"The Missing Link in Organizational Performance"
In the September 2012 Chapter Meeting and Workshop

Join ISPI Charlotte on September 13th for our fifth evening program of 2012 titled "The Missing Link in Organizational Performance" presented by Miki Lane. During this program Miki will explore why managers and supervisors promoted to their position from within the organization fail almost 50% of the time and what can be done to alleviate this workplace phenomenon.

"What Managers and Supervisors Need to Know About Improving Workplace Performance"

We are also inviting you to join us the following day on September 14th for Miki's one-day workshop entitled "What Managers and Supervisors Need to Know About Improving Workplace Performance". During the workshop participants will delve deeper into the critical issues of workplace performance including helping managers, supervisors and the people they report to think outside of the normal, hierarchical organizational structure. Through presentation, interactive discussion and activities, participants will learn how to manage day-to-day performance of direct reports, provide feedback and deal with resistance.

About the Miki Lane

Miki Lane, CPT is the immediate Past President of ISPI. He has received a number of ISPI Awards of Excellence for the work he and his team have done for corporations around the world. His recent book, Stepping Up: A Road Map for New Supervisors, is published by John Wiley & Sons. He also contributed a chapter in the award-winning Handbook of Improving Performance in the Workplace. Miki was a chapter contributor and editor on the second Handbook of Human Performance Technology. He has been a senior partner at MVM Communications Inc., a performance improvement company, for the past 30 years.

From the President

Hello everyone. I hope you are having a good summer yet are ready for the upcoming fall and some cooler temperatures!

Before I get too far, I want to thank Carol Panza for a great Chapter presentation in July. It was a perfect continuation of some of the concepts Rick Rummler shared with us in May. It was wonderful to see all those in attendance ask so many questions. I don't know how many slides Carol had in her presentation, but she didn't get to them all because the questions and conversation were so engaging. Thank you all who attended, and I hope you walked away with something you could immediately apply in your roles.

Last week, I was lucky enough to be on vacation. One of the things that struck me during the week (well... it always has but it was more apparent last week), was the creative, outside-the-box, inquisitive mind of my 7-year-old son. He comes up with questions that continually baffle me, and his desire to learn far surpasses mine at his age, and maybe even now. He loves to read, specifically history, animal activist stories, anything Star Wars, and some fiction chapter books. Along with his enjoyment of reading, he has also written several of his own books, stories, and movie scripts. Hands down, his favorite activity is walking in circles on his bed while thinking. When I asked him if he was ready to go back to school, he said resoundingly, "Yes, I miss school. I like learning new things."

 Luckily for him, the new school year is almost here. I've always thought of the fall as a time to start learning again. Lucky for you, this fall we have some great learning opportunities for you. To kick off the back-to-school season, Miki Lane will be joining us for an evening presentation entitled "*The Missing Link in Organizational Performance*" and a workshop the following day entitled "*What Managers and Supervisors Need to Know about Improving Workplace Performance*".

I have been looking forward to hearing Miki discuss these two topics since the day he agreed to come speak at our Chapter last fall. I am extremely confident that the content he will be sharing will be instantly applicable for anyone that attends.

This is also a great opportunity to invite managers and leaders in your organizations. In March, Lowe's provided an opportunity to engage our managers and leaders, and Miki is going to provide a similar opportunity. I look forward to seeing you all on September 13 and 14. Until then, enjoy the summer and get ready for the kick-off of the "learning season".

Thanks,

Marc

Interview with Miki Lane

An interview by ISPI Charlotte's Joanna Roop

What was the most rewarding performance improvement experience you've had?

Through one client of ours, IATA (International Aviation Transport Association), I have had the chance to work with HR and Training departments around the world. Whether an airline, airport or aviation supplier, they all have had challenging performance problems that have had, as their management prescribed solution, training. It has and continues to be very gratifying to work with them and see a move towards non-training solutions.

What was the most frustrating performance improvement experience you've had?

Historically, it has been working with clients that bring us on-board to develop and/or help them implement inappropriate solutions. In other words, they "knew" what the solution was before they asked us to help. Whether the rationale behind their "magical" thinking was political, cultural or a personal hidden agenda, they rarely want to talk about alternatives. Admittedly, this has changed now that I have more grey hair.

What is one piece of advice you would give to someone new to the HPT field?

Aside from getting grey hair, we have to get away from the solution trap. We are trained to be problem solvers. When you are first a problem solver, you rush to solutions. It is very important to listen, listen and listen some more. Only by listening can you begin to understand what your client is saying and ultimately meaning.

