

ISPI 國際年會返台暨ASTD 2013 ICE隔空學習分享會

企業HRD策略新思維 績效提升 X 人才發展

國際新知接軌 開創組織競爭力

5.7^二
13:30-17:00
台北

5.16^四
13:30-17:00
新竹

講 義

2013 年 5 月 7 日

主 辦 單 位 ： 育 基 數 位 科 技

議 程

時間	主 題	主 講 者
1:30-1:40	【開場】	育碁 楊中旗 總經理
1:40-2:30	【ISPI 專題分享】 讓績效發光---績效導向的學習與發展	育碁/ 嚴萬軒 經理
2:30-3:20	【ISPI 專題分享】 從人的發展與管理出發，落實企業績效的提升	育碁 楊中旗 總經理
3:20-3:40	Break	
3:40-4:10	【ISPI 專題分享】 The Performance Chain： 如何連結個人產出與組織目標	CPC/ 藍家祺 組長
4:10-4:40	【ISPI 專題分享】 Continuous Improvement for Learning and Performance: 學習成效 - Measurement 以 落實人才訓練發展投資	育碁 楊中旗 總經理
4:40-5:00	【Q&A 暨 隔空學習的分享與推廣】	全體講師

13年 ASTD ICE 學習取經回顧 暨 2013 ISPI Reno 專題分享

2010年美國訓練發展協會授獎 - OK超商, 育基, 資策會



ASTD 2001-2013 派員專業取經連續13年不間斷
George參與：2001, 2004, 2007, 2008, 2010, 2011六次 + 2012 網路學習
2002 SHRM, **2013 ISPI**

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楊中旗(George)
2013.5.7

因為是學習取經分享, 分享講義中使用相當比例 ISPI 2013所提供的講次講義內容, 特此致謝, 我們並於下方標記來源。各相關內容之智財仍歸各講次講者與ISPI所有, 請分享會學習者謹慎使用, 避免侵權, 並於使用時標示原出處。

Agenda

- ▶ ASTD (American Society of Training & Development)
 - WLP (Workplace Learning & Performance)
- ▶ 我參與 7 次ASTD ICE 的學習與體會
- ▶ 2013 ASTD ICE 簡介
- ▶ 2013 ISPI(International Society of Performance Improvement) ICE 簡介
- ▶ ASTD 與 ISPI 的簡單比較

ASTD(American Society of Training & Development)

LMS/eHRD應用成效第一 - 成就企業卓越人才
Taiwan No. 1 HRD Solution and Service Provider

- ▶ **WLP (Workplace Learning & Performance)**
 - 近十年的用詞，代表主要關注的移轉
- ▶ **ICE (International Conference & Exposition)**
 - 每年五月前後舉辦四天，已經舉辦70年 (since 1943)
 - 全球人力資源專業(供需雙方)最大匯集年度盛會- 取經學習的好所在!
- ▶ 投影片資源網路上公開
- ▶ 常設競賽獎項 ASTD Excellence in Practice Awards
 - OK超商/育基/資策會 首創台灣本土企業獲獎 in 2009
 - 中國郵政首創中國本土企業獲獎 in 2011
- ▶ 各國參加人數：
 - 台灣近年的主要組團機構: 自強基金會，平均前往人數30人上下
 - 韓國約自1999年起每年超過300人前往ICE (10幾年蟬聯美國以外第一)
 - 中國近幾年人數開始越來越多，近年平均約70人, 2012年 175人排第三

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回顧我不同階段參加ASTD - 價值期待與收穫

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- ▶ 2001: **劉姥姥逛大觀園**
 - 奮鬥學習，勇於整合分享，有志於專業內外的擴散!
 - 見識到的韓國”唐三百藏”赴美ASTD Conference取經”人才發展”
- ▶ 2004: **Best practice benchmark(超級比一比)**
 - 比較美國成功案例與自己在台灣的專案成功經驗
 - Samsung, Hyundai, Wistron 等亞洲案例發表比較追蹤(學習後的應用, 成效, 超越?)
- ▶ 2007: **Models, Pattern, Methodology尋求之旅**
 - 育基顧問與專案管理方法論(since 2005, 首用於OK超商...) 整理後的學習、比較、參考與調校。
 - 驚喜於尋得策略合作者Dr. Reza Sisakhti (繼之前 2000年與Cisco, 2002年與Saba...之後)
- ▶ 2008: **策略合作展開，實務整合架構的貫通**
 - **趨勢發展的脈絡判斷與決策**
2001年起LCMS, SCORM..., 2007年2nd life, Podcasting, eLearning 2.0, Social Learning ...科技曾有的過早期待
 - **業務人才Talent Development/ 職能整合**
實務應用架構與成功應用模式的比較與再精進
- ▶ 2010: **業務職能/人才發展持續比較觀察**
 - 客戶OK 超商 ASTD Excellence in Practice Awards 聯合授獎
 - 應用科技趨勢, Aligned with Biz 階段評估, 業務職能應用
- ▶ 2011: **站在國際講台上/Mobile Learning與績效發展...**
- ▶ 2012: **學無止境 - 5天 隔空學習 與Gordon跨海交流並即時撰文發表分享**

科技與專業都不停歇!



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ASTD 2012 ICE 現場日誌與隔空學習

- 2001-2012連續12年ASTD專業取經分享
- 育基官網提供50頁pdf文件下載,隔空學習推廣

LMS/eHRD應用成效第一 - 成就企業卓越人才
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更多資訊
http://www.aenrich.com.tw/download/info_04-1_new.asp
<http://www.aenrich.com.tw/download/download.asp>
 2013/5/30 早上 新竹教育大學數位學習所ASTD 隔空學習分享

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策略性人才發展-「業務職能模型建構」工作坊

LMS/eHRD應用成效第一 - 成就企業卓越人才
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6.7~8_{五~六}

國際大師Dr. Reza Sisakhti中文授權課程系列2
「職能模型建構」工作坊
 策略性人才管理的基礎-以業務人員為例
*Competency Models :
 Foundation for Strategic Talent Management*

人才發展策略大師
 理沙 希沙提
 Dr. Reza Sisakhti

“業務力”為公司經營之本!

大前研一認為,在市場縮小的環境下,企業一方面
 一方面也以信譽為基礎,與客戶建立長期且深厚的
 要達成這項艱鉅任務,有項不可或缺的、微卻
 企業不僅必須擁有能夠販售產品的業務人才,
 更重要的是,必須大量培育能夠針對客戶問題、課題,
 提供與產品相關解決策略的專業業務人員。

2007年以來持續的策略合作,深入取經引進台灣,
 繼2012/9/14-15後再一場(本次特別前往Boston取經)

線上報名

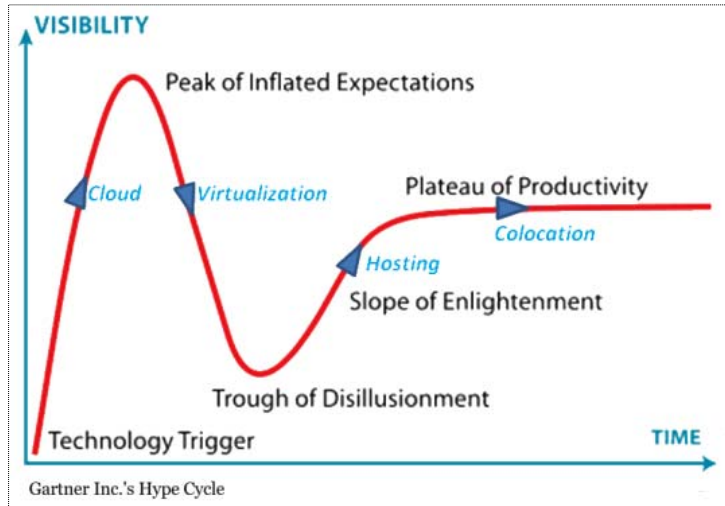
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科技應用的Hype cycle – where we/you are?

eLearning, Xerox PDA mobile learning, Podcasting, 2nd life ...

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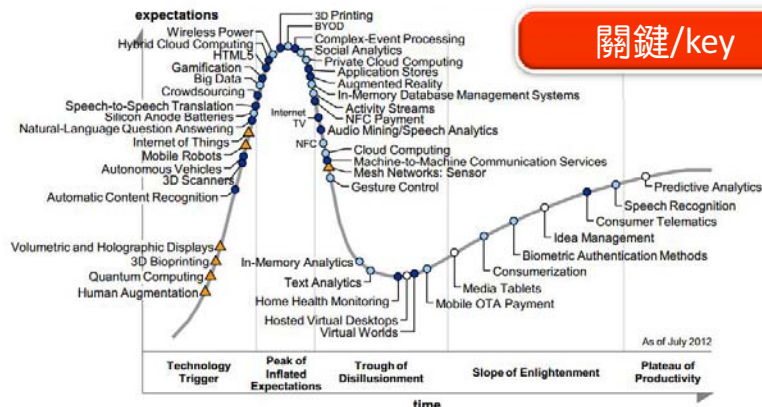


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Hype cycle – emerging technology 2012

Emerging Technologies Hype Cycle 2012



Plateau will be reached in:
 ○ less than 2 years ● 2 to 5 years ● 5 to 10 years ▲ more than 10 years ● obsolete before plateau

Gartner

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2001 Mobile-Learning 的 40 呎貨櫃

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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► Share by 2001年 reporter 陳俊宇 (Page 44)



2001.6.4 11:27



2001.6.4 11:36

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ASTD 2012 in Denver

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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- 年度主題 : Learn Something New, Perform Something Extraordinary
- Cover 11 pre-conferences, 3 General sessions, **270 educational sessions**, 3 days Expo 300 vendors... (台灣去約60-70人)
- Cover **8 tracks**(與2011相近 tracks in red),
 - Career Development; **Designing & Facilitating**;
 - Global HRD ; Trends;
 - **Human Capital**; **Leadership Development**;
 - **Learning Technology**; **Evaluation**
- 看你是要歐式自助餐 或 點菜?
 - 例如主題挑選: KPI (Performance Mgt), Integrated Talent Management (ITM/HRD), Mobile (Learning & Performance Support)



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2013 ASTD 年度主題

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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- ▶ Content內容：隨著新興產業崛起，勞動結構改變，人力資源領域所著重的面向及內涵也隨之改變。
- ▶ Community社群：行動裝置的盛行及社群媒體學習的蓬勃發展，使得社群的概念已從實體擴大到虛擬，每一個人應把握並利用此一趨勢在此最大的學習社群充份與其他人互動，充實個人學習。
- ▶ Global perspective全球視野：全球化對各國經濟、社會及文化均造成影響，在此浪潮下，人才培訓與學習應從全球視野的角度切入。
- ▶ Source：ASTD官網與自強基金會組團翻譯資訊

2013 ASTD Tracks (與2012比，僅有一項不同)

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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- Career Development
- Designing & Facilitating Learning
- Global Human Resource Development
- Human Capital
- Leadership Development
- Learning Technologies
- Measurement, Evaluation, ROI
- Workforce Development

講義已經可以從www.astd.org下載... 學習與預習都可以開始了...

240 education sessions，估計會有160場次提供 pdf，足夠您找到幾份可供參考的主題與內容，便於您的學習與應用...

ISPI 2013 (international society of performance Improvement)

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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- ▶ 年度主題 : discovering the **interventions and strategies** that **work** to create **proven, measureable results**
- ▶ **60 sessions** grouped along seven tracks grouped along seven tracks (**2個 tracks 與ASTD大致相同 – overlap**):
 - 1. Analysis,
 - 2. Business of Human Performance Technology,
 - **3. Instructional Interventions,**
 - **4. Measurement & Evaluation,**
 - 5. Organizational Design Interventions,
 - 6. Process or Tool Interventions,
 - 7. Research to Practice
- ▶ Cover 9 pre-conferences, 3 Keynotes, 3 masters series, 3 Research-to-Practice Symposium, Chat'n Chew* 32, Lunch'n Learn *, **no expo.**

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ISPI 2013 參與者約 500人...(ASTD 2012 約9000人)

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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- ▶ **美國以外 81人 (16%, ASTD 約23%)**
- ▶ **南韓 35 (7%, ASTD 約 4.2%)**
- ▶ Canada 16
- ▶ Nigeria 11
- ▶ **Taiwan 4**
- ▶ United Arab Emirates 4
- ▶ Ireland 2
- ▶ Singapore 1 * 9 (無 Japan/China 參與者, 但是 China ISPI 分會於2012年成立, 目前 70人左右...)

