







Carl Binder International Precision Teaching Conference 2005 Pittsburgh, PA

### My Background

- Graduate study with B.F. Skinner at Harvard
- Associate Director of Bea Barrett's Classroom & Lab (1973-1982)
- Consulting to Global 2000 and Fast Growth Companies (1978 - present)

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## We Teach Our Methodologies

- Six Boxes™ Performance Management
- The FluencyBuilding™ Technology
- Sales Knowledge Management
- Measurement Counts!

http://www.Binder-Riha.com http://www.SixBoxes.com http://www.Fluency.org

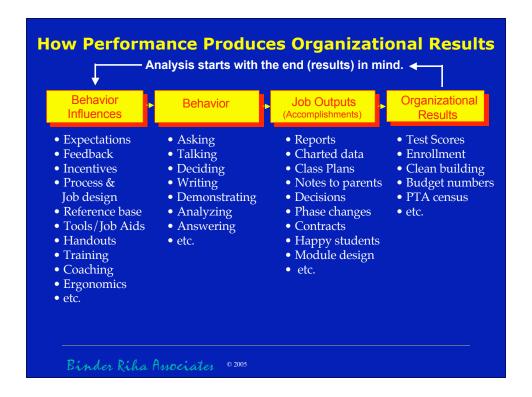
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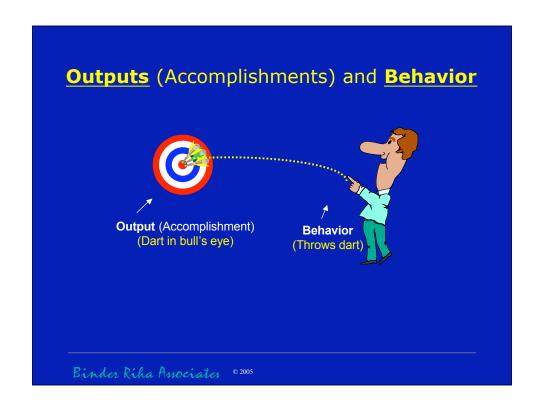
### Who Uses the Six Boxes?

- **Executives:** alignment, communication, planning, and execution
- Middle Managers: performance planning & management, best practices, continuous improvement
- Front Line Managers, Supervisors & Team Leaders: performance management & problem-solving
- Human Resources & Performance Improvement Professionals: needs or opportunity analysis, performance design, training support, program planning, and more...
- Individuals: "performance thinking" for continuous improvement, career planning and personal/family development

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The success of any organization depends on the behavior of it's people.





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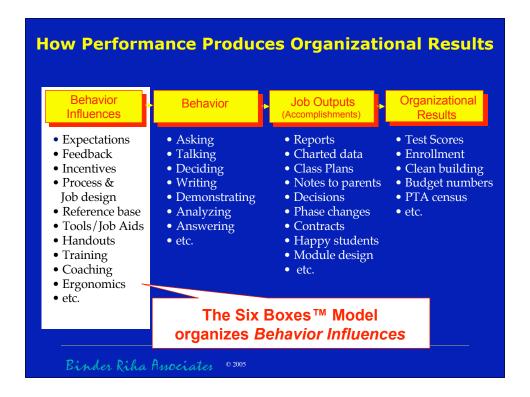
### Is it an **Output** (O) or a **Behavior** (B) ?

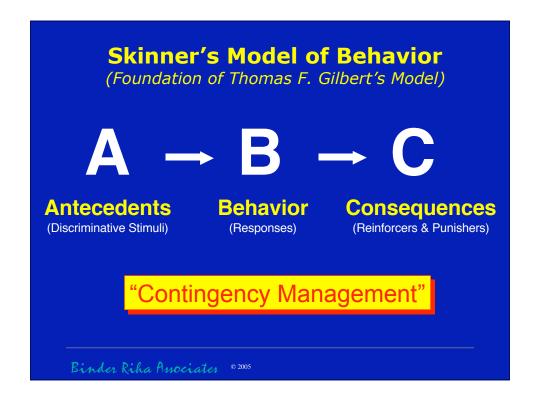
- 1. corrected student essay 0
- 2. prompt appropriate conduct B
- 3. completed teacher feedback form 0
- 4. speak with parent about grades B
- 5. give correction for student mistake B
- 6. student portfolio ready for open house 0
- 7. summer reading list for students 0
- 8. Newly hired teacher ready for school 0

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### **Optimizing Investments in Performance**

We need a **comprehensive** framework for how to invest in (influence) behavior to optimize Return on Investment (ROI).