What was the greatest learning experience you've had?

I 'm kind of hoping it hasn't happened yet. But if it has, I would say that learning the power of performance analysis has been critical. If you start a project off on the wrong foot, it takes too much time, energy and costs to get back on

"When you are first a problem solver, you rush to solutions. It is very important to listen, listen and listen some more."

target. You also run the risk of not getting the chance to get back on track.

When did you have your a-ha moment when you knew HPT was for you?

There were a number of them, but one in particular was hearing Barry Booth talking about job aids. I was heavily into training and development at the time and he opened my eyes up to the possibilities of non-training solutions.

What is the greatest marketplace opportunity for those in performance improvement (PI) professions that you see emerging looking out to the next 2-3 years?

I am a firm believer in the power of professional associations like ISPI and their ability to help individuals learn, network and market themselves. Also I believe that the CPT designation will become more important as organizations look to HPT for providing answers/solutions to their performance problems. I had the same thought process.

What is the greatest marketplace risk for those in PI professions that you see emerging looking out to the next 2-3 years?

One of our strengths is the ability to integrate across HR, Process Improvement and Organizational Development. If you tend to specialize in one particular area or solution you might be left behind. I look at professionals in our field as general practitioners, to use a medical model. We need to be expert diagnosticians and then be able to call in and/or work with the specialists now and in the future. If we don't have that capability, then…

Interview with Miki Lane continued from page 3

What advice would you offer to PI professionals to help them improve their relationships with clients and customer (internal and external)?

Look at the answers to questions 3 and 4. I think that both of those applied to both internal and external clients will greatly benefit any relationship.

A lot of energy and dialogue has taken place in the last two decades about the importance of demonstrating and measuring the value of PI projects. In your opinion, what has resulted from this dialogue and energy around the measurement and evaluation of training and other PI efforts?

I think that the energy and dialogue has been wasted, as we still don't do enough evaluation of

PI projects. In the second handbook of HPT (1999), Richard Swanson stated that ROI on PI projects averaged 8.7:1. If this is the case, then doing PI projects and evaluating their ROI should be a no-brainer. If we have spent the energy it was misplaced and should have been put into promoting and marketing PI projects.

If you were not in HPT, what would you be doing?

My hobby is glass blowing and I would love to spend more time at it. However, as much as I love it, it is very difficult to make a living as an artist. Both Marilynne and I are moving towards community volunteer work and are applying our HPT expertise in helping these organizations improve their performance.

In Review: Carol Panza's "Analysis Tools that Engage and Involve People"

Carol Panza presented at the July Chapter Meeting titled "Analysis Tools that Engage and Involve People". Carol discussed how to use Organization Maps to identify, document, and gain agreement on strategically important performance improvement opportunities. She explained that Organization Maps help companies:

- Gain shared understanding and common picture of how the organization works.
- Gets employees involved, invested and engaged in the organization's success.
- Develop an effective way to transfer or build ownership among their employees.

Carol discussed that by creating an Organization Maps businesses will see how internal and external clients interact with and impacts business results. Organization Maps should be created prior to conducting task analysis so that one can review what is happening now and discover where opportunities for improvements may be. She stated that most organizations focus soley on task analysis which deals with individual

performance and not with the overall business output.

Rather than starting at the performer-level, we should start at the organization level to review how efficient the organization is operating. Even if an organization believes they are producing good output, Carol stated that there are always opportunities for improvement. To prove her point, Carol provided several Organization Maps and divided the meeting participants into groups. Each group were assigned a case and asked to provide one reason why the organization was not performing.

After review the case study and the organization maps, each group was asked to provide feedback on their observations. We learned that reviewing organization maps are helpful to identify opportunities for performance improvement and to engage people across the organization. The map should reflect the actual overall process from end-to-end so that one can see where all the efficiencies and pain points are.

By Gary Grant

Featured Member Profiles

Elizabeth Rivera-Blanco

Name: Elizabeth Rivera-Blanco

Place of Employment: Wells Fargo

How and when did you get started in the performance improvement field?
My exposure to the performance improvement field began in 2009 while working as a consultant at TIAA-CREF and Ingersoll-Rand University.

What are some of the major clients with whom you have worked OR major projects on which you have worked?
As a team member at Ingersoll Rand and TIAA-CREF, I worked on programs related to internal development as well as diversity and inclusion.

What are the most significant lessons that you have learned about performance improvement?
Understanding your role within the organization and participating actively as a valued contributor in the "big" picture which enables achieving the goals and objectives of the organization.

