講 義

2013 年 5 月 16 日

主 辦 單 位 ： 育 碁 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
2:30-3:30	【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
3:30-3:45	Break	
3:45-4:45	【ISPI + ASTD 關聯主題 + 多年實務省察】 回歸基本面的學習發展實務	台積電/ 奚永明 副處長
4:45-5:00	【Q&A 暨隔空學習的分享與推廣】	全體講師

aEnrich 育碁數位科技

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, 育碁, 資策會

ASTD
EXCELLENCE IN
PRACTICE AWARD
Lai Lai Convenience Stores Company
Institute for Information Industry
aEnrich Technology Corporation
New Product Promotion,
Monthly Promotion and Pre-Sale Training
2009

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)
2013.5.16

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

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回顧我不同階段參加ASTD－價值期待與收穫

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

- 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
  - 育碁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！

育碁策略合作夥伴 in 2008

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3

ASTD 2012 ICE 現場日誌與隔空學習

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

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

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

aEnrich 育碁數位科技

4

策略性人才發展-「業務職能模型建構」工作坊

科技應用的Hype cycle – where the subject is?
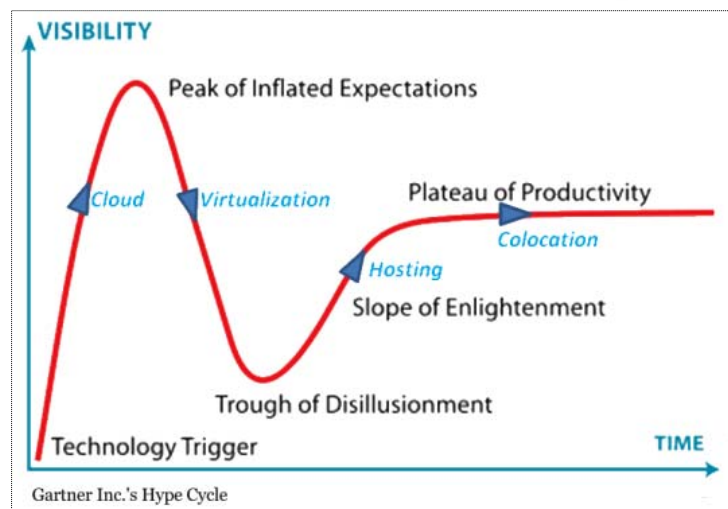
2001 Mobile-Learning 的 40 呎貨櫃 (Hyper Cycle)

▶ Share by 2001年 reporter 陳俊宇 (ASTD 2012 ICE 系列專題報導 Page 44)

2013 ASTD Tracks (與2012比，僅有一項不同)

- 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)

- 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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ASTD與ISPI簡要比較

	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)

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讓績效發光 ～

績效導向的學習與發展

育碁數位科技
嚴萬軒(Gordon)
2013/5/16

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(HR與管理職的人員)並讓公司的相關人員學習成為績效顧問

Agenda

▶ 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
人資和管理者在人員績效的角色

▶ Manager as Performance Consultant 管理者, 績效顧問
- & How to Make Manager as Performance Consultant

▶ Wrap up 小結

再探ISPI與HPT
實證與理論兼顧，結果與研究並重

What is ISPI?

▶ **Vision**

International Society for Performance Improvement
WHERE KNOWLEDGE BECOMES KNOW-HOW

- Performance improvement practices are recognized globally as an essential part of every organization's competitive strategy.

▶ **Mission**

- ISPI and its members use evidence-based performance improvement research and practices to effect sustainable, measurable results and add value to stakeholders in the private, public, and social sectors.

5

Performance Improvement/HPT Model

Performance Improvement/HPT Model

6
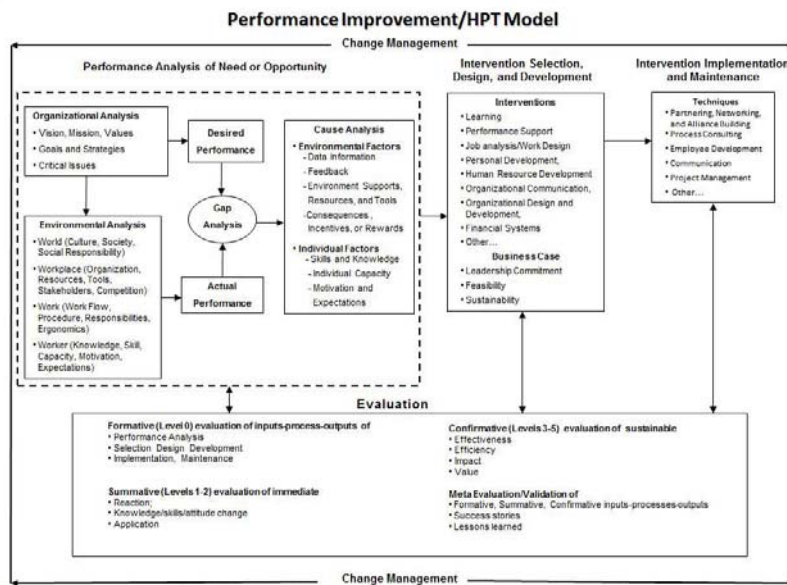
Why systematic view?這次P&P的講師問:

▸ If _____ is the solution, then what is the question?

▸ 如果____是答案，那我們的問題是甚麼？

▸ 如果"這包藥"是答案，那我們的問題(病)是甚麼？

One most important thing

▸ 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

▶ 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

▶ 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

▶ 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?

