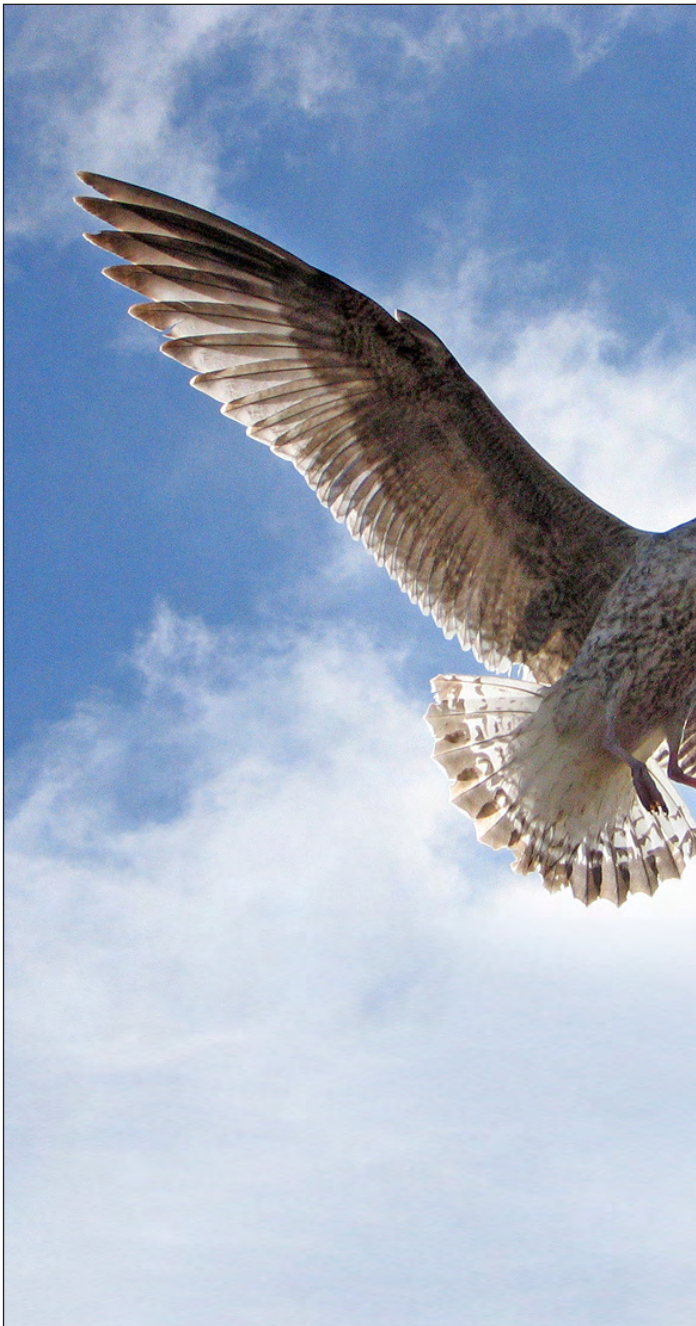


# Performance Improvement

*June 2007*



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## ▲ Improving Performance to Improve Business Results ▲

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Ardent is focused on creating solutions that impact behavior and drive tangible business results. Our holistic approach to learning takes into account the entire system in which learners operate and seeks to provide them with the necessary knowledge, tools, and processes to achieve success.

Ardent employs a uniquely integrated approach to learning that encompasses e-learning, satellite broadcasts, video, instructor-led training, experiential exercises, workbooks, job aids, role-playing, and simulations. We assimilate your business realities with our core expertise and proven approach to performance improvement. We also situationally apply technology as appropriate — in other words, we draw upon a wide variety of tools for development and delivery, selecting the ones that are right for the specific business objectives you are trying to meet.

We begin by immersing ourselves in your business — including your brand, customers, objectives, and challenges. By starting with a solid understanding of your business needs and environment, we are able to offer valuable solutions that truly affect business results.

Before we define the solution, we analyze all of the factors that drive performance, then recommend solutions that both support individual performance and meet your organization's business objectives.

Based on sound instructional design principles, our solutions allow learners to define their own experiences through their choices. We encourage frequent and meaningful interaction, and focus on relevant and useful information that learners can quickly apply on the job. Our instructional strategies are aligned with your business objectives to drive the best choice of delivery systems.

## Factors That Drive Performance

Gaps in performance don't always equate to learning needs. Ardent's performance improvement approach is designed to identify and address the causes of the performance gaps and deliver tangible improvements in your business results.

Ardent uses the Six Boxes model (Binder, 2005) to classify, understand, and improve the factors that drive performance. Our initial assessment of performance gaps takes into account each of these elements.

