can't see the cognitive portions of that and what they're thinking. And so there's other approaches to get that. But also, an issue is that performers are seldom acting in kind of a solo capacity. They're often involved with others, other job titles perhaps, or whatever. So it's important to then clarify the roles and responsibilities, and well, I like to do that task by task. Who does this task? Oh, there's three different jobs doing that task, and the next task is done by one person and then it's handed off, et cetera. But it's good to get that clarification down.

Michelle Ockers:

So Guy, in terms of getting started quickly, that doesn't sound quick. How are our learning professionals, many of whom at the time we are recording this, my sense is they're still responding to the immediacy of now, like there's some new things people are doing or people's work context has changed either because of physical distancing in the workplace or working from home. What would be, if you like, the minimum viable approach to actually doing some form of decent analysis before you start whipping up performance support for people right now?

Guy Wallace:

Well, it depends on how good and accurate and complete you want your job aid or performance support to be. So we are always in a hurry. We were in a hurry back in the 70s and 80s, believe it or not. So I like to assemble a team of master performers. Now you do that virtually nowadays. In the old days you did that face to face. But basically you work with them so that they can bounce ideas off of each other, correct each other's errors of omission, etc., and capture what's important about the output. How can you tell a good one from a bad one? What are the tasks? One, two, three, four, five. Somebody might say something's missing between three and four, and this is what I do. And everybody else might say, "Oh yeah, we forgot." But you capture that.

Guy Wallace:

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So then you're going to turn that content into instruction, just as if you bought a swing set for the kids. What's going to come along with that is going to be an assembly instruction. That's a job aid or performance support. Same thing. Same concept. So that's about as quick as you can go.

Michelle Ockers:

It sounded quick when you rattled it off. That's great.

Guy Wallace:

But it's never that quick. But so the danger is, is that we're going to miss something, we're going to miss something important, and I don't believe that you should be doing performance support kinds of things on the so-called low hanging fruit. They should be addressing high stakes performance, where the risks and rewards are high. And we want to make sure that people don't learn by failure because that may be too risky and/or we may forego a reward. So we've got to put the right amount of effort into this, and of course that's something that we may have to negotiate with our clients.

Michelle Ockers:

Right. Can you give me an example of the kind of task that performing this kind of analysis is well suited to? You talked about high risk, high stakes. What are some examples where you've seen it used appropriately?

Guy Wallace:

Well if you were going to audit a loan application or something like that, and you want to make sure that people don't gloss over certain areas, critical areas of that, you want to provide them with some guidance. You want to make sure that they pay particular attention to certain areas and so that's what performance support or a job aid can do. It can highlight those things and draw out the criticality.

Michelle Ockers:

Okay, so we've identified appropriate tasks that we want to support with performance support. We've done our analysis, at the very least, the kind of minimum viable approach you've described. If we have a little more time and/or if the risks and the stakes are high enough, we do it more thoroughly. Then we need to decide what sort of support are we going to provide? When is performance support or job aids a good solution versus other solutions? When are they best suited?

Guy Wallace:

Well, again, when the risks and rewards are high, but also when the performance is complicated, when we would be fearful of people trying to memorize the complicated tasks, and if the risks and rewards are high, we can't trust their memory, or we shouldn't. And so we should do it when performance is complicated and we need to make sure that certain steps or all the steps are completed. If the performance is infrequent and you may have trained somebody on something, but now it's gone into cold storage, and when they bring it out, they're going to forget half of what they were taught, and so that's problematic, as well. Again, high risk, high reward, that's problematic.

Guy Wallace:

If you can't use it, if the use of performance support, a job aid, would interfere with the task performance, we expect our emergency medical technicians to have things at the ready. They need to know what to do as soon as that situation arrives. They don't have time to refer

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to anything. And so, and we should also not do this if the performance is likely to change, because that's when, if the performance is going to change, then we don't want people to memorize it, or we should do it when performance is likely to change, because we don't want people to rely on their memory because the procedures may have changed, and therefore we want them to refer to the job aid each time. Much like in the pharma industry, standard operating procedures are issued each time somebody is going to go do a task. So you're getting the latest SOP to guide that performance.

Michelle Ockers:

Right, and that all makes sense. Good guidance. So in terms of what to produce, so we've decided it's the most appropriate solution. What are our options with the kind of format for the form that our performance support aid will take?