▶ 沒有工具/模型時:
  - 1. 可能不容易發想或太發散
  - 2. 可能想得不容易全面

阻礙你工作成就的最主要的原因是?(單選)

Behavior Engineering Model

	Information	Instrumentation	Motivation
Environmental Supports	*Data* 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	*Resources* 1. Tools and materials of work designed scientifically to match human factors	*Incentives* 1. Adequate financial incentives made contingent upon performance 2. Non-monetary incentives made available 3. Career-development opportunities
Person's Repertory of Behavior	*Knowledge* 1. Systematically designed training that matches the requirements of exemplary performance 2. Placement	*Capacity* 1. Flexible scheduling of performance to match peak capacity 2. Prosthesis 3. Physical shaping 4. Adaptation 5. Selection	*Motives* 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.

The Role of HR and Manager
in People Performance

The Role of HR and Manager in People Performance

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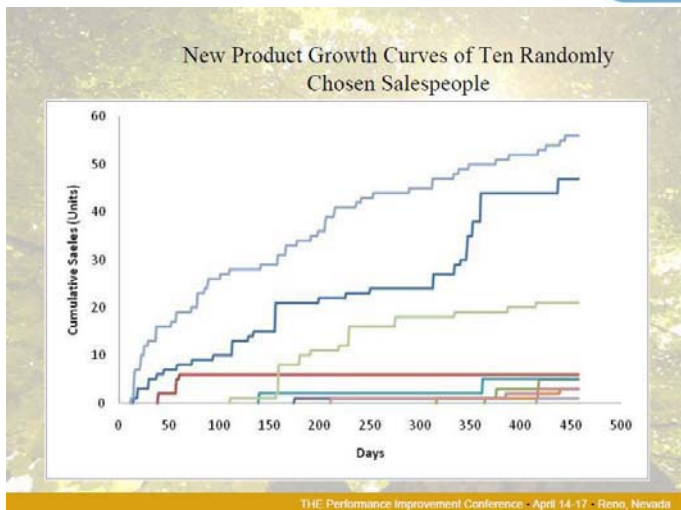
資料來源：ISPI 2013 Mon PM Session: Selling New Products to Salespeople: Training Matters

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

管理意涵

▸ 壓力(Subjective Norm)是雙面刃

▸ 如何讓業務員對新產品更熟悉有待雙方配合

- 自我效能(Self-efficacy) --- 管理者 可能較主要
- 意圖(Intention) --- HR 可能較主要

Manager as Performance Consultant

& How Make Manager as Performance Consultant

Manager as Performance Consultant

▸ 員工的管理者(經理)--HR不能忽略的另一半

▸ 管理者的角色
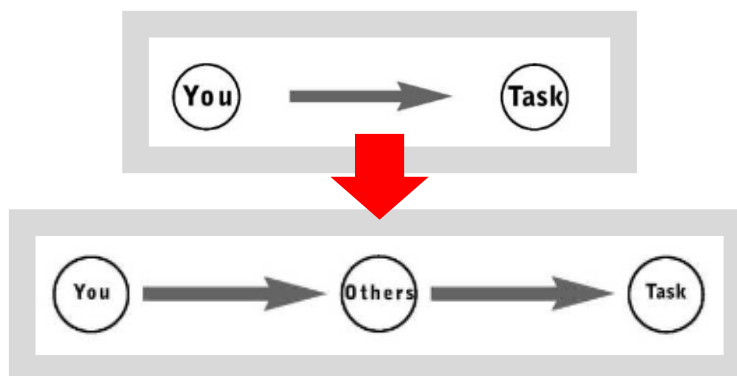
You → Task

You → Others → Task

19

管理者的例行工作即在於

▸ 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

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

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1

▸ 聽起來不是很熟悉嗎?

▸ 如果管理者能擅長使用績效顧問的手法是不是更好?

▸ 下手處是?

　　要如何更好的進行績效教練以及更好的描述績效落差和分析落差的成因

The Performance Coaching Process

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

一個例子

Cause Analysis Worksheet

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

Wrap Up

Wrap up

▶ 2則小故事, especially for HR

▶ 人資小周末的近期活動，某家公司的董事長的一番話

▶ ASTD常勝軍, IBM/HP的大顧問的一番話

Wrap up

▶ 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！

【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**

育碁數位科技
楊中旗(George)
2013.5.16

www.aEnrich.com.tw

Session Objectives

- 掌握個人與組織績效的提升重點所在, 讓初期資源投注的重點可以產生較大成效

- 從架構到行動 – 如何邁向績效顧問(Performance Consultant)之路

- 提供一些可以增進人才發展領域專業的approach

- 取得可以促進學習成效的一些實用做法

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

▸ Measurement & On-the-job學習曲線與遺忘曲線

▸ 評量問卷 (Smile sheets)改善建議與實作

▸ 學習成效上, 主管的影響

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③

Performance Improvement/HPT Model

- ISPI中幾乎人人認同的參考模式…
- 這本書第三版新版會有簡體中文的譯本，約在 2013年下半年出版 (CPC 規劃繁體譯本中)

Source: From Fundamentals of Performance Improvement: Optimizing results through people, processes, and organizations, by D.M. Van Tiem, J.L. Moseley, and Joan C. Dessinger, 2012. Used with permission from ISPI/Wiley.

ISPI 2013 Wed AM Session: Performance Improvement : Gamble or Sure Bet?

