

How to Create Damn Good Job- Aids and Other Mobile Performance Support Tools

Joe Halpin
Russ Powell

Peregrine Performance Group



“Here, then, is our situation at the start of the twenty-first century:

We have accumulated stupendous know-how. We have put it in the hands of some of the most highly trained, highly skilled, and hardworking people in our society.

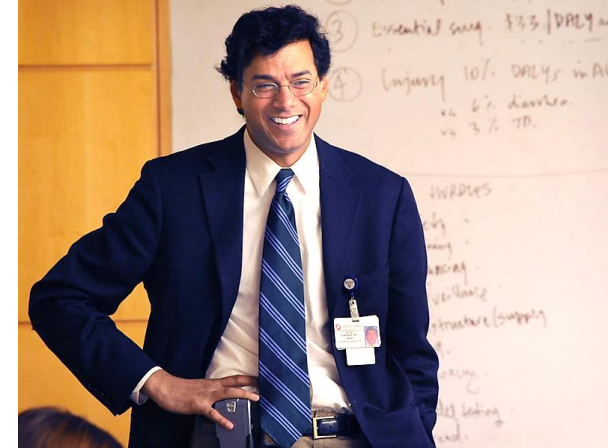
And, with it, they have indeed accomplished extraordinary things.

Nonetheless, that know-how is often unmanageable.

Avoidable failures are common and persistent, not to mention demoralizing and frustrating, across many fields—from medicine to finance, from business to government.

And the reason is increasingly evident:

The volume and complexity of what we know has exceeded our individual ability to deliver its benefits correctly, safely, or reliably. Knowledge has both saved us and burdened us.”