Guy Wallace:

Well, this is a big issue, because this has been articulated going back into the 60s and 70s, by people in the instructional design business, if you will. Everybody's got different labels for these things, but a more typical one is often called a cookbook or a step action table or it could provide step-by-step directions, much like you'd find in a cookbook. There can be worksheets and forms. If you need people to do calculations or something like that, you may want to provide them with a format so that they can get it right and check their own work. A simple checklist is often involved. Sometimes it's to guide the sequence of performance, the task performance, or sometimes the sequence doesn't matter. You've just got to make sure that you do each and everything, and so the checklist can help guide people doing that.

Guy Wallace:

There's decision tables with a bunch of if then statements, if this, do that, if this other condition exists, do something else. There's flow charts that are more visual in nature where we're used to seeing, you know, they were asked a question, and if the answer is yes, go this way. If it's no, go that way, and that guides our performance. We can also use sets of work examples to provide people with some guidance. And back in the day before there were really computers, there was a thing called paper computers, where people might go through a series of questions and answering them and use a number two pencil or something, and fill in a little hole under the yes or no or whatever the options were, and at the end they find out, oh, I should do this instead of that, because I've just gone through this series and I've told myself in a logical sequence, quite Socratic, that the green colour is better than the red colour for me, or whatever the situation might be.

Michelle Ockers:

So in that case, it sounds like you're helping someone to step through a logical sequence of decisions to come to a final conclusion.

Guy Wallace:

Yes. And this was kind of interestingly, when this first came out, this was in an article in a newsletter from 1970 from the Lake Erie Rambler and the late Tom Gilbert's company [inaudible 00:12:35]. But they share an example where instead of having a salesperson use this paper computer, they gave it to the customer and they let the customer go through the decision-making process themselves so that they could logically conclude, hopefully, to buy that salesperson's product versus the competitors' products.

Michelle Ockers:



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So performance support could be for a customer rather than just the worker in your organization, Guy?

Guy Wallace:

Oh yes. Just like the swing set, set of instructions on how to put the whole thing together.

Michelle Ockers:

I'm putting together a compost bin at the moment. I've been doing it for three days because I can only handle trying to follow the instructions for about 20 minutes at a time.

Guy Wallace:

Those aren't always well written or tested.

Michelle Ockers:

No. We'll come back to that in a moment. Before we move on, in terms of format, so I wanted to ask you about electronic performance support. What is that? When is it useful?

Guy Wallace:

Well, EPSS, electronic performance support systems, is a phrase coined by Gloria Gery. And that's when we took the same kind of a concept of a job aid and embedded it into software, so that when people were going along the workflow and they got to a certain stage, either they would have the option of getting some help or they would be confronted with help regardless of whether they wanted it or not, just to make sure that the step was followed correctly. So that concept works really well with a lot of our work today, because a lot of our work today is on the computer and is following a workflow that's enabled by software.

Michelle Ockers:

So there is an option for learning professionals or performance support professionals to work with software vendors, with IT departments, to embed performance support into the operating systems that people are using to do their jobs.

Guy Wallace:

Yes. And of course the more stable the processes, the more worthwhile that an investment like that would be. But if it's something that's going to be changing often, you probably have to go some other route.

Michelle Ockers:

Yeah. Understand. So in terms of quality of the final product, the [inaudible 00:14:52] performance support, what are some good practices for people to follow? Either design guidelines or things they can do perhaps as they're designing, testing, and so on, to make sure that whatever they produced is helpful?

Guy Wallace:

Well, I guess the first, on the front end, is your approach to analysis and getting down what are the outputs and tasks. Again, we talked a little bit about subject matter experts and all of

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us operating on non-conscious knowledge, so we have to be wary of that, and we're going to have to deal with that one way or another. But in the famous words of Bob Mager, "Test, test, test." Now, back in the old days we called it alpha testing, where I would show it to the person in the cubicle next to me. Today, we'd have to share that virtually. And they could make sure it made sense to them before I potentially wasted the time of other performers in a beta test, which I would give them the whole thing that's already been looked at to make sure that the spelling and language and whatever, it's logical, and I would ask them to test it out.

Guy Wallace:

You would ideally, I think want to go after two kinds of audiences, but you don't have to. You could save that to what I would call the pilot test, the third test, so we would do an alpha quick test, a beta, trying to test the whole thing with a few people, and then we'd want to take it out to an authentic real use and do a pilot test. One of the things that I would do when I do pilot testing of any kind of instruction is to ask for two types of audience, the target audience themselves, members of the target audience who don't know how to do the job necessarily or haven't done it a lot and give it to them and see if they can do the job. And if they can do it each and every time, then it's successful.