Slide 1
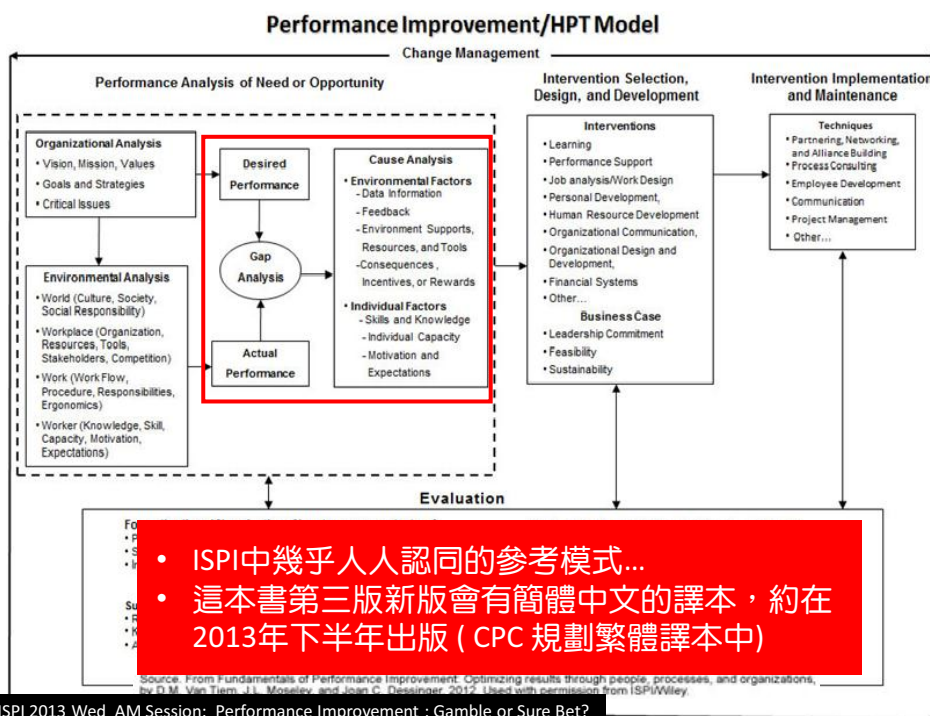
Information :
1. 角色職務與績效期待清楚定義;給予員工績效關連且經常性的回饋
2. 對於工作流程有清楚且關聯的規範與指引
3. 具備可以引導員工績效與發展的**績效管理系統**

Knowledge/Skill :
1. 員工有必要的知識, 經驗與技能來做出被期待的行為
2. 員工依其角色能將知識經驗與技能適切的運用以及分享
3. 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

Work Environment

| Information | Resources | Incentives |
| Knowledge | Capacity | Motives |

Individual

Measure
Reinforce
Inspire
Opportunity

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.
	Knowledge / Skills	**Capacity**	**Motives**
Individual	1. Employees have the necessary knowledge, 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. Employees have the capacity to learn and do 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. Motives of employees are aligned with the work and 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.

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Alignment
Engagement,
Passion

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

Resource :
1. 提供完成工作所需的素材,工具與時間
2. 為求績效達成,提供清楚定義的可遵循之流程與程序
3. 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 :
1. 員工有能力以學習與執行來達成績效期待
2. 員工的招募與任用條件能符合實際工作情境所需
3. 員工能不受情緒限制及干擾影響…

Slide 2

從6 boxes 延伸出來相近的修正模式

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

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 + motivationThe ability to adapt to new or novel situations based on past experiences

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6

Primary Causes of Poor Performance

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%

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…

ISPI 2013 Mon PM Session: Performance Goals & Feedback at Three Levels!

Goals and Feedback for HOPE

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'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

ISPI 2013 Mon PM Session: Performance Goals & Feedback at Three Levels!

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II. Samsung Electronics` Competitive Weapons ?

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

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

Three major innovative axes in Samsung Electronics

Product
3P
Process   Personnel

INNOVATION

Knowledge + Passion

Learning + Value, Goal

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

aEn

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5

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.	✓	✓	✓	✓	✓

Feedback and Performance

回饋對個人績效的影響

Giving Feedback - Exercise

內部可以提供這樣的範例給同仁與主管參考follow

FEEDBACK STATEMENT:	"I"	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.	✓	✓	✓	✓	✓	✓

當你將你的用具留在球場邊時,可能會讓其他人絆倒. 若是你能將用具放在保管箱,我會非常感謝. (當下看到如此,還沒發生絆倒)

ISPI 2013 Mon PM Session: Performance Goals & Feedback at Three Levels!

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aEnrich 育碁數位科技

績效顧問 : Models & Tools

– 實務顧問的approach

啟動績效分析 : Models and tools

- 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).

- Biz 進展如何?
- 負責的biz成長或衰退?
- 我可以貢獻的是?(燈奴)
- …

- 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,是否有助於縮減落差…

- 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

Models and Tools for Performance Analysis

Work Environment

Information	Resources	Incentives
Knowledge	Capacity	Motives

Individual

Updated Behavior Eng

- 假如影響程度是 85% v.s. 15% (or 70% v.s. 30%)，那改變與對應資源投入的比例是多少呢?(關鍵議題?)

