



International Society for
Performance Improvement



PERFORMANCE
XPRESS

The central image shows a large, bright yellow arrow painted on a dark, textured asphalt surface, pointing towards the right. The text 'PERFORMANCE XPRESS' is overlaid on the arrow. 'PERFORMANCE' is in white, all-caps, sans-serif font. 'XPRESS' is in white, all-caps, sans-serif font, with the 'X' being a larger, blue, stylized font.

**EMERGENCE
IN PERFORMANCE**

SPRING 2021

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Supplemental Photography by Deborah Hood, PhD



FROM THE EDITORS



Sue Czeropski, PhD, CPT



Deborah Hood, PhD

Emerging from the deep sleep of Winter...

Spring has sprung! As the snow and ice melt around us, the soil is warming up to allow for new life to emerge from the long winter.

Just a look out the window and you can now see birds looking for nesting materials, flowers beginning to bud, and even spiders spinning webs in hopes of a juicy meal some time soon.

Much like the flora and fauna that is awakening around us from the long, cold winter, we, too are “emerging” from a kind of hibernation that the pandemic forced us into. A year of social distancing, limited contact with anyone outside your household, “staycations” instead of vacations, and a plunge into Zoom...it’s been a long hibernation!

And, although we are now a year into the pandemic which is nowhere close to being over, we can be inspired by the signs of better things to come abound: the sight of businesses returning to operation, employees going back to work and the increasing availability and access to the COVID-19 vaccine.

In this issue of PX, you will hear about how learning design and delivery, leadership development, and technology is “emerging”. You’ll read about the impact of burnout. And you’ll hear how about the next EMEA conference. We are also introducing a new feature to PX--an interview series by Judy Hale to get to know our PI community.

We thank our contributors for their great submissions that make up this issue and invite you to consider submitting for the Summer issue. Whether you are a seasoned practitioner, a leader in industry or a student learning about the field, your shared experiences and shared knowledge is what this publication is all about.

What can you submit? Talk about research you are doing, or best practices that are working for you. Share your ideas on how to make our work more effective. Help us grow our toolbox of knowledge by sharing your experiences with the ISPI community.

Thanks for reading and again, send us your feedback and submissions to px@ispi.org. From both of us here at PX, have a wonderful Spring season. Until our next issue, stay safe!



FROM THE PRESIDENT NANCY CRAIN BURNS, PHD

Welcome to the Spring issue of Performance Xpress! We thank all who have contributed to making our online publication a great success!

As we **EMERGE** into a new year and decade, we celebrate our past, present and future! We look forward to emerging from a pandemic that has impacted our workers, work, workplace and world.

Thank you, ISPI Volunteers!

We appreciate our wonderful volunteers who have made great contributions to our professional home and will continue to do so this year! Thank you ALL!

2021 Performance Improvement Conference

Please be sure to register for our 2021 Annual Performance Improvement Conference! We will present the conference virtually this year and we have a great program of speakers and networking opportunities!



International Society for
Performance Improvement

THE 2021 ISPI Performance Improvement Conference

The Value of Performance in the Age of Disruption

The business case for augmented/artificial Intelligence, agile and design thinking and ROI and best practices to improve performance.

Presented virtually - April 26-30, 2021
Register at: www.ispi.org

The theme of our flagship event is: The Value of Performance in the Age of Disruption: The Business Case for Augmented/Artificial Intelligence, Agile and Design Thinking and ROI (Return on Investment) and Best Practices to Improve Performance.

As Performance Improvement Practitioners, it is important for us to understand how this new age of disruption is shaping the work, worker, workplace and world. At ISPI 2021, thought leaders will deconstruct the myths, explore the realities and harness the innovations that will shape the bright future. Conference dates are April 26-April 30th. We will have the Conference opening and Pre-conference Master Series speakers on Saturday, April 24. The ISPI Annual meeting will be held on May 1 for ISPI members only. To register, please see the information on our website at https://ispi.org/page/2021_Annual_Conference We look forward to seeing you at our Conference!

Celebrating the life of Dr. James Moseley

We celebrate the life and legacy of Dr. James Moseley, a great friend and contributor to ISPI! Dr. Moseley had many roles: Professor Emeritus at Wayne State University, College of Education, Instructional Technology Program, Detroit Michigan. He served as an external and internal consultant in program evaluation, performance improvement, and health education. Jim was co-author of several ISPI award winning books with Darlene Van Tiem and Joan Dessinger: *Fundamentals of Performance Improvement: Optimizing Results through People, Process, and Organizations* (3rd ed., 2012); *Fundamentals of Performance Technology: A Guide to Improving People, Process, and Performance* (2nd ed., 2004); and *Performance Improvement Interventions: Enhancing People and Performance through Performance Technology* (2001).



Please see a full tribute to Dr. James Moseley in the February 2021 edition of *Performance Improvement Journal*.

Working Together for Our Future!

Let us continue to work together to build a new future and look forward to 2022, when we will celebrate 60 years of ISPI! This will be a great milestone for our field of performance improvement in work, worker, workplace and the world!