Thoma	as F. Gilbert (A)	's Behavior   - <i>(B)</i>	Engineering l - <i>(C)</i>	Model
	(S <sup>p</sup> ) Information	(R) Response	(S <sup>R</sup> ) Motivation	
E N V I R O N M E N	Data	Instruments	Incentives	
T P E R S O N	Knowledge	Capacity	Motives	
		996). <i>Human Con</i> Washington, DC		eering

	Easier to Un	derstand and	Communicate
1	Expectations & Feedback (1)	Tools & Resources (2)	Consequences & Incentives (3)
	Skills & Knowledge (4)	Selection & Assignment (5) (Capacity)	Motives & Preferences (6) (Attitude)

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**Definition:** *Information* about what to do and produce, how to do it, and how one is performing compared with *objective* standards of quality and productivity.

#### Guidelines:

- Check for consistency among expectations.
- Align expectations with consequences.
- ASK if people know what to do!

#### Examples:

- job descriptions, performance objectives
- performance feedback reports, graphs, & sessions
- feedback and measures built into the environment
- informal coaching and "culture"

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- **Definition:** The environmental and human resources needed to do a job.
- **Guideline:** Easy-to-use tools and accessible resources are among the most cost-efficient performance interventions. (Find out what the *best* performers use to do their jobs.)

#### **Examples:**

- well-maintained tools selected carefully for the job
- job design and workflow
- accessible experts and reference resources
- user-friendly hardware and software
- supportive physical space and ergonomics
- sufficient time to do the job

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- **Definition:** Formal and informal, tangible or intangible results of behavior that increase or decrease its likelihood of occurrence.
- Guidelines:
  - Objective, Positive, Certain, Timely, Frequent are best.
  - Arrange consequences for specific behaviors.
  - Negative consequences produce escape, avoidance, and mere compliance.
  - Reliable positive consequences produce discretionary effort.
  - Social consequences are free.
  - Align consequences with expectations.
  - Strive for at least a 4:1 ratio of positive to negative.
  - Look for negative consequences unintentionally part of processes.

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#### **Examples:**

- praise for specific behaviors
- performance-based pay
- informal "cultural" discouragement
- monetary and tangible incentives
- cooperative games and competitions (reward preparation)
- failures or delays in downstream process stages (punishes behavior)

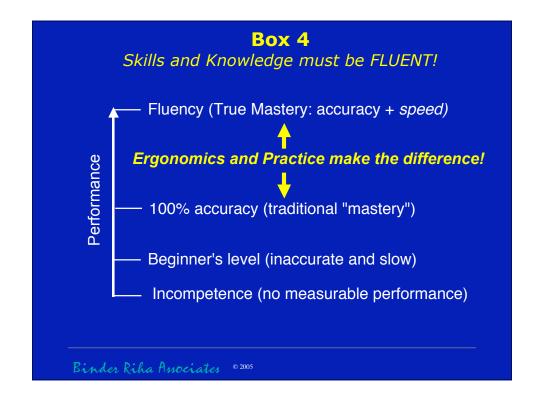
#### Non-examples:

- bonuses not tied to specific behavior
- non-contingent prizes and awards
- non-specific celebrations

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- **Definition:** Specific capabilities or expertise that the individual must use to perform a job.
- Guidelines:
  - Never assume that training is the solution.
  - Training without a foundation in the "first three boxes" will probably not work or be cost-effective.
  - Effective reference tools and job aids are often faster and cheaper than training.
- **Examples** (of how to produce S/K):
  - coaching programs for continuous learning
  - job aids, information sheets
  - classroom and self-study programs, e-learning
  - case study application exercises



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# Check assumptions about Skills & Knowledge

- Do we sometimes assume that skills and knowledge are the problem?
- How other than with training can we provide skills and knowledge?
- How often do does training fail to produce *fluency*? What is the result?

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# Questions for identifying needed skills, knowledge, and reference resources

- What must performers DO to produce outputs?
- What must they KNOW fluently?
- What must they be able to LOOK UP fluently?

