

# PERFORMANCE AND CAUSE ANALYSIS TEMPLATE: TEAM TAG

*Using Instructional Design to take the "Hitch" out of Organizational Performance*

## Performance Analysis

Performance Gap(s)	Business Goal(s)
<ul style="list-style-type: none"> <li>➤ What we want the sales and service reps to do is closing customer sales without seeking out guidance from the Assistant Manager 80% of the time.</li> <li>➤ What the sales and service reps are doing now is relying on guidance from the Assistant Manager to close customer hitch sales 50% of the time.</li> </ul>	<ul style="list-style-type: none"> <li>➤ The RVMart mission statement is "to be the leader in our industry through our tradition of honesty and fairness to customers, employees and business partners."</li> <li>➤ The company's vision statement is to "treat every customer in a manner that they will do business with us for the rest of their lives."</li> <li>➤ Business goal: To increase profitability through a reduction of lost sales and increased up-sells by providing customers with the "good, better, and best" hitch options that match their needs.</li> <li>➤ Make 15,000 to \$20,00 in otherwise lost sales.</li> <li>➤ <b>Let the Assistant Manager feel he can go on vacation without stopping sales.</b></li> </ul>

**Comment [SWV1]:** The team has done a good job specifying a measurable performance gap that makes sense to the client and all stakeholders.

**Comment [SWV2]:** Notice the "unofficial" business goal here. Even though it is unofficial, it is still important.

## Cause Analysis<sup>1</sup>

	Sources of the Gap	Finding	Evidence	Responsibility for Further Diagnosis and Fixing
Environmental Sources of the Performance Gap	<b>① Information (35.3 %)</b> Are there clear standards specifying expected performance?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<ul style="list-style-type: none"> <li>➤ <b>There are established sales goals.</b></li> </ul>	
	Do performers have on-demand access to clear and relevant guidance?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<ul style="list-style-type: none"> <li>➤ Reps receive no guidance describing what constitutes exemplary, adequate, and unacceptable performance.</li> <li>➤ There is extensive parts manual and Word documents for each manufacturer that the Parts Dept. stocks. These manuals are lengthy and difficult to decipher. They do not always provide the same information or support comparison shopping. Using these guides increases the time to sell hitch customers.</li> <li>➤ Interview comment: "Time of Sale (hitch information sheets) sheets are hard to use and part #s don't match what is in the application charts in the parts catalog."</li> <li>➤ Interview comment: "If you are using a parts catalog to try to find information for a customer, you may spend a lot of time finding information on one hitch, and then after you find that information the customer asks what you have in a different hitch manufacturer instead, and you have to start all over again. Current job aids do not provide comparison information."</li> </ul>	<b>Team TAG</b> RVMart Management

**Comment [SWV3]:** Many sources of evidence could be expressed with better precision and traced to a credible source.

**Comment [SWV4]:** It's common for ID teams to take on responsibility for fixing sources of performance gaps arising from a lack of adequate guidance.

<sup>1</sup> This hybrid cause analysis model combines aspects of Gilbert's (1996) BEM, Mager and Pipe's (1997) performance analysis flow diagram, Chevalier's (2003, 2008) updated BEM, and Rummier's (2006) human performance system. Percentages for each source indicate Dean's (1998) relative frequency of occurrence.