During our 2020 Annual meeting, we discussed our ISPI Strategic Goals:

- Express Our Value
- Offer Extraordinary Products and Services
- Be available/listen/serve our members
- Sustain the Society for Future Generations

We appreciate your continued support, and are encouraging you to volunteer and add value to others!

NANCY CRAIN BURNS, PH.D., CPT, PMP, PRESIDENT
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US COAST GUARD BLENDED TRAINING IMPROVES DELIVERY DURING ONGOING EMERGENCIES

DAVE TORRES & TRAVIS COLLIER

The US Coast Guard has faced systemic & historic challenges maintaining a well-trained workforce, whether the 2019 government shutdown or the ongoing pandemic. These constraints greatly affected the ability for the service to maintain training capacity for all-hazards response.

Central to developing the workforce is the service's Force Readiness Command (FORCECOM) and 8 subordinate resident training centers. These training centers have historically been the technical and cultural focal points for Coast Guard resident training. So much so, when job task and front-end analyses recommended a training intervention of any category, the next conversation started with a discussion on whether a Coast Guard resident training center, US Department of Defense training center, or outside contractor would be the best training delivery provider.



By default, blended or self-paced training solutions were seldomly discussed as primary options during post-analysis training decision conversations. If a school-house wanted to develop another delivery method, such conversion would happen after the resident course had been developed & well-established. And because the resident course was well-established, there was limited return on investment or buy-in to shift the course instructional method from resident to another blended training format.

That culture began to change in 2013. From 2013 to 2015, members across the Coast Guard's training system came together in a working group to figure out how to have the instructional method conversation earlier in the development process. Their initial efforts highlighted one key gap: There was no Instructional Method Selection Model used in training development.

There are several models available for media selection—but all these models assumed the delivery method as part of the model. Not whether the best delivery method had been previously selected. As a first step, and working with the end in mind, this working group determined the outputs of the instructional method selection model to be created:

- Resident and Exportable face to face training
- Standardized On The Job Training
- Facilitated Online Training
- Self Paced E-Learning
- Electronic Performance Support Systems and Job Aids

The group then researched numerous media selection models for ideas and synthesized their concepts to create a method selection model. At first, the group uncovered 42 characteristics in method selection that came into play for developing all training, from aviation simulations to leadership e-learning.

Answers to the five questions results in the model identifying applicability of the five instructional methods to support instruction of the TPO. These questions account for operational workplace impact, safety and security of training a task, any special equipment needed, one way vs two way communication requirement, and whether the task being trained was a near or far transfer task.

This final matrix became known as the Instructional Method Selection Matrix, and was incorporated into training policy in October 2019. Further testing its effectiveness, six courses throughout the training system were evaluated for potential conversion away from resident training to blended delivery. The selected course, Aviation Unit Maintenance Resource Management, was successfully piloted & launched in February 2020. This course was converted from a 5 day, resident course, to a 3 day, facilitated online course, which allowed instructors to double throughput and save \$60,000 in training costs.

The Coast Guard's training system pandemic response has heightened the need to assess and convert courses on an accelerated pace. Between February 2020 and January 2021, a total of 54 courses have been converted from resident to blended or asynchronous delivery to overwhelmingly positive trainee response. 26 more courses are in progress. These converted courses cross subjects & operational specialties.



CDR Dave Torres is the Chief of Operations Training Branch under the USCG Force Readiness Command. His assignment prior to this position was Executive Officer of the USCGC ALERT (WMEC-630), out of Warrenton, OR.



CDR Travis Collier is a Training Manager within the Mission Support Training Branch. His assignment prior to this position was Senior Investigating Officer, out of USCG Sector New Orleans.

Both are graduates of the Instructional & Performance Technology Master's program at Boise State University.

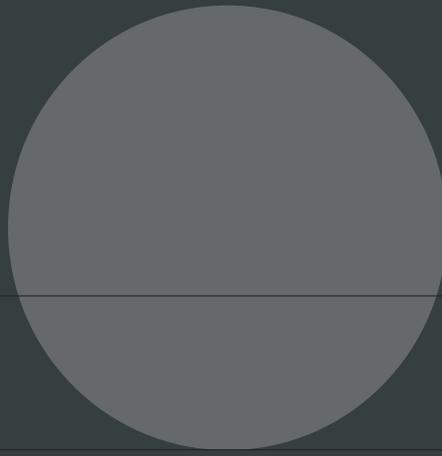
Burnout as a Strategic Capacity Issue in HPT Work

Holly Burkett, PhD, CPT, SPHR



In the wake of the ongoing pandemic, rates of burnout, stress, and anxiety are rising exponentially, with more than three-quarters of employees struggling with stress (Gallup 2020). Burnout has been defined as a syndrome characterized by: feelings of energy depletion or exhaustion; increased negativism related to one's job; and reduced professional efficacy. In 2019, The World Health Organization (WHO) included burnout in its International Classification of Diseases not as a medical condition, but as an occupational phenomenon resulting from chronic workplace stress. Burnout leads to disengaged employees, higher turnover, and "increased mental distance from one's job" (Borysenko, 2019). At an estimated, annual cost of \$1 trillion in lost productivity worldwide, the responsibility for managing it has shifted away from the individual and towards the organization.