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

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

Cause Analysis Worksheet

Present Level of Performance: _____

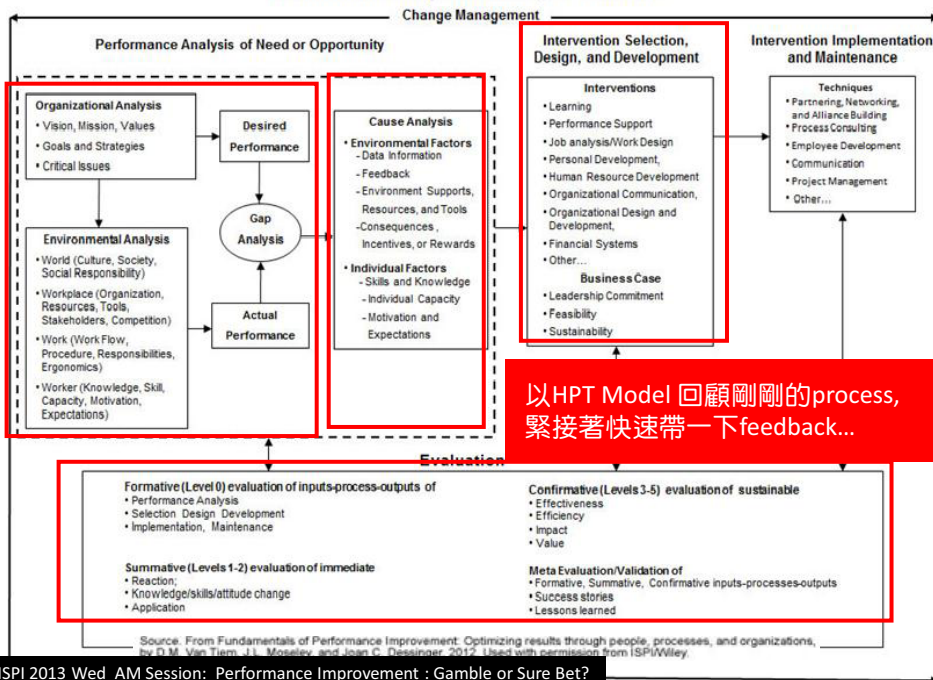**Desired Level of Performance:** _____

Reasonable Goal: _____

Factors	Driving Forces					Restraining Forces			
	+4	+3	+2	+1	0	-1	-2	-3	-4
Information									
clear expectations	.	.	.	.		.	.	.	.
relevant feedback	.	.	.	.		.	.	.	.

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 (Holistic & systematic...)

Incentives									
financial incentives	.	.	.	.		.	.	.	.
other incentives	.	.	.	.		.	.	.	.
enriched jobs	.	.	.	.		.	.	.	.
positive work environment	.								
Motives									

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

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Performance Improvement/HPT Model

Change Management

Performance Analysis of Need or Opportunity

Organizational Analysis
- Vision, Mission, Values
- Goals and Strategies
- Critical Issues

Desired Performance

Gap Analysis

Environmental Analysis
- World (Culture, Society, Social Responsibility)
- Workplace (Organization, Resources, Tools, Stakeholders, Competition)
- Work (Work Flow, Procedure, Responsibilities, Ergonomics)
- Worker (Knowledge, Skill, Capacity, Motivation, Expectations)

Actual Performance

Cause Analysis
- **Environmental Factors**
  - Data Information
  - Feedback
  - Environment Supports, Resources, and Tools
  - Consequences, Incentives, or Rewards
- **Individual Factors**
  - Skills and Knowledge
  - Individual Capacity
  - Motivation and Expectations

Intervention Selection, Design, and Development

Interventions
- Learning
- Performance Support
- Job analysis/Work Design
- Personal Development,
- Human Resource Development
- Organizational Communication,
- Organizational Design and Development,
- Financial Systems
- Other...

Business Case
- Leadership Commitment
- Feasibility
- Sustainability

Intervention Implementation and Maintenance

Techniques
- Partnering, Networking, and Alliance Building
- Process Consulting
- Employee Development
- Communication
- Project Management
- Other...

以HPT Model 回顧剛剛的process, 緊接著快速帶一下feedback...

Evaluation

Formative (Level 0) evaluation of inputs-process-outputs of
- Performance Analysis
- Selection Design Development
- Implementation, Maintenance

Confirmative (Levels 3-5) evaluation of sustainable
- Effectiveness
- Efficiency
- Impact
- Value

Summative (Levels 1-2) evaluation of immediate
- Reaction;
- Knowledge/skills/attitude change
- Application

Meta Evaluation/Validation of
- Formative, Summative, Confirmative inputs-processes-outputs
- Success stories
- Lessons learned

Source. From Fundamentals of Performance Improvement: Optimizing results through people, processes, and organizations, by D.M. Van Tiem, J.L. Moseley, and Joan C. Dessinger, 2012. Used with permission from ISPI/Wiley.

ISPI 2013 Wed AM Session: Performance Improvement : Gamble or Sure Bet?

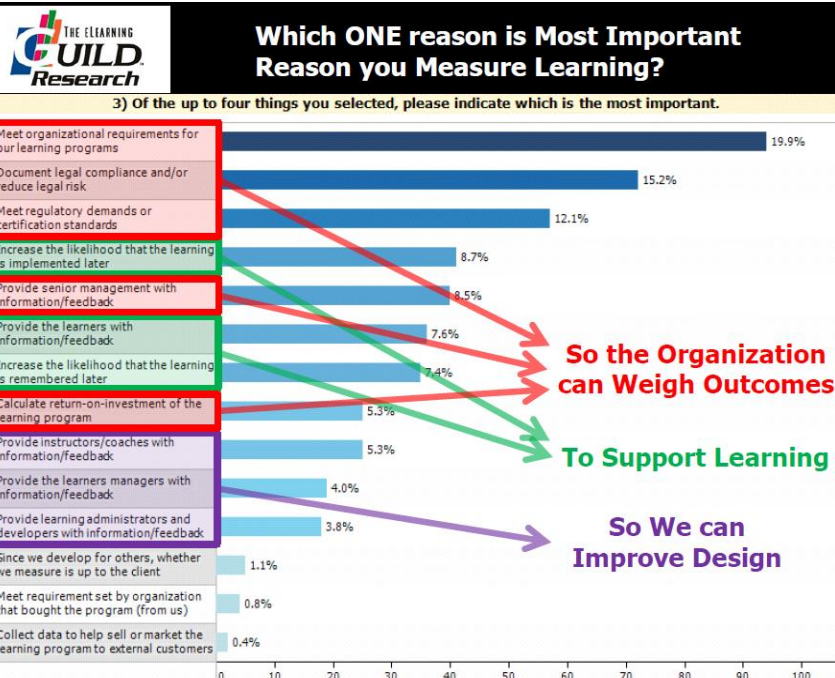以下分享內容擷取 ISPI 2013 Will Thalheimer 的 Master Presentation 的部分內容作學習分享