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**Definition:** having the "right people" for specific jobs, based on the prerequisite characteristics and capabilities that they bring to the job, rather than on those we can cost-effectively develop.

#### Guidelines:

- Initial selection and assignment is generally done fairly well because it is an "event" for which organizations plan.
- Matching people to jobs after a job re-design or strategy change is often poorly executed.

#### **Examples:**

- personality, social skills, intelligence, enthusiasm
- background, entering skills, experience

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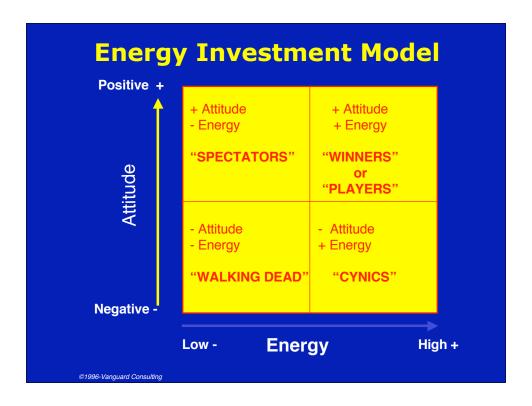
- **Definition**: What types of incentives, work, and other job factors people prefer, and their general "attitude" about work.
- Guidelines:
  - Check to see if the person is inherently interested in the work.
  - Identify rewards and incentives that motivate the individual and that are available.
  - Poor or good design in the other "boxes" can often affect this category more than trying to address it directly.

#### **Examples**:

- Overall career and personal goals/options
- What "turns on" the person professionally

**IF** you handle boxes 1-5 **THEN** box 6 takes care of itself. **IF NOT**, there's little you can do directly to fix "bad attitude."

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### Exercise: Can you describe the Six Boxes?

- 1. Use a blank piece of paper or the back of a handout.
- 2. Turn to your neighbor and introduce yourself if you have not already done so.
- 3. One person is speaker, the other person listens.
- **4. Speaker**: please draw the Six Boxes frame and fill in the numbers and names of each box as you say them to the listener, 1-6. **Listener**: ask questions as needed.
- 5. Talk a little about what's in each box.
- 6. Look at the handouts only if you cannot recall.
- 7. After 3 minutes, exchange roles.

This is a good way to practice so you can easily communicate with others about The Six Boxes on the spur of the moment.

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# **Implementation Planning** *Question*

What factors in each Box are needed to ensure behavior for successful implementation of new:

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- Programs

- Systems, or

- Strategies?

Expectations &	Tools &	Consequences &
Feedback	Resources	Incentives
(1)	(2)	(3)
Skills	Selection	Motives
&	&	&
Knowledge	Assignment ("Capacity")	Preferences ("Attitude")
(4)	(5)	(6)

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### **Implementation / Execution**

What can go wrong?

- Teams are not in alignment -- people don't share goals and specific performance expectations.
- Tools are poorly matched to performance, or difficult to use.
- Rewards and recognition conflict with goals, reinforce the wrong effort.
- People lack needed skills or knowledge, or easy access to needed information.
- Poor match between those selected for the team and the characteristics required.
- All of the above resulting in "bad attitude" and low energy.

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Treat program, system, or strategy implementation in the same way as you would treat any other performance.

Six Boxes Performance Planning

Accomplishments (Job Outputs / Milestones)	Behavior (Tasks / Tactics)	Behavior Influences (+ and −) (Use Six Boxes™ Model)
Start here		