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ASTD與ISPI簡要比較



LMS/eHRD應用代理商 - 成就企業卓越人才
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International Society for
Performance Improvement
WHERE KNOWLEDGE BECOMES KNOW-HOW

	ASTD(70年)	ISPI (51年)
重要主題	創新性, HRD相關主題 (Learning & Development 為主, Solution 掛帥) , 涉獵層面較廣, 重推廣	策略性, 專注在組織與個人的 Performance Improvement. (Biz/PER/Gap/Cause Analysis為重, Solution Neutral)
內容的廣度, 開放度與深度	新的議題開放度很高, 熱門的, 趨勢的, 多元新潮的都接受; 也因此成為各項議題與vendor 推動者熱衷支持, 供給與需求兩端互相吸引, 是創新實驗推廣的好平台。	架構嚴謹、biz 分析很solid、重視實證成效的, 以持續改善架構與內涵為主, 內容深入, 講師學員互動開放度高, 彼此交流分享深度都很高。
特色	行銷很成功, 廣告與贈品超多; 場面浩大, 內容多元, 參加者必須自己慎選主題與內容 (all Hyper Cycle)	專業領域; 內涵深得專業工作者的信任. 廣告超少! (Hyper Cycle 的enlighten/productivity 那段為主)
參加人數	多, 250個Session, 每場常是在200人上下, 彼此較生疏	較少, 60個Session 每場約40人上下, networking 較深(再聚機會高)

讓績效發光 ~ 績效導向的學習與發展

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嚴萬軒(Gordon)
2013/5/7



國際年會參與經驗

- ASTD ICE : 2011、2012
- ISPI : 2013

Objective

- ▶ 瞭解HPT(Human Performance Technology)
與績效顧問的內涵和意義
- ▶ 體驗績效顧問的方法和工具
- ▶ 能讓自己並讓公司的管理職人員學習成為
績效顧問

Agenda

LMS/eHRD 應用成效第一 - 成就企業卓越人才
Taiwan No. 1 eHRD Solution and Service Provider

- ▶ 再探ISPI與HPT
 - 實證與理論兼顧，結果與研究並重
- ▶ The Role of HR and Manager in People Performance
- ▶ Manager as Performance Consultant
 - & How to Train Manager as Performance Consultant
- ▶ Wrap up

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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再探ISPI與HPT

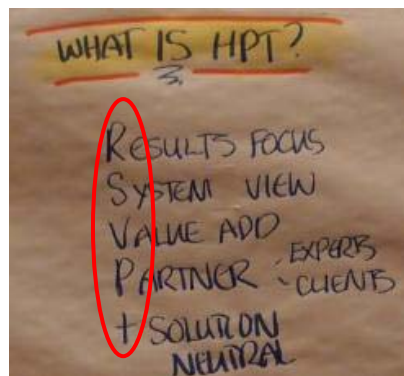
實證與理論兼顧，結果與研究並重

ISPI 2013

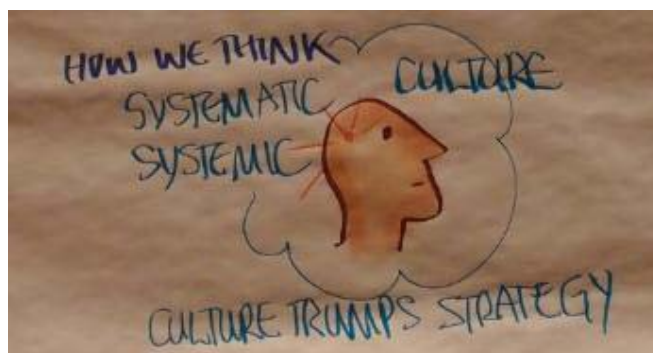


資料來源：ISPI 2013 Opening Session

What is HPT?



資料來源：ISPI 2013 Opening Session



資料來源：ISPI 2013 Opening Session



資料來源：ISPI 2013 Opening Session

HPT小歷史

LMS/eHRD應用成效第一 - 成就企業卓越人才
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- ▶ HPT主要是由四個領域所交互影響而來
 - 行為心理學
 - 教學科技(Instructional Technology)
 - 組織發展
 - 人力資源發展

HPT的焦點

LMS/eHRD應用成效第一 - 成就企業卓越人才
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- ▶ 人員的績效
- ▶ 活動和結果
- ▶ 量化的結果
- ▶ 完成有價值的成就

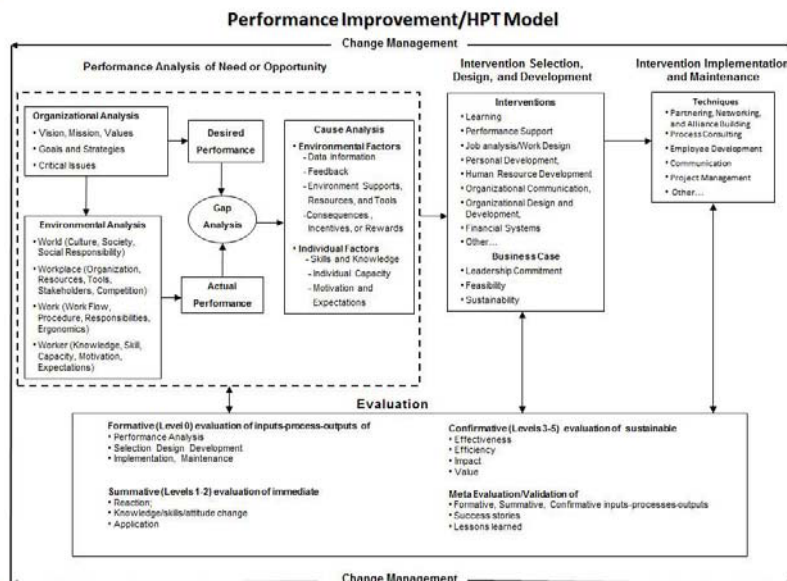
Human Performance Technology

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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- ▶ To provide “an engineering approach to **attaining desired accomplishments from human performers** by determining gaps in performance and designing cost-effective and efficient interventions”
- ▶ 特徵：不同層次，多元因素，回饋與調整
- ▶ 能力與心態的要求+利益關係人的參與+合適的工具

Performance Improvement/HPT Model

企業卓越人才
Service Provider



Why systematic view?

LMS/eHRD應用成效第一 - 成就企業卓越人才
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- ▶ If _____ is the solution, what is the question?
- ▶ 如果_____是解法，那我們的問題是甚麼？



- ▶ 如果“這包藥”是解法，那我們的問題是甚麼？

Why systematic view?

LMS/eHRD應用成效第一 - 成就企業卓越人才
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- ▶ Doctoral Model



One most important thing

LMS/eHRD應用成效第一 - 成毅企業卓越人才
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▶ Analyze：必要但常被忽略 (即使是TTQS、人提計畫)

- 價值不易彰顯
- 不好做(需要能力以及其他人的配合)
- 沒有工具做
-



▶ 因此常常會有許多“creative”的解法.....

One most important thing

LMS/eHRD應用成效第一 - 成毅企業卓越人才
Taiwan No. 1 eHRD Solution and Service Provider

▶ Analyze: 必要但常被忽略

▶ 可以嘗試的第一步：Speak in customer's language

- 大型會計師事務所的故事 --- 審查
- 工程行業的故事 --- 根本原因(Root Cause Analysis)
- 大陸用語 --- 調研(即: 調查研究)

Tools

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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- ▶ 可以嘗試的第二步：使用工具
- ▶ Tools: Systematic Way to find possible problems
 - BEM (or six box)
 - TPS(Total Performance System)
 -

A Little Exercise

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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- ▶ Think back to your current or last job and write down the biggest thing that kept you from doing your job.
- ▶ 想一想你現在或者是上一份工作, 阻礙你做好你的工作的最大的一件事是甚麼?

阻礙你工作成就的最主要的原因是?(單選)

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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Behavior Engineering Model

	Information	Instrumentation	Motivation
Environmental Supports	<i>Data</i> 1. Relevant and frequent feedback about the adequacy of performance 2. Descriptions of what is expected of performance 3. Clear and relevant guides to adequate performance	<i>Resources</i> 1. Tools and materials of work designed scientifically to match human factors	<i>Incentives</i> 1. Adequate financial incentives made contingent upon performance 2. Non-monetary incentives made available 3. Career-development opportunities
Person's Repertory of Behavior	<i>Knowledge</i> 1. Systematically designed training that matches the requirements of exemplary performance 2. Placement	<i>Capacity</i> 1. Flexible scheduling of performance to match peak capacity 2. Prosthesis 3. Physical shaping 4. Adaptation 5. Selection	<i>Motives</i> 1. Assessment of people's motives to work 2. Recruitment of people to match the realities of the situation

Figure 1: Behavior Engineering Model, *Human Competence: Engineering Worthy Performance*, 1978, p. 88.

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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The Role of HR and Manager in People Performance

The Role of HR and Manager in People Performance

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資料來源：ISPI 2013 Mon PM Session: Selling New Products to Salespeople: Training Matters

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If we build it, will they sell it?

New Product launch

- Product Literature
- Product Training
- Kick-off materials

New Product

SALES

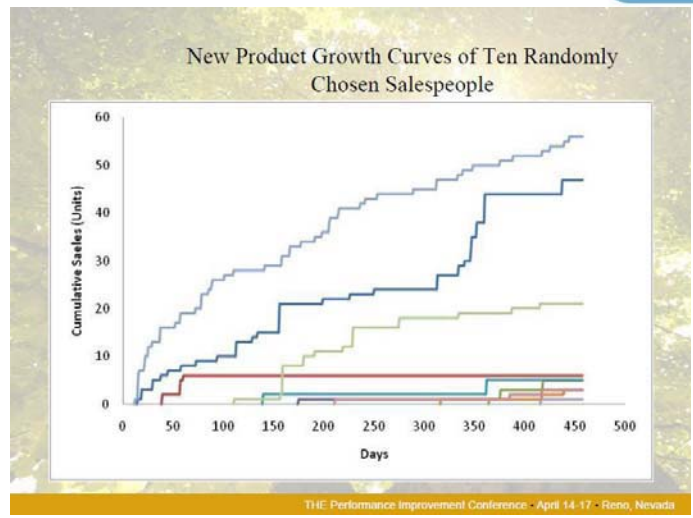
CRASH

THE Performance Improvement Conference - April 14-17 - Reno, Nevada

資料來源：ISPI 2013 Mon PM Session: Selling New Products to Salespeople: Training Matters

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資料來源：ISPI 2013 Mon PM Session: Selling New Products to Salespeople: Training Matters

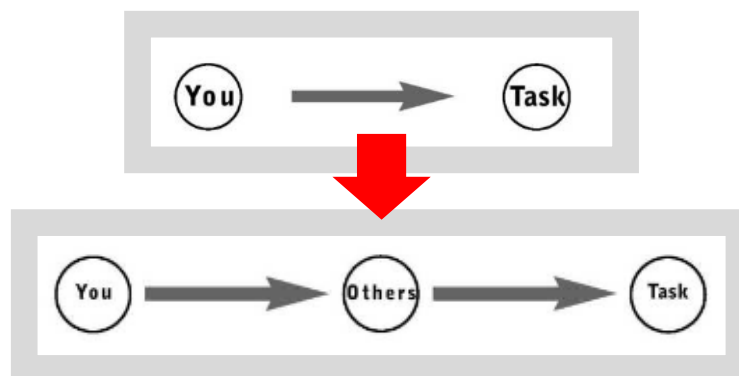
Manager as Performance Consultant

& How to Train Manager as Performance Consultant

Manager as Performance Consultant

LMS/eHRD應用成效第一 - 成就企業卓越人才
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- ▶ 員工的管理者(經理)--我們不能忽略的另一半
- ▶ 管理者的角色



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管理者的例行工作即在於

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- ▶ 營造人們可以成功的環境
 - 協助招募以找到具適合能力與知識的人
 - 以**明確的績效目標**和**回饋**來教練和發展員工
 - 提供必要的工具以及時間和明確規範的程序
 - 衡量與獎賞
- ▶ 解決績效落差的議題
 - 澄清績效落差並用可衡量的指標來描述
 - 澄清阻礙績效的因素
 - 發展可能的解決方案並從中選擇最好的
 - 執行必要的改變並以所期待的企業成效來衡量

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Cause Analysis Worksheet

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Cause Analysis Worksheet

Present Level of Performance: _____

Desired Level of Performance: _____

Reasonable Goal: _____

Factors	Driving Forces				0	Restraining Forces			
	+4	+3	+2	+1		-1	-2	-3	-4
Information									
clear expectations
relevant feedback
relevant guides
performance coaching
Resources									
materials/tools
time
clear processes/procedures
safe/organized environment
Incentives									
financial incentives

資料來源：ISPI 2013 Tuesday Chat & Chew, Roger Chevalier, PhD, CPT

LMS/eHRD 應用成效第一 - 成就企業卓越人才
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Wrap Up

Wrap up

LMS/eHRD應用成效第一 - 成就企業卓越人才
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- ▶ 2則小故事
- ▶ 人資小周末的近期活動，某家公司的CEO的一番話
- ▶ IBM/HP的大顧問的一番話

Wrap up

LMS/eHRD應用成效第一 - 成就企業卓越人才
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- ▶ Trainer -> Performance Consultant
- ▶ OD -> Performance Consultant
- ▶ Managers capable to be Performance Consultant
- ▶ 這就是績效導向的學習與發展！

a+ Thank you! Questions?