Burnout is a significant issue for HPT professionals who routinely attempt to engage leaders and teams in supporting performance improvement efforts. No matter how strategic, innovative, or technically-sound a human performance solution may be, it's likely to fail if the humans responsible for sponsoring, implementing, or sustaining the solution are too exhausted or stressed to drive it. Burnout can put the "No" in "Go/No Go" decision-making!



To that end, here are some implications for HPT practice:

Take a Systems View

Like many performance gaps, the root causes of burnout do not really lie with the individual. Historically, there has been a bias for burnout solutions that “fix” the individual by prescribing yoga, breathing techniques, better time management, or more mindfulness. Yet research by Gallup has found the top five reasons for burnout are:

1. Unfair treatment at work
2. Unmanageable workload
3. Lack of role clarity
4. Lack of communication and support from their manager
5. Unreasonable time pressure

While emphasizing burnout interventions at an individual or team level may be helpful, prolonged exposure to stressful work conditions erodes individual or team-level resilience and the motivation to apply discretionary effort over time. What is clear from the research is that it takes a wide range of systemic levers to influence and prevent burnout. As an example, Johnson & Johnson integrated a myriad of preventive interventions – such as resiliency training for multiple levels of seniority, management policies, and business processes -- into their Human Performance Institute’s unique change approach for optimal impact. In general, organizational interventions to prevent burnout are more effective than solutions for treating burnout after it occurs.

Practice Design Thinking

Design Thinking is a design methodology that provides a solution-based approach to solving complex or ill-defined problems by understanding the human needs involved. The first stage of the Design Thinking process is to apply empathy to a human-centered design process in order to gain useful insight about users and their needs.

Here, it’s important for HPT professionals to ask the right questions and dig into what causes people to feel motivated or burnt out. What basic motivation and hygiene needs

to not only determine which features or processes will remain stable and unchanging and which elements need to be created or adapted quickly, they must also work to integrate interventions designed to improve agility or resiliency.

Leverage Front-line Leaders

Not enough organizations or HPT professionals have focused on the profoundly important role that frontline managers play in improving employee health, well-being, morale and engagement, especially as remote/hybrid/socially distanced workplaces become the norm. Remote working may cause managers to feel that they lack visibility into employees' performance. Employees may feel more anxious, often amid circumstances (e.g., caring duties) that might mean they can't perform as usual. Here, HPT professionals can help organizations introduce new ways of working such as daily check-ins/-outs and more personalized, on-demand, data-driven performance feedback to "nudge" employees towards different behaviors in real time. When employees are burned out, frequent feedback discussions can also help managers understand how to best provide performance support. In short, addressing burnout issues is an excellent opportunity to help organizations instill a more permanent feedback culture and ensure that performance goals align with employees' needs as well as fast-changing business priorities.

Putting It All Together

The role of the performance improvement professional is amplified in the current crisis. Not only must we respond to fluctuating business needs, we must help organizations address the health and safety concerns of workers if they expect to drive and sustain human performance, as well as human potential. It's no longer about achieving work/life balance. It's about successfully designing well-being into work, so that well-being becomes indistinguishable from the work itself and is embedded across all organizational, team, and individual levels. Organizations that address the holistic needs of their workforce through strategies focused on safety and well-being, resilient leadership, flexible work design, and continuous learning and feedback have been shown to have large, measurable effects on a wide range of performance outcomes including increased productivity, work engagement, and job satisfaction -- along with reduced absenteeism, turnover, and stress symptoms. In addition, research has also demonstrated statistically significant relationships between an organization's cash flow, profitability and return-on-investment and its assessed level of resilience (Stephenson et al, 2010).

While incidents of burnout continue to rise, the good news is that burnout is preventable. It requires good organizational hygiene, better data, asking more timely and relevant questions, and investing time and resources in assessing, managing, and developing both the capability and the capacity of leaders, teams, and individuals to effectively buffer disturbances and setbacks in an age of chronic stress and disruption.

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Meet Your Community: Interview with M. Mari Novak, M.A., CPT

**by Judith Hale, Phd, CPT,
CACP, CDT & ibstpi Fellow**

Let's face it...we are better together, especially in our field. PI practitioners benefit from networking, collaborating and learning from their peers. Getting to know your peers is made easy with this new feature for PX : an interview series by Judith Hale designed to help us get to know our fellow members in the HPT/PI community. In this issue, meet M. Mari Novak, M.A., CPT! Hello Mari!



JH: What attracted you to PI/HPT?