Expectations and Feedback	Tools and Resources	Consequences and Incentives
• Descriptions and measures of expected work outputs	Tools, resources, time, materials, and physical environment designed to support optimal work output and comfort	Sufficient financial incentives contingent upon performance: a comp. plan that work.
Clear and relevant information/expectations on how to do the job  Relevant, timely, frequent, positive concrete feedback about how one is performing against expectations	Access to managers, leaders, coaches, experts      Sufficient personnel to support efficient workgroup performance	Non-monetary incentives for success  Informal positive social consequences for doing the right thing-from mgrs and peers  Career development opportunities
Constructive suggestions for improvement and corrective feedback	Optimal work processes and job designs     Reference tools and resources that are easy to use and built for the job	Clear consequences for poor performance     Consequences match expectations and feedback
Skills and Knowledge	Selection and Assignment (Capacity)	Motives and Preferences (Attitude)
Opportunity to learn in the most efficient and effective means, in classrooms, self-study, with peers, with managers/coaches	A good match between the capacity and characteristics of people and jobs	Incentives and compensation that people ar motivated to work for - they want what is available
Training designed to support performance of exemplary performers  Ways to achieve fluency in using job tools  Ways to achieve fluency in critical knowledge elements	Effective selection processes and tools     Scheduling and deployment of people to support their peak capacity     Social and problem-solving abilities appropriate for the job	Assignments and job functions that sufficiently fit individuals' preferences     Positive, enthusiastic attitude about job and Company     Good relations with co-workers and environment that supports positive social
Effective skills training and skill support/modeling from managers	Other personal characteristics needed for job	feelings

Six Boxes	s™ - Obstructions / Negative Behavior Infl	uences
Expectations and Feedback	Tools and Resources	Consequences and Incentives
Poor contradictory or absent descriptions and measures of expected work outputs	Not enough people, money, time, supplies, equipment, or other resources	Too little compensation  No recognition for exemplary performance Informal negative social consequences for
<ul> <li>Fuzzy, absent, or conflicting information/ expectations on how to do the job</li> </ul>	Managers are bean-counters, not coaches	doing the right thing - from mgrs or peers
Poor job descriptions	Inefficient poorly designed jobs & work flow	Informal positive social consequences or easexcuses for doing the wrong thing
Vague, infrequent, negative, unconstructive, delayed feedback about how on e is	Lack of needed support functions/staff     Bad ergonomics or other physical	Unclear or absent career development opportunities or career planning process
performing against expectations	environmental factors	Poor performance rewarded same as good
<ul> <li>Too many different expectations, lack of clear priorities</li> </ul>	Reference tools and resources that are hard to use , irrelevant, information-overloaded, absent, not helpful, etc.	Consequences inconsistent with expectation and feedback
Skills and Knowledge	Selection and Assignment (Capacity)	Motives and Preferences (Attitude)
<ul> <li>Training and other learning methods that are cumbersome, ineffective, not worth the time, don't produce improvement</li> </ul>	People with intrinsically different abilities than the job requires	Incentives and compensation that just isn't worth the work, if there were any other job available
Training as the automatic performance solution without true needs analysis Training not based on characteristics of	Performance scheduling demands that prevent people from being at their peak	Assignments and job functions that conflict with individuals' preferences
exemplary performance  Training on wrong objectives/topics	Inappropriate social behavior	Negative, cynical or defeated attitude about
Learning left to chance     Absence of fluency in u sing job tools	No background that is relevant.	job and Company
Lack of fluency in critical knowledge elements		Chronically problematic relations with co- workers
<ul> <li>Lack of fluent skill training, support or modeling from managers</li> </ul>		Unpleasant working conditions

Accomplishments (Job Outputs / Milestones)	Behavior (Tasks / Tactics)	Behavior Influences (+ and −) (Use Six Boxes™ Model)
Practice sheets selected/designed	Conduct assessments for each child     Select pinpoints for child's program     Decide whether you need to create sheets     Etc.	Assessment materials and manual     Expectations set for quality/quantity     Written procedure and checklist for selecting or designing practice sheets     Practice sheet database/archive     Examples to emulate     PT Advisor/coach     Recognition by PT Advisor for completion     Training sessions     In the beginning, selection of the first three to express interest in pilot
Student folders ready in the morning		
Teacher ready to coach children		
Charts and materials easy to access		
Etc.		