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ISV/Software Solutions

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電話: 07-5224782

【ISPI 專題分享】

從人的管理與發展出發， 落實企業績效的提升！

ASTD 2001-2013 派員專業取經連續13年不間斷
George參與：2001, 2004, 2007, 2008, 2010, 2011六次 + 2012 網路學習
2002 SHRM, **2013 ISPI**

育基數位科技
楊中旗(George)
2013.5.7

Agenda

- ▶ ISPI 聚焦的 Human Performance Technology 架構與 6個boxes (Behavior Engineering Model) 簡介
- ▶ 組織績效問題關鍵所在與行動方案
- ▶ 績效顧問：Models & Tools – 實務顧問的 approach

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ISPI 聚焦的 HPT 架構 與 6 個 boxes 簡介

- HPT(Human Performance Technology)
- BEM(Behavior Engineering Model)

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Human Performance Technology

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HPT

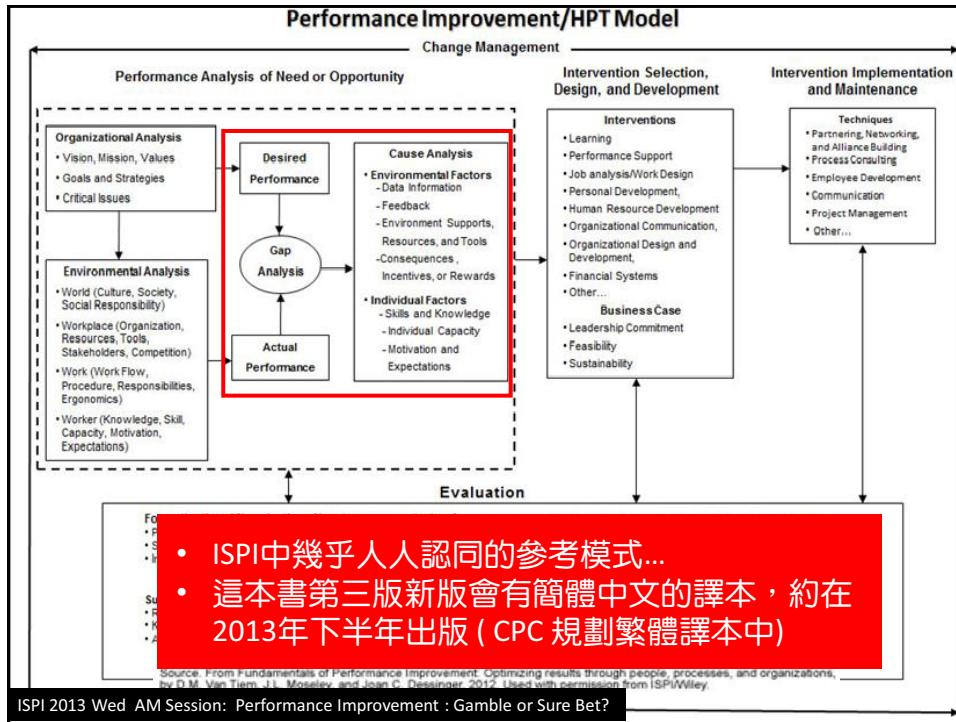
Definition:

- According to the International Society for Performance Improvement (ISPI), HPT is "a set of methods and processes for solving problems or realizing opportunities related to the performance of people, and organizations."
- The focus is on the factors that impact individual and organizational performance.

ISPI 2013 Mon AM Session: HPT Is Good Leadership; Good Leadership Is HPT

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Information :

- 角色職務與績效期待清楚定義,給予員工績效關連且經常性的回饋
- 對於工作流程有清楚且關聯的規範與指引
- 具備可以引導員工績效與發展的**績效管理系統**

Knowledge/Skill :

- 員工有必要的知識,經驗與技能來做出被期待的行为
- 員工依其角色能將知識經驗與技能適切的運用以及分享
- 員工能夠適切的跨角色團隊合作

> **Goal setting, feedback, JD, PM system...**

Models and Tools for Performance Analysis

Information	Resources	Incentives
Knowledge	Capacity	Motives

Updated Behavior Engineering Model

	Information	Resources	Incentives
Environment	<ol style="list-style-type: none"> Roles and performance expectations are clearly defined, employees are given relevant and frequent feedback about the adequacy of performance. Clear and relevant guides are used to describe the work process. The performance management system guides employee performance and development. 	<ol style="list-style-type: none"> Materials, tools and time needed to do the job are present. Processes and procedures are clearly defined and enhance individual performance if followed. Overall physical and psychological work environment contributes to improved performance, work conditions are safe, clean, organized, and conducive to performance. 	<ol style="list-style-type: none"> Financial and non-financial incentives are present, measurement and reward systems reinforce positive performance. Jobs are enriched to allow for fulfillment of employee needs. Overall work environment is positive, where employees believe they have an opportunity to succeed, career development opportunities are present.
Individual	<ol style="list-style-type: none"> Employees have the necessary knowledge, experience and skills to do the desired behaviors Employees with the necessary knowledge, experience and skills are properly placed to use and share what they know. Employees are cross-trained to understand each other's roles. 	<ol style="list-style-type: none"> Employees have the capacity to learn and do what is needed to perform successfully. Employees are recruited and selected to match the realities of the work situation. Employees are free of emotional limitations that would interfere with their performance. 	<ol style="list-style-type: none"> Motives of employees are aligned with the work and the work environment. Employees desire to perform the required jobs. Employees are recruited and selected to match the realities of the work situation.

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Resource :

- 提供完成工作所需的素材,工具與時間
- 為求績效達成,提供清楚定義的可遵循之流程與程序
- 整體的生心理工作環境可以有助於績效的達成;安全,清潔,組織,具協助機制的...

Capacity :

- 員工有能力以學習與執行來達成績效期待
- 員工的招募與任用條件能符合實際工作情境所需
- 員工能不受情緒限制及干擾影響...

從6 boxes 延伸出來相近的修正模式

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Performance Factors Model

Organizational Factors (under the authority, control, and responsibility of the organization)			
Information	Resources	Incentives	Selection/Assignment
Vision, mission, values, job descriptions, feedback, policy, doctrine (stored in binders, websites, pamphlets, posters)	Money, time, people, tools or equipment	Extrinsic offerings: pay, bonus structure, benefits (vacation, health insurance), titles, promotions	Hiring standards, job assignments, career progression
Individual Factors (under the authority, control, and responsibility of the individual)			
Knowledge	Skill	Motivation	Capacity
Theories, rules, data, facts (stored between one's ears) Knowledge is a precursor to performance (skill).	Ability to perform a defined task, procedure, or role	Intrinsic alignment of personal values with specific goals, purpose, or tasks	Capacity = knowledge + skill + motivation The ability to adapt to new or novel situations based on past experiences

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Performance Factors Model

- HPT is good leadership 場次，
- 85%(環境) v.s. 15% (個人) 貢獻比例？
您認為呢？ 您所處的組織呢？



Individual Factors

ISPI 2013 Mon AM Session: HPT Is Good Leadership; Good Leadership Is HPT

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組織績效問題關鍵所在 與行動方案

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Primary Causes of Poor Performance

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Cause	Percentage
Poor or Insufficient Performance Feedback	60%
High Individual Stress Levels	40%
No Performance Standards	39%
Lack of Clear Individual Goals	37%
Reward Not Performance Based	31%
Poor Performance Rewarded	31%
No Career Planning	28%
Fear of Failure or Punishment	23%
Inability to Envision Successful Outcomes	22%
Lack of or Poor Company-Sponsored Training	17%
Inability to Concentrate on Task at Hand	14%
Low Worker Self-Esteem	9%
Low Compensation	8%

0% 10% 20% 30% 40% 50% 60% 70%

- 這是一張令看到的人都很有啟發性的投影片 - 一個總結性的問題分析, 您的解讀是..., 填入 6 boxes...

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Goals and Feedback for HOPE

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- ISPI's Performance Improvement Standard 1

- 同時可以提供跨企業跨文化共通性的三個行動方案 –
 1. 結果導向的目標設定，
 2. 目標導向的回饋 which will help
 3. 透過績效管理的資訊系統進行個人化的目標管理作業與回饋

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Goals and Performance

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- ▶ To perform well, an employee should know the definition of good performance
- ▶
 - 像 Innovation/Creativity 這樣困難的突破, 目標的driving 是關鍵
- ▶ Goals influence performance by:
 - focusing behavior in the desired direction
 - energizing behavior to perform difficult tasks

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II. Samsung Electronics` Competitive Weapons ?

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▶ The Ability to practice continuous innovation in all the divisions of management

Three major innovative axes in Samsung Electronics



- 像 2004年ASTD，Samsung分享的組織變革架構 – Continuous Innovation 來自 Value & Goal trigger Passion... (since 1999)

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Writing SMART Goals

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- ▶ **S**pecific
 - 5 Ws
- ▶ **M**easurable
 - Quantity, Quality
- ▶ **A**chievable
 - Capacity, S/K
- ▶ **R**elevant
 - Related to your job
- ▶ **T**ime-bound
 - By when?

大家熟悉的目標設定原則 - SMART

- *Example:*
CSRs will respond 10-15 customer calls in an hour and either solve their issue or transfer it to upper level; enter the case to the database.

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SMART Goals – Exercise

As HR, 內部可以提供這樣的範例給同仁與主管參考 follow - SMART or not?

GOAL STATEMENT:	Specific	Measurable	Achievable	Relevant	Time-bound
1) Sales people should sell more products.					
2) Smart company will raise Smart-E tablet production by 60% by the end of this year.	✓	✓		✓	✓
3) Whole-sale people should increase end-user satisfaction by 10% by the next quarter.	✓	✓	✓		✓
4) By August 1, 2013, implement updates to OnCourse system and provide training to faculty based on their preferred time so that faculty and students can use the updated OnCourse for the fall semester.	✓	✓	✓	✓	✓

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SMART 與否對於績效目標的有效性影響

SMARTometer Lite

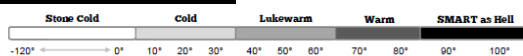
Action/Decision/Message/Goal:

Why: So that...