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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Email: info@work-learning.com
Website: work-learning.com
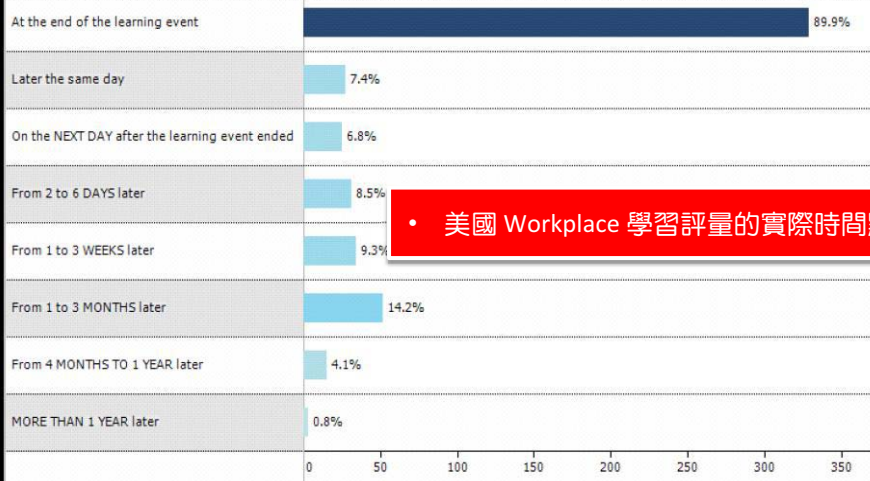Blog: willatworklearning.com
Book: willsbook.net
Twitter: @WillWorkLearn

ISPI Masters Presentation：Wild and Wondrous (and sometimes Research-Based) Ideas for Improving Learning Measurement

Which ONE reason is Most Important Reason you Measure Learning?

3) Of the up to four things you selected, please indicate which is the most important.

Meet organizational requirements for our learning programs — 19.9%
Document legal compliance and/or reduce legal risk — 15.2%
Meet regulatory demands or certification standards — 12.1%
Increase the likelihood that the learning is implemented later — 8.7%
Provide senior management with information/feedback — 8.5%
Provide the learners with information/feedback — 7.6%
Increase the likelihood that the learning is remembered later — 7.4%
Calculate return-on-investment of the learning program — 5.3%
Provide instructors/coaches with information/feedback — 5.3%
Provide the learners managers with information/feedback — 4.0%
Provide learning administrators and developers with information/feedback — 3.8%
Since we develop for others, whether we measure is up to the client — 1.1%
Meet requirement set by organization that bought the program (from us) — 0.8%
Collect data to help sell or market the learning program to external customers — 0.4%

So the Organization can Weigh Outcomes

To Support Learning

So We can Improve Design

ISPI Masters Presentation：Wild and Wondrous (and sometimes Research-Based) Ideas for Improving Learning Measurement

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Specific Concepts

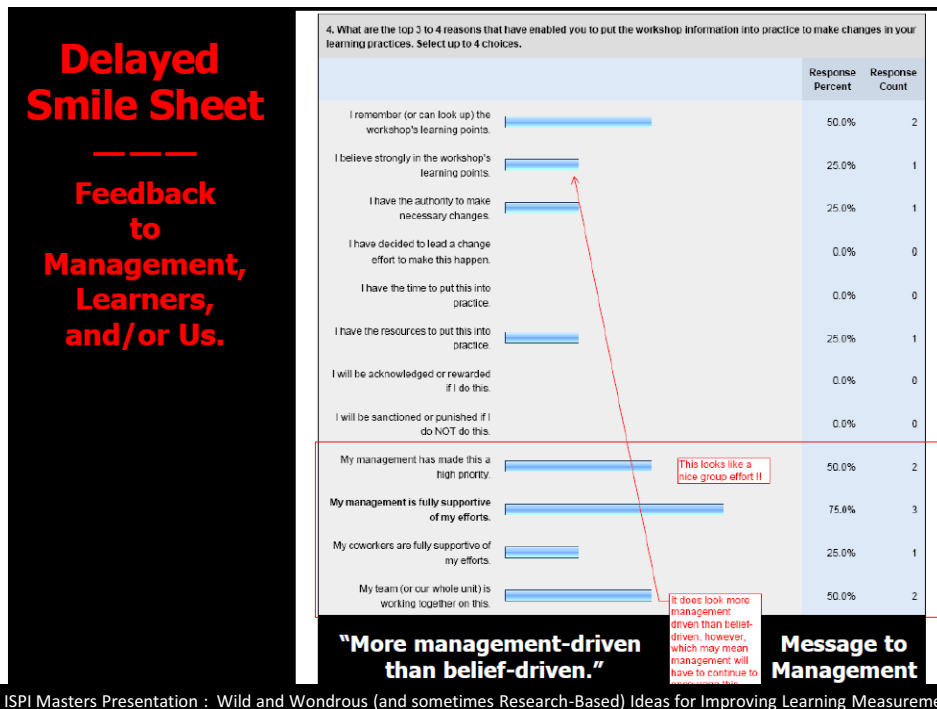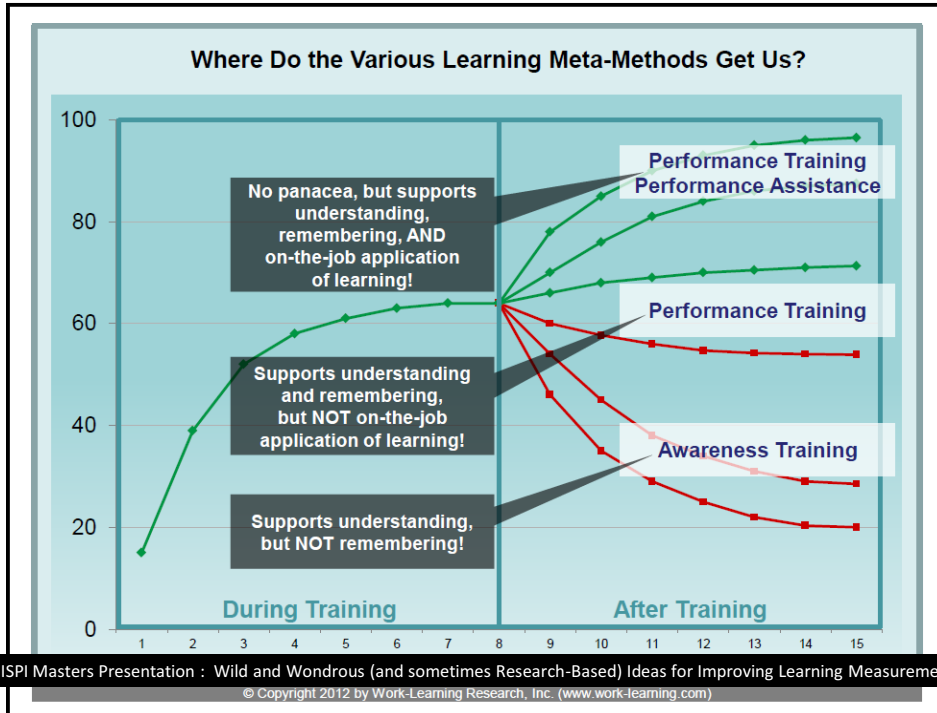* 10 個主題內容, 分別給分 對您的價值程度, 新穎程度, 內容介紹清楚程度…