MMN: My early career and graduate studies opened my eyes to the futility of linear solutions. Diverse experiences (from swim instructor and Peace Corps Volunteer) plus graduate studies revealed what did/did not work. I needed the science. Studying with Dale Brethower, then managing projects to apply the principles, there was sincere relief: System! Dynamics! Process! The cascading Big Ideas (and acronyms) pushed the field forward, but still missed the mark. The partially understood dynamics led to stupefying rules, forms, competition for 'best practices' -- from MBO to Logframe constructions. PI led me to study why it worked, to complexity, chaos, complex adaptive systems, and other supporting disciplines. With these understandings, our consultancy KNO was able to solve, substantiate and mitigate organizational requirements.

JH: What is some work you are most proud of?

MMN: There are clients who are serious about improvement. There are people/organizations which trip over themselves. These different commitments to performance require flexibility, tools, and tough skin. Many small businesses, NGOs, and pockets within large organizations were serious. The lightness of being when the client succeeds is professional fulfillment. Large scale projects that demanded every ounce of insight, methods/tools and tenacity apply to projects such as a national health management system: Because management, statistics, finance, professional organizations, and education ministries/agencies were involved; it was necessary to map the processes so that each part understood the whole. Getting to that point was uphill. Once everyone “was on the same page,” the streamlining and handoffs among responsibilities was accomplished. Having worked extensively in Central and Eastern Europe, Central Asia and the Caucasus after the Communist bloc transitioned, many state businesses transformed to profitable, skill development, planning and decision-making entities. Elected as the first woman President of the Slovak-American Chamber of Commerce. Working with staffs to reorganize the flow in the utility, manufacturing, education, agricultural sectors were projects that impacted nations, economies, and social life. Planning and coordinating with the Palestinian Authority. Resolving issues of retention revealed a maze of process and policy requirements at two National Banks. Over 8 years I managed the Czech and Slovak Participant Training Project, funded by USAID. Continually integrating PI, our programs were acclaimed by both the national and HQ staff. When project evaluation was counting trainees, we were closing performance gaps -- better outcomes for hundreds of public and private sector managers. Years of projects are strewn with near misses, abject rejection. I am proud of the team approach in identifying the core problems and process weaknesses, the skills and approach for presentation, and the tools developed to depict the situation.

JH: When people speak/think of you, what do you want them to remember/say?

MMN: I have accomplished, learned, and mucked up over a long career. That I could grasp a complex, broken system and present the gap and the recommendations in simple, elegant language has been advantageous. To coach other project managers and consultants is a contribution I had hoped to make. Working with diverse cultures, classes, status, gender, and authority; acknowledging agency amongst the extended team was essential. It is also the right thing to do. Over my career I have been complimented as a competent, woman-in-charge. The value is that other women know and ascend to their own abilities. One executive, bored and tired, asked me what I wanted out of this project. When I answered, “I want you to go home before 7:30 pm” (and see your son), he sat back. My questions and recommendations were aimed at a better functioning organization – making his life easier, no, manageable. This was for the client’s benefit, not for my package of tricks. Most basic is my pride in developing the skill, broad and deep knowledge, to ask the right questions. I was awarded the 2015 Geary Rummler Award for the Advancement of Performance Improvement.

Mari can be reached at mari.novak.kno@gmail.com

About the Author

Judith Hale, PhD, CPT, CACP, CDT, and ibstpi Fellow, is the CEO of the Center for International Credentials, LLCs. She is the author of nine books on performance improvement. The Performance Consultant’s Fieldbook: How to Improve Organizations and People, 2nd edition, is used as a text by numerous universities. Performance-Based Certification: How to Design a Valid, Defensible, Cost-Effective Program, 2nd edition, received the Outstanding Communication Award from ISPI in 2014. Judy has served as president of ISPI and director of Certification for ISPI. She can be reached at Judy@HaleCenter.org.



20th ISPI EMEA Conference

September 30 - October 2 and October 4 -5, 2021

2nd Virtual (Online) Conference

	September 30	October 1	October 2	October 4	October 5
15:00 CET 09:00 EDT 06:00 PT		Discussion space of your choice	Discussion space of your choice	Discussion space of your choice	Discussion space of your choice
16:00 CET 10:00 EDT 07:00 PT	ISPI EMEA 2021 Conference Onboarding Session	Briefing Session	Senior Executive Panel	Briefing Session	Briefing Session
17:00 CET 11:00 EDT 08:00 PT	Open Assist: Bidders Conference	Briefing Session		Briefing Session	Open Assist: Team Proposal Presentations
18:00 CET 12:00 EDT 09:00 PT		Briefing Session	Briefing Session	Performance Improvement and Sustainability	
19:00 CET 01:00 EDT 10:00 PT	Briefing Session	Briefing Session	Briefing Session		ISPI EMEA 2021 Closing Session
20:00 CET 02:00 EDT 11:00 PT	Discussion space of your choice	Discussion space of your choice	Discussion space of your choice	Discussion space of your choice	Discussion space of your choice

A unique, **highly interactive** conference, with a long track record of high value, and an open exchange of knowledge, experience, and innovative ideas in the field of human and organizational performance . . . will be taken on-line again this year in response to Covid-19. Consider joining us to experience for yourself our approach to making a virtual event high-value and highly engaging.

