How to Recognize and Create Damn Good Job-Aids

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Peregrine Performance Group
Game Plan

• Who are we? Why are we here?
• What is a damn good job-aid?
• Advantages?
• “Good” vs. “bad” job-aids?
• How to create an exemplary one?
• How to take some of this with you?

Despite its major payoffs, the job aid is a vastly underused tool.

– Paul Elliott, Handbook of Human Performance Technology (1999)
We Are: Shifting the Performance Curve

Percentage of Workforce

Quality and/or Quantity of Performance

Top Performers

ROI on the performance-improvement initiative

Minimum
Current Standard
New Standard
Exemplary

Workforce
Performance

Low
High
Low
High
We Are: Helping US and Global Organizations

Fortune 500

Food, Bev, Hospitality

Food, Bev, Hospitality

Biotech, Pharma

Hi-tech

Financial

Other
Game Plan

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The Damn Good Job Aid – What Is It?

• Repository for information, processes or perspectives
• External to the individual
• Supports work activity
• Directs, guides and/or enlightens
• Exemplary, works very well

Whether a poster, a pencil, a manual, a sticky note, or an application – it must store and make accessible the information, processes or perspectives on which human work and activity are based.

– Allison Rossett, Handbook of Job Aids (paraphrased)

The differentiator between good and “damn good”
The Damn Good Job-Aid, What It’s NOT

- A tool (e.g., screwdriver, office chair, pencil)
- Instruction (e.g., training)
- Unusable (e.g., poorly designed, poorly written, incorrect, incomplete, difficult to find)

Instruction happens BEFORE the need arises.

Job-aids are used AS the need arises.
Advantages of Job-Aids

• Just-in-time availability
• Simplicity
• Relevance
• Saves time
• Reduces need to recall information
• Minimizes errors

Inside every fat course, there’s a thin job-aid crying to get out.

– Joe Harless
Advantages > Example > Electronics Manufacturer

One-week training course reduced to one day with accompanying eight-page job aid. Proficiency increased by 50%.

Joe Harless, job aids workshop
Advantages > Example > Chemical Company

Reduced error rate in insecticide formulation from 10% to 1% by using two-page job aid.

Joe Harless, job aids workshop
Advantages > Example > High-tech

When troubleshooting a system, no significant difference was found between the performance of (a) an experienced group of expert technicians and (b) an inexperienced group of non-expert technicians who employed a job aid.

Joe Harless, job aids workshop
When to Use a Job Aid

- Task is performed with **low frequency**
- Task is **unusually complex** (has many steps, requires fine discrimination of stimuli)
- Failure results in **dire consequences**
- Steps **change often**
Examples

- Solar Power System Quality Check
- Aircraft Emergency Checklists
- Social Media Channel Management
- Health Services, Differential Diagnosis
- Pharma/Bio-tech Safety Communications
- Surgical Safety Checks
Residential Rooftop Solar Power System Installation Quality Check (Media: Paper Extended)

How to Perform a Quality Assurance (QA) Visit v1.8

Before You Begin

Things to be aware of:
- Used every time.
- Place.
- Only use when:
  - Polished.
  - Right.
  - Fixed.

Project:
- Be sure you:
  - Capture.
  - Inspect.

Recommendations for Taking Photographs on the QA Visit

Use these recommendations to make the best of your photography at the site:

What a “4” Looks Like

Array Examples

High-Quality Work

Low-Quality Work

This example was rated a “4” because the array is level and square with cleanly cut rails.

This example was rated a “2” because the array was installed too close to vent.
Aircraft Emergency Checklists (Media: Paper and/or Digital)

Large, modern jetliner

Small, light aircraft
Social Media Channel Management Best Practices for Engagement (Media: Paper/Digital Extended)

Summary of Best Practices for Social Media

Engagement
- When creating content, focus on:
  - Audience
  - Audience (Inspiration)
  - Brainstorm every component
- Make your passion area, talk to interesting people

Use of Imagery
- LinkedIn
  - Networking
  - Represent
  - Visuals
- Twitter
  - Management
  - Identify your audience and respond to their needs.
  - Be prepared to respond quickly.
  - Keep the length of Tweets to 71-100 characters, 118 when including a link.
  - Optimize Tweets for use on mobile devices. Keep content to a minimum and only include the necessities.
  - Think of Tweets as attention-grabbing headlines – quick and clear so users can get to the point right away. Think big and then shrink it down.
  - Be personal and conversational.