– Atul Gawande, American surgeon, writer and public health researcher

Photo: Fred Field

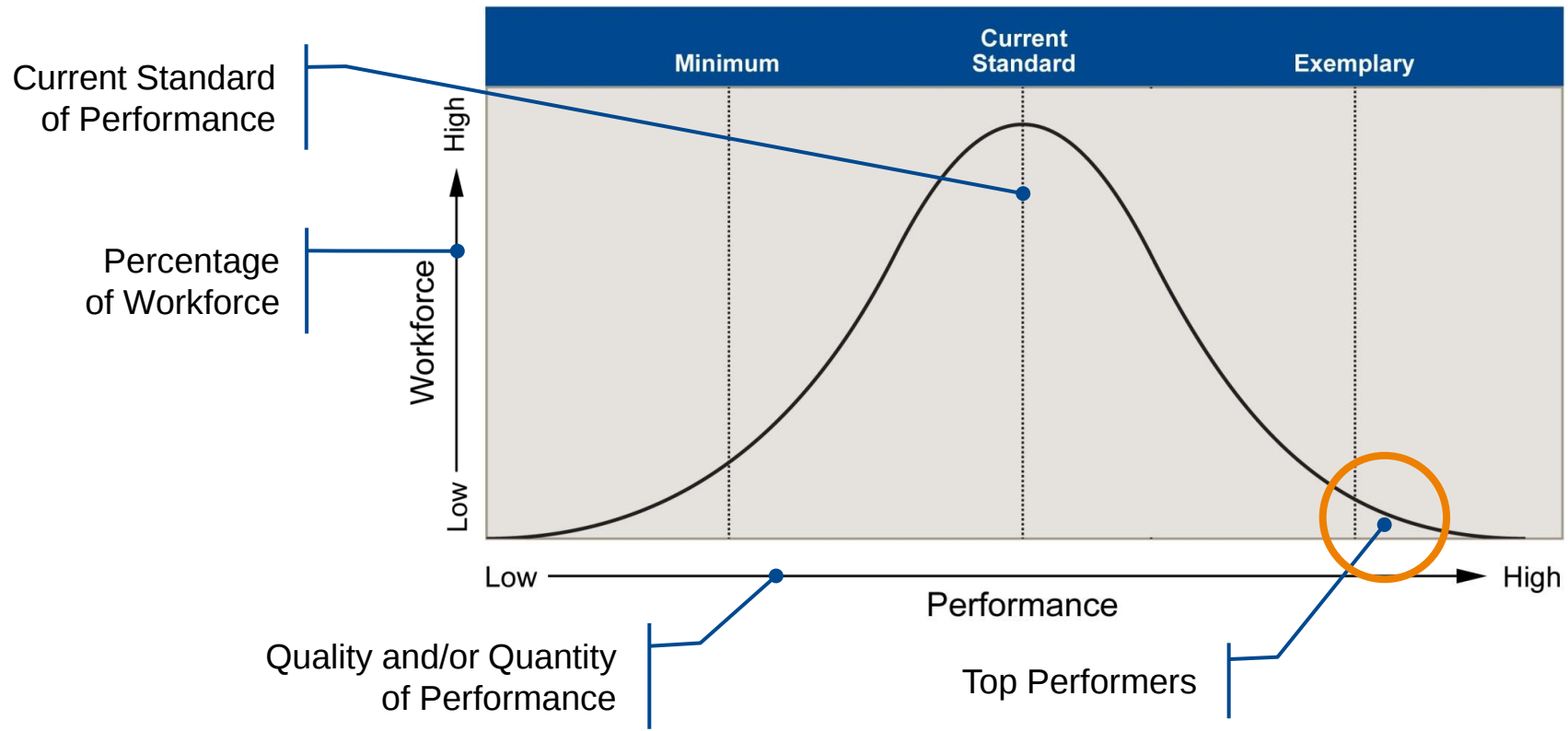
Game Plan

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

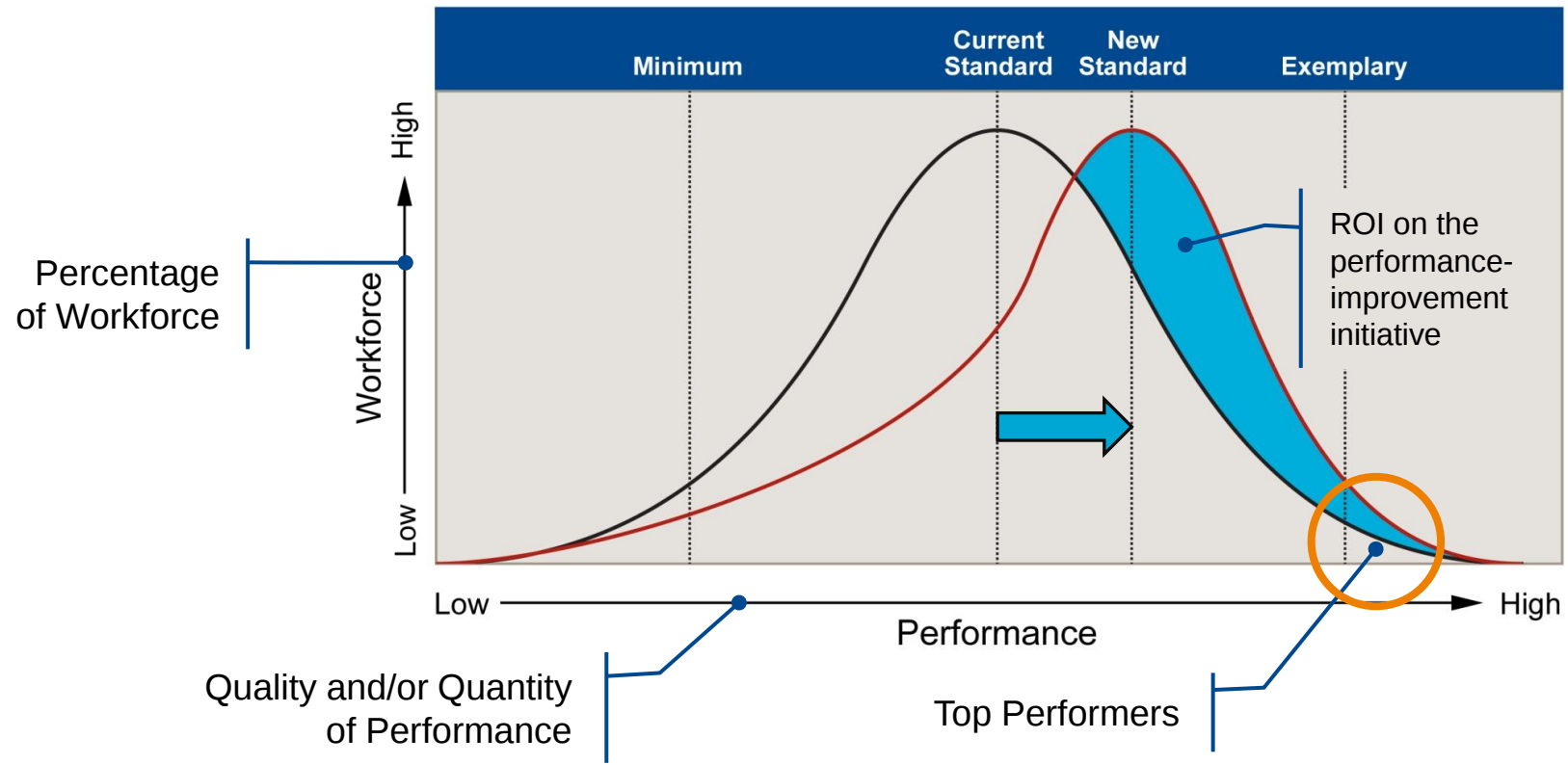
*Despite its major payoffs,
the job aid is a vastly
underused tool.*

