



Job Aids as Performance Improvement Solutions

TU-116

Participants in this session will:

1. Practice choosing the job aid format that is appropriate for particular performance challenges
2. Learn the most common mistakes in the design of job aids

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Session Preliminaries

- ▶ Put your card in the box at the front of the room to be eligible to win one of several nice door prizes (yes, you must be present to win and the drawing will take place at the end of the session).
- ▶ Once you've done that, turn to the person next to you, introduce each other, share what session at the conference you got the most of and identify at least 3 job aids you've seen today.



Causes of Performance Gaps

Sanders-Thiagi Model based on Gilbert's Behavioral Engineering Model

<p>Physical Resources Tangible resource factors that are extrinsic to the performer.</p>	<p>Structure/Process Workflow factors that are extrinsic to the performer.</p>	<p>Information Factors that pertain to the ineffective exchange of data between people, or between machines.</p>
<p>Knowledge Skill-related factors that are intrinsic to the performer.</p>	<p>Motives Motivational factors that are intrinsic to the performer but may or may not be influenced by the work environment.</p>	<p>Wellness Factors related to an employee's physical or emotional well being as they affect performance.</p>



What's a Job Aid?

A job aid is an external resource designed to support a performer in a specific task by providing information or compensating for worker memory.

- ▶ External to the performer
- ▶ Supports a specific task
- ▶ Focuses on information, memory, confidence and indirectly skill/knowledge



Your Job Aid Experience

- ▶ Turn to the person next to you
- ▶ The two of you should identify two examples. One example should be of a job aid that one of you found to be elegant and effective. The other example should be of a job aid that was poor, clunky or a failure.
- ▶ Look for lessons—what made the good job aid so good and the poor one so poor?
- ▶ You'll have 4 minutes for this activity



Why Use Job Aids?

- ▶ Job aids can be developed 75% faster than training
- ▶ Most performance issues are due to lack of information (and job aids address info gaps)
- ▶ Job aids can be deployed quicker than most other solutions
- ▶ Job aids usually have a very high ROI



Comparing ROI

Training ROI Example

- ▶ Direct expenses: \$73k
- ▶ Indirect expenses: \$3.5k
- ▶ Benefit: \$140k
- ▶ ROI: 61%

Job Aid ROI Example

- ▶ Direct expenses: \$23k
- ▶ Indirect expenses: \$3.5k
- ▶ Benefit: \$72k
- ▶ ROI: 175%



Job Aid Formats

- ▶ Reminder—simple, often improvised
- ▶ Match—a model to compare against
- ▶ Step—sequence usually with numbers
- ▶ Checklist—items to remember
- ▶ Worksheet—format and sample for work or calculations
- ▶ Process Table or Flowchart—extended sequence/big picture
- ▶ Decision Table—help choose between alternatives
- ▶ Troubleshooting Diagram—eliminate possible problems
- ▶ Data Array—list of information
- ▶ Script—required language and sequence for that language



What Format to Use?

- ▶ A list of the most commonly requested phone numbers for a new receptionist.
- ▶ Data for a bar tender to help spot illegal IDs.
- ▶ Info for a help desk to deal with callers that have computer or software problems.
- ▶ A process that is unfamiliar to performers and in which the sequence is critical.
- ▶ Help for a new criminal investigator to identify types of gunshot wounds



Job Aid Trigger

The job aid development process requires a trigger:

- ▶ Front-end analysis identifies a task that requires a job aid due to memory or information issues,
- ▶ Task analysis identifies several tasks in existing training that should be converted to job aids often as a way of shortening a course
- ▶ Job aid because of management's decision it's a better way to provide information than a meeting or course
- ▶ Support for training (or substitute for training) that instructional designer has been asked to design



Job Aid Development Process

- ▶ Collect Task and Performer Data—define the task and determine what we know about the performer and work situation
- ▶ Confirm that a job aid is appropriate for the work setting
- ▶ Sort tasks to be job aided through training support filter
- ▶ Select format for job aid
- ▶ Design and develop job aid
- ▶ Validate and troubleshoot the draft job aid
- ▶ Rollout job aid
- ▶ Maintain and upgrade the job aid



Design Challenge

- ▶ Unique situation: high stress, rarely used, quick decisions required
- ▶ Field portability is essential
- ▶ 75% of the necessary information will prove to be irrelevant if the need arises
- ▶ Durability is critical
- ▶ Ease of use is critical



Good Design in Action





Your Design Challenge

- ▶ Form a small group (2-5 people)
- ▶ You will have 5 minutes to come up with a concept for an alternative to this job aid
- ▶ Develop an alternative approach to this job aid and be prepared to explain quickly what your approach or medium involves and its advantages



The Most Common Mistakes

- ▶ No context to the job aid.
- ▶ Too broad—insufficient focus.
- ▶ Not realistic for the performer.
- ▶ Not integrated into work environment and poor storage/accessibility.
- ▶ Too complex, not enough white-space
- ▶ No training or instruction on how to use the job aid.



Re-inventing ASTD's Handouts

Your challenge:

- ▶ Form a pair or small group
- ▶ To the extent that conference session handouts are job aids, develop an alternative approach to replace the conventional conference handout (ie: paper copy of powerpoint slides)
- ▶ Limits: your new job aid must be inexpensive, capable of mass production, and effective
- ▶ You have 3 minutes



Speaker Bio

Joe Willmore is President of the Willmore Consulting Group in Northern Virginia. He is a former member of the Board of Directors of ASTD. He has consulted for the World Bank, Booz Allen Hamilton, Intelsat, Wal-Mart, Club Managers Association of America, US Embassy-Moscow, Lockheed Martin, and the National Geographic Society. Joe is a facilitator for ASTD's HPI program. He is the author of: Managing Virtual Teams, Performance Basics, and Job Aid Basics. He can be reached at: Willmore@juno.com or 703-855-4634.