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When Change Requires Change

eLearning

Managing the Change:

A Systematic Approach To Implementing A Performance Improvement Environment

Rebecca L. Smith

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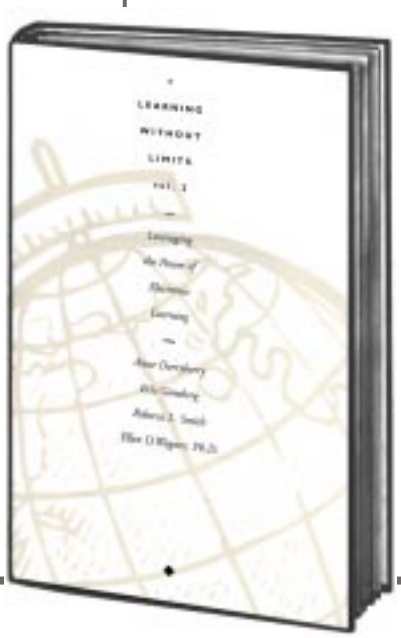

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Managing the Change:

A Systematic Approach To Implementing A Performance Improvement Environment[1]

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An eLearning system, or performance improvement environment is a powerful facilitator for knowledge workers' acquisition of essential job knowledge and skills. The value of the Environment can best be realized when a company thoughtfully and systematically pursues its deliberate implementation by identifying the critical business success factors and designing and managing the effective transition from existing training and education practices to a true performance improvement environment.

Implementing a performance improvement environment can represent a significant change in how an organization leverages its intellectual capital. And, just as every organization is unique, so each implementation of a performance improvement environment is unique. The configuration of the environment, the content objects it contains, the users and the usage requirements will all vary according to the particular organization's needs. Nonetheless, a systematic approach to change management can greatly smooth the transition to and implementation of this new and innovative way of supporting, training and developing its employees. This article describes a change management process that offers strategic and tactical tips for performance improvement environment implementation.

PREPARING FOR IMPLEMENTATION

Once an organization's management team has decided to install an eLearning system or performance improvement environment, implementation does not automatically follow. Integrating the business practices, organization requirements, technology and content, infrastructure of the performance improvement environment with a business' existing, formal and informal knowledge and skill delivery methods must be thoughtfully executed.

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Pulling all of these considerations together typically requires the formation of a team chartered with precisely this task. Team members should be drawn from each of the key stakeholder groups related to the implementation. This serves the additional purpose of identifying champions for the initiative who will drive the solution through the organization.

The team will decide whether they will perform all the work of the implementation themselves or will act as the subject matter experts and represent the organization throughout the performance improvement environment implementation that they, or an external vendor team, manage.

PHASES OF IMPLEMENTATION

There are four phases that must be completed to effectively implement a performance improvement environment. The phases are:

- Assessment
- Design
- Pilot Test
- Roll-Out-Full Implementation

ASSESSMENT. The information gathered from the assessment provides information about the company's unique context and articulates requirements for eLearning installation. Performance improvement environment implementations require a comprehensive understanding of the following factors to ensure an effective integration throughout the company of business unit:

- Business: Such factors include business strategies, goals, objectives, budget, product types, global and local economy issues, competition, customers, markets, culture, customization of products and services, regulations, raw material availability, and availability of skilled knowledge workers.

- Organization: Factors likely to affect implementation include the company's management practices, business and workflow processes, product creation cycle time, product development methods, manufacturing, order processing and service delivery practices, sales quotas, demand for skilled employees, rate of technical obsolescence, staffing practices and turnover, physical location, competencies, firm-specific training, and organization policies and procedures.

• Technologies and Tools: These include technology availability, the use of technol ogy to meet business objectives, strategies for technology deployment, job perfor mance support, demands for information technology/systems infrastructure such as rates of new technology or application introducing, rate of adoption of new technologies, and access to technologies, patents, and copyrights.

Defining the unique context and company-specific requirements leads to their translation into clear business objectives, sometimes referred to as a "burning platform" for the company. Some of these objectives will be answerable by a performance improvement environment and some will not. Listen for business objectives that sound something like these:

• "Reduce the cost of delivering product training to the worldwide sales force."

• "Accelerate the rate at which the sales representatives apply new product training information."

• "Improve all closure rates in the HelpDesk."

• "Reduce the response and problem resolution times for support engineers."

The best way to illustrate how to plan, launch and maintain a successful performance improvement environment implementation is to consider how this process might work in the context of a hypothetical corporation: NTA, Inc.

During the Assessment Phase, NTA, Inc. identified a key business objective:

> "At the beginning of Q3 sales representatives were only meeting 80% of quota. The current calls-to-closure rate is too low to meet the fiscal year's sales goals. Sales representatives need to improve their results or the company will not meet its profit goal.

