

The Manager's Role in Performance Support

— By Alan Ramias —

In her book, *Electronic Performance Support Systems*, Gloria Gery popularized the notion of designing technology to assist workers in performing tasks, writing about the growing use, and importance, of electronic job aids such as on-line tutorials, directories, help menus, technical support and the like, for users of laptop and desktop computers. Now often called Performance Support Tools (PST), electronic performance support systems (EPSS) include includes PDA's, laptops, UPC scanners, and a host of other technologies. EPSS/PST is a useful concept and has grown to be a significant consideration for anyone who designs or improves processes and work environments.

Unfortunately the EPSS/PST movement has put all the emphasis on electronic devices as the means of performance support. For many, "performance support" connotes technology and nothing else. Yet there is potentially much more to the concept. This article is intended to retrieve the idea of performance support, strengthen and expand on its definition, and explain why it ought to be regarded as a critical element in achieving and maintaining high organizational performance.

The Management System

At The Performance Design Lab

(PDL), we have long argued that to be effective any organization needs to have a well-designed management system (see Figure 1). The management system consists of a set of planning activities—collectively called "Performance Planned"—and another set of activities for monitoring and guiding performance—called "Performance Managed." Performance Planned consists of three activities: Expectations are set; plans are set and resources and support requirements determined; and, finally, plans

Performance support is critical for high performance organizations.

are made operational (resources, structure and support are in place).

The plans themselves are executed at the process level. As performance occurs, the management system monitors performance—that is, the system identifies and diagnoses variations and takes corrective action as needed.

Because most organizations have managers at multiple levels, the management system is operational at each level. Expectations set for the enterprise are cascaded down to lower levels where plans are devel-

oped and implemented at lower and lower levels. Once performance of the processes begins, monitoring happens in reverse of planning, with performance at the job level being monitored by first-line supervision and back to enterprise level.

One of the cynical misinterpretations of this management model we have heard is it implies that all managers have to do is plan for performance and then let the results roll in, describing management as a largely passive, reactive, white-tower role rather than being actively involved in ensuring that performance happens. Certainly, this is not the correct interpretation of the model, but the active role of management during execution may be buried.

What is Performance Support?

Performance support is included in the planning activities listed above. In step one of Performance Planned, managers at each level are supposed to determine what support is needed (i.e., the performance requirements) at the next level down. In step three, when plans are operationalized, provisioning of all necessary support is supposed to be included. But what, exactly, constitutes “support?”

To answer the question of what is performance support, let us examine

another model we use at PDL called the Human Performance System (HPS) (see Figure 2). This model describes the situation in which every performer exists and depicts the variables of the HPS as they ideally should exist for any given performer. The first two variables are outputs and inputs. They include an output definition, so the performer knows what outputs and outcomes are expected and what standards determine success. The inputs, include the availability of all required supplies, materials etc., when a signal to begin is triggered, and all the necessary tools, equipment, funds, instructions, etc., in order to transform the inputs into outputs as expected.

The next two variables are consequences--which are what happens when the performer executes the job or task and feedback so performers know how well they are performing, or what the results of performance have been. The last variables are knowledge, skills, capacity. These variables focus on the performers and whether they have been adequately trained in the job requirements and have the capabilities required.