		+/-	total	corrective actions
S	C01 – Is the goal written down? _____	if yes, +50°	<input type="checkbox"/>	write it
	C02 – Are there multiple goals (verbs, 'and', 'or', 'or ;')? _____	if yes, -30°	<input type="checkbox"/>	split &/or weight
M	C03 – Any ambiguous words? _____	if yes, -30°	<input type="checkbox"/>	make unambiguous
	C08 – Is it clear when we're done (the 'to' or 'until')? _____	if no, -30°	<input type="checkbox"/>	Articulate end-state
A	C09 – Are 'robust' metrics in place? _____	if yes, +10°	<input type="checkbox"/>	establish robust metrics
	C12 – Does it pass the 'Aggressively S.E.T.' test? _____	if yes, +10°	<input type="checkbox"/>	S.E.T. aggressively
R	C15 – Are there clear 'upside/downside' targets? _____	if yes, +10°	<input type="checkbox"/>	create upside/downside
	C16 – Does the 'why' matter (mission, vision, values)? _____	if no, -50°	<input type="checkbox"/>	start over
	C19 – Any serious unintended consequences? _____	if yes, -30°	<input type="checkbox"/>	rewrite or create 'guardrails'
T	C23 – Is the date specified? _____	if yes, +10°	<input type="checkbox"/>	pick a date
	C24 – Will this timeline 'win the race'? _____	if yes, +10°	<input type="checkbox"/>	pull in the date

Total _____

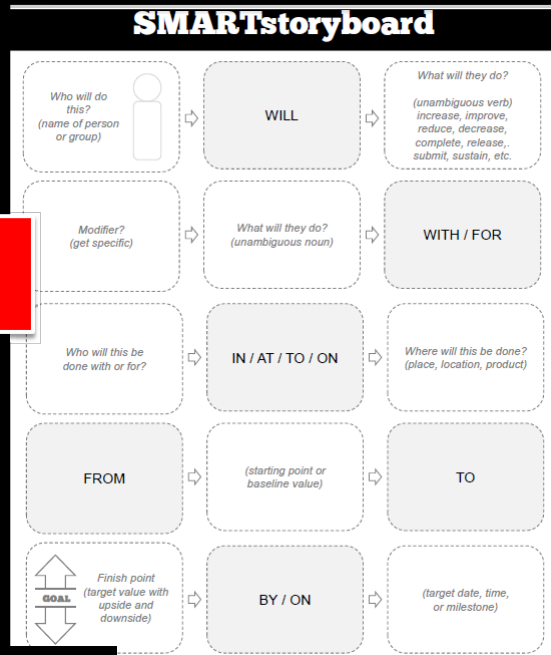
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SMART 操作性拆解
成為可運用的語句



SMART example



Feedback and Performance

回饋對個人績效的影響

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Why We Hesitate to Give Feedback

不敢給回饋的經常性原因

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Effective Feedback

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那麼, 如何進行有成效的回饋呢? (SMART)

- ▶ Specific information (S)
- ▶ Information on a performance the person controls (R, A)
- ▶ Immediately following the performance, if not during (T)
- ▶ Individualized (S, R)
- ▶ Self-monitored when possible (R)
- ▶ If not self-monitored, delivered by the person in charge (R)
- ▶ Focused on improvement (S, M, A)
- ▶ Easily understood, Graphed (S, M)

(Daniels & Daniels, 2004)

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Formula for Giving Feedback

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回饋共通的架構

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Giving Feedback - Exercise

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內部可以提供這樣的範例給同仁與主管參考follow

FEEDBACK STATEMENT:	Impact	Behavior	Feeling	Impact	Timely	Appropriate
1) You let us all down just now when you let that participant in the SRSC without having them show their student ID. It puts pressure on the rest of us because the next time they are going to expect us to do the same thing.		✓		✓	✓	✓
2) I'm really angry with the way you handled your calls.						
3) You are a really good salesman.						
4) When you leave your gear courtside, you create a trip hazard for other participants. I would appreciate it if you would put it in a locker.	✓	✓	✓	✓	✓	✓

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績效顧問 : Models & Tools

- 實務顧問的approach

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啟動績效分析 : Models and tools

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▶ 績效顧問(As Performance Consultant)如何引導您的內外部客戶 (Leading our clients)

- 準備 (Preparation)
- 評估 (Assessment)
- 診斷對話 (Diagnosis)
- 建議處方 (Prescription)
- 夥伴關係建議 (Partnering)
- 強化確認 (Reinforcement)
- 落實執行 (Follow-up)

績效顧問指引：架構性的提醒 – 角色扮演，恰如其分，適時轉變

績效顧問的關鍵基礎 - 真正了解客戶對於問題的認知，也同時可確認客戶的準備度 (readiness)與承諾程度 (commit) – 決定了我們這時該對應的方式 (flexibility and adjusted).

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- Biz 進展如何?
- 負責的biz成長或衰退?
- 我可以貢獻的是?
- ...

- 您會如何陳述目前績效?
- 目前衡量的定義與標準為何?
- 期望的績效水準是?
- 目前衡量的方式與內容, 有助於縮減落差...

- 工作環境中那些會造成落差?
- 人員明確知道自己被期望如何?
- 人員對其績效有收到經常性回饋?
- 他們有無所需的工具, 時間與資源?
- ...

在不同階段，詢問的目的與對應的原則，其中常問的問題

ISPI 2013 Wed PM Session: Models and Tools for Performance Analysis 27

Models and Tools for Performance Analysis

Work Environment
Individual

Information	Resources	Incentives
Knowledge	Capacity	Motives

Updated Behavior Eng: 假如影響程度是 85% v.s. 15%，那改變與對應資源投入的比例是多少呢?

盤點環境與個人中的驅動要素與限制要素, 對應資源的投入

Environment	defined; employees are given relevant and frequent feedback about the adequacy of performance. 2. Clear and relevant guides	present. 2. Processes and procedures are clearly defined and enhance individual performance if followed. 3. Overall physical and	present; measurement and reward systems reinforce positive performance. 2. Jobs are enriched to allow for fulfillment of employee needs. 3. Overall work environment
--------------------	--	--	--

ISPI 2013 Wed PM Session: Models and Tools for Performance Analysis

Individual

Updated Behavior Engineering Model

	Information	Resources	Incentives
Environment	1. Roles and performance expectations are clearly defined; employees are given relevant and frequent feedback about the adequacy of performance. 2. Clear and relevant guides are used to describe the work process. 3. The performance management system guides employee performance and development.	1. Materials, tools and time needed to do the job are present. 2. Processes and procedures are clearly defined and enhance individual performance if followed. 3. Overall physical and psychological work environment contributes to improved performance; work conditions are safe, clean, organized, and conducive to performance.	1. Financial and non-financial incentives are present; measurement and reward systems reinforce positive performance. 2. Jobs are enriched to allow for fulfillment of employee needs. 3. Overall work environment is positive, where employees believe they have an opportunity to succeed; career development opportunities are present.
Individual	1. experience and skills to do the desired behaviors 2. Employees with the necessary knowledge, experience and skills are properly placed to use and share what they know. 3. Employees are cross-trained to understand each other's roles.	1. what is needed to perform successfully. 2. Employees are recruited and selected to match the realities of the work situation. 3. Employees are free of emotional limitations that would interfere with their performance.	1. the work environment. 2. Employees desire to perform the required jobs. 3. Employees are recruited and selected to match the realities of the work situation.

Updated 或是各家可供參考盤點驅動或限制要素

ISPI 2013 Wed PM Session:

Cause Analysis Worksheet

Present Level of Performance: _____

Desired Level of Performance: _____

Reasonable Goal: _____

<u>Factors</u>	<u>Driving Forces</u>					<u>Restraining Forces</u>			
	+4	+3	+2	+1	0	-1	-2	-3	-4
Information									

Reasonable Goal 可以是階段性，務實，可以建立快速戰果的績效目標 - 透過Factors Check lists 的運用，可以幫助您更全面化的思考與盤點出問題與機會

問題分析工作表 (Cause Analysis Worksheet) – 也是潛在機會的列表, 可以從中挑出關鍵的，以及短期內可以改變的，先做運用 (也是活動intervention可以提報與執行所在)

ISPI 2013 Wed PM Session: Models and Tools for Performance Analysis


 International Society for Performance Improvement
WHERE KNOWLEDGE BECOMES KNOW-HOW

The Performance Chain : 如何連結個人產出與組織目標?

 中國生產力中心
CPC China Productivity Center

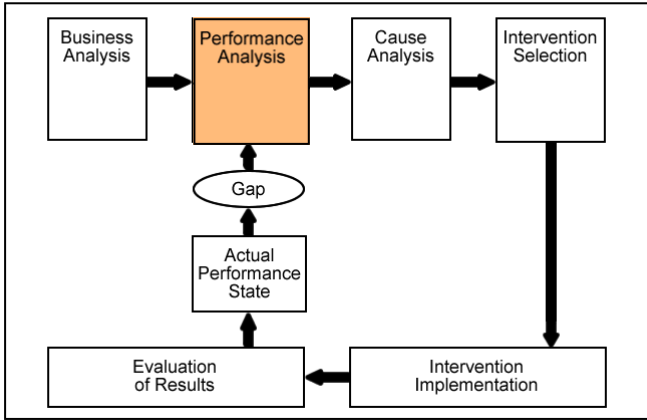
人資發展組藍家祺組長
2012年5月7日

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 International Society for Performance Improvement
WHERE KNOWLEDGE BECOMES KNOW-HOW

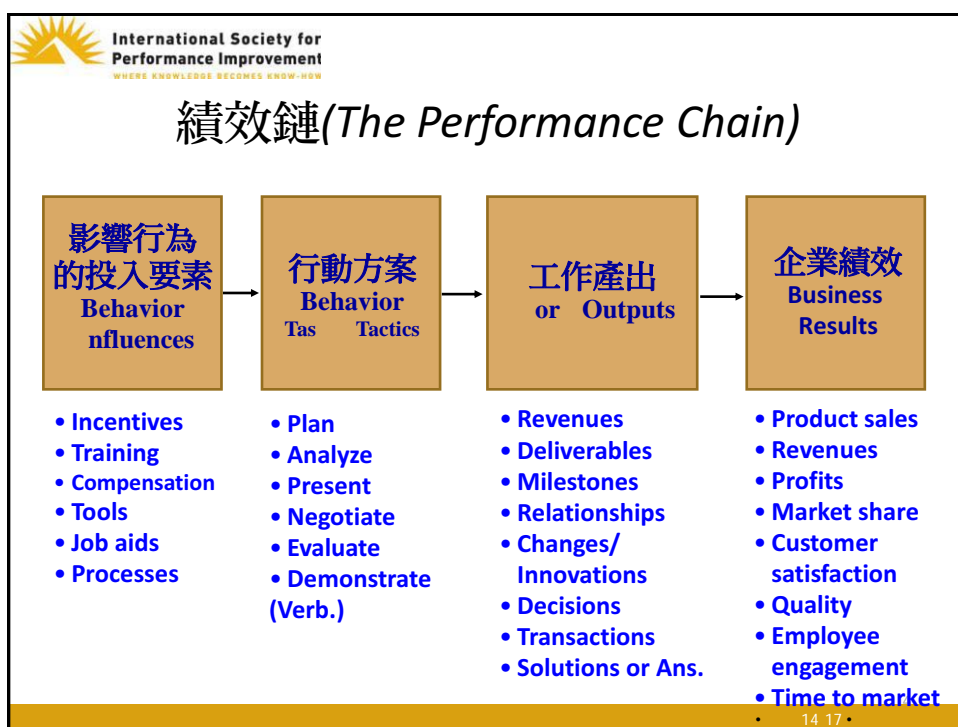
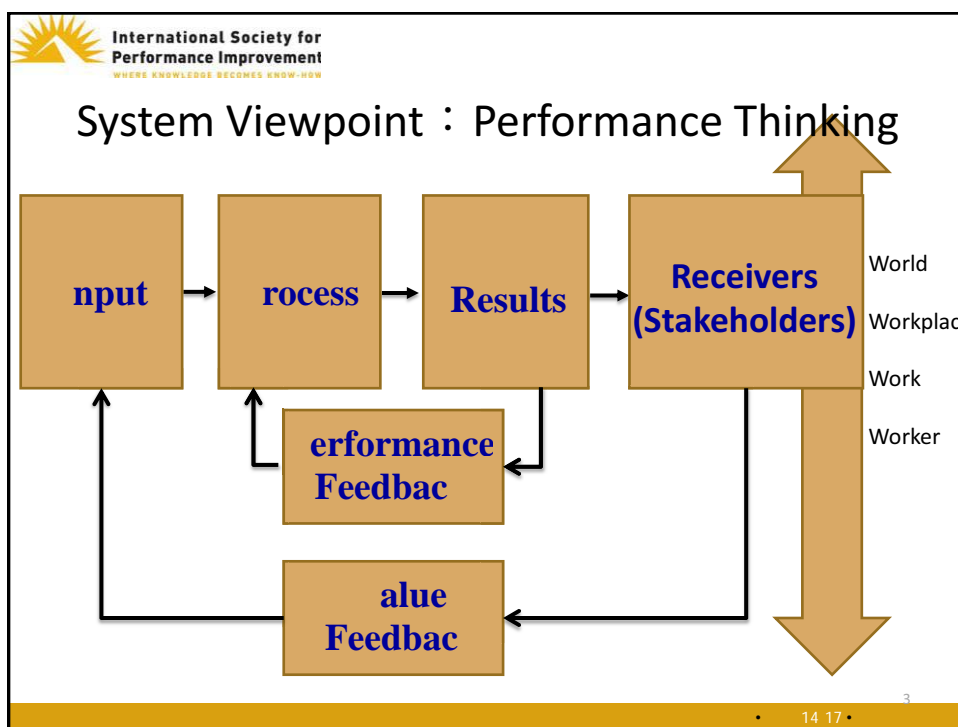
Human Performance Improvement Model