Members' Opportunity to Publish with ISPI Charlotte

Performance Charlotte

The Journal of ISPI Charlotte

Volume 1, No. 2, 2011

Be a part of the ISPI Charlotte Journal
This winter ISPI Charlotte will publish its third e-journal filled with articles from some of the year's presenters and others in the field of performance improvement.

In addition to the "big names" in the performance improvement field, we want our Chapter's journal to be a place that showcases our *own* talent. Please submit your own works to be published. This is a great opportunity to be published and to share your expertise with a large community of practitioners.
Here are the basic requirements for submission:

- **500-1000 words** (we will accept longer pieces, but this is a suggested length)
- **Topics**: ISD, performance technology, or any other issue related to performance improvement. We also accept reviews of case studies and your own stories about your work in our field.
- **Deadline for submission: December 28, 2012**

For more information or if you have questions, please contact Gary Grant, VP of Publications at
publications@ispicharlotte.org

Featured Member Profiles

Name: Kimberly Betty

Place of Employment: Charlotte-Mecklenburg Utilities Department

How and when did you get started in the performance improvement field?
A very passionate professor recruited me out of Web design by convincing me that I could change the way people work and actually make a difference in their lives. It might sound a little cheesy, but he gave me a purpose and direction that has proved to be very fulfilling.

What are some of the major clients with whom you have worked OR major projects on which you have worked?
During my undergrad studies, I worked with a team at the California Department of Corrections and Rehabilitation to redefine the training requirements for correctional officers in California by conducting a large-scale task analysis.

After that, I worked with two semiconductor companies; Intel and Micron Technologies. At both companies, I worked on a number of needs assessments, instructional programs, performance support solutions and program evaluations.

What are the most significant lessons that you have learned about performance improvement?
It sometimes amazes me how few training professionals truly understand the concept of "performance improvement", but then I have to remind myself that many people just never learned about it from the perspective that has been the basis of my education. A huge lesson I have learned is to be patient with those I work with but also to contribute as much as I can and promote the "performance perspective" in a respectfully persuasive way every chance I get.

Kimberly Betty
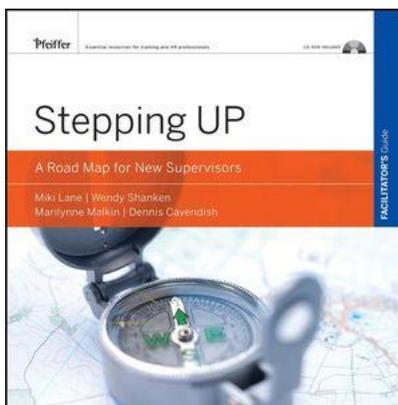
Miki Lane's Publications

"Performance Aids" chapter in Handbook of Improving Performance in the Workplace, Vol. 2: Selecting and Implementing Performance Interventions, Pfeiffer, San Francisco, 2010.

Stepping Up: A Road Map for New Supervisors, Facilitator's Guide, CD-ROM Included by Miki Lane, Marilynne Malkin, Wendy Shanken, Dennis Cavendish
ISBN: 978-0-7879-8714-5

"Business Survival Skills" a chapter in the Handbook of Human Performance Technology, 2nd edition, March, 1999.

6

Web Resource

Program Information
For Miki Lane

Ten Tips for Measuring & Improving Performance

In this article, the president of Stengel Solutions, Geri Stengel, provides her top ten tips for measuring and improving performance. She explains that revenue and profit margins are extremely important to any firm. But to accomplish success, organizations must examine and implement techniques that will help ensure that business goals are achieved.

Below are Geri Stengel's ten tips for measuring and improving performance:

1. Define the goals
2. Determine the metrics to measure the company's performance
3. Develop methods to collect and organize data
4. Compare to the competition
5. Conduct research
6. Understand strengths and weaknesses
7. Focus on retaining customers
8. Measure the effectiveness of marketing
9. Track employees
10. Apply the information

Click here to read the entire article:
http://www.stengelsolutions.com/tips14.htm

Chapter Meeting on September 13, 2102. 5:30 p.m. to 8:00 p.m.

The Missing Link in Organizational Performance

Historically, Managers and Supervisors have been promoted to their position from within the organization. They have rarely received specialized training for their new position and yet they and their team are constantly being held to organizational performance standards. Most are unprepared for this new role and almost 50% fail in the first two years. This presentation will look at why this occurs and what can be done to alleviate this workplace phenomenon.

