Training That Delivers Results:

Instructional Design that Aligns with Business Goals

The Handshaw Model

Performance Consulting + Instructional Design
Cost vs Risk Rule

The Model becomes flexible when you weigh:

The COST of doing a step vs
The RISK of not doing a step

Handshaw Instructional Design Model

Proactive and Reactive Consulting Phases
Why use Performance Consulting?

“You all are doing a really good job here. The only thing wrong with training at this bank is that we are developing too much training.”

- Tom LaBonte
  Consultant

Performance Consulting

“A strategic process that produces business results by maximizing the performance of people and organizations”.

- Dana and Jim Robinson,
  Patti and Jack Phillips,
  Dick Handshaw
### Practice Performance Consulting

<table>
<thead>
<tr>
<th>Proactive Approach</th>
<th>Reactive Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Developed over time</td>
<td>Responding to a request</td>
</tr>
<tr>
<td>Strategic</td>
<td>Tactical</td>
</tr>
<tr>
<td>Usually easier</td>
<td>Sometimes difficult</td>
</tr>
<tr>
<td>Can eliminate the need for reactive approach</td>
<td></td>
</tr>
</tbody>
</table>

### The “True” Client

The owner of the line of business who is responsible for the performance problem.

- They know:
  - Current business goal
  - Internal and external barriers
  - Strongest and weakest performers

- They Can:
  - Answer questions as you conduct Reactive and Proactive Consulting.
  - Make decisions that affect business results.
Handshaw Instructional Design Model

Needs/Gap Analysis Phase

The Gaps Map

Business Need:

Gaps

- Business Should (Desired State)
- Business Is (Current State)

Factors

- External to Organization
- Internal to Organization
- Internal to Individual

Causes

From Performance Consulting © 2015 Dana and Jim Robinson, Patti and Jack Phillips, Dick Handshaw
You must have:

- Access to the “True Client”
- Time to conduct analysis
- The influence to suggest non-learning solutions
- A comfort level with ambiguity
Task Analysis

Procedural Task Analysis (Motor Skills)

Instructional Goal

1 → 2 → 3 → 4

Hierarchical Task Analysis (Intellectual / Knowledge)

Instructional Goal

1 → 2 → 3 → 4 → 6
5
The Value of Task Analysis

Revised Curriculum for Front Line Workers

- Total Development time of 4500 hours
- Task Analysis development time of 270 hours or 6.5% of total budget
- The Task Analysis correctly identified the scope and kept this large project on time and on budget with no real scope creep
Task Analysis

Putting a Golf Ball

Sample Task Analysis

Recruiting – Determining Who to Contact
Sample Five-Part Objective

Task: Recommend the best product mix for a customer.

<table>
<thead>
<tr>
<th>SITUATION</th>
<th>Given a customer</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEARNED CAPABILITY</td>
<td>the student will be able to recommend</td>
</tr>
<tr>
<td>OBJECT</td>
<td>the best product mix</td>
</tr>
<tr>
<td>ACTION</td>
<td>by asking probing questions, presenting benefits, and handling objections</td>
</tr>
<tr>
<td>TOOLS / CONSTRAINTS</td>
<td>with every customer.</td>
</tr>
</tbody>
</table>
### Sample Five-Part Objective

**Task:** Turn a customer objection into a sales opportunity.

<table>
<thead>
<tr>
<th>SITUATION</th>
<th>Given an angry customer with an objection</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEARNED CAPABILITY</td>
<td>the learner will be able to convert</td>
</tr>
<tr>
<td>OBJECT</td>
<td>the objection into a sales opportunity</td>
</tr>
<tr>
<td>ACTION</td>
<td>by restating the customer objection, offering alternatives, and identifying a solution that satisfies the customer need</td>
</tr>
<tr>
<td>TOOLS / CONSTRAINTS</td>
<td>with every customer.</td>
</tr>
</tbody>
</table>

### Handshaw Instructional Design Model

#### Blueprint Phase

![Blueprint Phase Diagram](image-url)
The Blueprint Meeting

- Discuss business goals
- Define training goals linked to business goals
- Identify key performance objectives
- Define measurement strategy
- Select instructional strategy and media
- Discuss course outline
- Show samples of learning materials
- Define content for prototype
- Agree on revisions