– Paul Elliott, *Handbook of
Human Performance
Technology* (1999)

We Are: Shifting the Performance Curve



We Are: Shifting the Performance Curve

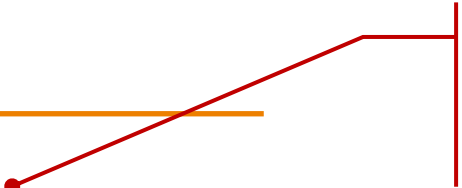


We Are: Helping US and Global Organizations

				
				
				
				
				
				
				
				
Food, Bev, Hospitality	Biotech, Pharma	Hi-tech	Financial	Other

Fortune 500

Game Plan



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- What's a damn good mobile performance support tool?
- Advantages?
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Why are YOU here? What's the primary business reason you're attending this program?

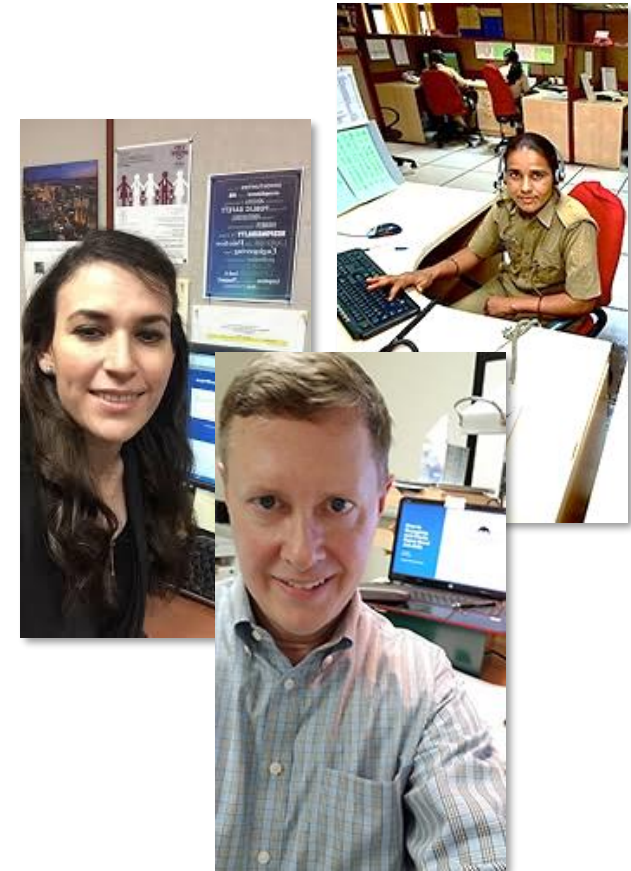
Respond in chat window.

