Chapter 46
Blending Front–End Analysis

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ABSTRACT

Performance problems come in all forms. The method presented in this chapter blends the models of three respected Performance improvement icons – Joe Harless, Thomas Gilbert, and Roger Chevalier. Their theoretical and practical approaches are applied to a case study. The three models – 13 Smart Questions (Front-end analysis), Behavior Engineering Model (BEM), and Updated BEM – when combined show ways practitioners can assess and improve performance. The practitioner will develop effective partnerships with clients, gain valuable perspectives on the issues, and their underlying causes. Finally the practitioner will be able to lead a department or an organization in fully analyzing problems and determining how best to solve them.

ORGANIZATION BACKGROUND

To onlookers, the award-winning team seemed to be running on all cylinders with work output at an all-time high. In reality, people were burning out and looking for jobs in other departments and companies. The annual employee satisfaction survey scores for the team had decreased by 10-30% in the 12 month period year-over-year. Why was this high-functioning team on the verge collapse?

This is an important question since many companies face situations like this that appear confusing, even hopeless and insurmountable. Some never know until it's too late. The choice many companies make is to continue as it is going and put band aids on the problems, cross their fingers, and hope it turns around when things slow down. This is especially true when the department is producing high quality work. But things usually don't slow down; to the contrary, things usually speed up.

As other departments and leaders see the success of the team, they ask for more. More is given and more is expected. This further exacerbates the problems creating a dangerous feedback loop. Employees are asked to do more and more until the morale decreases and productivity fails. Employees finally burnout and stay, leading to lower quality and quantity of work; or they take a job elsewhere, and the talent and knowledge is lost to the company forever. And those who remain have additional workload and expectations.

If a department really wanted to fix itself, how would they do it? Let's look at the department and company and then a real world example and see what solution they found. How would they make the correct diagnosis and take the proper steps to correct?

The company is a well-established and respected financial services company. They have been in operation for over 100 years. They operate in a highly-regulated industry selling a wide variety of financial products. The company supports and adheres to the regulations very strictly. This can lead to multiple layers of compliance and review of all communications and training produced by each product group to ensure the material is in compliance with not only the regulations, but also the company's high standards. The company prides itself on its reputation as an ethical and trustworthy organization.

The culture at the company is fairly hierarchical. There are additional marketing, communications and training in each different product-type departments across the company. Each product/function group within the company maintains their own communications and training teams, each working within a decentralized model in a heavily matrixed organizational structure. There is continuous work and desire throughout the company to remove barriers across product/function groups, and a lot of effort to encourage employees to work laterally as well as vertically.

The department is responsible for supporting financial product launches and sales strategies through communications and training for a medium wholesaling and a large advisor population. They do this through sales brochures and literature, sales strategy whitepapers, competitive updates, webpages, client seminars, instructor-led training, web-based eLearning, job aids, and additional print and digital collateral. There is an in-house design and project management department that supports the group.

The leaders of the marketing, communications and training department found themselves with the challenge to determine what was wrong; how to fix it; and how to keep the morale up. They wanted to do this while keeping the quality of the work as excellent as it had been. Everyone knew it was not an ideal situation for sustained growth and excellence. Something needed to be done, but what?

The leaders in this case could see that the employees were very good at what they did, but obviously there was something wrong. The employees were still performing at a high level and still winning awards for their work in both communications and training. They knew the satisfaction survey results were telling them something important. If asked, each employee had his or her own theory about what was wrong. Each leader had a theory about what was wrong. But no one really knew what was wrong.

The leaders decided to do something radical. They asked for volunteers from the employees in the department to be willing to look into the employee survey and find out what was wrong with the department. Since this was an employee satisfaction survey, they asked the employees to tell them what the problems were or at least, what was causing the problems. The employee volunteers would open up the employee survey results and tell the leaders what was really wrong. The leaders would then work with the group of employees to figure out what could be done.

When putting together the team to review the satisfaction survey, the leaders were seeking to find out what was wrong, why it was wrong, and how they could fix it. It was already determined that the department was important to the company and had to continue. The team had at that time eleven employees across the three functions, two managers, and one vice president. Six of the eleven employees volunteered to help determine what was wrong. The volunteer employees were dispersed across the three functions of the department and the leaders.

The volunteer employees and leaders met to kick off the program. In the meeting, the leaders provided copies of the full employee satisfaction survey for the department and asked the employee volunteers to keep it in confidence only among this sub-team. They could and would share results and recommenda-

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