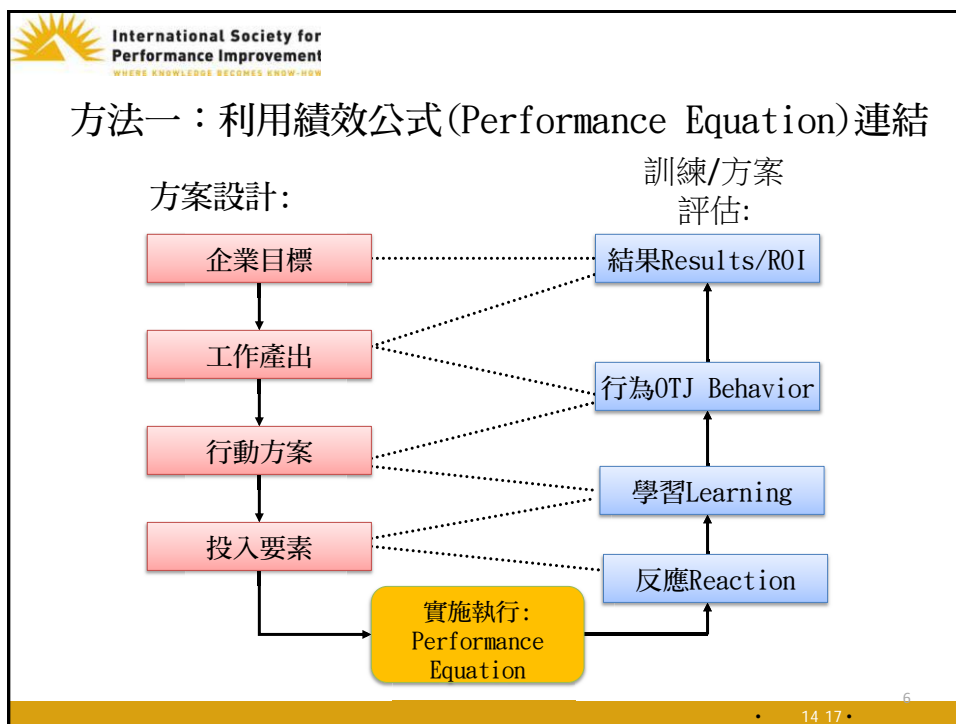
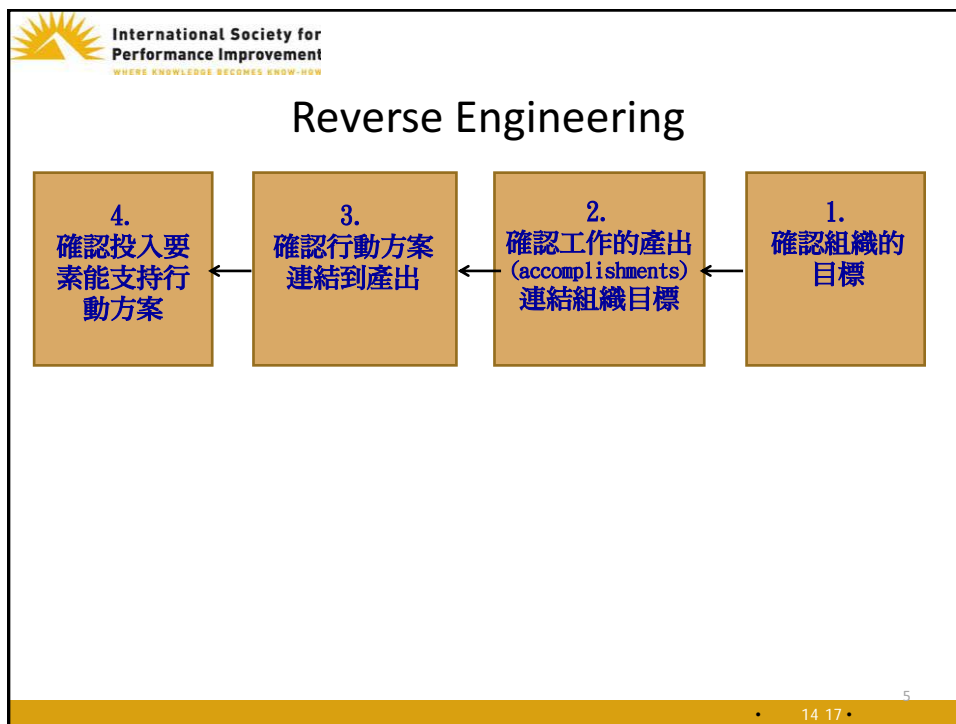
HPI Model



```
graph TD; BA[Business Analysis] --> PA[Performance Analysis]; PA --> CA[Cause Analysis]; CA --> IS[Intervention Selection]; IS --> II[Intervention Implementation]; II --> ER[Evaluation of Results]; ER --> APS[Actual Performance State]; APS --> G((Gap)); G --> PA; CM[Change Management] --> PA; CM --> CA; CM --> IS; CM --> II; CM --> ER; CM --> APS; CM --> G
```

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績效公式(The Performance Equation)

$$P = C \times K\&S \times M \times I \times EE \times OS \times T\&R$$

- C=Inherent Capacities
- K&S=Knowledge and Skills
- M=Motivation
- I=Incentives
- EE=Environmental Elements
- OS=Organizational Systems
- T&R=Tools and

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績效公式(The Performance Equation)

PSS :
Performance Support
Systems

HB :
Human Behaviors

HPER :
Human Performance

```

graph TD
    EE((EE)) --> PSS((PSS))
    OS((OS)) --> PSS
    INC((INC)) --> PSS
    TR((T/R)) --> PSS
    PSS --> HB((HB))
    CAP((CAP)) --> HB
    KS((K/S)) --> HB
    MOT((MOT)) --> HB
    PSS ==> HPER((HPER))
    HB ==> HPER
  
```

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設計干預措施(Interventions)

HPER GOAL = 假如要練好罰球(籃球)

- EE =
- OS =
- I =
- T&R =
- C =
- K&S =
- MOT =

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方法二：Performance Improvement Logic

4. 選擇衡量指標

```

    graph LR
      A[影響行為的投入要素  
Behavior Influences] --> B[行動方案  
Behavior  
Tas Tactics]
      B --> C[工作產出  
or Outputs]
      C --> D[企業績效  
Business Results]
      E[5] --> A
      F[3] --> B
      G[1] --> C
      H[2] --> D
  
```

5. 分析、腦力激盪並選擇影響行為的投入要素；

6. 實行並根據衡量指標調整；

7. 與他人分享此邏輯觀念。

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Gilbert's Behavior Engineering Model
(行為工程模式)

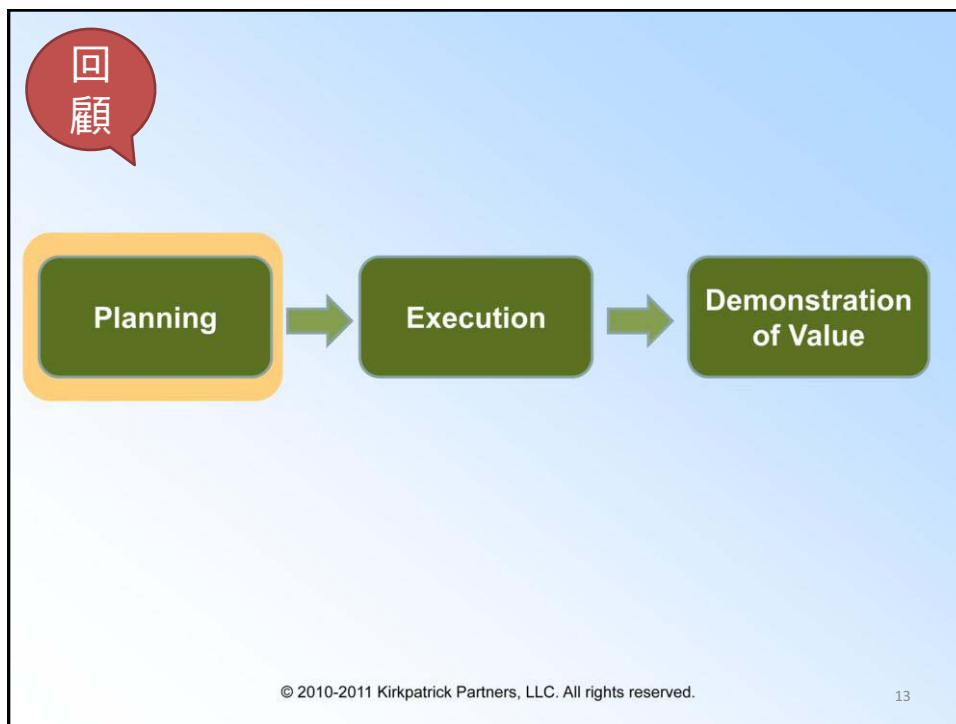
	資訊(Information)	設備(Instrumentation)	動機(Motivation)
	1. 資料(Data)	2. 工具(Instruments)	3. 誘因(Incentives)
環境支持	<ul style="list-style-type: none"> • 每個人都知道他們所被期待的地方嗎? • 每個人都知道他們表現的好嗎? • 每個人都對他們的表現給予指導嗎? 	<ul style="list-style-type: none"> • 每個人都有正確的績效工具使用嗎? • 公司設計的績效工具符合績效上的人因考量 (the human factors of performance) 嗎? 	<ul style="list-style-type: none"> • 根據績效給予適當的財務誘因嗎? • 是否有非財務性的誘因? • 是否有職涯發展的機會?
	4. 知識(Knowledge)	5. 能力(Capacity)	6. 動機(Motives)
個人表現	<ul style="list-style-type: none"> • 每個人都具備預期表現需要的知識與技術? • 訓練是否依績效所需進行設計? 	<ul style="list-style-type: none"> • 每個人達到最佳績效標準的時程表為何? • 每個人是否具有達到工作績效的才能與體能? 	<ul style="list-style-type: none"> • 動機衡量 • 每個人是否願意為誘因工作? • P-J Fit?