Carol M. Panza

ISPI EMEA is online and still focused on providing high value.

We hope that our 2021 virtual conference, by minimizing some barriers such as cost for travel and in-person conference fees, as well as extended time-away-from-home, will allow some people to join us, who have been unable to participate in an ISPI EMEA Conference yet. Like our successful 2020 virtual conference, our 2021 conference, will be scheduled in 5 half-days (4 hours) of sessions, over a 6-day period. This schedule will allow us to offer great value to all participants, as they will be able to participate in all sessions live, with only one session live-streamed in each time slot. That means that you won't have to choose only one (1) of three (3) concurrent sessions that each run only once. Plus, all sessions will be recorded and available 24 hours a day, after they are live streamed, and throughout the balance of the conference, together with all related "handout" downloads, thus reducing the impact of a wide variance in time zones for our multinational participants.

However, to optimize the ability of all participants, from a broad spectrum of time zones, to join live-streamed sessions, our 2021 conference agenda will be built around Central European Time, with each day's sessions beginning at 16:00 (4 PM) CET and ending by 20:00 (8 PM) CET. -- That translates into 10:00 (10 AM) US Eastern Time until 14:00 (2 PM) Eastern Time. -- Note that Open Assist Teams will develop their own meeting schedules over the entire September 30 – October 5 time period, from the beginning to the end of the conference (minus October 3), including the ability to set-up asynchronous contribution processes 24 hours per day, at their option.

For anyone who has not yet heard about ISPI EMEA conferences, we most cordially invite you to read below about some unique features of our conference format and also encourage you to visit our website at www.ispi-emea.net. When visiting our website, you will be able to access videos and Feedback Reports from several of our most recent and, of course, in-person conferences, containing participant reactions, and reasons they come back every year. There are challenges, to be sure, to offering a virtual experience that is as high value, and highly engaging/ involving for our diverse international participants, as our in-person conferences, particularly in the face of brand-new issues such as Zoom fatigue. However, we believe that the exceptional participants ISPI EMEA conferences have been fortunate to be able to attract year after

year, have always made the difference, including last year for our first ever virtual event. We hope that you will join us this year and help us to prove that even a virtual event can offer an engaging, involving, high-value, learning and sharing experience, that can actually be energizing.

Unique Conference Centerpiece – Open Assist Experience

Most conferences seem pretty much alike. Right? They provide value by assembling speakers who share their wisdom and insights against an interesting unifying theme. We at ISPI EMEA feel that we have a way to make our conference deliver significantly more value to both presenters and participants. For one thing, our conferences have always aimed to be smaller in size but much greater in level of participation and interactivity, than typical conferences.

As in previous years with our in-person events, our 2020 online conference was successfully organized around an opportunity for participants to be immersed in a unique live teamwork experience we call Open Assist. We are about to introduce our very interesting and high-impact 2021 Open Assist Client. Look for that introduction on our website mid-March, for information about this important conference centerpiece experience, which will run throughout our conference, providing an exciting opportunity for teams of participants to engage directly with senior management representing a real organization (client). The objective for participant teams, will be to respond to the organization's (client's) Request For Proposals (RFP) to outline an approach for resolving a current problem the organization is facing and/or to identify and take advantage of opportunities to perform and produce "even better" results.

Through the Open Assist process our client organizations have consistently received real value for their participation, as measured by their immediate feedback at the end of the process and also, importantly, one year later.

Our inspiring 2020 Open Assist Client (Communicare, South Africa) had this to say last year. "Thank you so much and your teams, who provided truly stimulating ideas. We really were not expecting to receive so much value!"

Participants gain valuable knowledge and actual experience, working on a diverse multi-national team, as they interact directly with, present to and get feedback from a senior management team, all in a “safe,” supportive, constructive environment of learning, sharing and enriching each participant’s experience and ability to grow their professional network. In fact, all conference participants become “crowd-sourcing” resources for Open Assist teams, working to respond to an actual request for support from a client organization.

A chance to hear directly (unfiltered) from senior executives . . .

Another ISPI EMEA featured session, and a perennial favorite, is our Senior Executive Panel Session, which brings together, by invitation, a diverse group of senior executives, representing a cross-section of organizations and sectors. Participants in our 2021 conference will have the opportunity to hear directly from and interact with a panel of senior executives with diverse backgrounds in a special double-length session. During this highlighted event, senior executives will not be there to make presentations, PowerPoint or otherwise. They will be there to answer and discuss questions from participants. If our 2021 executives are anything like previous panels, they will contribute in an open and honest, down to earth way.

We always invite a diverse group of Panelists, in terms of work background. However, our online conference last year permitted us to invite a group of Panelists which was also geographically diverse, with one based in Sweden, one in Dubai (Middle East), and two on the African continent. It is notable that over the years since our first Senior Executive Panel in 2010, we have consistently received feedback from Panelists indicating that they enjoyed participating and valued the opportunity to hear from their fellow Panelists, during the session. Watch our website to learn about our Senior Executive Panelists, as they are introduced, which will begin shortly.