The Assessment Phase must also clearly identify potential performance gaps in the current system and articulate the objectives essential to the success of the business. A sample NTA, Inc. performance gap may look something like this:

> "Sales representatives are not as knowledgeable of the new products and cannot properly position the company's products with respect to the competition."

NTA, Inc., properly determined that the situations represented by both these statements could be addressed through their performance improvement environment.

DESIGN. The eLearning installation will be designed to enable the organization to specifically address the burning platform, or key business objectives. There are three major activities that must be included in the Design Phase:

- Articulate the organization's Learning Strategy and design the knowledge architecture of the performance improvement environment.

- Ensure the content and technologies are properly designed and capable of providing essential training and support information.

- Decide how to best integrate the eLearning system into the company's existing technology infrastructure.

Specific to NTA, Inc., successful design guarantees that the sales representative can quickly complete the new product training "learning objects" and acquire the specific knowledge they need to better represent our company's products to customers.

The overall implementation strategy must be incorporated into the Design Phase. Engage managers and individuals who represent the appropriate functions within the organization (they should be found within the implementation team) to assist in the design of the implementation strategy. This ensures the performance improvement environment has the support of management and that employees will be supported, and rewarded, for using the performance improvement to secure relevant job knowledge. It will also help demonstrate that the environment is consistent with the company's approach to improving job performance.

For NTA, Inc. to address the sales representatives' product knowledge requirements, a team made up of the VP of Sales, Field Regional and District Sales Managers and Sales Representatives, product/business unit marketing managers, sales training and support teams and the internal, Information Systems/Information Technology team responsible for implementing performance improvement environment's technology infrastructure will work together to determine the most effective way to implement this change. The outcome of this team's effort is an implementation design and a plan to manage the business, technical and staff issues regarding the installation of this Environment.

PILOT TEST. Pilot tests are useful in identifying unforeseen challenges prior to full implementation. Test the performance improvement environment by implementing it for a team that is representative of the large business unit or organization. Information learned in the Pilot Test will then be integrated into the final roll-out plans.

At NTA, Inc., install the performance improvement environment in one sales district with a limited set of products upon which the sales representatives are to be trained. The pilot test should be

designed to portray the sales representatives' reality as closely as possible and identify the technical issues that will be encountered during roll-out and ongoing support of the performance improvement environment.

ROLL-OUT. There are several key steps to accomplishing a successful roll-out of an eLearning system:

1. Plan the company-UNDE roll-out on a business unit or function.

2. Incorporate that basis which was learned in the pilot, and correct any design flaws.

3. Determine the sequence, breadth and depth of the implementation.

4. Measure the effectiveness of the eLearning System.

During the roll-out phase constantly evaluate initial acceptance and use rates. For example, determine the percent of sales representatives who actually pursued the learning objects in the performance improvement environment and track their sales results. It is also important to further evaluate the effectiveness of the performance improvement environment in meeting the business objectives. If the sales representatives who used the performance improvement environment increased their sales quota, and those who did not use the performance improvement environment did not improve their closed sales rates, then, all other things being equal, it can be assumed that the performance improvement environment had a direct impact on the company's business results.

THROUGHOUT THE IMPLEMENTATION PROCESS

Because moving to an eLearning System requires major change for business, the transition must be managed deliberately. To be effective, the four phases of performance improvement implementation must be framed within a clear transition management strategy adopted by the company or business unit. There are critical actions to be managed by the performance improvement environment implementation team:

- Create and set the vision for moving to the performance improvement environment – create a picture of the "future state" of acquiring job knowledge for the organization.

- Communicated the vision – enable the new way of acquiring job-specific knowledge and skills to become a "way of life" in the company or business unit.

- Build commitment to the vision by addressing the following fundamental themes of change management:

- Clearly articulate and gain buy-in for the mission (or reason to be) for the company.

- Gain commitment to the corporate identity or outside image to be portrayed to customers and stakeholders;

- Clarify and build relationships with the key stakeholders in the move to the perfor mance improvement environment;

- Define and gain clear understanding of the way work can be performed with on demand performance support capabilities available through the performance improve ment environment; and

- Clearly identify the culture, or set of values and assumptions that distinguish a particular company from others that guide actions in the organization. That is, make it clear that invoking the performance improvement environment is a positive, desirable and rewarded activity in the company or business unit.

CONCLUSION

An eLearning System or performance improvement environment can be a powerful facilitator for knowledge workers' acquisition of essential job knowledge and skills. The real business value of the performance improvement environment can best be realized when the company thoughtfully and systematically pursues a formal change management process as part of the implementation plan. This will call for identifying critical business success factors and designing and managing the effective transition from existing training and education practices to a comprehensive environment designed to encourage and support improved performance.

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