	Six Boxes™ Summary Form	
Behav	vior to produce: Practice sheets selected or des	signed
(1) Expectations and Feedback Principal announces program and sets expectations (specify); requests volunteers for pilot 1:1 meeting with volunteers Training session defines specifics Include quantity and quality expectations Set clear parameters in program manual (to be revised after pilot) Etc.	Program manual     PT coach/advisor     Checklist/guidelines for creating materials     Materials directory/database     Samples to emulate as templates on computer     etc.	(3) Consequences and Incentives  Positive recognition in faculty meetings and posted on board of everyone who completes each step in the implementation  Special recognition for achieving milestones first (specify)  Communication to parents about new program with prompt to encourage faculty members taking first steps  Help teachers select pinpoints most likely to see valuable improvements in students.
<ul> <li>(4) Skills and Knowledge</li> <li>Specific selection and design steps and skills (specify)</li> <li>Computer skills</li> </ul>	(5) Selection and Assignment (Capacity)     Let people volunteer and vie for first 5 "slots" in pilot program (self-selection based on motivation, etc.)	(6) Motives and Preferences (Attitude)     Select initial participants based on their enthusiasm and insights about value of time-based measurement and practice     other?

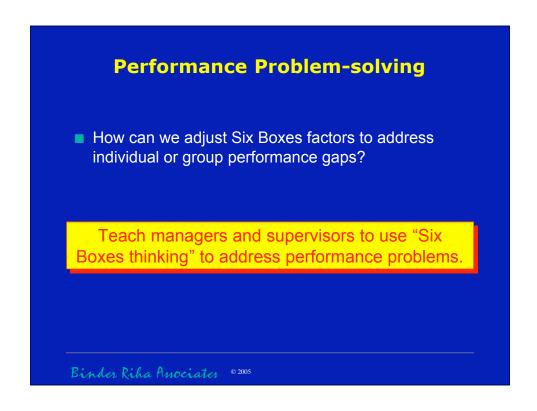
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#### Sample Implementation Planning Brainstorm for Corporate Training Classroom Fluency Development Program 3. Consequences and Incentives Recognition for achieving "personal best" performance every day in classroom Recognition for achieving each fluency aim, signing off on a Master Task List for each exercise. Tangible or monetary or recognition reward for recode who do best in groun on reward for recode where the second of the second o 1. Expectations and Feedback 2. Tools and Resources Job descriptions Explain how program links to business objectives Executives, managers, supervisors willing to speak to trainees and to articulate with some understanding the value and benefits of fluency-based training Coaching tools and guidelines for managers or · Set clear expectations for behavior, level of effort, and performance outcomes during the classroom program and afterward on job Include as many levels of line management and direct supervision in the expectation-setting process, in person if possible. Be sure they can be articulate about the fluency-based approach and why they have chosen to implement/support it. supervisors to assess performance and provide additional practice on the job. reward for people who do best in group on each exercise or game that requires Training team who use Fluency Coaching Best Practices Trainer/facilitator who can credibly demonstrate use fluency. Correction and intervention for trainees who do not actively practice, who fall behind; a balance of problem-solving and motivational intervention. Set expectations for how management and trainers will of the practice materials and who can demonstrate fluent performance that meets stated fluency aims monitor performance during and after training, e.g., monitor exercise data, field-based coaching and feedback motivational intervention. Elimination by management of responsibilities or requirements during training that actually punish or make it difficult to do sufficient practice. Ensuring informal social/cultural recognition and approval of completion and excellence in performance on exercises and simulations, etc. Disapproval of failure to invest energy or time uddies, coaches/mentors to support practice and help with feedback and encouragement tools, etc. Be specific. Present specifics of how people are measured on the job, Coaches, mentors and content experts available on the job for support and ongoing learning the behavior required to produce outcomes, etc. Be as clear as possible drawing the direct line between what trainees Sufficient time for practice and well-designed fluency practice materials Tools and materials that set clear practice goals with instructions that allow trainees to practice on their are learning to do, say, and produce and the business. Trainees should be able to explain this *themselves*. Provide timely, positive, specific, objective, frequent feedback about behavior and results both during training own in their own time if they so wish Consequences for not achieving course performance aims Games and competitions during and a t the end of training in which success depends and on the job following training. Forms and charts for trainees to self-measure/record. Flip chart templates and/or computer templates with LCD to project group practice performance on wall immediately after and daily, to set expectations and on achieving fluency on specific content and skills during training Ways to increase the likelihood of see how group is doing (don't put individual names on public display, but do put all measures so each Training and reference materials and job a ids designed for easy use during training and on the job Training and reference of the idea o customers or peers on the job noticing and rewarding expert or fluent performan On the job tools, systems, environments that support fluent performance 5. Selection and Assignment (Capacity) 4. Skills and Knowledge 6. Motives and Preferences (Attitude) Instruction at beginning and as needed during training so that trainees know how to use exercises, practice materials, · Trainees well-matched to job requirements Trainees interested in achieving very • If trainees cannot keep up in training, suggest other high levels of performance on the job and see the advantages of self-motivated practice (this might only come after the start of the class). and measurement tools. iob options if possible Facilitator skills and knowledge using the exercises, tools. and best practices for Fluency Coaching. · Clear career path that is exciting to Managers/supervisors who can do fluency coaching.