Strength – All Tweets are public and can spread rapidly.
Weakness – Given rapid nature of exchanges on Twitter, Channel Managers must be ready to assess and respond very quickly.
Differential Diagnosis, Work-up Prior to Visit w/ Medical Officer (Media: Paper Extended)

<table>
<thead>
<tr>
<th>CHIEF COMPLAINT</th>
<th>CONDITION</th>
<th>HS3 Post 'A' School</th>
<th>HS2</th>
<th>IDHS 'C' School</th>
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</thead>
<tbody>
<tr>
<td>DERM</td>
<td>EENT</td>
<td>CV</td>
<td>RESP</td>
<td>GI</td>
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</tbody>
</table>

### CHIEF COMPLAINT: RED EYE OR PAIN (continued)

<table>
<thead>
<tr>
<th>CONDITION &amp; DEFINITION</th>
<th>KEY FEATURES</th>
<th>DIFFERENTIATING SIGNS &amp; SYMPTOMS</th>
<th>DIFFERENTIATING OBJECTIVE FINDINGS</th>
<th>COMMON DIAGNOSTIC TEST</th>
<th>TREATMENT</th>
<th>FOLLOW-UP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conjunctivitis, Allergic Inflammation of the conjunctiva.</td>
<td>• History of allergies, redness, itch, watery eyes</td>
<td>• Complete eye exam</td>
<td>• Usually none indicated</td>
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<td>• History of conjunctivitis</td>
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Pharma/Bio-tech, Safety Communications Team – Decision Making Tool (Media: Digital)

Safety Communications Recommendations
Decision Support Tool

When preparing to respond to a new, actionable safety issue, use this tool to help you decide which safety communications procedures to follow.

A new, actionable safety issue is any safety event that has all of the following characteristics:

- The event is directly linked to a specific product or treatment combination.
- The safety signal for the event is new, i.e., an identical signal does not already exist.
- One or both of these conditions are true:
  - The event has significant impact on the way the drug is prescribed or provided.
  - The event has significant impact on benefit and/or risk of product.
World Health Organization (WHO) Surgical Safety Checklist (Media: Paper and/or Digital)

See also Atul Gawande’s TED Talk “How we heal medicine” and book *Checklist Manifesto*
Steps for Creating

1. Clarify desired output
2. Align with managers
3. Choose format, medium
4. Draft
5. Test
6. Revise
7. Manage
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Uncover:
- Ideal outcome
- Problem to be solved
- Environmental influences
- Accomplished performers
- Ideal way to perform the task
- Common errors, misjudgments
- Special circumstances
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If possible:
- Obtain buy-in from, alignment with managers
- Confirm expectations are clear, workers are receiving feedback
- Confirm tools are working

Consider:
- How will the job-aid be introduced?
- Who will enforce, reinforce its use?
Performance Analysis Flowchart

Useful for analyzing performance, identifying non-training solutions (i.e., often faster, less expensive), and aligning with managers and other stakeholders.

This is available on our resources page
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Formats:
- Step
- Checklist
- Worksheet
- Decision table
- Flowchart

Media:
- Poster
- Paper extended (“quick start” guide)
- App / Digital
- Audio
- Video
JobAider App

Try JobAider for free!

Download from Google Play
ppg.fyi/6
-or-
iTunes App Store
ppg.fyi/5
The Value of Performance Support Apps

- Smoother business operations
- Employee empowerment
- Faster change implementation
- Better process control
- Knowledge management
- Risk reduction
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- Focus on the *how*. What does it do for the user?
- Be clear, direct
- Use simple language
- Lead with action verbs
- Present information in small bits.
- As needed:
  - Provide examples
  - Use graphics, drawings, photos
Use:
- “Real world” end users
- Representatives of worker population

Ask:
- Where did you have difficulty?
- Is it complete, accurate?
- Missing any special circumstances?
- Would you (your colleagues) like a copy?

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• Test, revise, test, revise
• This (with previous step) is what transforms *mediocre* into *good* and *good* into *damn good!*
• Use a revision system
• Obtain sign-offs from key stakeholders
Consider:

- People
- Work environment
- Job-aid
- Revisions
- QR Code

Revision questions:

- Who initiates?
- Who implements?
- Who keeps track, administers?

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Get a Copy of this Presentation
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Primary Sources

- Elliott, P., Job Aids, in Stolovitch and Keeps (1999) *Handbook of Human Performance Technology*
- Harless, J. (1980) *Job Aids Workshop*
- Rossett, A. (2007) *Job Aids and Performance Support*
If you’d like to continue the conversation, contact one of us. We’d be delighted to explore the content of this presentation w/ you in greater detail.

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