Announcing our ISPI EMEA 2021 Call For Proposals

The agenda for ISPI EMEA conferences also includes a limited number of Briefing Sessions for which we are about to publish a Call For Proposals. We expect all sessions selected for presentation to provide participants with practical, valuable insight and tools in alignment with the conference theme. Given the nature of virtual events and what has been learned about what works best from the experience of others as well as our own experience, we are keeping the number of hours of sessions to four hours a day, though we will be once again providing Discussion Spaces in the morning before regular sessions start (except for the first day of the conference). Discussion Spaces will be available for use by participants during all conference hours and will remain open for an hour after the last session on each day.

We will announce our Call For Proposals with a blast email as well as a banner announcement on our website. The Call For Proposals will also be downloadable from the ISPI EMEA website at www.ispi-emea.net. We anticipate a submission deadline in mid to late April 2021.

Some Reasons for Joining Us!

We hope you will put it on your calendar to submit a Briefing Session proposal, or plan to learn and share as a participant in our upcoming 2021 ISPI EMEA Conference, where you can expect the following:

- **Dynamic and Performance Focused** – A dynamic learning and sharing environment, where everyone is seeking to improve their own, their organization’s or their clients’ performance
- **Client Engagement Centerpiece** – A professional conference organized around an Open Assist Client request for support, which will run throughout the conference
- **Senior Executive Interaction** – The opportunity to interact with real executives and address their real life performance challenges and what they see on the horizon

- **Purposely Limited in Size** – An event where the number of participants is purposely limited to ensure a much greater level of interaction and participation than typical conferences.
- **Proven Value** - A highly interactive format with a proven track record of high value for both presenters and participants
- **Relationship Building** - A multinational environment, with participants from San Francisco to Shanghai, which supports relationship and network building, not just an exchange of business cards
- **Open Exchange** - An atmosphere that fosters an open exchange of knowledge, experience and innovative ideas in the field of human and organizational performance
- **Special Place to Come Together** - A place where all of us can meet and prepare together for the challenges that lie ahead for creating healthy, prosperous organizations and communities.

Please visit the Previous Conferences page on www.ispi-emea.net to view videos and access Feedback Reports from past conferences, and learn what participants have said about ISPI EMEA conferences.

A Small Sample of Comments from Past Conference Participants . . .

*You have demonstrated that high performance and engagement involves more than a formula or a program. It's about **being intentional about interactions, relationships and human activity...it's an attitude, not merely a routine!*** (2010, Gothenburg, Sweden)

*At ISPI EMEA, I started to see how performance improvement can be applied to many different aspects of organizational development, management, leadership development, and training design. **The simulation was a great, interactive way to meet people, try out new ideas, and get practice making a pitch to a potential client.*** (2016, Bonn, Germany)

*This conference was very much an **eye opener** into a whole new world that I didn't know existed. It exposed me to a way of thinking that I have never heard before and I have discovered that there are **practitioners, a valuable support network and an intellectual body of knowledge that I can now access.*** (2011, Skopje, Macedonia)

*The conference fosters and supports the building of relationships, rather than just the exchange of business cards. The conference format and overall atmosphere (culture), directly supports an ability to **get to know people and actually build relationships. ISPI EMEA feels like a family, even to new people.*** (2016, Bonn, Germany)

*The discussion sessions (**Discussion Spaces**) with simple access through break-out rooms made it **easy to interact with other participants – like being there [in person].*** (2020, Online - Zoom)

*Great organization of the conference! **It was ideal that we could follow all the sessions.*** (2020, Online - Zoom)

*Virtual expanded our reach, both participants and Senior Executive Panelists, yet **interaction was still high, like we were all together.*** (2020, Online - Zoom)

Remember, ISPI EMEA conferences are limited in size. So, mark your calendar now and plan to join us.



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Should We Give an Iota about IoT?

Diana R Carl, Ed.D.



Congratulations! We have broken a computing record! Worldwide, the number of devices that make up the internet of things (IoT) now exceeds the number of other devices. Prior to 2020 there were more smartphones, laptops, and computers. Now, the IoT numbers are soaring. But, what is “IoT?”

The IEEE defined IoT as any device that connects via internet or other combinations of connections (IEEE, May 2015). Each device is uniquely identifiable and available via a network anywhere and at any time. IoT devices have sensors and actuators that provide data and / or activate functions based on sensor data. The devices possess at least a rudimentary processing capability and memory and are capable of self-configuration without human intervention if desired. Humans can engage in IoT command and control through either user-friendly interfaces or with programming languages. Mobile computing is a subset of IoT. IoT applications are wide, varied, and include industrial IoT, healthcare IoT, home IoT, and highly mobile IoT such as connected automobiles. The devices are primarily sensors, transmitters / receivers of information, and activators of assets such as light switches. Some are stationary; some are mobile; some are wearable. Some have activity recognition and include accelerometers, cardiac sensors, and gyroscopic sensors among others. Examples of common home devices are motion sensors, cameras, connected thermostats, connected smoke detectors, connected TVs, and voice-controlled intelligent personal assistant services such as Google Assistants or Amazon Echos. At the time of this writing there were over 11B connections. IoT growth is projected to continue at an annual rate of 13% through 2025 (Luth, November 2020), and it will interact with human performance.

