HPI MODEL:
Improving Skills for Administrative Assistants

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HPI OVERVIEW

The HPI (Human Performance Improvement) model helps project managers, as well as trainers, focus on improving performance in the workplace in a way that produces measurable results. It is a systematic process of measuring a performance gap, identifying the cause, developing the most efficient yet effective “fix,” and evaluating results … all the while tying it in to the business needs of the company. The model is deceptively simple but if followed, guarantees that at the end of a project or program, you will be able to quantitatively point to success or the need to re-evaluate and go through the process again.

HPI Model Components: The HPI model has five components that form a circle of continuous improvement. They are:

1. Business analysis
2. Performance analysis
3. Cause analysis
4. Intervention
5. Evaluation

In approaching a project, you may not always start with #1 and move forward, but no matter where you start you will want to go through all five components, completing the circle. See figure 1.

Business Analysis: During this stage the business goal and project goal should be clearly defined in measurable terms. To identify the goals you should ask:

- What is the ultimate business goal or bottom line? Most businesses have mission and vision statements. The business goal can often be derived from those.
- What is the project goal? This goal is more specific, stating what measurable, performance levels are expected at the end of the project.
- Are the business and project goals in sync? How will project results contribute to the business goal?

It is critical that everyone involved in a project understand the business reason for the project and stay focused on project goals that contribute to it.

Note: “Training” is never a project goal. It may be an appropriate intervention but only if the results of training support the business goal.

Performance Analysis: At this stage you will quantitatively define the level of performance necessary to reach your project goal and the ultimate business goal. To begin you should ask questions such as:

- What performance level will enable us to reach the desired goals?
- Who specifically is not performing at that level?
- Who is an exemplary performer? Why?

In answering these questions, keep the focus on performance and “outputs”. (Outputs are the results of actions or performance). It is important not to blame or point fingers. This phase is all about determining the gap between what the performance level and outputs currently are and what they should be in order to reach the goals.
Cause Analysis: Now that you have defined your performance goals and determined the gap, you are going to identify why the gap exists. Your analysis should include inquiries such as:

- Are performers provided clear and frequent feedback on performance?
- Is there a lack of knowledge hindering performance?
- Do performers have the necessary tools to meet the performance goal?
- Are performers capable of meeting the performance goal?
- Is proper motivation in place?

Answering questions like these will help you determine why the gap exists. The cause or causes of the gap will determine the intervention. Skip this step and you may apply the wrong “fix” to the problem, wasting time and money.

Intervention: In this stage you will select the intervention(s) that will address the cause(s) of the performance gap. Interventions may include better communication, change management, process consulting, networking, or training.

Note: Training should be used as an intervention if, and only if, the reason for the performance gap is lack of knowledge. If there are other reasons standing in the way of achieving the business goal, training will be a waste of company assets. Often training may be part of the solution but the total intervention will include methods to specifically address the other causes.

Evaluation: Because every project faces limited resources and time, it is safe to assume that no planned intervention will resolve 100% of the gap. Therefore, it is necessary to include a plan for multiple evaluations. Phased evaluations will allow you to make changes along the way, assess effectiveness at the end of the intervention and determine if additional interventions are needed in the future. A plan for evaluation is a plan for continuous improvement.

Three are three, main types of evaluation:

**Summative**: This is typically done throughout the planning and implementation process. A pilot group is one method of summative evaluation. You test the intervention on a small group, then measure the results. Summative evaluation allows for fine tuning along the way. It allows developers and project managers the freedom to move quickly and possibly make mistakes because those mistakes are systemically identified and corrected.

**Formative**: This type of evaluation is typically done at the end of a project. It answers the question, “Did we close the gap?” A measurable gap makes formative evaluation easier, allowing a committee to say quantitatively if a gap was closed completely or partially. Measurable results naturally lead to continuous improvement.

**Confirmative**: This method of evaluation answers the question, “Did they really get it? Is the gap still closed?” Confirmative evaluation is typically done three to twelve months after the initial intervention. Data from this evaluation frequently becomes part of the cause analysis of a new circle of continuous improvement.
HPI: IMPROVING SKILLS OF ADMINISTRATIVE ASSISTANTS

JWT Detroit is the Midwest arm of a large brand communication agency, with corporate headquarters in New York. JWT is the largest agency in the United States and works with clients like Ford, White Castle, Dominos, Kraft, Unilever, DeBeers and more. There was a perception in Detroit that administrative assistants’ (AA) software skills were not as strong as they should be. The immediate thought was, “They need testing and training” but the statement brought many questions to mind. What actual skills did they need? Was training the answer? If it was, what was the best approach? Did the AAs all need the same skill set or were there different skill sets for the different levels of AAs? If the various AAs needed to be tested and/or trained on different skill sets, what was the best approach for a small training department who was also handling other training demands?

Business Analysis: Communication between the Human Resources (HR) Director, HR Specialists, Training Manager and various functional managers resulted in general agreement that the project should focus on the end results. The group took a step backwards to identify the business goal. This was necessary to ensure that the project goal was in sync with the business goal.

- The business goal was to have all administrative assistants up to the necessary software skill levels needed to efficiently and effectively support their groups.
- The project goal was to have the AAs pass the necessary software skills tests with scores of 80% or better.
- The project goal was in line with the business goal which supported the mission and vision of the agency.

Performance Analysis: HR Specialist, Melanie Lard-Jones, was given the task of determining what the skill set should be for each AA. To this end, she met with the training manager who provided a list of software applications that might be in the AA’s necessary skill set. For each application, the training manager listed specific skills that might be considered beginning, intermediate or advanced. For example, Word beginning skills included saving a new document, previewing a document, printing a document, inserting text, and moving and copying text.

