Blending Front–End Analysis

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EXECUTIVE SUMMARY

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.

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