



Who Needs HPT? Competing Models for Performance Improvement

44th Annual ISPI International Performance Improvement Conference: Researching the Radical
Educational Session 7

Tuesday, April 11, 2006, 3:00 pm (T707)

Presenters

Deb Wagner, MS is a graduate of Boise State University's Instructional and Performance Technology program and works as a Project Manager in a health care organization. In this role, Deb's work has focused on instruction and performance as it relates to staff development and regulatory issues. Her major research interest includes the relationship between HPT and corporate social responsibility. For additional information, contact: wagner.deb@gmail.com and www.debwagner.info

Shaunda Paden, CPT is a Performance Consultant and Certified Online Learning Designer whose expertise is in developing performance-based training and e-learning. Her company, DesignComm, Inc. has designed and developed performance improvement solutions for various clients including Home Depot, IBM, Bellsouth, Wachovia, GE, Orkin, Morris, Schneider & Prior, LLC, Aegis Mortgage, AstraZeneca, and the American Foundation for the Blind. Shaunda will soon graduate with a M.S. in Instructional and Performance Technology from Boise State University. For additional information, contact: designcinc@aol.com.

Diane Gayeski, Ph.D. is a Professor of Organizational Communication, Learning and Design at Ithaca College, adjunct professor at Boise State University, and CEO of Gayeski Analytics. She has examined and implemented trends in business performance improvement and learning through her 13 books and over 300 consulting engagements worldwide. She has presented at 21 previous ISPI conferences, and received an ISPI Research Award to support a study examining the barriers and enablers to adoption of HPT. For additional information, contact diane@dgayeski.com and www.dgayeski.com

Objectives

- Describe major organizational performance improvement initiatives and awards that compete with or compliment HPT.
- Recognize and use the terminology of other popular performance initiatives in explaining your own work.
- Compare and contrast HPT with other initiatives and awards criteria such as Malcolm Baldrige, Great Places to Work, and Six Sigma.
- Discuss how the various performance initiatives and awards overlap with HPT.
- Decide individually whether to continue using the HPT approach and terminology instead of or as a compliment to other performance initiatives, and defend that decision.
- Discuss the enablers and barriers to HPT.

Brainstorm

<p>Are we still relevant?</p>	<p>Is our model more powerful than others or too academic...general...?</p>
<p>Does it adequately consider business goals?...workplace quality?...ethics/social responsibility?</p>	<p>If we're so smart...why aren't we rich?</p>
<p>Name some other performance improvement initiatives, models, tools, etc.</p>	

Case Study: Orkin Pest Control

Company Profile

Rollins, Inc. is one of the nation's largest consumer services companies. Through its wholly owned subsidiaries, Orkin, Inc. and Western Pest Services, the Company provides essential pest control services and protection against termite damage, rodents, and insects to over 1.7 million customers in the United States, Canada and Mexico from over 400 locations.



Situation

In 2003, Rollins, Inc. decided to change its pest control sales model. The company kept the commercial pest control sales responsibilities within the branches but migrated to a call center model to handle residential pest control sales. Rollins added 10 regional Orkin call centers to handle residential pest control sales and implemented an ISO9000 Quality Assurance program within its Rollins Corporate Call Center (RCCC).

In 2004, Orkin recognized a need to standardize its call centers and developed initiatives for Selection, Training & Quality.

- The Selection Initiative focused on helping the call centers recruit and hire New Customer Specialists (NCS).
- The Training Initiative focused on providing consistent training to the 180 NCS agents across the U.S.
- The Quality Initiative focused on providing call centers with effective monitoring equipment and call quality processes.

Solution

David Lamb, Vice President of Learning Services for Orkin University, was asked to develop a standard NCS training program. After developing a FastTrack Training program to quickly meet the learning needs of the field, Mr. Lamb recognized a need to take a more thorough approach to the call center standardization efforts and hired Shaunda Paden, a Performance Consultant. Mrs. Paden closely partnered with the RCCC, Orkin University, and the regional call centers to assess the needs of the call centers.

Mrs. Paden incorporated an HPT approach into the other initiatives by:

- Researching the cultural and operational differences between the RCCC and regional call centers.
- Analyzing various factors that impact performance (capacity, standards, knowledge and skill, measurement, feedback, conditions, and incentive/motivation).
- Facilitating a focus group study to enable call center managers to voice opinions and provide operational information.
- Recommending various training and non-training solutions that will impact Selection, Quality, and Training initiatives.

Results

Orkin revised the standardization initiatives to incorporate a greater focus on call center managers. Recognizing the fact that management would be the biggest impact on long-lasting changes, Orkin is developing a Call Center Manager Coaching Program to ensure that all 11 call center managers are:

- Strategically aligned with the business goals of Rollins, Inc.
- Champions of creating a quality-focused culture within their call centers.
- Focused on strengthening the Orkin brand by ensuring a positive customer service image.
- More informed and aware of all aspects of the Quality Monitoring Program.
- Better trained to handle any issues and challenges resulting from standardization efforts.
- Committed to long-term improvements in lead tracking and closure rates.

The new call center business model has been a great success! Currently, the Orkin regional call centers handle over 75% of all Orkin pest control revenue. The Quality Monitoring Program has substantially improved call quality scores in the two call centers who have implemented the program. The call quality scores in the South East Call Center have increased from 74% to 90% within 3 months and scores in the South Central Call Center have increased from 59% to 79% within 3 months. Each of the remaining 8 regional call centers will implement the Quality Monitoring program by April 2006 and we anticipate that each will reach the 90% call quality target within 3 months.

Are Organizations Using HPT?