IoT is Everywhere

IoT is ubiquitous at work, in your health, in your transit, in getting the food you eat, and getting the comfort and safety you want in your home. The largest IoT growth is industrial. Building automation alone has grown 42% in 2020 (Malvina, September 2020) and continues to lead the way. Industrial IoT now exceeds 4,300M devices, an increase of 105% over 2018. Industrial IoT is found in agriculture, mining, retail, manufacturing, in safety services such as policing, warehouse operations, and in transportation to name a few. The biggest driver is cost reduction followed by improved security. If IoT can help a business become more efficient or safe, it is being considered.

On a farm, IoT sensors and controls are employed to aid farmers in the regulation of water flow to crops, to manage precision plowing, seeding, and harvesting. In factories IoT sensors and controls are used to regulate production: sensing when an automobile part is ready for the automated installation of a door, executing the installation by another IoT device, a robot, and using other sensors to evaluate the acceptability of the work. Managers also use IoT to control the supply chain and to adjust production based on weather or seasonal inputs either automatically gathered via sensors or provided by managers who recognize changes in population behavior patterns sensed via IoT.

It goes on. Remote cameras on toll roads identify the car license and automatically send the toll bill to the owner of record. Cameras, another IoT device, mounted atop stoplights automatically sense and take a picture of the car license, sending it to an enforcement agency that automatically using another device issues a ticket. A camera atop a police car begins recording when the siren and lights are activated. Recordings of the incident with, for example, a stopped vehicle are automatically transmitted to a central station.

E-Health (healthcare provided via remote electronic means) is a significant IoT growth area. In 2021 e-Health IoT growth is expected to be valued at \$136M, more than double what it was in 2014 (Malvina, September 2020). In health care, command and control sensors are becoming common place, allowing health care professionals to monitor physical conditions in everyday contexts away from the hospital-based testing and care that fail to capture the effects of the client's natural context on the client's health. E-health includes diagnostic IoT, symptom tracking, status measurement, timed delivery of pharmaceuticals into a body, as well as other distributed interventions. IoT allows a health care client to be at home and more mobile rather than being confined to a healthcare facility. Remote glucose and heart monitoring (another type of sensor) can be completed wherever the client is and at different times. The remote provision of pharmaceuticals or other interventions are more commonplace today via IoT.

In a smart home, the device status is designed to be dependent on the status of the residents, including physical status, social state, and changes the resident(s) want (Dhelim, Huansheng, Cui, Jianhua, Huang, Wang, 2020). If the resident normally wakes at 6AM, the thermostat in the home will automatically adjust to the temperature the resident set for 6AM. Another IoT may turn on closet lights when the resident enters the closet. Another may brew the coffee while another (or sometimes even the coffeemaker!) announces the morning news from a desired news source according to the preferences set by the resident. Upon leaving the home, the lights and coffee maker are turned off, and the security system is automatically invoked upon the resident exiting the geofence.

Where in business have you witnessed the employment of IoT being? Do you wear any IoT device? Where have you observed IoT use in health care? How many IoT devices are in your home? Mine has 16. If your automobile is a recent model, the embedded IoT devices exceed 100 in your vehicle (Abdelhamida, Hassaneina, Takaharab, 2014). And, as a professional in HPT are you ready to address performance issues in these arenas where IoT is rapidly being deployed?

IoT Translates into Data and Actions to Support Human Performance

While a case has been put forth that IoT is primarily machine to machine (also known as M2M), at some point the data and actions taken by the IoT device(s) have implications for humans intending to reap the IoT benefits. In all cases, an action is associated with the IoT. The action might be taken M2M, by a human, or by a group such as a business enterprise. The action might be the provision of data to be acted on by the human or by another machine; the device might execute a command on behalf of a human and provide data that the human uses to evaluate the effectiveness of the action.

My work in IoT, discussions, and reviews of what others have done and written about IoT indicate a high degree of attention to the technical engineering of the device and to the exchange of data. However, studies focusing on the interaction of the human with the IoT device to affect an outcome is difficult to locate. Rather than planning based in analysis of human performance, decisions and studies have been based in assumptions about human performance and information processing capabilities. The question arises: What information about the intended use of IoT by the human is needed to guide the development of the device functionality / display and underlying programming? Is there a need for increased attention to human performance and human characteristics in the IoT planning process so that the device better supports the human's goals? You already know my answer... well, you partially know.