Handshaw Instructional Design Model

Prototype and Learner Tryout Phases
Formative Evaluation

“Formative – to Improve 
Summative – to Prove”

- Thiagi

Learners Are Your 
Best Design Consultants

- Develop a prototype that represents the outcome of the Blueprint meeting
- Conduct a Learner Tryout of the prototype and make revisions to strategies and prototype content
- Conduct a Field test and make final revisions
The Value of Formative Evaluation

Revised Curriculum for Front Line Workers

• Tested and measured two different strategies; selected clear winner based on learner input
• Identified functionality changes which affected the entire course
• Functionality changes alone would have cost an additional 80 hours of work

The Value of Formative Evaluation

Revised Curriculum for Front Line Workers

• Identified important changes to implementation plans
• Modified key course materials used through much of the course
• Obtained positive feedback from the instructor group who were key influencers
• Formative Evaluation execution time of 150 hours or 2.7 % of total budget
Handshaw Instructional Design Model

Production Phase

Field Test Phase

Handshaw Instructional Design Model
“More training initiatives fail due to poor implementation than for any other reason.”

Dick Handshaw
Five Levels of Measurement and Evaluation

1. **Reaction:** Measures reaction to, and satisfaction with, the experience, contents, and value of the program.

2. **Learning:** Measures what participants learned in the program—information, knowledge, skills, and contacts (takeaways from the program).

3. **Application:** Measures progress after the program—the use of information, knowledge, skills, and contacts.

4. **Business impact:** Measures changes in business impact variables such as output, quality, time, and cost linked to the program.

5. **Return on investment:** Compares the monetary benefits of the business impact to the costs of the program.

Jack and Patti Phillips
ROI Institute
What Executives Want to See

<table>
<thead>
<tr>
<th>We currently measure</th>
<th>What Executives Want</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Reaction - 53%</td>
<td>22%</td>
</tr>
<tr>
<td>2. Learning – 32%</td>
<td>28%</td>
</tr>
<tr>
<td>3. Application – 11%</td>
<td>61%</td>
</tr>
<tr>
<td>4. Impact – 8%</td>
<td>96%</td>
</tr>
<tr>
<td>5. ROI – 4%</td>
<td>74%</td>
</tr>
</tbody>
</table>

From ROI Institute, Jack and Patti Phillips

Applying Cost vs Risk

Software Upgrade
- Your client is upgrading infrastructure by investing several million dollars in new software systems to support front-line personnel.
- This is a major new initiative for your organization.
- You have been asked by several line managers to develop training for the new systems.

Question: Do you need to reframe the training request through the use of reactive performance consulting?
Software Upgrade

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- You have been asked by several line managers to develop training for the new systems.

Question: Is it necessary to identify the business goal(s) for this major initiative?

Software Upgrade

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Question: Would you find it necessary to conduct a task analysis?
Applying Cost vs Risk

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- You have been asked by several line managers to develop training for the new systems.

**Question:** Would you measure business impact or ROI on this project? If so, how?

Applying Cost vs Risk

New Sales Process
- Your client is introducing an entirely new sales process for 1200 performers across the enterprise.
- There is a lot of mistrust and ambivalence among sales managers towards the new process.
- You have been asked to develop a series of instructor-led training programs for this new sales process.

- **Question:** Would you really need to write performance objectives? Why or why not?
Applying Cost vs Risk

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- **Question:** Other than task analysis, what other type(s) of analysis should you conduct?

Applying Cost vs Risk

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- **Question:** Is it worth the effort to conduct a learner tryout? Why or why not?
Applying Cost vs Risk

New Sales Process
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• There is a lot of mistrust and ambivalence among sales managers towards the new process.
• You have been asked to develop a series of instructor led training programs for this new sales process.

• Question: This project has a tight schedule. Do you need to conduct a Blueprint Meeting?
Available Now

Handshaw, Inc.

- Founded in 1985
- Privately Held
- Based in Charlotte, NC
- Business Overview
  - Training Services
  - Performance Consulting
  - Technology Solutions
  - Professional Development