All-day workshop on September 14, 2012. 8:30 a.m. to 4:30 p.m.

What Managers and Supervisors Need to Know About Improving Workplace Performance

While the previous evening's presentation set the stage for this topic, the workshop will delve deeper into the critical issues of workplace performance. Through presentation, discussion and activities, participants will learn how to manage day-to-day performance of direct reports, provide feedback and deal with resistance. The focus will be on helping managers, supervisors and the people they report to think out of the normal, hierarchical organizational structure.

ISPI Charlotte 2012 Speaker Schedule

Date	Event	Guest Speaker	Speaker's Program Title
July 12, 2012	Evening Program	Carol Panza	Analysis Tools that Engage and Involve People
September 13, 2012	Evening Program	Miki Lane	The Missing Link in Organizational Performance
September 14, 2012	Workshop	Miki Lane	What Managers and Supervisors Need to Know About Improving Workplace Performance
November 8, 2012	Evening Program	Panel	Cracker Barrel and Year-End Celebration

Please register for these meetings online at www.ispicharlotte.org

HRCI Re-Certification Credits, Financials, & Networking

HRCI Re-certification Credits Available

"The July 12th Chapter Meeting **"Analysis Tools that Engage and Involve People"** has been approved for 1.5 (General) recertification credit hours toward PHR, SPHR and GPHR recertification through the HR Certification Institute (HRCI). Eligible attendees will receive the HRCI program ID upon completion of the program. Please be sure to note the program ID number on your recertification application form. For more information about certification or recertification, please visit the HR Certification Institute website at www.hrci.org."

"The use of this seal is not an endorsement by the HR Certification Institute of the quality of the program. It means that this program has met the HR Certification Institute's criteria to be pre-approved for recertification credit."

Cancelling Your Membership?

Many thanks to everyone for their membership! We understand that there are life and career changes that may result in you discontinuing your membership. If at any time, for any reason, you elect to cancel your membership and you have not registered or attended an ISPI event during the related membership period, you may request a refund of your membership dues from the VP of Finance (finance@ispicharlotte.org) within 7 days of the payment being received by ISPI."

Bring cash for UNCC Uptown

One of the benefits of our new location at UNCC Uptown is that you no longer have to use a parking token. Instead, you will have the opportunity to pay $4-$6 in cash for the parking lots adjacent to the building. Each of these lots has a cashbox where you will pay, in cash, when you park. There are no attendants at these lots, so please bring the exact amount.

PAYPAL - Has your credit card expired?

Please be sure to update your credit card expiration dates in PayPal before your credit card expires; otherwise PayPal will cancel your account.

ISPI Charlotte Networking Event

Date: Tuesday, August 14, 2012

Time: 5:30 - 7:30 PM

Location: BlackFinn (in the EpiCentre)

Come join ISPI Charlotte to:

- Network with chapter and non-chapter members.
- Discuss Performance Improvement (PI) and Human Performance Technology (HPT).
- Ask questions about the chapter, PI, and HPT that you haven't had a chance to ask at a chapter meeting.

Don't forget to invite a colleague or your manager that may not come to a meeting, but would get a drink with you after work.

As an added incentive, the first 20 people to introduce themselves to the chapter President (Marc Donelson) will receive a free drink ticket.

Note: ISPI Charlotte is hosting a networking event. For liability reasons, the chapter will not be providing drinks or food (aside from the 20 drink tickets). The purchase of any drink or food will be the responsibility of the individuals attending. BlackFinn will be providing some drink specials.

Meeting Location

Events are held at the UNCC – Uptown Building

Date: September 13, 2012
Time: 5:30 p.m. to 8:00 p.m.
Place: UNCC – Uptown Building
Address: 320 East 9th Street, Room 1104
Charlotte, NC 28202
Corner of 9th & Brevard

Registration Prices

Event	Member	Guest
Chapter Meeting on 9/13	$15.00	$25.00
Workshop on 9/14	$60.00	$80.00

Special pricing for students and faculty

http://www.ispicharlotte.org/events

UNCC Uptown Parking

Parking tokens will no longer be sold at the registration desk. Parking is available in lots surrounding the UNCC building. One such lot is at 707 N. Brevard St. This is at the corner of 11th St. and Brevard St.

General Rules for Parking in Lots:
- Park in numbered spaces.
- Pay the box (usually $4.00-$6.00) in the numbered slot corresponding to your spot.
- Bring exact change; there is no change machine on site.
- Pay every time you enter the lot; you cannot leave and come back without paying again.

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