IoT Implications for HPT

We have been schooled in our profession to not let the technology drive the performance support decisions, which is mostly correct. However, when technology is an increasingly pervasive force that changes the ways in which the performer accomplishes tasks, a reexamination of the potential interaction of the technology with the performer and with the wanted outcomes is warranted. Poorly designed IoT creates ineffectiveness, inefficiencies, and pain. Having been frustrated in my attempts to employ a badly designed IoT device, I have firsthand knowledge of how a poor UI design has prevented me from achieving my wanted results. Puzzling workflows, decisions incorporated into the code that should be left to me (the human!), and screens that provide incomplete or confusing information have added time and taken me off task when it should have enhanced my ability to perform. While admittedly only one example, I have observed others in my work interactions. There is an important role for HPT in the IoT requirements definition and evaluation process. Those who engineer IoT devices benefit from HPT input because the input makes their devices more immediately usable in accomplishing the user's goals.

Our HPT analytic approaches are sound, providing usable task and performer data on which IoT programming decisions can be based. For example, descriptions of common performer characteristics for identified performer groups help engineers provide functionalities and interfaces that align with the mental models of performers, leading to ease-of-use. Descriptions of the desired outcomes, associated tasks, risk factors, and decision points in task execution are usable in defining which functionality requires human intervention, which do not, and the kinds/ timing/ communication modes required for timely data exchanges and alerts. These can inform the IoT specifications so that the solution more effectively and efficaciously supports achievement of desired outcomes. However, our analytic processes have been delinquent in one area that is more visible in our performance arena due to IoT: context. IoT has brought the context of the performer's sensing and actions to the forefront.

IoT commands and data are intrinsically related to the context in which the data/actions occur. The IoT information and services are context-aware. While context has always been an underlying truism for human performance, it has been under-scrutinized in both the analysis and design of performance support decisions. How many studies and what guidance have you seen that overtly treat context elements in the analysis and design?

Information about the context, what the performer wants to achieve in the context, and what services and information are relevant to achieving the goals within the context are needed if the IoT is to be of use to the performer. The resident wants information and services to secure the home; the farmer needs information and IoT actions to efficaciously grow a profitable crop; the manager needs the IoT data control production, quality, and supplies; the healthcare provider needs information and services to remotely assess the patient's status and to assess if the patient's status within the current context warrants the remote administration of a medical intervention. In all cases, the characteristics of the context are significant in specifying the needed data, prescriptions for action, and who/what needs to take the actions.

Should we give an iota about IoT? Of course. To engage, HPT must expand the analytic and prescriptive processes to incorporate context elements usable in orchestrating IoT solutions. Let's give an iota about the context.

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Dr. Diana Carl, Ed. D. (Indiana University, 1977) is the principal of Diana R Carl, LLC. Her recent work with IoT and mobile application decisions and design in both the U.S. and in Brazil along with reviews of the relationship of context to human performance led to her develop materials and experiences for software, hardware, and IoT engineers. Her applied research of mobile applications spanning the U.S. Department of Transportation and with the collaboration of the U.S. Department of Defense received high level recognition from the Secretary of Transportation.

Leadership Workshops Evolve From the Classroom

Jim Naughton

It's interesting how change is sometimes thrust upon us. Innovation flourishes when disruption forces us to abandon the status quo and approach leader development without the quintessential leadership workshop. It had been widely accepted that leader skills require full-contact engagement. After all, leaders interact with people constantly. So, it follows logically that we would design leader development with a lot of people interaction... like in a workshop.

But things sure have changed! I don't imagine there will be a lot of demand for trust falls or team Lego building exercises in the near future. And I suspect that once we re-engineer leader development for the times we live in today, we won't have much appetite to return to the past.

Let's face it. It was often inconvenient to remove a leader from circulation for days at a time to attend a development program. And mobile technology ensured those leaders were constantly distracted by communication from the organization as you tried to sequester them so they could be immersed in well-designed workshop interactions. Leaders are simply too valuable for most organizations to take offline for long periods of time. But most of us dug in our heels and tried to make the best of it. That was how leadership development was done... and everyone accepted it.

A New Era

The way I see it, things are changing for the better. What's now emerging is a new approach to develop leaders from a distance. Future leaders will learn how to lead, not from instructor-led workshops, but in smaller segments and from multiple sources. Leadership development will involve sharing more videos, participating in more (and shorter) virtual sessions, and reading more books and articles. None of this will be done randomly and without guidance. It will be done intentionally and with thoughtful curation and design.

We're already engaged in the future at Innovative Learning Group and are actively helping our clients define the new learning path for leaders. This new approach is definitely part of the trend towards blended learning. However, the notion of blended learning used to imply adding some elements to supplement a classroom learning experience. The blend we recently designed for a large insurance client included everything except the classroom. Instead, we curated a set of highly focused videos, articles, book summaries, and e-learning subscription material, and then supported it with several virtual discussions to make sure it was fully applied.

No Looking Back

If we step back and take a longer view, this is an opportunity to take a giant leap forward instead of finding a temporary solution. A new approach can be more effective than the workshop-focused programs of the past and can become the future model, even beyond the pandemic of 2020. One day, we may look back fondly on the good times we used to have sitting around a table with others in the same room. What a quaint thing it will seem.

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