EXPECTATIONS AND FEEDBACK	TOOLS AND RESOURCES	CONSEQUENCES AND INCENTIVES
SKILLS AND KNOWLEDGE	SELECTION AND ASSIGNMENT	MOTIVES AND PREFERENCES

- Expectations and feedback refer to the information provided to the employee that specifies desired job outcomes, how to produce them, and how the employee is doing as he or she attempts to produce the outcomes. Expectations and feedback are often weak in organizations and represent a great opportunity for performance improvement.
- Tools and resources can include organizational processes, environmental and ergonomic factors, job designs, and various tools needed for tasks to produce the desired job outcomes.
- Consequences and incentives, both formal and informal, can either increase or decrease job performance. These answer the questions "why care?" or "what would make this job worth doing?"

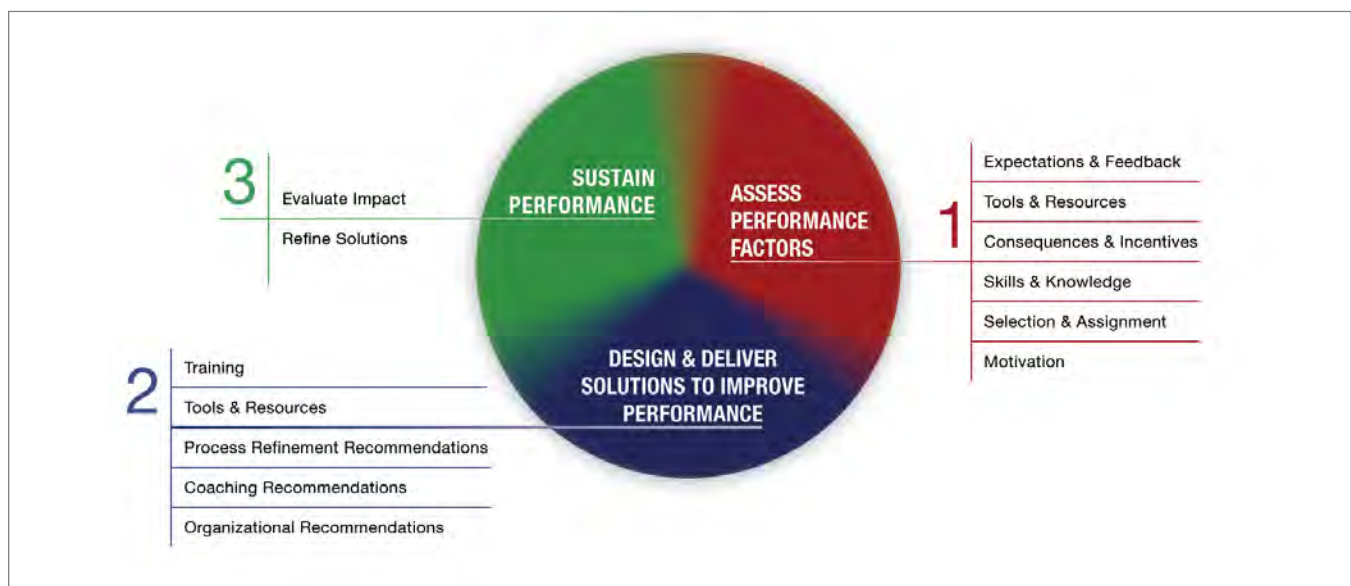
**We assimilate your  
BUSINESS REALITIES  
with our  
CORE EXPERTISE**

- Skills and knowledge equip individuals to execute the behaviors necessary to perform their jobs effectively. They are the primary focus of Ardent's expertise and include training, coaching, and practice opportunities to provide the skills and knowledge your employees need.
- Selection and assignment include personal and professional characteristics and skills employees bring to the job.
- Motives and preferences (attitude) are made up of factors that reflect positive or negative feelings about the job. In most cases, when the first five boxes are managed well, this one is positive.

## Ardent's Approach to Performance Improvement

We begin with an assessment that takes culture and process into account as well as the desired performance goals of the organization. Based on our findings, we prescribe training for performance issues caused by gaps in skills or knowledge and suggest different interventions for other issues.

Our three-step integrated performance approach is illustrated in the diagram below. Each step is explained in detail throughout this document.



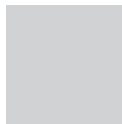
## Assess Performance

Ardent uses the Six Boxes model as a framework to assess performance. While our solutions are targeted at improving knowledge and skills, we focus our assessment on all of the factors that may influence performance and offer suggestions that will improve business results.

