

# How to Recognize and Create Damn Good Job-Aids

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**PEREGRINE**

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PERFORMANCE GROUP

WE ENABLE SUCCESS

## Game Plan

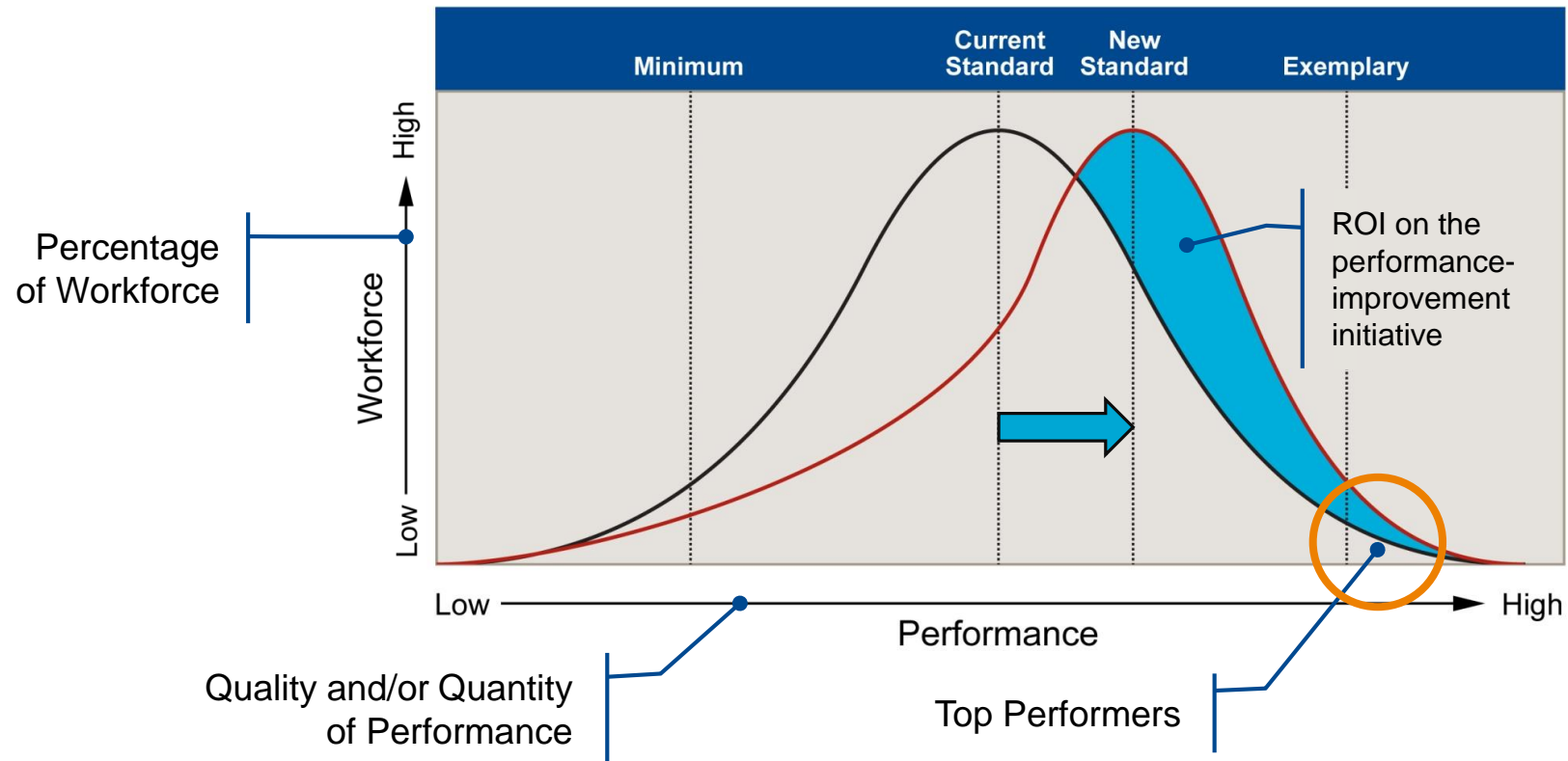
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- Who are we? Why are we here?
- What is a damn good job-aid?
- Advantages?
- “Good” vs. “bad” job-aids?
- How to create an exemplary one?
- How to take some of this with you?