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

– Paul Elliott, *Handbook of Human Performance Technology* (1999)

Housekeeping

- For live-tweets, use #damngoodjobaids
 - Take, tweet:
 - Photo of yourself participating in the session
 - Photo of a point/slide you found useful
- Check
 - Find, raise/lower virtual hand?
 - Type comment in Chat?



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

- 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

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

- 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 Remember

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

- ☐ Place the camera on a tripod.
- ☐ Only use the camera's zoom function.
- ☐ Photograph the array from the front, side, and rear.

Project Checklist

Be sure you have:

- ☐ Camera
- ☐ Inspection form

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)

[] 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

Airspeed68 KIAS

Fly the airplane!

Fuel shutoff valveOn (In)

Fuel selectorBoth

Auxiliary fuel pumpOn

MixtureRich

Ignition switchBoth

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 creating foundational content
 - Audience lead
 - Audience (Inspiration)
 - [Redacted] brand even company
- Make your passionate area. Take to interest

Use of Imagery

- Sub on
- 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	
CHIEF COMPLAINT: RED EYE OR PAIN (continued)						
CONDITION & DEFINITION	KEY FEATURES	DIFFERENTIATING SIGNS & SYMPTOMS	DIFFERENTIATING OBJECTIVE FINDINGS	COMMON DIAGNOSTIC TEST	TREATMENT	FOLLOW-UP
Conjunctivitis, Allergic Inflammation of the conjunctiva.	- Erythema of the eyelid - Bilateral Itchy, watery, burning sensation	- History of allergies, Rhinorrhea, itchy, watery eyes - Seasonal environmental conditions present	- Complete eye exam - Different Palpebral conjunctiva with cobblestone-like swelling	Usually none indicated	Topical ophthalmic: liquid tears Oral Antihistamine: Diphenhydramine (Benadryl), loratadine (Claritin), or Fexofenadine (Allegra) - Treat underlying allergic symptoms - No contact lens use until resolved	F/U if not resolved in 14 days
Conjunctivitis, Infectious Contagious viral or bacterial infection of the conjunctiva. "Pink eye" refers to bacterial infection.	 - Erythema of the eyelid - Itchy, watery, burning sensation 	 - 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 	 - Complete eye exam - Injected conjunctiva and margin edema - Bacterial - crusted discharge may or may not be present - Viral - may have preauricular adenopathy 	Usually none indicated	Topical ophthalmic: - Bacterial infection - Gentamicin OR erythromycin solution/ointment - Viral infection - liquid tears - Good hygiene - No contact lens use until resolved 	F/U if not resolved in 7 days

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

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 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

[<to simulation>](#) [<to next example>](#)

11 | April | 2018

Safety Communications Recommendations Decision Support Tool **START >**

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11 | April | 2018

Event title





11 | April | 2018

Event title

New haemorrhage events



Event description

CONTINUE



11 | April | 2018

Event title

New haemorrhage events associated
w/ Devcelsen

Event description

Several observed events

CONTINUE



11 | April | 2018

Event title

New haemorrhage events associated
w/ Devcelsen



Event description

Several observed events of haemorrhage
have been included in the safety
database. This has been identified as a
signal. A full assessment confirms that



CONTINUE

11 | April | 2018

Event title

New haemorrhage events associated
w/ Devcelsen

Event description

this is a new ADR presenting a risk to
patients. This means it is new relevant
safety information and needs to be
communicated to Health Care Providers

CONTINUE



11 | April | 2018

Event title

New haemorrhage events associated
w/ Devcelsen



Event description

patients. This means it is new relevant
safety information and needs to be
communicated to Health Care Providers
in a timely manner.