We use a variety of methods including interviews, focus groups, surveys, and on-the-job observations to gather information around the six categories. We understand that when a client asks for a training program (box four), that investment will not pay off if the other categories are not aligned.

After completing the assessment, we offer recommendations for solutions that will improve performance. These may include:

- Training to ensure all individuals are equipped with the knowledge and skills necessary to meet the objectives.
- Performance support tools, such as job aids, information portals, or podcasts with information to reinforce ongoing performance.



These two types of interventions are Ardent's primary areas of expertise — and they help us to address deficiencies in tools, resources, knowledge, and/or skills.

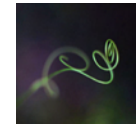
When the performance gap is attributed to other areas that affect performance, we often recommend solutions such as:

- Coaching and feedback to help your managers set clear expectations and deliver appropriate feedback.
- Changes to technology and the environments in which the individuals are working.
- New business processes or refinements to your existing processes.
- Updates to your processes that support improved performance in the future.
- Organizational recommendations such as changes to job descriptions or workloads of individuals.
- Coaching and feedback to identify and address individual performance issues.

## Design and Deliver Solutions to Improve Performance

When developing a learning solution, Ardent applies instructional design principles to create an interactive and inviting learning environment for adults. We employ the following strategies:

- Focus on the learner's needs. Our solutions answer the learner's question: "What's in it for me?" We design programs that emphasize benefits and allow learners to open themselves to new ideas and ways to perform their jobs.
- Incorporate the learner's experiences. Adults have real-world experiences that can serve as a resource for learning. We draw examples and experiences from learners in our design process as well as in the delivery (e.g., classroom sessions with best-practice sharing).



- Facilitate independence. It's important for adult learners to assume responsibility for their own learning by encouraging them to learn independently. We do this through exercises, hands-on practice, case studies, simulations, games, and discussion opportunities. Learners are encouraged to provide their own ideas, suggestions, solutions, information, and examples.
- Provide for individual differences. We accommodate differences by using a variety of instructional techniques, providing a range of appropriate instructional materials, and relating instruction to learners' experience.
- Help learners apply the new knowledge or skill. This can be as simple as asking participants to write down concrete things they will do, or it can be a more formal plan with goals and strategies. We've learned that the more we pay attention to how students will apply their learning, the more useful our solutions become. We also provide them with on-the-job support tools (e.g., job aids) and refresher opportunities that keep the learning accessible.

## Learning Methods and Audience Characteristics

When recommending a solution, we take into account the specific needs and characteristics of the audience as well as the objectives of the program. Learner preferences and experiences are two of the factors we consider.

### LEARNER PREFERENCES

Ardent recommends that your instructional methods align with individual learning preferences or “styles.” According to Richard Felder and Linda Silverman (1988), learners have a preference for one of the two styles in each category:

#### Category 1

##### SENSING

OR

##### INTUITIVE

*(concrete thinker, practical, oriented toward facts and procedures)*

*(abstract thinker, innovative, oriented toward theories and underlying meanings)*

#### Category 2

##### VISUAL

OR

##### VERBAL

*(prefers material to be visually represented, such as images or charts)*

*(prefers written and spoken explanations)*

#### Category 3

##### ACTIVE

OR

##### REFLECTIVE

*(learns by trying things, enjoys working in groups)*

*(learns by thinking things through, prefers working alone or with a single partner)*

#### Category 4

##### SEQUENTIAL

OR

##### GLOBAL

*(thinks in a linear process; learns in small incremental steps)*

*(thinks holistically; learns in large leaps)*

Although these preferences are not perfect indicators of how participants are (or are not) capable of learning, they can be used as a basis for recommending learning activities and delivery media that different audiences are more likely to find appealing.

### LEARNER EXPERIENCES

According to research, an even more important indicator for developing instruction to accommodate individual differences is prior knowledge of the content (Clark & Feldon, 2005). For experienced learners, studies have demonstrated significant improvements in instruction when learner support was phased out as learners acquired more knowledge. Based on this, we recommend assessing learners' knowledge prior to the instruction so that skilled learners can “test out” by demonstrating that they have the prerequisite knowledge and/or can perform the skill.

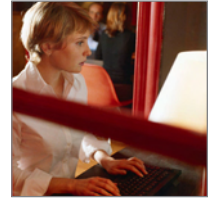
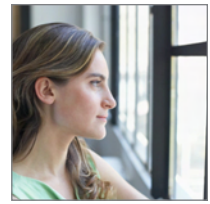
### Design Considerations

Regardless of the delivery media and methods, Ardent designs interactive learning experiences that are engaging, motivating, effective, and practical in order to maintain interest and maximize retention. Two critical design considerations are ensuring interactivity and engaging the learners in the program.