I would suggest that the HPS model describes all the important

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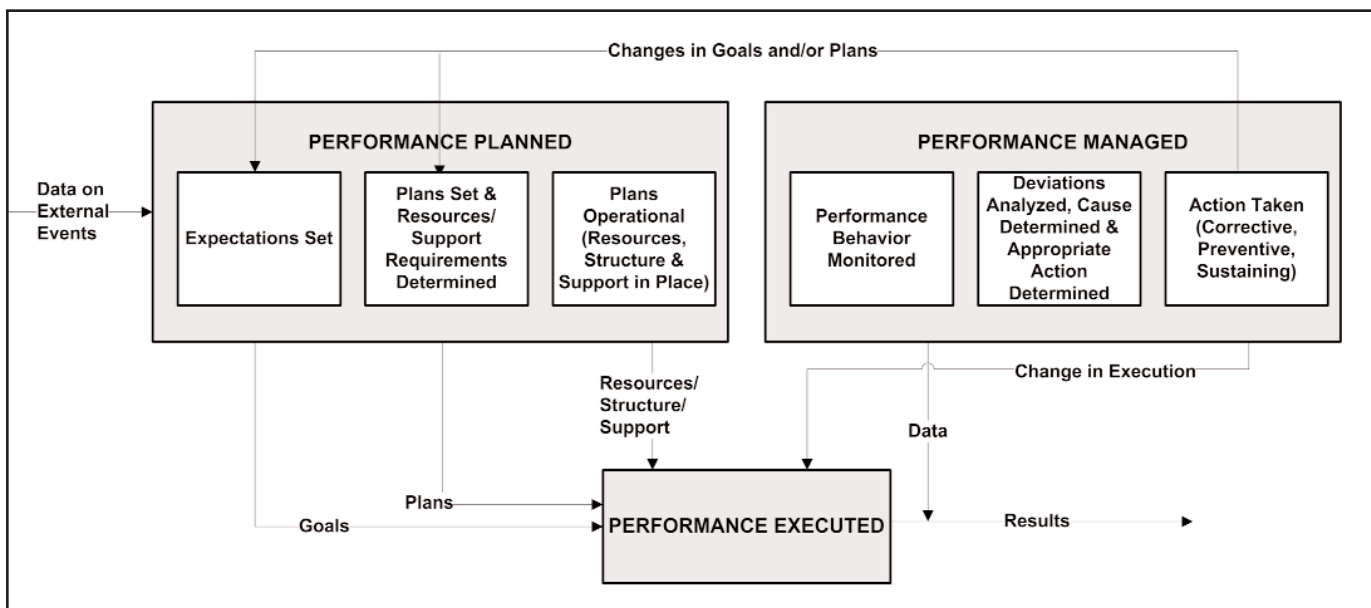


Figure 1

variables of performance support. Performance support means providing one or more elements of this model—for example, providing training for all new performers; ensuring that all the performers have the PDA's they need; making sure everyone doing this job understands what the daily output requirement is, monitoring the work as it is performed or providing on-the-spot coaching and correction of technique.

Managers and Performance Support

So who is responsible for performance? Who designs the HPS for a job? Who provides the required instructions, training, equipment, coaching, feedback, and consequences? Managers, of course. For many managers, providing performance support is the most important part of their role.

For each element in the HPS model, there is a corresponding set of managerial tasks that together comprise performance support. Figure 3 summarizes these managerial tasks.

It is clear that to perform these tasks, performance support is not a passive responsibility. Monitoring, for example, is an on-going assessment of how well the work is going and anticipating the needs of performers before they run out of materials, time, patience or something else. Of course, some kinds of performance support activities are needed infrequently, while others might be required constantly. For example, a line manager's activities may range from making sure that every new employee receives basic training when newly hired (an infrequent responsibility) but also includes providing constant coaching on the line as employees execute their jobs.

Management tasks such as expectation-setting and performance monitoring are, of course, going to be different at different management levels. Typically, the CEO sets out performance expectations for the enterprise for the upcoming year, and then monitors results on a quarterly and annual basis. For a line manager, performance expectations could conceivably change daily or even hourly, could be different by