Guy Wallace:

But there's variants in the work, in the workflow. It's not always the same standard approach. And so sometimes it's hard to test for that. You don't have the situation in front of you that varies enough to destroy, fully destruct your little pilot test. So I often ask for master performers to also test, to make sure that the content is accurate, complete, and appropriate. New people can't tell me that, but I can measure whether they can really learn or use from that. And that that kind of brings up the subject of learning. If you do a job often enough, you may find that you don't need the job aid or performance support after a while. You've learned it. But sometimes we want that, sometimes we don't. Sometimes it's just a guide or a prop to get us up and running up the learning and performance curve, but other times we don't want people to use the job aid all the time. We want them to eventually memorize it.

Guy Wallace:

But there's the cases where if something is going to change, we want them to look at it each and every time. In fact, the regulations that we are guided by, governed by, may require us to have people using standard operating procedure, an SOP, or a performance support or a job aid. Again, it all depends on the risk and reward and the situation involved in the performance itself.

Michelle Ockers:

Okay. Let's talk tools and technology. What kinds of technologies are appropriate to use, and at what point in the whole process from analysis through to end use of your performance support aids?

Guy Wallace:

Well, when I'm doing the analysis upfront is when I want to understand what tools and systems these performers already have. I think introducing something brand new to them, it might be the right approach, but it may not. It just encumbers them further, they and their organizations. And so you want to use what they already have, unless it's just not conducive or they're getting ready to replace it or something. So I don't think that that really matters. So

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if, depending on the, you know, back in the old days, if you strapped a tape recorder or a tape player to somebody's belt and let them listen to the instructions and hit the pause button themselves, that might have been the way to go. Now we have the ubiquitous smartphones and tablets and et cetera, and so we have all sorts of digital ways to deliver our content.

Guy Wallace:

And I just really think that we need to understand the performance context and all the variation therein to determine, and you know, the master performers, if you dealt with them, they'll be happy to tell you exactly how to do it and not to do it. And they won't be shy about correcting you, because they don't want something that's not conducive to the work environment. So I think it's really critical to listen to the voice of the master performers and take their guidance. They can tell you what the output is, what the measures are, what the tasks are, and how to deliver this performance support job aid item.

Guy Wallace:

And that brings up the question of, so how do we make sure that these are accessible, findable? So now we're into naming conventions, which is always problematic. Folks [inaudible 00:20:13] will tell us what they're calling it, but if you talk to enough people, you're going to find out that they call it multiple different things, and so there is no one right answer out there in the workplace. But I think naming conventions are really critical. And that's something that you need to engage the master performers and have them have a say in how we name this.

Guy Wallace:

But also then, how do we organize these things on the company intranet or however or whatever they're using? And I like to organize things by department. There are things that happen, tasks that happen in a department, that happen in every department. So there's a bunch of shareable job aids, if you're going to do strategic planning or financial budgeting or things like that. Every department has to do that. So there should be one guideline and share it across many. But every department has its own core set of processes and outputs that they're responsible for, and so we need to make sure that those things that are unique to department have a special place and nobody else can mess with them. But there's got to be a logical way to organize those, and I would organize them by the processes.

Guy Wallace:

In the instructional design business we have, this may be controversial, the [inaudible 00:21:31] process, so we can plug things into an [inaudible 00:21:33] box and put the job aids in there. And then there's people who deliver the content in instructor-led training or webinars or whatever. We can have things on the deployment side or delivery side for them. And then there's administrators who do registration. So we can organize our view of processes and put in the appropriate performance support and organize it in a way that's conducive to their work, reflects their own work processes, and is named in a manner that's going to be recognizable for them. If there's a language issue, and on the East coast they're calling it one thing, out on the West Coast, they call it another, in the central part of the country they call it something else, well, eventually everybody will learn the new language. That's part of the problem is that there's nothing to anchor them to here's the nomenclature we're going to use going forward, and here's the translation guide for the people who are caught up in their current state and need to migrate. Eventually everybody will understand the new language and how we've configured all of this content.

Michelle Ockers:



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So Guy, in addition to your file storage system and your naming conventions, do you advocate the use of tagging the files? And if so, what are some of your suggestions for how to effectively use tagging to help make things discoverable?

Guy Wallace:

Well, again, I think that if you are tagging with the output or the name of the process, and again in some places what we call this process versus that process, it's all well understood, but there's a lot of places where it's the Wild West, so to speak, and everybody's calling it all sorts of different things. And that's the challenge. So I think the tagging has to reflect the real world, authentic language that's being used. We can't use instructional design speak and our favourite language. We really need to use what the customer wants and is familiar with, because they have to live with it.

Michelle Ockers:

So again, you probably need to test the tagging, right, and the naming conventions and so on as part of your testing process?