### INTERACTIVE LEARNING

Ardent defines “meaningful interactivity” as something more than simply requiring learners to engage in activity. All activities are not equal in promoting learning. For example, learners engage in activity when they're given words to write in a workbook or when they're required to click a “next” button to access more information in a Web-based training course. While these are examples of “interactivity,” they don't prove that the learner understands or can apply the concept.

A great deal of activity that leads to learning takes place inside the learner's head — the cognitive processing that you can't see. However, to verify that learning has taken place, you must observe a measurable behavior. For example, if a learner adds a column of numbers in his head, that's active responding, but because it can't be observed, you can't be certain the learner is doing it correctly (i.e., that he learned the task).



When we design activities, we ensure that they are meaningful in the sense that the learner is required to think about the information presented and do something to demonstrate that he or she understands it and can apply it to a new situation. For instance, if a course objective is for automotive sales consultants to learn a new seven-step process in order to sell more vehicles, we would make sure those learners could do more than simply recite the seven steps. We would provide a realistic customer scenario and ask the learner to apply each of the seven steps.

### ENGAGING LEARNING

Along with incorporating sound adult learning principles and meaningful interactivity, we understand that to be successful, learning activities must be inherently interesting — even fun. Our courses incorporate elements of curiosity, challenge, and success — all of which make activities interesting and help promote knowledge and skills transfer. Our creative and programming teams bring learning to life with elements such as graphics, animations, and themes.

### Delivery Media

Unlike organizations that specialize in a single type of learning solution or medium, Ardent selects the most appropriate medium and method to meet the objectives of your program.

Learning interventions can be delivered in a variety of media, including instructor-led training sessions, Web-based training courses, or asynchronous learning events. Other considerations may include job aids, podcasts, or reference tools such as online portals.

We select the delivery systems/materials based on learning needs and additional factors such as learner preference and experience. For example, if learners are geographically dispersed, and travel is a concern, we may recommend Web-based training.

### Learning Methodologies

Once the delivery medium has been selected, we employ a variety of methods in the design of the learning solution to facilitate application and retention of the information provided. The following elements are examples of those methods.

**Simulations:** Simulations enable learners to engage in authentic experiences and visualize how they can use what they learned to solve a problem or improve something. Simulations help learners self-assess and self-correct as they understand the “big picture” of the new information.

**Role-play:** Role-play exercises are a form of simulation in which learners are asked to take on a role in a realistic scenario. Learners work in groups to accomplish a specific task and learn by doing during the course of the exercise. This type of exercise is beneficial because it encourages learners to understand the context in which their new knowledge and skills will be applied.

**Experiential learning:** Experiential learning requires participants to complete tasks that are seemingly unrelated to their typical work and draw connections between the activity and the way they complete their work. These activities are particularly useful for team-building and leadership exercises.

**Guided dialogue:** Group dialogue and discussions can be an effective means of instruction in the classroom and during asynchronous online events. The collaborative aspect of group discussions ensures that learners are actively engaged, which increases learning through critical thinking and reflection.

**Collaboration:** In collaborative learning exercises, teams work together to solve problems and achieve common goals. The active exchange of ideas within teams increases interest among participants and promotes critical thinking.

**Modeling/demonstration:** Demonstrations are generally conducted during small group sessions and are particularly effective for tangible content that is best explained via hands-on experience. An effective demonstration requires a proficient instructor to ensure instruction is accurate.

**Case studies/examples:** Case studies use realistic examples to illustrate how participants' learning will be applied in the real world. Case studies can be particularly effective because they clearly illustrate the relevance of a subject. Developing and delivering realistic case studies requires expert facilitation and content development.





**Problem-solving:** Problem-solving exercises allow learners to immediately apply what they're learning to a realistic scenario. This immediate application increases retention and prepares learners to transfer what they have learned to the job after training.

**Fluency:** Fluency is the combination of accuracy and speed in responding. This results in competent performance that can be transferred easily to real-world applications and is retained over time. Fluency-based methods attempt to minimize initial learning time using efficient instruction and job aids (stage 1). They allocate the most time for practice of critical skills (stage 2) to build a strong foundation that supports easy application (stage 3). These types of exercise are particularly appropriate for product knowledge, call center training, and any other skills that require recall without hesitation.

**Questions/hands-on-practice:** When learners practice by answering questions related to components of the whole complex skill, they're able to assess their understanding and correct misconceptions and errors. Once they're proficient in component skills, they can apply those skills to the complex skill.

**Gaming:** It is estimated that the average age of gamers is over 30 years old; this estimate puts learning and gaming on a positive collision course where training can meet the dynamic needs of the gaming generation. We combine many of the above methodologies to create an interactive gaming approach that has real learning value to both gamers and the more traditional learners.