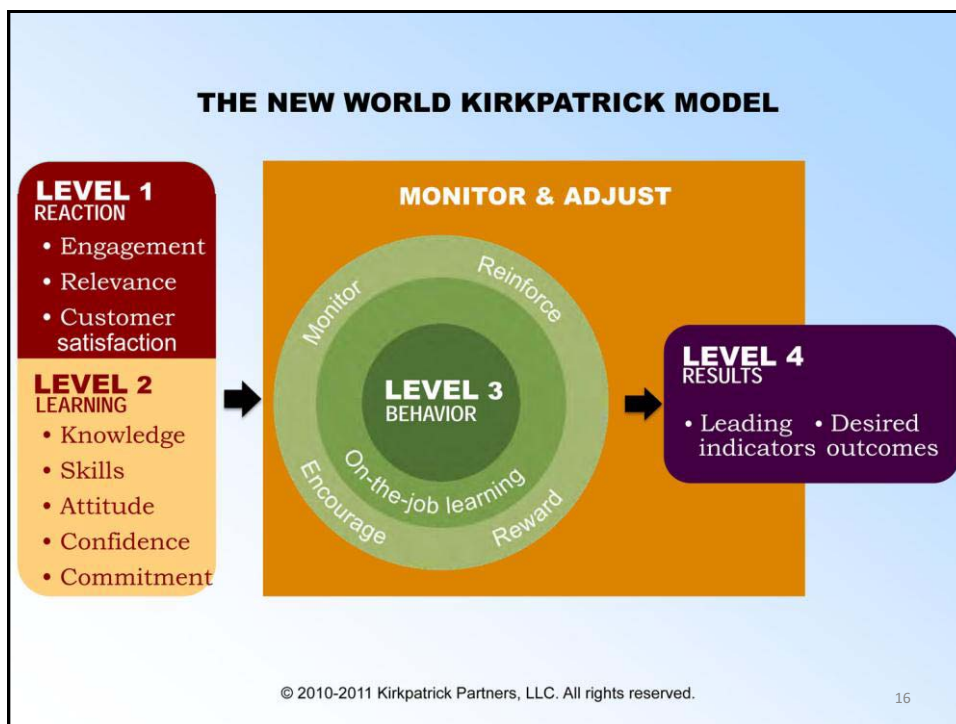
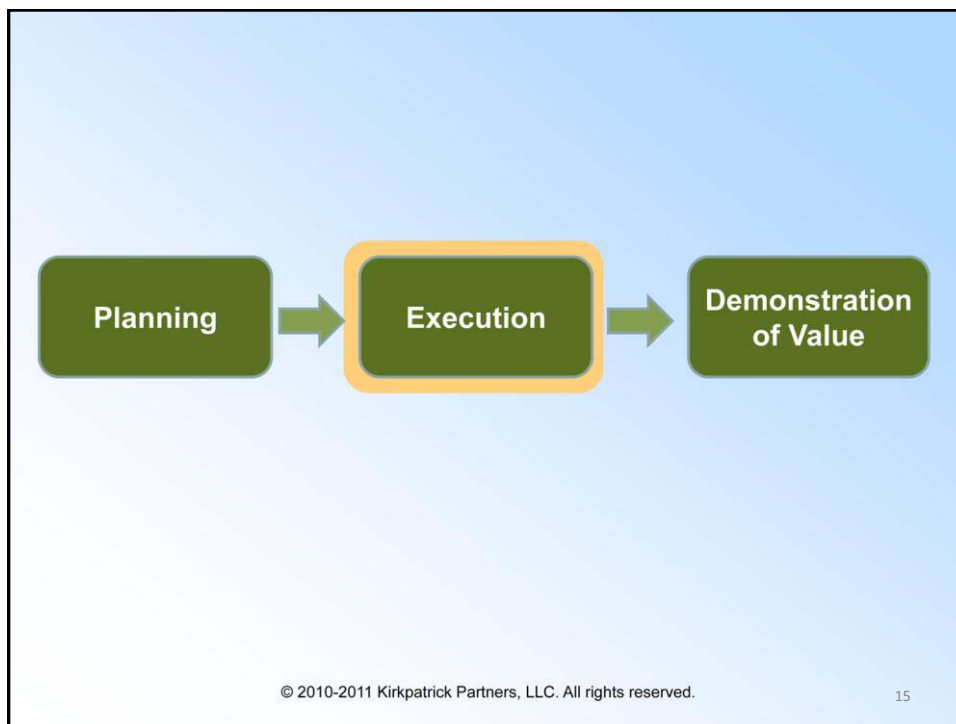
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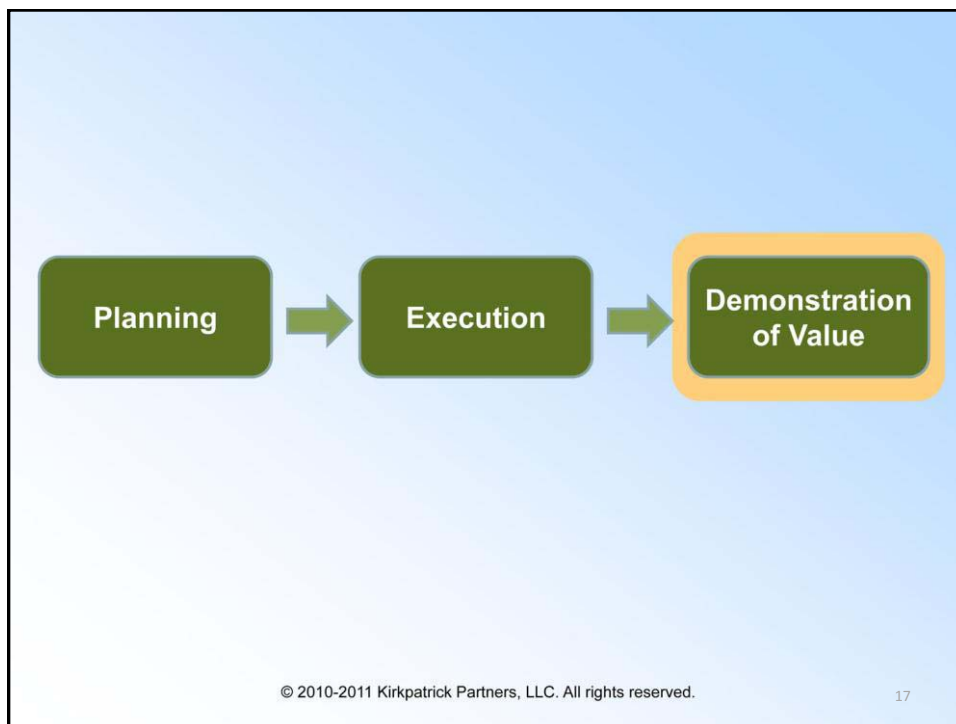
總結&延伸


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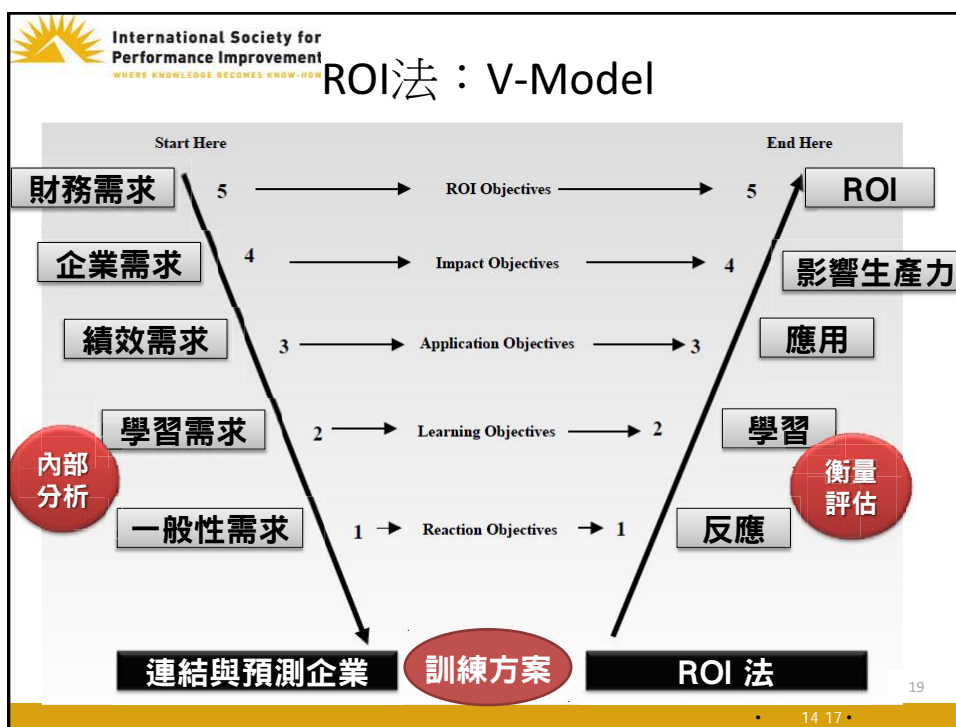
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The ROI Methodology

-Dr. Jack Phillips



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MANY APPROACHES—DISCOVER WHAT WORKS

Reno, Nevada
April 12-17
2013
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aEnrich 育碁數位科技 LMS/eHRD 應用成效第一 - 成就企業卓越人才
Taiwan No.1 eHRD Solution and Service Provider

【ISPI 專題分享】

Continuous Improvement for Learning and Performance:
學習成效 – Measurement 以落實人才訓練發展投資

ASTD 2001-2013 派員專業取經連續13年不間斷
George參與：2001, 2004, 2007, 2008, 2010, 2011六次 + 2012 網路學習
2002 SHRM, **2013 ISPI**

育碁數位科技
楊中旗(George)
2013.5.7

www.aEnrich.com.tw

Session Objectives

LMS/eHRD 應用成效第一 - 成就企業卓越人才
Taiwan No.1 eHRD Solution and Service Provider

- ▶ 提供一些可以增進人才發展領域專業的approach
 - Measurement and feedback for continuous improvement
 - Limitation of KirkPatrick & Philip 4-/5- levels measurement
- ▶ 取得可以促進學習成效的一些實用做法
 - Delayed test
 - On job support
 - 了解現行smile sheets 的限制, 並知如何調整
 - 可以運用以跟主管提醒 on-the-job performance support重
要性的參考資訊
 - 可以明確幫助講師了解學員回饋的問卷內容

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Agenda

LMS/eHRD 應用成效第一 - 遠東企業卓越人才
Taiwan No. 1 eHRD Solution and Service Provider

- ▶ Measurement for what?
- ▶ On-the-job 學習曲線與遺忘曲線
- ▶ 評量問卷 (Smile sheets)
- ▶ 學習成效上, 主管的角色與影響
- ▶ 如何擴展 4-/5- levels measurement 的運用成效
- ▶ Workplace learning 常見的 failure

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3

本場次擷取 ISPI 2013 Will Thalheimer 的 Master Presentation 的部分內容作學習分享

LMS/eHRD 應用成效第一 - 遠東企業卓越人才
Taiwan No. 1 eHRD Solution and Service Provider



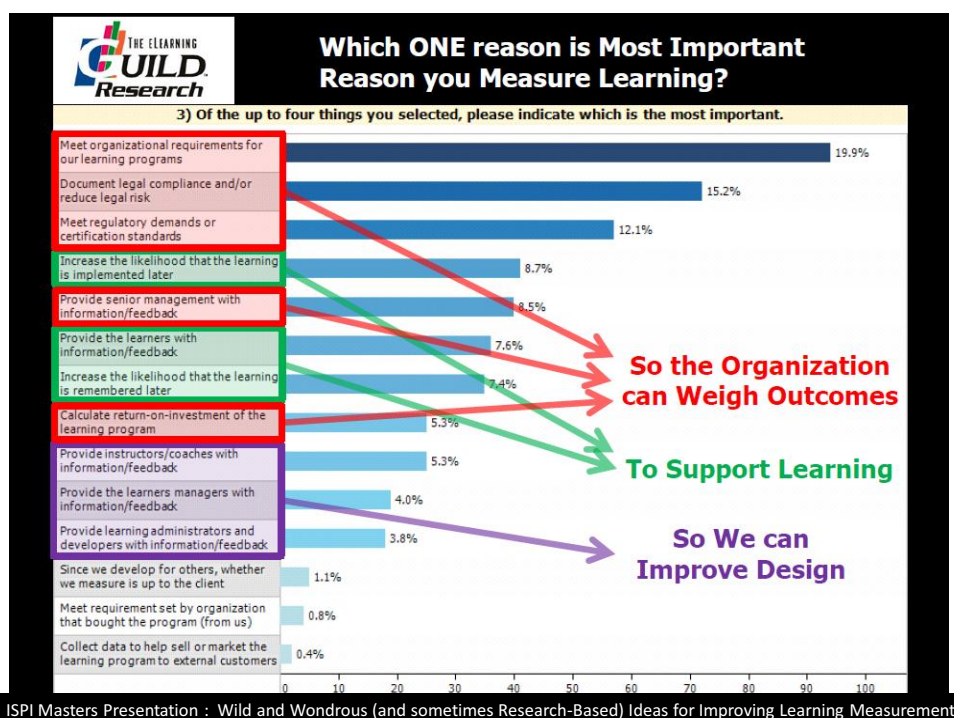
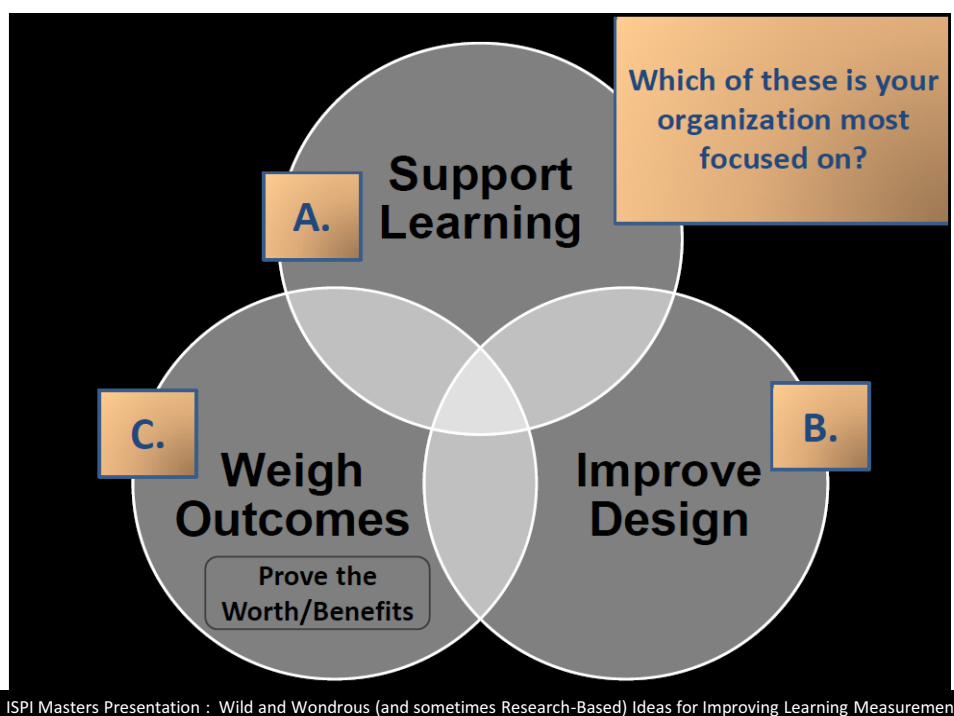
Wild and Wondrous (and Sometimes Research-Based) Ideas for Improving Learning Measurement