CONTINUE

 11 | April | 2018

Is the product in active development (e.g., there are on-going clinical trials, including post-trial access (PTA) or compassionate use (CU) programs for this product)?

YES

NO

< Start Over

Q1



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Is the product on the market?

YES

NO

< Start Over

Q2Y



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Is patient re-consent required?

YES

NO

< Start Over



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Is the issue likely to lead to a protocol amendment
or an ad hoc or immediate IB update?

YES

NO

< Start Over

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Follow the Safety Communications in Clinical Trials SOP (SOP-0114024) section Memo and the DHPC SOP (SOP-0111902).

[Clinical Trials SOP](#)

[DHPC SOP](#)

CONTINUE

< Start Over

11 | April | 2018

Thank you for using the Safety Communications recommendations decision support tool regarding the following event:

Title: New haemorrhage events associated w/ Devcelsen

Description: Several observed events of haemorrhage have been included in the safety database. This has been identified as a signal. A full assessment confirms that this is a new ADR presenting a risk to patients. This means it is new relevant safety information and needs to be communicated to Health Care Providers in a timely manner.

Based on your responses, you should follow the Safety

Create PDF of summary

< Start Over

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26_November_2018Recommendation (1).pdf - Adobe Acrobat Pro DC

File Edit View Window Help

Home Tools 26_November_2... x

Save Share Print Email Search Up Down 1 / 1 Mouse Hand Rotate Zoom 90% Fit Full Screen Comment

11 | April | 2018

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Based on your responses, you should follow the Safety Communications in Clinical Trials SOP (SOP-0114024) section DIL.

This recommendation is based on the following:

- The product is in active development
- The product is NOT on the market
- Patient re-consent is required
- An urgent safety measure (USM) is NOT required

Back to main

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

11 | April | 2018

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

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v.14_03_18

[<to simulation>](#) [<to next example>](#)

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 WHO Surgical Safety Checklist forms. The top-most form is the 'Sign Out' section, which includes 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

Below the 'Sign Out' form, other sections of the checklist are visible, including 'Before Patient Leaves Operating Room', 'Before Skin Incision', 'Before Induction of Anesthesia', and 'Sign In'. The 'Sign In' section includes checkboxes for Patient Identification, Site Marking, Anesthesia, and Pulse Oximetry. The 'Before Induction of Anesthesia' section includes checkboxes for Patient Identification, Site Marking, Anesthesia, and Pulse Oximetry. The 'Before Skin Incision' section includes checkboxes for Patient Identification, Site Marking, Anesthesia, and Pulse Oximetry. The 'Before Patient Leaves Operating Room' section includes checkboxes for Patient Identification, Site Marking, Anesthesia, and Pulse Oximetry.

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?

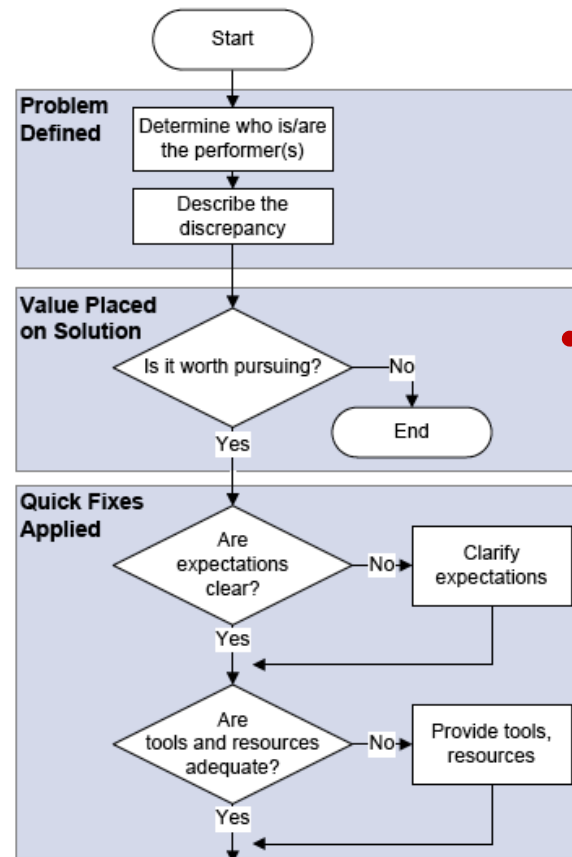
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Performance Analysis Flowchart