*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



# We Are: Helping US and Global Organizations



Food, Bev,  
Hospitality

abbvie



Genentech



Biotech,  
Pharma



Hi-tech



Technologies



Financial



Other

Fortune 500

## Game Plan

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- What is a damn good job-aid?
- Advantages?
- “Good” vs. “bad” job-aids?
- How to create an exemplary one?
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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”

Instruction happens  
BEFORE the need arises.  
Job-aids are used AS the  
need arises.

## 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)

## Advantages of Job-Aids

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- 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



56 hours

- OR -

One day, a job  
aid, and better  
performance

## 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

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

Joe Harless, job aids workshop

\$50,000  
expense

- OR -

\$5,000 expense  
and two-page  
job aid

Five “expert”  
technicians  
(\$10,000)

- OR -

Five “non-expert”  
technicians with job  
aids (\$2,500), who  
can accomplish the  
same results

## 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

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- 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

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- 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 Remember: Recommendations for Taking Photographs on the QA Visit

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

- Place

Only use

- Po

- Fr

#### Project

Be sure y

- Cu

- Ins

### What a "4" Looks Like

#### Array Examples

#### High-Quality Work



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

#### Low-Quality Work



This example was rated a "2" because the array was installed too close to vent.

# Aircraft Emergency Checklists (Media: Paper and/or Digital)

**[ ] DOOR FWD CARGO**

**Condition:** The forward lower cargo door is not closed and secure.

**Object**

1 LDG  
2 Cho  
A  
A

**Engine Failure During Flight**

- Airspeed 68 KIAS
- Fly the airplane!**
- Fuel shutoff valve On (In)
- Fuel selector Both
- Auxiliary fuel pump On
- Mixture Rich
- Ignition switch Both

**END**

Large, modern jetliner

Small, light aircraft

# Social Media Channel Management Best Practices for Engagement (Media: Paper/Digital Extended)

## Summary of Best Practices for Redacted Social Media

### Engagement

- When cr foundati
- Audi lead
- Audi (Insp
- Redact bran even comp
- Make yo passiona area. Ta to intere

### Use of Imagery

- Sub ong
- Cor pho sha ele bro field
- Col with to c pho ligh
- Cropping – C effects. Choos

### LinkedIn

LinkedIn

### Management

- K
- S
- P
- L
- U
- F
- It

### Twitter

Twitter is used for brief messages. Traffic on Twitter typically consists of information about news, celebrities and trends.

### 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.

### LinkedIn



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)

EYES, EARS, NOSE, AND THROAT						
CHIEF COMPLAINT	CONDITION	HS3 Post 'A' School	HS2	IDHS 'C' School		
DERM	EENT	CV	RESP	GI	GU	
<b>CHIEF COMPLAINT: RED EYE OR PAIN (continued)</b>						
CONDITION & DEFINITION	KEY FEATURES	DIFFERENTIATING SIGNS & SYMPTOMS	DIFFERENTIATING OBJECTIVE FINDINGS	COMMON DIAGNOSTIC TEST	TREATMENT	FOLLOW-UP
<b>Conjunctivitis, Allergic</b> Inflammation of the conjunctiva.	<ul style="list-style-type: none"> <li>Erythema of the eyelid</li> <li>Bilateral Itchy, watery, burning sensation</li> </ul>	<ul style="list-style-type: none"> <li>History of allergies, Rhinorrhea, itchy, watery eyes</li> <li>Seasonal environmental conditions present</li> </ul>	<ul style="list-style-type: none"> <li>Complete eye exam</li> <li>Different Palpebral conjunctiva with cobblestone-like swelling</li> </ul>	Usually none indicated	<b>Topical ophthalmic:</b> liquid tears <b>Oral Antihistamine:</b> Diphenhydramine (Benadryl), loratadine (Claritin), or Fexofenadine (Allegra) <ul style="list-style-type: none"> <li>Treat underlying allergic symptoms</li> <li>No contact lens use until resolved</li> </ul>	F/U if not resolved in 14 days
<del> <b>Conjunctivitis, Infectious</b>                              Contagious viral or bacterial infection of the conjunctiva.                               "Pink eye" refers to bacterial infection.                         </del>	<del>                             • Erythema of the eyelid                              • Itchy, watery, burning sensation                         </del>	<del>                             • Bacterial - may have history of inoculation or family member with "pink eye," purulent discharge with morning crusting of lid margin                               • Viral - may have associated viral symptoms with watery discharge                         </del>	<del>                             • Complete eye exam                              • Injected conjunctiva and margin edema                              • Bacterial - crusted discharge may or may not be present                              • Viral - may have preauricular adenopathy                         </del>	<del>Usually none indicated</del>	<del> <b>Topical ophthalmic:</b>                              • Bacterial infection - Gentamicin OR erythromycin solution/ointment                              • Viral infection - liquid tears                              • Good hygiene                              • No contact lens use until resolved                         </del>	<del>F/U if not resolved in 7 days</del>