ISPI 2013 - Masters Presentation

Will Thalheimer, PhD
President
Work-Learning Research, Inc.
Somerville, Massachusetts, US

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Blog: willatworklearning.com
Book: willsbook.net

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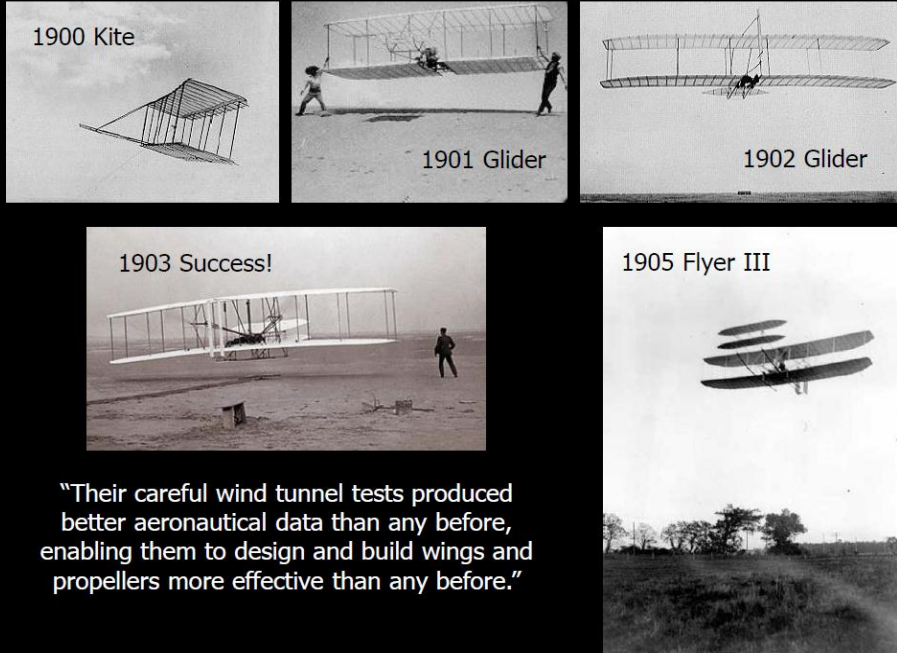




#3

*We don't seem to feel
a professional obligation
to continuous improvement*

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1900 Kite

1901 Glider

1902 Glider

1903 Success!

1905 Flyer III

"Their careful wind tunnel tests produced better aeronautical data than any before, enabling them to design and build wings and propellers more effective than any before."

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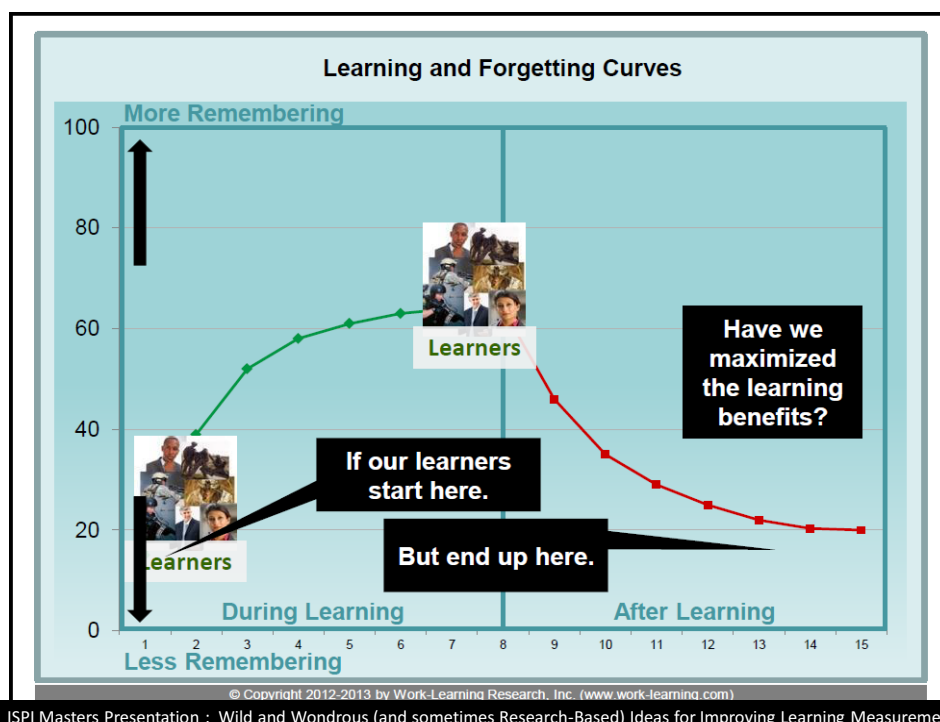


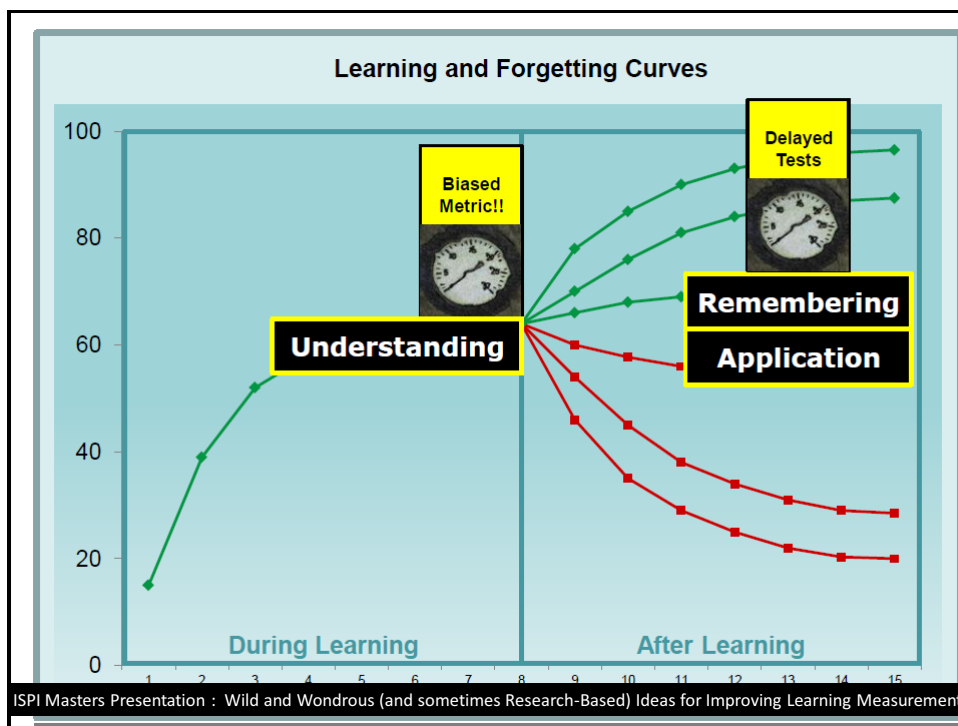
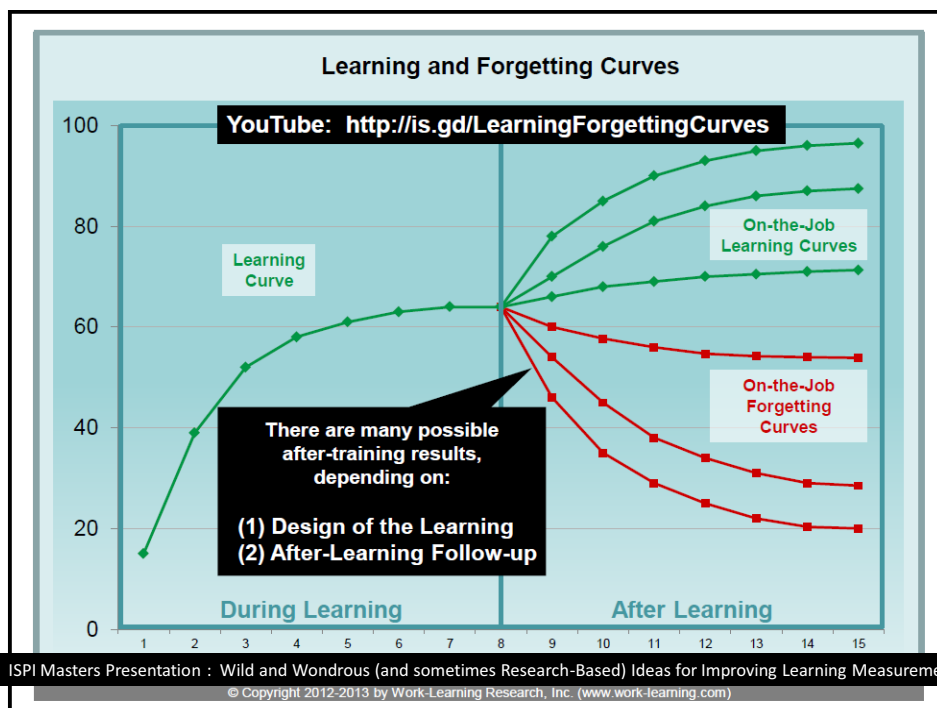
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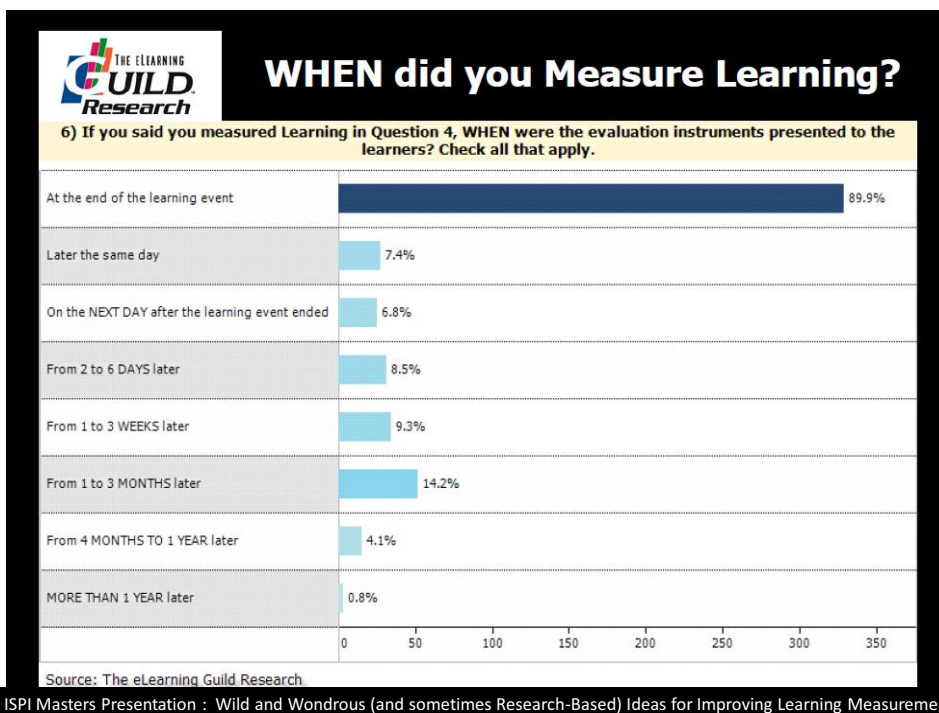
We need to measure:

1. Understanding
2. Remembering
3. Application

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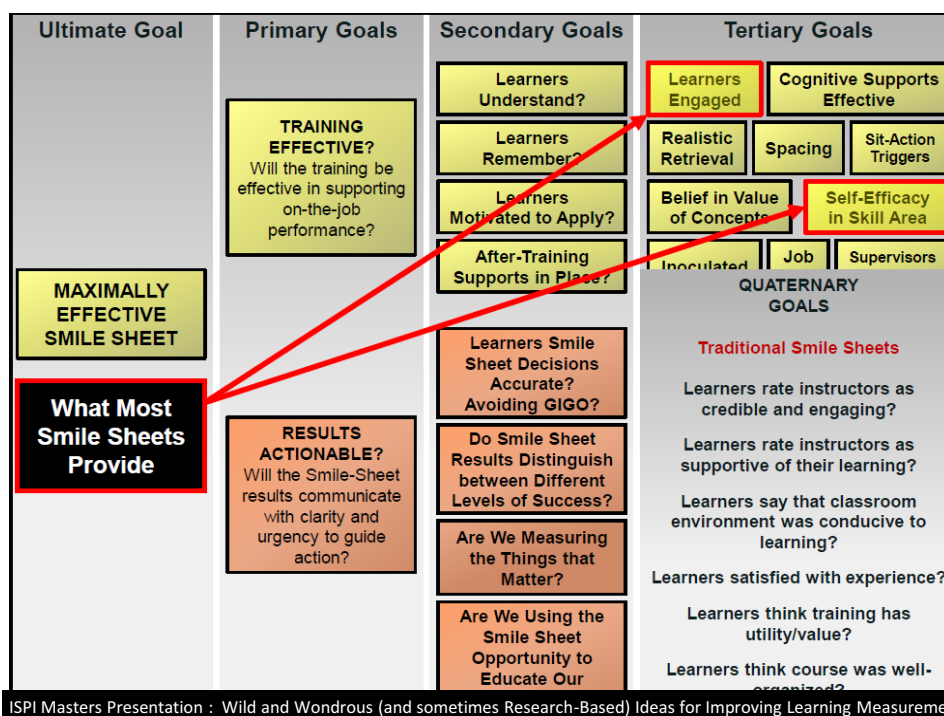




#10

*Smile Sheets
Can be Improved!*

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Revisited

#10

*Smile Sheets
Can be Improved!*

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My New Smile Sheet

Your Immediate Impressions of the Learning Experience

Developed by Dr. Barbara Belmont-Cull and with responses by staff

Value of Specific Information

Learning Concept	Like/Dislike it/Dislike it/Don't know?	How useful was content to you?	How well was content presented?
A. Two common practices in practice were discussed. Please give us your opinion of each practice. (1-5 Likelihood of using in the learning context)	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all well 2=Somewhat well 3=Well 4=Very well 5=Most people already know this
B. Learning needs assessment. How do you measure on the job performance and results once you are well trained? (1-5 Likelihood of using in the learning context)	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all well 2=Somewhat well 3=Well 4=Very well 5=Most people already know this
C. Instructional activity. The more comprehensive the better the real world, the better simulation and scenario-based questions are better than memorandum questions, which have to be written for maximum value.	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all well 2=Somewhat well 3=Well 4=Very well 5=Most people already know this
D. Learning objectives. We typically get very poor feedback about our learning programs produce minimal application and results. This makes learning objectives for training very important.	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all well 2=Somewhat well 3=Well 4=Very well 5=Most people already know this
E. Learning programs. We designed our learning materials to be able to support our training. We made our specific steps to enhance the quality of the training.	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all well 2=Somewhat well 3=Well 4=Very well 5=Most people already know this
F. Learning materials. We are not sure how many materials they are using for the job performance situation.	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all well 2=Somewhat well 3=Well 4=Very well 5=Most people already know this
G. The specific effect. Having the positions of learning over time over time as possible to support the learning.	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all useful 2=Somewhat useful 3=Useful 4=Very useful 5=Most people already know this	Value of this Concept (Scale 1-5) 1=Not at all well 2=Somewhat well 3=Well 4=Very well 5=Most people already know this

How prepared are you to act on this knowledge?

I Am Not Yet Ready
I Have Awareness
I Know What to Do

Comment on relevance of topic to your current or future work:

How could we improve our training on this:

I Am Not Yet Ready
I Have Awareness
I Know What to Do

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How prepared are you to act on this knowledge?



B. Following The Money and Financial Analysis is important to: identify facilitators / gatekeepers; estimate the scope of funding; identify modus operandi; obtain insight to sophistication of operations; understand the crime/terror nexus; determine geographic movement/location of network, and to stop the threat, collect intelligence, and prosecute.

Now, how prepared are you to act on this knowledge?

I Am Not Yet Ready
I Have Awareness
I Know What to Do

C. Illicit Funds and Money Laundering involves three stages: PLACEMENT (First phase and most vulnerable - the physical movement of money into the banking system), LAYERING (movement of funds through several accounts, companies, or nominees to obscure source and destination of funds), and INTEGRATION (return of funds to the beneficiary in a form that appears legitimate, after placement and layering)


Now, how prepared are you to act on this knowledge?

I Am Not Yet Ready
I Have Awareness
I Know What to Do

I Am Not Yet Ready
I Have Awareness
I Know What to Do

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Ultimate Goal	Primary Goals	Secondary Goals	Tertiary Goals
World's Best Smile Sheet Question???			
<p>In regard to the course topics taught, HOW ABLE ARE YOU to put what you've learned into practice on the job?</p> <p>A. I'm NOT AT ALL ABLE to put the concepts into practice.</p> <p>B. I have GENERAL AWARENESS of the concepts taught, but I will need more training/practice/guidance/experience TO DO ACTUAL JOB TASKS using the concepts taught.</p> <p>C. I am ABLE TO WORK ON ACTUAL JOB TASKS, but I'll need more hands-on experience to be fully competent in using the concepts taught.</p> <p>D. I am ABLE TO PERFORM ACTUAL JOB TASKS at a fully-competent level in using the concepts taught.</p> <p>E. I am ABLE TO PERFORM ACTUAL JOB TASKS at an EXPERT LEVEL in using the concepts taught.</p>			
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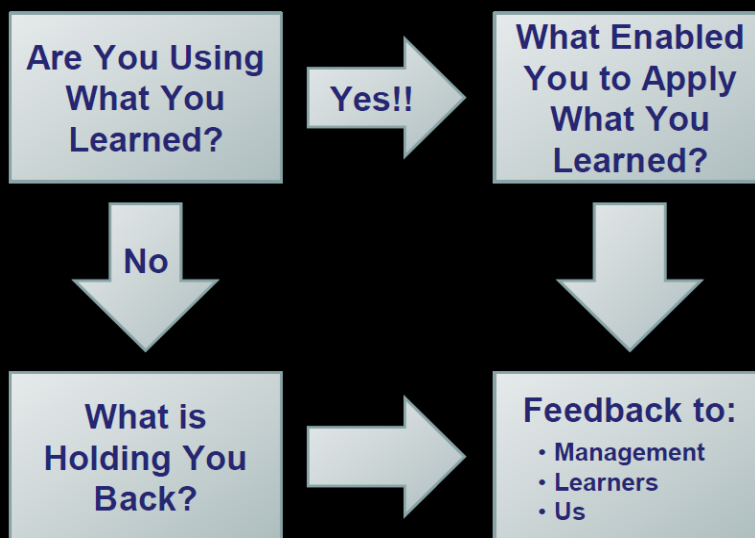


#13

*Delayed Smile Sheets
offer Great Promise!*

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Delayed Smile Sheet — Feedback for Improvement



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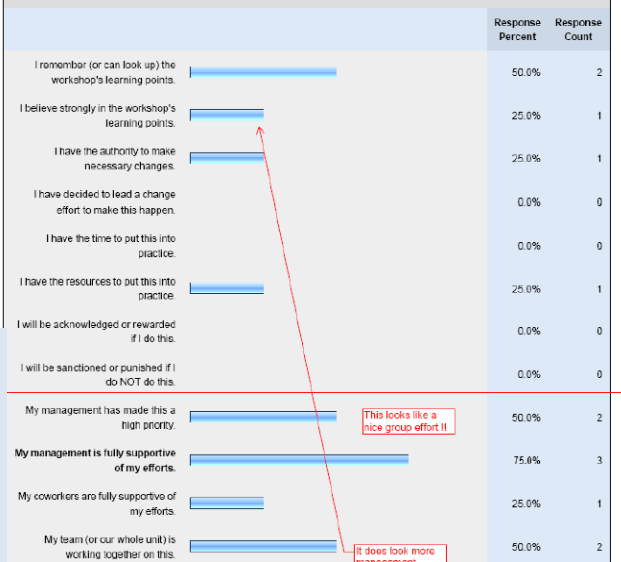
Delayed Smile Sheet

Feedback to
Management,
Learners,
and/or Us.

那些是可以促進您將研討會中高度認同的內容，應用到工作前4大原因：

1. 我記得研討會中的內容 *2
2. 我對於內容有高度的認同 *1
3. 我有權限去做這樣的改變 *1
4. 我有時間去行動與執行
5. 我有執行這內容的資源 *1
6. 我若執行這內容會被獎賞或認同
7. 我若沒有執行這內容會被懲罰
8. 我主管將這列為高順位工作 *2
9. 我主管全力支持我做這事 *3
10. 我同儕全力支持我做這事 *1
11. 我們團隊一同做這事 *2

4. What are the top 3 to 4 reasons that have enabled you to put the workshop information into practice to make changes in your learning practices. Select up to 4 Choices.

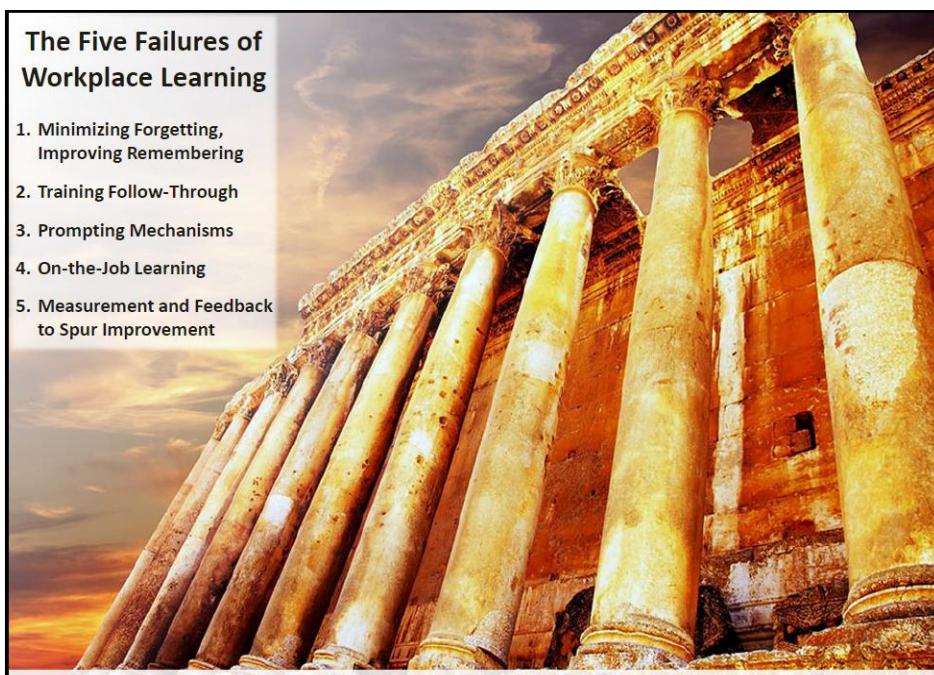


"More management-driven than belief-driven."

Message to Management

This looks like a nice group effort!!
It does look more management-driven than belief-driven, however, which may mean management will have to continue to

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The Five Failures of Workplace Learning

1. Minimizing Forgetting, Improving Remembering
2. Training Follow-Through
3. Prompting Mechanisms
4. On-the-Job Learning
5. Measurement and Feedback to Spur Improvement

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Session Objectives wrap up

LMS/eHRD 應用成效第一 - 培訓企業卓越人才
Taiwan No. 1 eHRD Solution and Service Provider

- ▶ 提供一些可以增進人才發展領域專業的approach
 - Measurement and feedback for continuous improvement
 - Limitation of KirkPatrick & Philip 4-/5- levels measurement
- ▶ 取得可以促進學習成效的一些實用做法
 - Delayed test
 - On job support
 - 了解現行smile sheets 的限制, 並知如何調整
 - 可以運用以跟主管提醒on-the-job performance support重要性的參考資訊
 - 可以明確幫助講師了解學員回饋的問卷內容

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