Number of Certified Performance Technologists (CPTs) Employed by Award-Winning Companies					
Baldrige Award		Best Places to Work 2004		Corporate Citizen 2004	
4 companies/ 50 since 1990 8%	13 (3.25/co.)	12 companies/100 12%	29 (2.4/co.)	12 companies/100 12%	29 (2.4/co.)
Average CPT employment rate in Baldrige companies 0.26/company		Average CPT employment rate in Best Places to Work 0.29/company		Average CPT employment rate in Corporate Citizens 0.29/company	

Review of Baldrige Award Winners' Applications

Results:

- HPT not mentioned; Balanced Scorecard, TQM, Six Sigma
- Vision/Mission: all include financial performance goals, some include employee and customer satisfaction, rare to see mention of societal impact (CSR)

Performance Indicators Noted	
Financial	Product/process quality <ul style="list-style-type: none"> • Financial growth
Workplace Quality	Employee Satisfaction <ul style="list-style-type: none"> • Survey participation rates • Organizational loyalty rating • Turnover rates
	Safe Work Environment <ul style="list-style-type: none"> • Number of injuries/incidents • Lost work days due to illness/injury
	Learning and Development <ul style="list-style-type: none"> • Number of training hours • Training expenditures • Attendance at training offerings • One connects effective leadership training to employee satisfaction • Another measures by surveys and application of knowledge/skills (Level 1 & 3)
	Performance Awards/Incentives <ul style="list-style-type: none"> • Few tied to individual performance • Most based on overall organizational performance • Numbers participating in non-financial recognition programs • Number of employee ideas used to save money
CSR	<ul style="list-style-type: none"> • Focus on environmental compliance • Not integrated across all levels • Something "nice to do" • Number of volunteer hours • Philanthropic donation dollars • Suppliers: on-time, costs, not employee relations, community

10 Most Enduring Business Trends

1. Execution	<ul style="list-style-type: none"> Implementation of strategy: Systemic view, systematic improvements, effectiveness measured by results, cyclic Don't chase management fads; use tools already available
2. The Learning Organization	<ul style="list-style-type: none"> Organizational development via increased learning capacity Beyond knowledge/skill sharing Encourages innovation, collaboration Increase long-term advantage
3. Corporate Values	<ul style="list-style-type: none"> Care about more than just making money Role is unclear Not sure how to do it
4. Customer Relationship Management	<ul style="list-style-type: none"> Cultivate long-term customer relationships "Customer-centric": benefit customers even when no direct benefit to company May not be doing this well
5. Disruptive Technology	<ul style="list-style-type: none"> Tech innovations undermine incumbent companies Adopt innovation early, with future focus
6. Leadership Development	<ul style="list-style-type: none"> Improvements seen in performance of those who are led Accountability, transparency, oversight are changing Ecology of interdependent management, leadership, governance
7. Organizational DNA	<ul style="list-style-type: none"> Structures, strategies, goals aligned with each other to yield high performance
8. Strategy-Based Transformation	<ul style="list-style-type: none"> Structures, processes, culture redesigned to achieve strategic goals
9. Complexity Theory	<ul style="list-style-type: none"> Understanding complexity of organization as a system improves ability to intervene/act more effectively
10. Lean Thinking	<ul style="list-style-type: none"> Employee awareness, involvement in reducing costs, increasing quality, productivity

(Adapted from strategy + business, Winter 2005)

5 Qualities of a "Really Good" Business Idea

Timely	Addresses need in new, compelling way
Explanatory	Reveals patterns not addressed by other theories, disciplines
Pragmatic	Produces replicable results, even for "soft" concepts
Empirical Foundation	Tested in real world, produces measurable data, survives theoretical challenge
Natural Constituency	Key people are ready to hear it

Debate Worksheet

Is HPT a “Really Good” Idea?

Quality	Strength (+) or Weakness (-)	Examples of your own experience
Timely		
Explanatory		
Pragmatic		
Empirical		
Natural Constituency		

Exclusive Strengths of HPT	Complimentary Models/Tools	Threats to HPT

Debate Summary: Who Needs HPT?

WE DO!
How is HPT relevant?
What are the strengths of HPT compared to other models?
How can we better compete with other models?

NOT US!
In what ways does HPT lack relevance?
What are the strengths of other models compared to HPT?
What does the future of HPT look like?

What the Research Shows: Barriers and Enablers to HPT

- Not able to practice what we preach
- Limited to isolated training function
- Failure to alter perceptions and garner support
- Organizational conditions are lacking
- “Trainers” must become “performance consultants”
 - Business acumen
 - Consulting process
 - Business finance
 - Wide range of improvement methods
 - Organizational behavior/politics
 - Power/authority

Barriers to HPT	
Communication and Language	<ul style="list-style-type: none"> • Academic jargon disconnected from business needs • Lack of business knowledge • Insufficient marketing • Lack of openness with strategies and successes (politics and change)
Business Environment Change	<ul style="list-style-type: none"> • Leadership changes • Not until a crisis • HR out of the loop; outsourcing • No foundation for performance • Lack of political champions
Professional Relationships, Placement of HPT Expertise	<ul style="list-style-type: none"> • Reactive rather than Proactive approach • Order-takers, not partners • Not involved beyond traditional training • Far removed from senior leadership • Management lack of awareness • No time for needs assessment; “quick fixes” • PT is a function of a few

Enablers to HPT	
General	<ul style="list-style-type: none"> • Effectively explain benefits of HPT approach to decision-makers • Overcome political obstacles and desire for “quick fixes” • Develop a professional identity • Develop a common language and set of practices

Go to www.debwagner.info or www.dgayeski.com for complete research projects, bibliography, and other resources.