Guy Wallace:

Yes, exactly. And I think that that's a negotiation with the organization, because if you're going to start off doing a couple of job aids, performance support items, and eventually you're going to grow something that's a large number of these things here, you're going to run into organizing them alphabetically is not the way to go. It just doesn't make it user friendly. Now, that may be one way to organize a directory, but another more appropriate might be by, again, the work itself and however they want to call it, by the job tasks or the processes or the practices, or there's lots of different language we can use, and I think that each organization can determine for itself what to call things. But then you might run into the problem, department by department by department, they want to do something so different that you can't share content. And I think that that's a sin, to miss the opportunity to share content.

Guy Wallace:

I mean, how many times do you need, how many different versions of how to create a departmental budget, the annual budget, how many different versions of that do we really need? Because if we have more than one version when we could have had one version, we've increased our first cost and we're going to increase our life cycle costs to keep those things maintained and up to date.

Michelle Ockers:

So there's a real opportunity to reduce duplication, reduce waste, and help people across the business to standardize on good practice, as well, in this process.

Guy Wallace:

Exactly.

Michelle Ockers:

So Guy, we have covered a lot of territory in a short space of time and it's been super practical. Thank you so much. Is there anything I haven't asked you about that you think is important for people who perhaps don't have a mature performance support practice to be thinking about right now or doing right now?

Guy Wallace:

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Well, there's a lot of history to performance support. I mean, back like I said, it was called guidance back in the 60s and 70s, job aids in the 70s and 80s, electronic performance support systems, quick reference guides, SOPs. I mean, we just have to have this proliferation of labels for this, and now we're calling it performance support. But Jane Bozarth, who you had in this series just a few days ago, told me a year or so ago that performance support is not a great term, because employees don't like it. It reminds them of performance management where we're going to fix people. So that whole performance term may be problematic. So that's one of the things to test.

Guy Wallace:

Or we could call it workflow learning, but again, learning's not always involved. Sometimes we just want people to use it and then they can forget about it and go on, and we don't want them to learn it. And so [crosstalk 00:26:17] vary.

Michelle Ockers:

[crosstalk 00:26:18] folks in your organization and for your people is what I'm hearing here.

Guy Wallace:

Exactly. And I think if you were to do a search on the internet, you'll find a lot of people have been talking about this for decades and decades. Some of the people more recent are Dave Ferguson and Russ Powell. They both have their own articulation of this. They use a slightly different set of language to label the types of job aids and guidance and performance support that there are. And Alison Rosette has a great book out, probably 20, maybe 30 years old at this point, so there's a lot of resources out there, but you're going to have to come to some common ground in terms of what you're going to call these things.

Guy Wallace:

I was talking the other day with a person who works for one of the airlines, and they were going to change the name job aid to something else and they did it and then they got a backlash. Their entire world had been calling these things job aids for 30 some years and they had to retract and go back and started calling everything job aids. So you've got to be careful about that. And again, if you're really in touch with your customers and the performers that you're trying to serve, they can give you some guidance in terms of what to call things.

Michelle Ockers:

Great, great. I feel like I need performance support for performance support right now, Guy. Thank you so much.

Guy Wallace:

Well, I actually have something that I was given in 1979, a job aid on job aids, and so there is such a thing, and it's included in the resources you're going to show at the end.

Michelle Ockers:

Show notes, yes. And I will point listeners to those show notes, sorry, and the resources in the show notes. Guy has shared a couple of key resources. When you first look at them, you might go, oh, these look a bit outdated, because I think they are from the 70s or 80s, Guy, but they've stood the test of time, which is why we're sharing them. Some of them are a little bit longer, but I think they will stand you in good stead if you really want to get your head around the process from end to end and start using this as we, I'm starting to call it, about the innovative middle. So I'm starting to talk about the change we're going through, Guy, in

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three stages, the fierce urgency of now, the innovative middle, and then the emergent future. And I think there's a real opportunity to improve our practices and to emerge stronger than we were before as a profession. So I think some of what you've shared there is going to be amazing for people to really, as they innovate and get their heads across the full potential of performance support, to use those resources. So thank you very much.

Guy Wallace:

You're most welcome.

About Michelle Ockers

Michelle Ockers works with business and learning leaders to realise the untapped potential of learning in organisations. She is an organisational learning strategist and modern workplace learning practitioner. Michelle works with organisations to develop and implement transformative organisational learning strategy, and to build the capability of their learning team. She delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events. Michelle also mentors learning professionals at all career stages on career planning and professional development.

Michelle received the following prestigious industry awards in 2019:

- *Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D Professional of the Year – for outstanding contribution to the practice of Learning and Development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*

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