# Best Practices Studies and Continuous Improvement Questions

- What behavior (tasks and tactics) do best performing individuals or groups use to produce outstanding levels of outputs / accomplishments?
- What factors in each of the Boxes are needed to establish and support exemplary performance?
- How can we routinely capture this information for continuous performance improvement?

Sub-outputs (Accomplishments or Milestones)	Key Tasks/Tactics (Best Practices Behavior)	Six Boxes Enablers
List of prospective referring doctors	Develop a list of prospective referring doctors top prospects by therapy - based on high prescriber lists and other information. Build alliances with drug company representatives to identify prospective neurologists (and to develop patient awareness see below)	Expectation from manager for list (1)     Pre-qualification criteria (2)     Lists of top doctors from organizations and societies (2)     Lists of key product companies and their local representatives (2)     Tools and guidelines for working with reps from other companies (2)     Tools and guidelines for gathering names, qualifying prospective docs (2)
Doctor demonstrates an interest in incorporating the therapy into his or her practice.	Decide which doctors to continue calling on     Ask very specific questions about "clinical pictures" of prospects' patients to generate an initial list of potential patients.     Communicate to doctors and staff exactly how to make a referral (using the Referral Information Card); and verify often that they can tell you and have the cards immediately available by asking them, calling their receptionists, etc.     Provide video and other materials, show patient successes.     Arrange peer-to-peer meetings     Arrange for site visit or educational events.     Persuade the doctor to teach you and your colleagues about the indication and drug.	Written process/procedures for making referrals (2, 4) Patient Management Team member(s) willing and able to speak with Neurologist. (2, 4) Journal Club, research articles, opportunities to meet with peers (2) Convenient, appropriate educational or other professional events (2) Pre-defined "clinical pictures" to probe for, with language appropriate to each type of doctor/specialty and diagnosis. (2, 4)



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### **Needs / Opportunity Analysis**

- What are the key behaviors (tasks, tactics) needed to produce desired Job Outputs?
- Are there obstructions to successful performance in any of the Boxes?
- Are there opportunities for improvement in any of the Boxes, or in alignment among them?

Construct tools for **observing** and **interviewing** exemplary and average performers structured with the Six Boxes

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### **Needs / Opportunity Analysis**

Sample Fact-finding Questions

#### BOX#

- 1. What are you expected to do and produce, and how do you know how well you're doing?
- 2. What tools, information, physical and social resources, help you perform? What prevents you from performing?
- 3. What's the payoff for doing the right thing? Are there any discouragements for doing the right thing?
- 4. What are the key skills and knowledge you need to perform? What do you wish you'd had when you started?
- 5. What are the personal characteristics that enable people to do well at this part of the job?
- 6. What do you like least and best about the job?

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HZN-ROZEEZH	Expectations & Feedback (1)	Tools & Resources (2)	Consequences & Incentives (3)
EMPLOYEE	Skills & Knowledge (4)	Selection & Assignment (5) (Capacity)	Motives & Preferences (6) (Attitude)

### **Management Development**

- Teach Six Boxes thinking to managers and supervisors.
- Provide opportunities to analyze, and solve performance challenges using The Six Boxes
- Encourage managers and supervisors to make Six Boxes language part of everyday discussion.

Make this simple but powerful Six Boxes model part of a performance-centered culture.

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# The Power of Collective Consciousness

- Six Boxes Performance Thinking
- We know that shared beliefs, goals, language, and practices strengthen cultures, armies, and families.
- The Six Boxes give everyone an easy-to-understand and easy-to-apply way of understanding performance.
- Teaching Six Boxes Thinking to everyone from Executive Management to Individual Contributors – offers enormous POWER to improve performance.

Our goal is to empower entire organizations with Six Boxes Performance Thinking

