



THE WILKINS GROUP

# Tool Kit

Providing Tools for  
Productive Workplaces

SUMMER 2003

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## Year's second half a good time to take stock and check direction



**S**ummertime marks the beginning of the second half of the year. It's a good time to pause a bit and take stock of our business initiatives and direction:

- What progress are we making toward achieving our targeted business goals?
- How well is our organization aligned to reach our specific targets?
- What progress are we making toward improving productivity and performance?
- How collaborative are our efforts toward getting results?

The down-turned economy and continuing layoffs make it extremely important to focus on getting results; that is, to work collaboratively on the right things, and to move strategically in the right direction.

The spring Toolkit explained the meaning and value of the Certified Performance Technologist designation. This issue describes the human performance improvement standards required for this designation.

## A CPT must meet rigorous standards

By Sheila Wilkins

**A** Certified Performance Technologist (CPT) systematically and systemically identifies and removes barriers to individual and organizational performance.

The CPT designation requires fulfilling specific performance standards. They are:

### **FOCUS ON WORTHY RESULTS**

#### **Address problems clients care about**

► Confirm the business need that is the client's real priority. Guide the client in focusing on accomplishments instead of activities or events.

► Help the client specify the desired results, what is expected to change, or what benefit is expected as a result of the effort or assignment.

► Determine what information is to be collected and how it is to be collected to measure accomplishment of the desired outcomes.

► Assist the client in establishing goals, performance expectations and performance measures with staff members.

### **CONSIDER THE LARGER CONTEXT**

#### **Consider the client's constraints and marketplace realities**

An outcome-focused approach facilitates working on the right projects, alleviates competition for resources and eliminates projects unaligned with stated goals. A systems approach considers the larger environment that affects processes and other work.

► Identify if there is a lack of alignment between or among:

- Goals and objectives
- Performance measures
- Rewards and incentives
- Job/work or processes
- Available systems, tools, and equipment
- Expectations and capacity
- Identify barriers and leverage points, both in the workplace and surrounding the project. The consultant and client may identify:
  - Issues affecting the larger environment
  - Pressures
  - Expectations
  - Constraints
  - Consequences

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*"Love the moment, and the energy of that moment will spread beyond all boundaries."*

— Corita Kent —

# A CPT must meet rigorous standards

Continued from front

## ADD VALUE

Make sure the outcomes are worthwhile

- Weigh the alternative solutions by comparing them in terms of:
  - Cost to design, implement and maintain
  - Probability of acceptance and adoption by the target audience
  - Impact on employees, customers and the community
  - Risk associated with success and failure
- Act in ways that add value. For example:
  - Challenge assumptions
  - Guide the process
  - Coach
  - Help set priorities
  - Model a collaborative process
- Be a partner and a resource to each client. Provide clients with self-sustaining tools and processes so they can function independently of the consultant.

## COLLABORATE

Work as part of a team and bring in appropriate specialists

- Take the initiative to define:
  - Expectations
  - Working relationships
  - Roles
  - Responsibilities
- Point out the benefits

**Be clear on desired outcomes.**

of collaboration and partnering.

- Recognize contributions. Give credit and acknowledge partners' support, endorsement and contributions.
- Involve all stakeholders in the decision making process. Work across all levels of the organization gaining agreement and understanding of how each business unit can collaborate and work cross-functionally to achieve the organization's targeted goals.

## FOLLOW A PROVEN SYSTEMATIC APPROACH IN ALL ASPECTS OF THE WORK

- Examine the current situation at the appropriate level (societal, organizational, process, or work group).
  - Identify the intent of the assessment.
  - Describe the plan for assessment.
  - Conduct an assessment. Identify the internal and external pressures affecting the situation. Include the voice of the major stakeholders.
  - Analyze through observations, interviews surveys, documents or work prod-

ucts why a gap in performance and/or expectations exists.

- Determine the business case for action or non-action:
  - Document the findings
- Design the solution:
  - Define the desired performance in measurable terms
  - Identify the objectives of the solution
- Develop the suggested solution and its components. The output is a product, process or technology developed by an individual or a team.
- Implement the solution and manage the change required to sustain it.

Implementation also includes how the consultant or the client will track change, identify and respond to problems and communicate the results.

- Evaluate the solution by including:
  - The goal of the evaluation
  - The metrics to be

used to determine success or effectiveness of the solution

- How data will be gathered
- What other data will be leveraged
- If other expertise is required

➤ Identify tools, instruments and guidelines to be used to collect and interpret the data.

The certification is performance based and is not tied to specific education requirements. Rather, individuals must demonstrate that their accomplishments meet the standards.

Proficiency in the performance technology standards is assessed through a combination of descriptions of previous work, attestations by clients or employers and a review of the documents by qualified reviewers.

"What certification promises and delivers" says Dr. Judith Hale, past president of the International Society of Performance Improvement, (ISPI) "is the recognition and confirmation that a person is a proficient practitioner, has committed to a code of ethics, and engages in efforts to improve his or her own performance."



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