Next, the HR specialist divided the AAs into functional levels and with the training manager went through the list and created a first draft of what specific skills were needed for each functional level. Then, the training manager met with several of the high performing AAs who recommended raising the standards in several areas. The HR specialist then met with most of the AAs’ managers who finalized the skills requirements list.

A gap was not specifically identified. There was no formal pre-testing because of time and resource constraints. However, the desired performance levels were minutely defined, allowing for measurable results at the end of the project.

Cause Analysis: The HR Director, HR Specialists, and Training Manager were able to determine the causes of the deficiencies, based on: manager observations; input from the trainers who were able to offer general feedback based on their interactions with the AAs; feedback from the meeting with the high achievers, and employee evaluations. The causes identified were:

1. Inadequate resources
2. Lack of motivation to acquire new skills,
3. Lack of knowledge,
4. Level of software aptitude.
Intervention: The intervention took all four causes into account. A self directed approach was taken, giving the AAs the tools necessary to test successfully at the skill level identified for their functional level. Here was the approach.

1. Inadequate resources had to be addressed first. The Help Desk checked software versions, making sure the AAs all had the appropriate software versions on their PCs. In some cases, older software had to be updated. This put everyone on a level playing field.

2. Lack of motivation was addressed. In a meeting, and then in writing, each AA learned what skill set was identified for their functional level. They were given a deadline and told they had to test successfully at these skill levels no later than the specified date. The testing was identified as mandatory. AAs were told that time on the job would be allocated to testing and training, if necessary.

3. Lack of knowledge was addressed with self directed training. JWT purchased individual ElementK©, training licenses for each AA. Each was able to decide if s/he wanted to go through the self paced classes or not.
   a. The AAs could go through the practice tests as often as they wanted. But to receive credit for passing, the test had to be taken in the Training Room at specified times.
   b. AAs could take these official tests up to three times. A passing score was 80% or better. There were time limits on these tests.
   c. In the real work environment, AAs could access an application’s “help” function or their own notes when working on a project. Therefore, when testing, AAs were seated at a table with two PCs. One had the test. The other had the appropriate software available. AAs could bring in notes. Tests were timed, “open book” tests to simulate real world assignments.
   d. AAs also had access to training modules for each software skill. In many cases, an AA would take a pre-test ... find out what they needed to work on ... go through the appropriate training ... practice the test ... then come into the Training Room to take the “official” test.

4. Limits of software aptitude. If it was determined that an individual could not pass the necessary tests, then transfers or terminations would result.

Evaluation: Summative evaluation was ongoing, resulting in several minor, adjustments to the program, such as allowing for more time in the Training Room which offered a quiet, controlled environment for learning. More resources were added to the program, with an HR Specialist spending time in the Training Room, assisting the training staff. Formative evaluation was conducted at the end of the program to measure success.

Plan for continuous improvement: There is a plan for confirmative evaluation in the fall. Its purpose will be to determine the extent of testing or retesting needed for current AAs or ones who have been hired since the last testing session. A plan will also be formulated to define how testing will be offered if any new versions of the applications are rolled out.
RESULTS

The following are the results at the end of the testing period:

<table>
<thead>
<tr>
<th>Requirement</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Completed ALL Required Tests</td>
<td>63</td>
</tr>
<tr>
<td>Completed Over 50% of Required Tests</td>
<td>81</td>
</tr>
</tbody>
</table>

A formative evaluation will be conducted this June to determine if the business needs defined in the original analysis were met. The following issues will be addressed:

- Employees were told that these tests were mandatory. Why didn’t everyone complete the required tests?
- Should the company revisit testing, contacting those who did not complete testing?
- New AAs have been hired since testing ended. Should these new people be required to take mandatory tests?

A confirmative evaluation is planned for September to determine if the business needs defined in the original program are still being met. The following issues will be addressed:

- Are the original business needs still valid or do they need to be redefined?
- What is the current perception of software skills for AAs?
- Are the managers satisfied? Do they feel better able to assign necessary tasks to their AAs?
- Are AA software skills better utilized?
- Are skill requirements for different levels of AAs still accurate or do they need to be fine tuned?
CONCLUSION

This project made significant headway towards the project goal of having AAs certified at specific skill levels. Results were measurable, leaving the project team with solid information to take into further evaluation and ultimately into a new plan. The project had the added benefit of helping HR quantitatively identify the high achievers. Several of the AAs passed their tests on the first, official try, but took advantage of the “three allowed” tries in order to bring test scores up to 100%. Several also took more tests than required in order to prove they knew more than just the required skills.

This plan to evaluate the project’s effectiveness in terms of business impact places JWT in good company. The ASTD State of the Industry report (Sugrue & Kim. 2004. p 5.), states,

“In our largest and broadest sample of organizations (BMS-Benchmarking Service), only 8 percent report that they are evaluating effectiveness in terms of business impact.”

As a brand communication agency, JWT believes that the consumer does not have time for advertising. JWT is revolutionizing the way it interacts with consumers, recognizing that time is the new currency and that we need to stop interrupting what people are interested in and be what people are interested in. This new way of thinking is making its way through all parts of the agency. The HR department specifically, understands that its “customers” - the employees - do not have time for training and therefore has restructured how it approaches performance improvement projects. When business needs dictate improved or changed performance, the HPI model allows for an efficient, effective way to meet those business needs.
If you want to learn more, here are some good sources:


b. **ASTD/ISPI CPT Program**. (Certified Performance Technologist) The American Society for Training & Development, along with the International Society for Performance Improvement offers a performance improvement, certification program that is *performance based*. The requirements are very stringent. Once certified, individuals must be recertified every three years. [http://www.astd.org/astd/education/cpt_certification](http://www.astd.org/astd/education/cpt_certification)