Sources of the Gap	Finding	Evidence	Responsibility for Further Diagnosis and Fixing
		➤ Reps do not always trust or rely on current job aids to provide the knowledge/information necessary to close hitch sales.	
Do performers receive timely, clear, and relevant feedback about the extent to which their performance meets expectations?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ Management provides no feedback about hitch closing sales. Reps don't know they are not performing to established standards for closing hitch sales.	RVMart Management
<b>② Resources (29%)</b> Do performers have access to the materials, tools, and time they need to do their work?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ Reps have no materials or tools to help them close hitch sales.	Team TAG
Do the processes and procedures supporting the work produce expected performance?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	➤ Only Assistant Manager Mike knows the process for matching hitches to the customers' vehicles and RVs.	
Do user interfaces match the workflow and thoughtflow of exemplary performers?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ The existing manuals are organized by topic, rather than the process for selecting hitches and upselling using good, better, best options.	Team TAG
<b>③ Incentives (11.3%)</b> Are there adequate and appropriate monetary incentives to reinforce desired performance or inhibit undesired performance?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ There is not currently a monetary incentive plan in place, but one is being developed for future implementation. ➤ Layoffs are an incentive for employees to work hard to protect their current job status, especially in the current down economy. ➤ There are no consequences when reps sell the wrong hitch to the customer.	RVMart Management
Are there adequate and appropriate nonmonetary incentives or consequences to reinforce desired performance or inhibit undesired performance?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ There is not currently a non-monetary incentive plan in place, but one is being developed for future implementation.	RVMart Management
Are there adequate and appropriate career development opportunities to reinforce desired performance or inhibit undesired performance?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ Morale is low due to a 2 <sup>nd</sup> round of layoffs and cut-backs in recent weeks. This has contributed to a lack of career development opportunities.	RVMart Management

**Comment [SWV5]:** This is a client responsibility, rather than the ID team's. The team should inform the client know that failure to fix this source of the performance gap will ensure that the gap remains—even if the ID team has otherwise met all of its responsibilities.

**Comment [SWV6]:** Because the process currently resides solely "in the head" of the Assistant Manager, the ID team is offering to create these materials to represent the process. These materials later became a:

- Wall-sized flowchart for helping the sales rep and customer select an appropriate hitch.
- Brochure with "good," "better," and "best" options for each hitch that the rep would use to discuss each option with the customer.

**Comment [SWV7]:** There is a process, but it doesn't reside in the environment. Rather, it resides in the head of the exemplary performer.

**Comment [SWV8]:** As with feedback, the ID team should inform the client know that the performance gap will remain unless the client closes these sources of the performance gap.

Sources of the Gap		Finding	Evidence	Responsibility for Further Diagnosis and Fixing
Individual Sources of the Performance Gap	④ <b>Motives (6.3%)</b> Are performers willing to meet performance expectations?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	➤ Survey comment: "Not having the customer doubt "our" ability to know the <b>right</b> product." "Getting the sale!"	
	Are performers willing to work for monetary or nonmonetary incentives and consequences?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	➤ Survey results indicate that sales reps are willing to work at existing pay grades.	
	⑤ <b>Capacity (7.5%)</b> Do the performers have the innate physical, cognitive, and emotional abilities for the desired performance?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	➤ Survey results indicate that sales reps possess the physical, cognitive, and emotional abilities to meet performance expectations.	
	⑥ <b>Knowledge and Skills (10.5%)</b> Do performers possess the knowledge and skills to perform to expectations? (i.e., If they could perform to expectations if they absolutely had to, then they possess the necessary knowledge and skills.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ 75% of those surveyed cited that they cannot independently complete a hitch sale without the assistance of a SME or other more knowledgeable staff members. ➤ 75% of those surveyed also did not feel that they have received enough training to assist customers on their own.	Team TAG
	Have performers performed to expectations in the past? (i.e., If they could perform to expectations at some point, then they possess the necessary knowledge and skills.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ Interview comment: "Reps have never selected appropriate hitches or discussed good, better, best hitch options on their own."	Team TAG
	Do performers perform to expectations sometimes but not at others? (i.e., If performers perform to expectations inconsistently, then they possess the necessary knowledge and skills.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	➤ Interview comment: "Reps consistently fail to perform to standards."	Team TAG

**Comment [SWV9]:** Extensive hitch product knowledge is not the goal. The training goal is being able to gather and utilize the necessary information to close hitch sales without help from others.

## Assumptions

List any assumption you need to make in order to proceed here. Then collect any necessary information to verify them and discuss them with the client.