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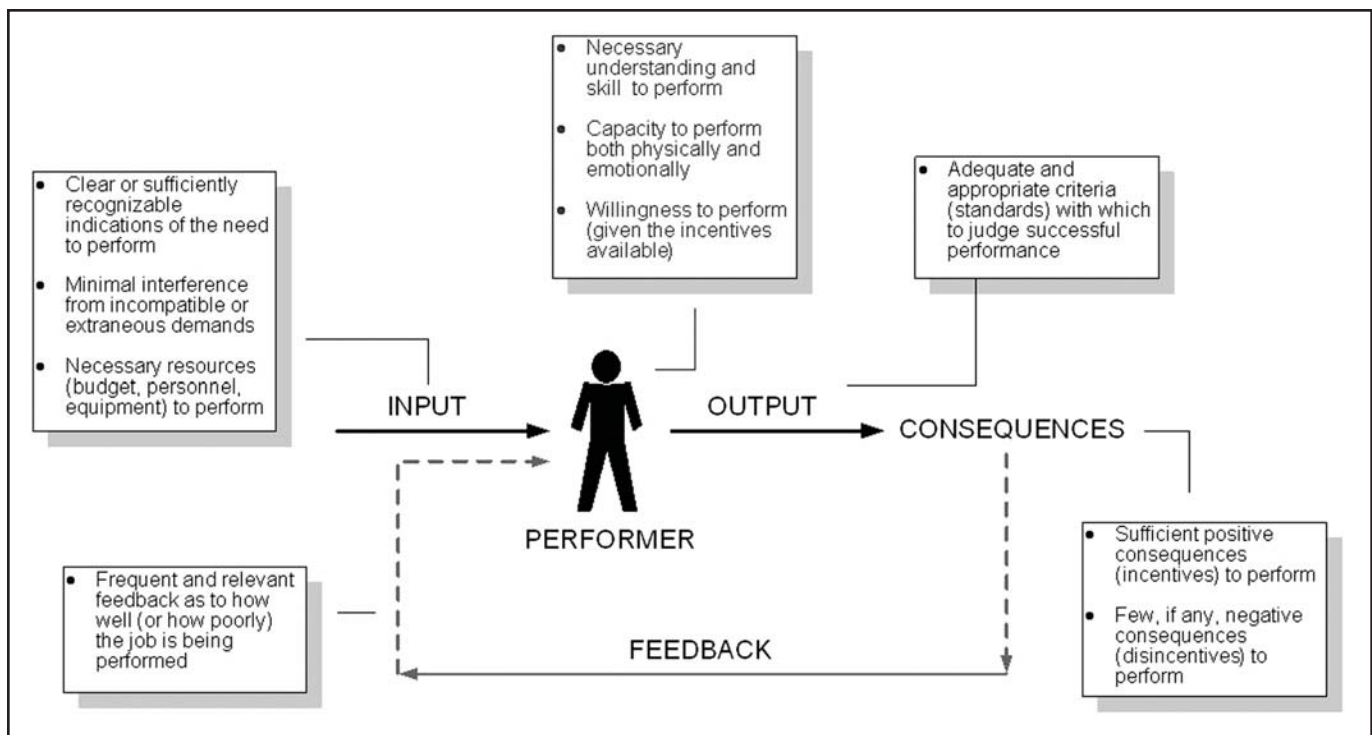


Figure2

HPS Variable	Managerial Performance Support Tasks
Output Requirements & Standards	<ul style="list-style-type: none"> • Define exactly what outputs and outcomes are expected from a given job or process • Define the performance standards (quantity, quality, time, cost, etc.) for the outputs • Communicate these requirements clearly to the performers
Inputs	<ul style="list-style-type: none"> • Determine exactly what resources are needed by performers • Provide the resources in sufficient quantities when needed • Ensure a continual resupply of consumable inputs • Monitor the work environment and eliminate anything that hinders performance (e.g., inventory, poor work space, job interference, poor written instructions)
Consequences	<ul style="list-style-type: none"> • Design the job or task so that it can be performed without excessive difficulty by a well-prepared employee under most circumstances • Observe the job as it is being performed and make changes to eliminate causes of delay, irritation, ambiguity, overload and other sources of poor performance
Feedback	<ul style="list-style-type: none"> • Provide constructive coaching as the job is being performed • Provide understandable written and verbal information about the performance frequently • Provide frequently feedback about results (e.g., customer comments, downstream comments, quantitative results)
Knowledge, skills, capacity	<ul style="list-style-type: none"> • Define the knowledge, skills and capacity needed to do the job • Establish a learning system to provide both initial and on-going formal training to provide knowledge and skills • Monitor actual performance and gauge whether formal training is providing appropriate and useful content • Provide job requirements to HR so that qualified candidates are hired

Figure3

job or by product line, or by shift.

Accordingly, the scale of performance support also differs by management level. The CEO has to be concerned with provisioning of learning for all performers in the organization while the line manager has a much smaller scope. Yet the managerial tasks are largely the same: defining the output requirements, designing the performance, designing the work environment, monitoring of performance execution, and providing coaching.

Conclusion

Performance support is more than design or use of technology tools. Much of what employees need on the job comes on an hourly, daily, weekly basis directly from the organization's supervisors and managers, who are ultimately responsible for making sure there is an effectively functioning performance support system—

including tools--in place. The essence of performance support is to ensure that every performer has an adequate human performance system in place. Managers have the responsibility to design the HPS for each job and ensure that all the variables of each job are maintained as the jobs are executed. Far from being a matter of technology, performance support is an integral part of management. Technology, if available at all, merely supplements what managers must do and is certainly no substitute for it.

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