# Pharma/Bio-tech, Safety Communications Team – Decision Making Tool (Media: Digital)

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11 | April | 2018

## Safety Communications Recommendations Decision Support Tool [START >](#)

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 [redacted] 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.*

v.14\_03\_18

# 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*

The image displays a stack of digital WHO Surgical Safety Checklist cards. The top card is titled "Before Patient Leaves Operating Room" and includes a "Sign Out" section with the following items:

- Sign Out**
- Nurse verbally confirms with the team:**
  - The name of the procedure recorded
  - That instruments, sponge and needle counts are correct (or not applicable)
  - How the specimen is labelled (including patient's name)
  - Whether there are any equipment problems to be addressed

Other visible cards in the stack include "Before Induction of Anesthesia", "Before Skin Incision", and "Sign In". The WHO logo is visible in the top right corner of the top card.

## Steps for Creating

---

1. Clarify desired output



2. Align with managers



3. Choose format, medium



4. Draft



5. Test



6. Revise



7. Manage





## 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?

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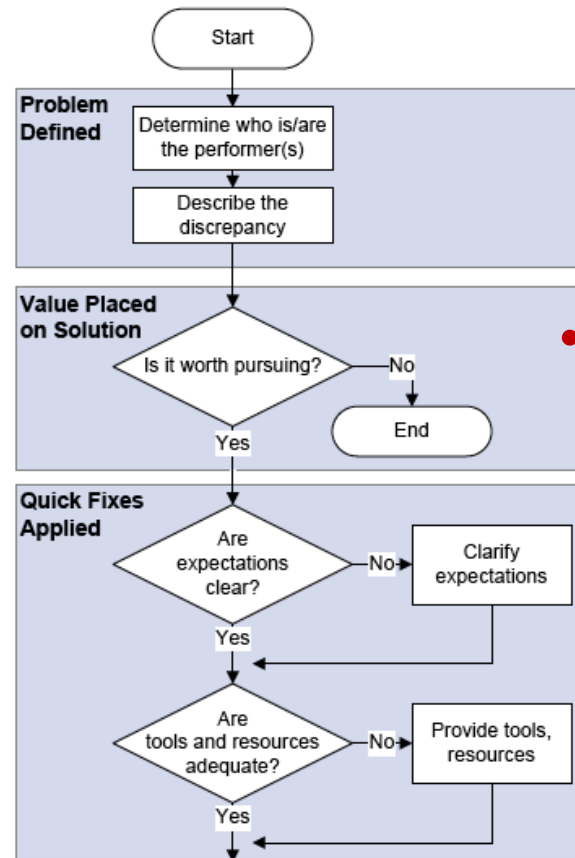


7. Manage



# 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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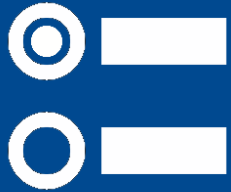
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### Formats:

- Step
- Checklist
- Worksheet
- Decision table
- Flowchart

### Media:

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

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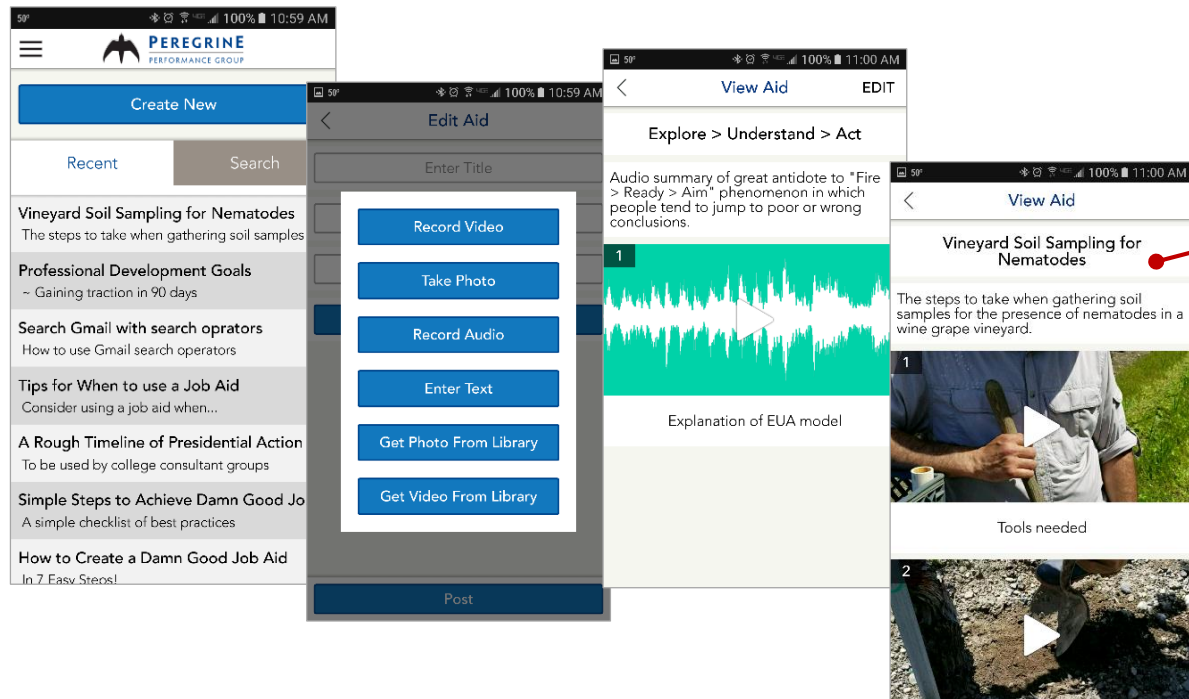
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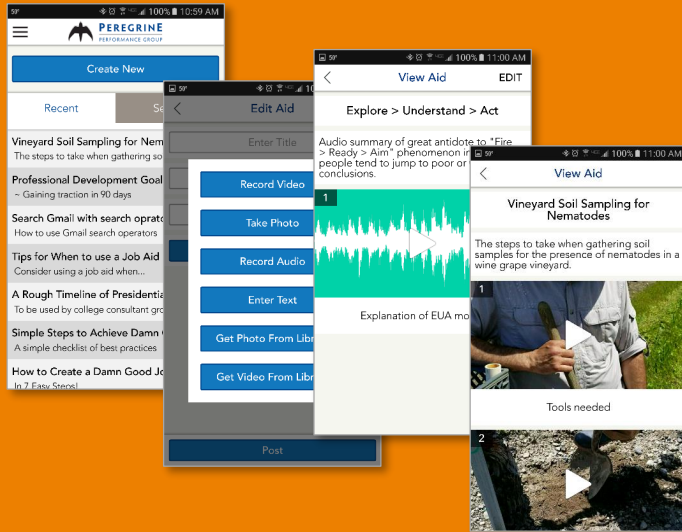
# JobAider App



Download from  
Google Play  
[ppg.fyi/6](http://ppg.fyi/6)  
—or—  
iTunes App Store  
[ppg.fyi/5](http://ppg.fyi/5)

Try JobAider for free!

## The Value of Performance Support Apps



- Smoother business operations
- Employee empowerment
- Faster change implementation
- Better process control
- Knowledge management
- Risk reduction



- 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

## Steps for Creating

---

1. Clarify desired output
2. Align with managers
3. Choose format, medium
4. **Draft**
5. Test
6. Revise
7. Manage





### 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?

## Steps for Creating

---

1. Clarify desired output



2. Align with managers



3. Choose format, medium



4. Draft



5. Test



6. Revise



7. Manage





- 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

## Steps for Creating

---

1. Clarify desired output
2. Align with managers
3. Choose format, medium
4. Draft
5. Test
6. Revise
7. Manage





### Consider:

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

### Revision questions:

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

## Steps for Creating

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6. Revise
7. **Manage**



## Get a Copy of this Presentation

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- QR Code

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## Steps for Creating

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3. Choose format, medium
4. Draft
5. Test
6. Revise
7. **Manage**



## Steps for Creating

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4. Draft



5. Test



6. Revise



7. Manage



## Primary Sources

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- Elliott, P., Job Aids, in Stolovitch and Keeps (1999) *Handbook of Human Performance Technology*
- Gawande, A. (2010) *Checklist Manifesto*
- Harless, J. (1980) *Job Aids Workshop*
- Rossett, A. (1991) *Handbook of Job Aids*
- 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.

## Contact Info

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JobAider  
inquires

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