Value of Specific Information

Learning Concept	Circle One # Below	Circle ONE Below	Circle ONE Below
A. Two common practices in measurement bias our results. Measuring learning at end of program may bias the results. Similarly, measuring learning in the learning context.	*How valuable is the concept to you?* **Value of this Concept** *(Circle NUMBER)* Low 1 2 3 4 5 6 High	*How new was concept to you?* 1. Concept was new to me. 2. Deepened earlier understanding. 3. Provided nice reminder. 4. I already use concept regularly. 5. Most people already know this.	*How well was concept taught?* 1. Taught really well. 2. Taught well. 3. Taught inadequately. 4. Taught poorly.
B. Measuring retrieval is essential (even if we measure on-the-job performance and results) because retrieval is required for on-the-job application. It is on the causal pathway from learning to performance and results.	**Value of this Concept** *(Circle NUMBER)* Low 1 2 3 4 5 6 High	1. Concept was new to me. 2. Deepened earlier understanding. 3. Provided nice reminder. 4. I already use concept regularly. 5. Most people already know this.	1. Taught really well. 2. Taught well. 3. Taught inadequately. 4. Taught poorly.

ISPI Masters Presentation : Wild and Wondrous (and sometimes Research-Based) Ideas for Improving Learning Measurement

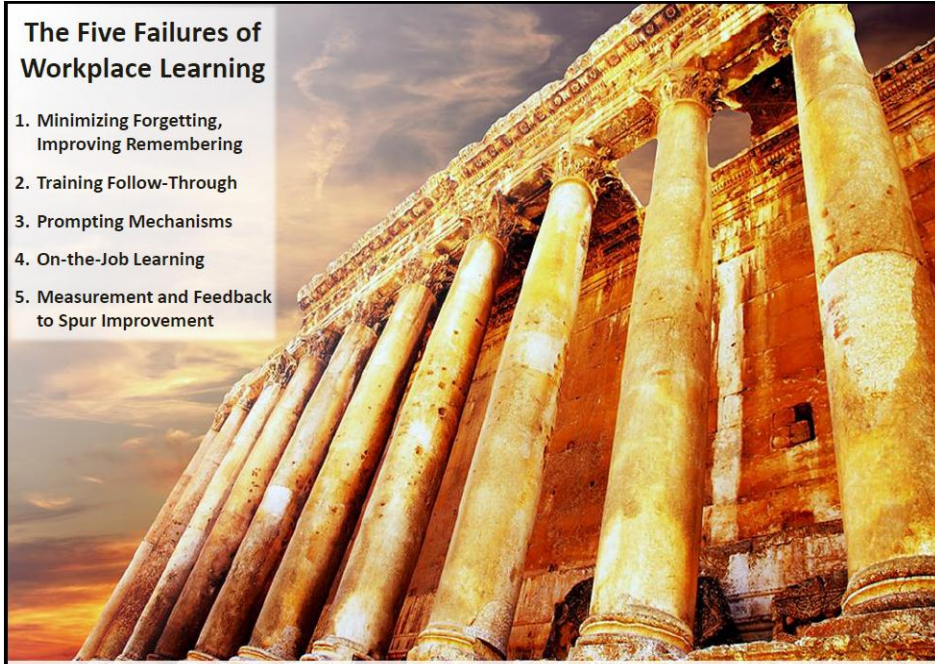## How prepared are you to act on this knowledge?

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*	Comment on relevance of topic to your current or future work: How could we improve our training on this:
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**

ISPI Masters Presentation : Wild and Wondrous (and sometimes Research-Based) Ideas for Improving Learning Measurement

ISPI Masters Presentation：Wild and Wondrous (and sometimes Research-Based) Ideas for Improving Learning Measurement

學習成效上, 主管的影響

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1

Session Objectives wrap up

▸ 掌握個人與組織績效的提升重點所在, 讓初期資源投注的重點可以產生較大成效
  - 6 boxes左上角 - Goal setting & Feedback, 績效系統…

▸ 從架構到行動 – 如何邁向績效顧問(Performance Consultant)之路
  - 範例(SMART, Feedback…), check list/Models/Tools/Phase/Priority…

▸ 提供一些可以增進人才發展領域專業的approach
  - Measurement and feedback for continuous improvement

▸ 取得可以促進學習成效的一些實用做法
  - Delayed test, On the 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