## Sustain Performance

After the program has been delivered, we recommend evaluating the effectiveness of the program and making any necessary adjustments to ensure that you achieve the desired impact.

Our recommended evaluation strategy is based on Kirkpatrick's (1998) four levels of evaluation:

- Level 1: Reaction and satisfaction
- Level 2: Learning
- Level 3: Behavior (skill application to the job)
- Level 4: Results (business impact)

## Level 1: Reaction and satisfaction

This data shows what the participants think about the program — learners' reactions to and satisfaction with the performance improvement solution, facilitators, and support materials. This information is used to adjust or refine the content, design, and/or delivery. We work with our clients to develop a Level 1 satisfaction survey that captures this information for each element in the program.

## Level 2: Learning

This measures the extent to which desired attitudes, knowledge, and skills that are presented in the program have been learned. This information is used to confirm that learning has occurred as a result of the program, and it's also used to make adjustments in the content, design, and/or delivery.

Examples of the types of Level 2 data we collect include:

- Certification exams. Certification exams are used to evaluate learner performance after taking the training. A pool of performance-based tests questions are typically developed to focus on key objectives for each learning element.
- Interactions/self-assessments. Frequent learner practice and interactivity are used in all training. Feedback is provided on-screen or by facilitators based on the learner's performance.
- Capstone case study exercises. These exercises require the learner to solve comprehensive problems by integrating concepts and principles learned in the program in realistic business scenarios.

## Levels 3 and 4: Behavior and results

Level 3 evaluation measures behavioral changes on the job after training has been implemented in the workplace, and includes specific application of the knowledge and skills learned in the training. Level 4 determines the training's influence or impact on overall business results.

## THE SUCCESS CASE METHOD

Ardent recommends an approach based on the Success Case Method (Brinkerhoff, 2005). This evaluation technique identifies and explains factors that differentiate successful from unsuccessful adopters of the performance improvement initiative. This approach identifies two types of participants from opposite ends of the spectrum. On one side, it looks for people who have been the most successful in using the new knowledge and skills back on the job and producing quantifiable results. On the other side, it looks for the people who have been the least successful.

A typical evaluation includes the following elements:

- Design and administer a brief survey to all participants to determine to what extent they're using the new knowledge or skills and what results, if any, they're achieving.
- Select a group of successful cases and a group of unsuccessful cases, based on the survey results.
- Conduct success case interviews with both groups. These phone interviews last approximately 20 to 30 minutes and help us to determine which factors led to successful or unsuccessful implementation (processes, management support, tools, resources, etc.).
- Examine available business-result metrics for all interviewees to correlate with the interview data. Examples could include quality, budget, and time-related metrics.
- Develop conclusions and recommendations based on interview data and business results. Comparing the results of successful participants with unsuccessful participants allows us to pinpoint key performance factors that lead to the successful use of the program.

## Our Implementation Strategy

Ardent is unique in the diligent way we execute each program. Our goal is to enable you to remain focused on your business, rather than on managing the project. Our business processes are ISO 9001:2000 certified, reflecting our focus on delivering consistently high-quality work.

Ardent manages projects from development through execution. The Ardent team is passionate about delivering a dynamic solution on time and within budget. We firmly believe that when a project is properly defined up front, it's easier to keep it on budget, within scope, and on time. Ardent has a long history of successful project management experience. We've managed international product launches, entire training curricula, and Web-based and computer-based training (CBT) projects. Quality assurance is integrated throughout our design and development process.

As part of our ISO certification, we have a well-documented quality management system which involves constant measuring, monitoring, and improving the quality of our products and our processes.

Structurally, we use the ADDIE (Analyze, Design, Develop, Implement, and Evaluate) model for design and development and constantly refer back to our client's business objectives, learning objectives, and scope to make sure we stay on target. We use a change log to document and track all client-driven and internal-driven changes throughout our design and development. When possible, we develop prototypes for client review as early in the process as possible.

## THE ARDENT ADVANTAGE



The name Ardent reflects our passion for designing and delivering exciting custom learning and performance improvement solutions that will help you meet your business challenges. Our true advantage lies in our unique combination of sound instructional design and high-impact creative — a combination that ensures that your audience not only gets the message, but also retains and applies it. Our mantle includes recognition from the prestigious ADDY Awards, Summit Creative Awards, John Caples International Awards, and regional Direct Marketing Association awards, among others.

To see some of these award-winning, results-oriented learning solutions, visit our Web site at [www.ardentlearning.com](http://www.ardentlearning.com).