回歸基本面的學習發展實務

奚永明
2012年5月16日

三個觀察

- 內在動機
- OJT
- 學習環境

以學習發展促動改變

- 學習
- 發展
- 動機
- 能力

3

Self Determination Theory

- Intrinsic Motivation
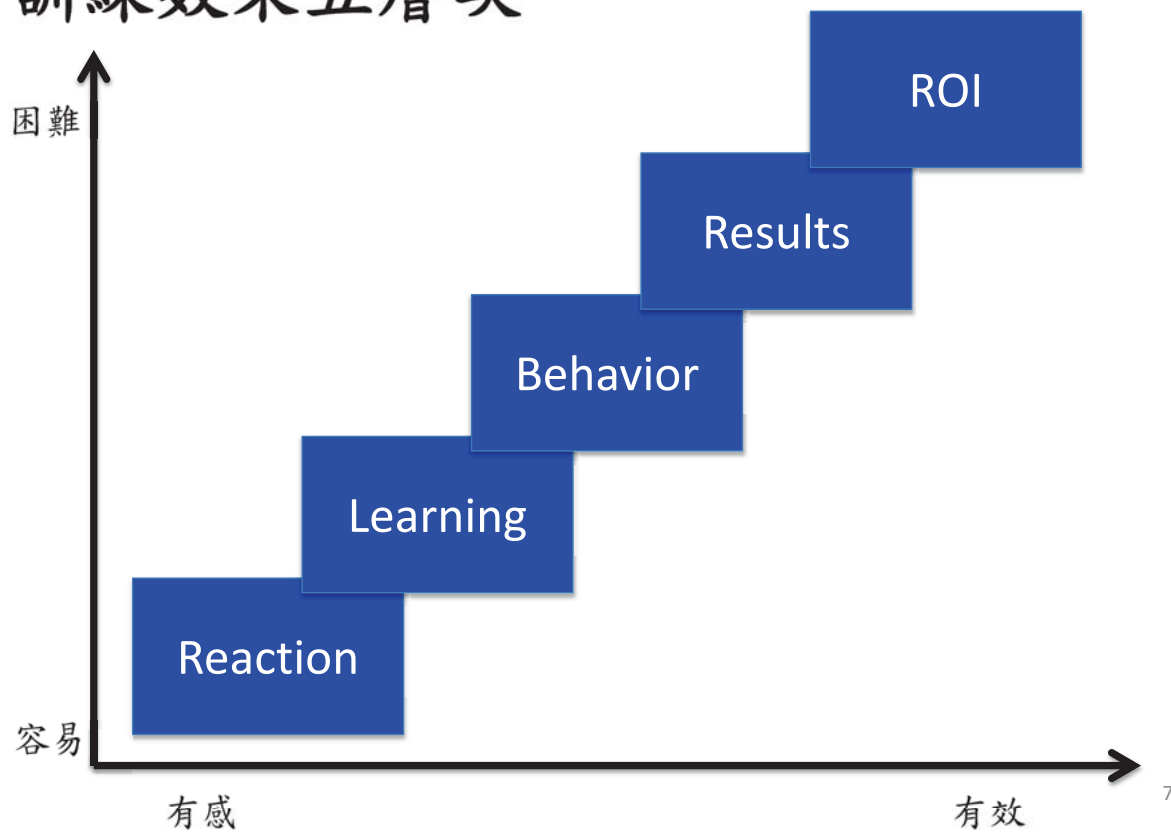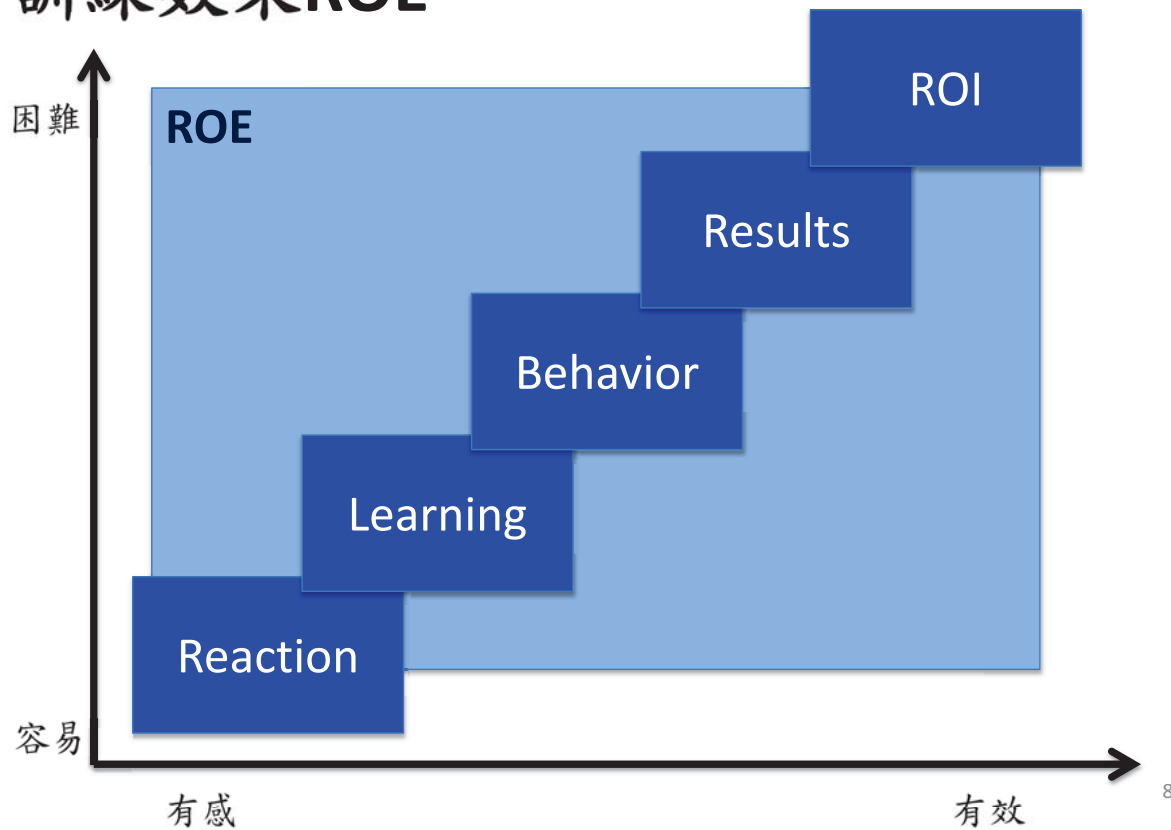- Extrinsic Motivation
- Optimal Motivation

4

自我探索

內在動機與學習效能

- ☐ 適應環境
- ☐ 創造環境
- ☐ 追求和諧
- ☐ 享受成長

訓練效果五層次

困難 / 容易

ROI
Results
Behavior
Learning
Reaction

有感 — 有效

訓練效果ROE

困難 / 容易

ROE

ROI
Results
Behavior
Learning
Reaction

有感 — 有效

重視OJT

1. 縮短訓練與成果時距

2. 形成連續學習循環

3. 提昇學習能力

4. 重視行為表現

5. 可能受框架局限

SOJT

1. 決定是否採用SOJT
2. 分析工作要素
3. 培訓訓練員
4. 設計訓練模組
5. 施行訓練
6. 評估並解決問題

70-20-10

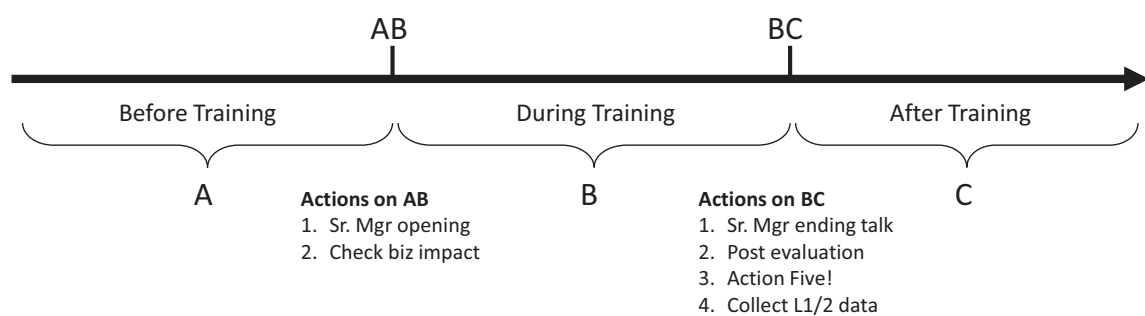|	
10	訓練
20	關係
70	歷練
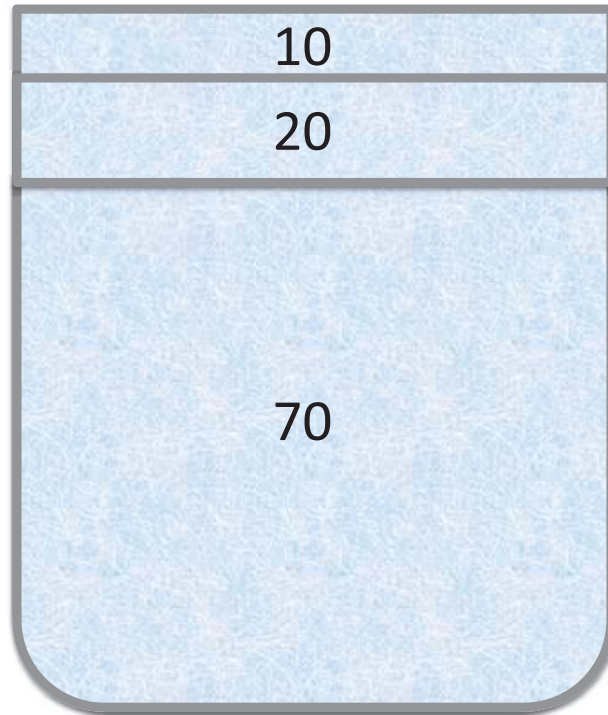
學習流失現象

學習環境塑造

- 教材－課程活動
- 資源－多元管道
- 人員－網絡關係
- 體系－流程實務
- 實踐－反饋激勵

Performance Oriented Training Process

Actions on AB
1. Sr. Mgr opening
2. Check biz impact

Actions on BC
1. Sr. Mgr ending talk
2. Post evaluation
3. Action Five!
4. Collect L1/2 data

Actions in A
1. Strategic dialogue
2. Set objectives at application and impact levels
3. Create expectations in achieving learning objectives
4. Develop data collection mechanisms
5. Send encouragement letter
6. Clarify importance to role and job
7. Design the content
8. Provide course quality evidence
9. Supervisor pre-engagement
10. Pre-evaluation

Actions in B
1. Deliver the content effectively
2. Sr. Mgr refresh talk
3. Sr. Mgr sharing

Actions in C
1. Follow up evaluation
2. Action Five!
3. Identify and remove barriers for learning transfer
4. Collect L3/4/5 data
5. Use data to make improvements

Plan learning application by *Action Five !*

1. Plan to make impact on …

2. Useful action tips …

3. Action tips to be taken in the first two weeks after training …

4. Significant on shot (SOS)

5. Further learning topics …

SOS (Significant One Shot)

- What is SOS:
    - The most significant single learning point from the training
- After identify SOS, the learner should elaborate it to at least one person per day in the first three days after training

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育碁數位科技股份有限公司

http://www.aEnrich.com.tw

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