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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- Confirm expectations are clear, workers are receiving feedback
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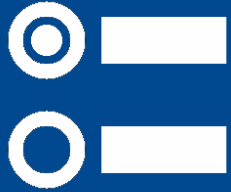
Consider:

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Formats:

- Step
- Checklist
- Worksheet
- Decision table
- Flowchart

Media:

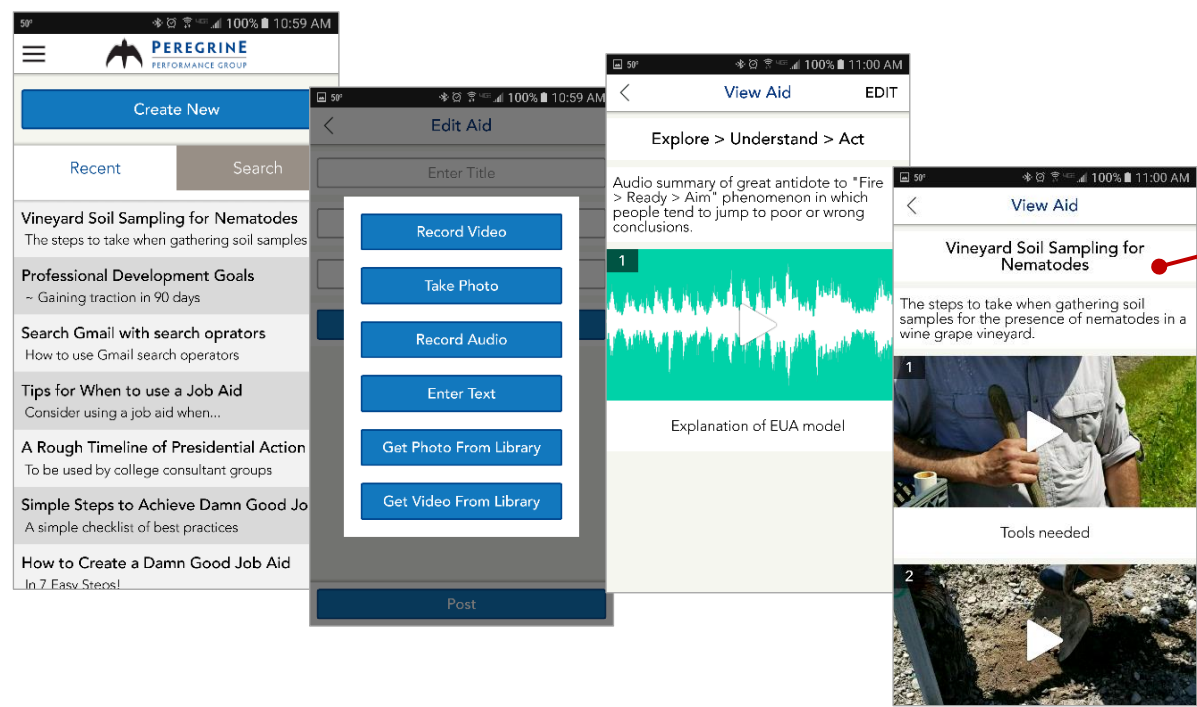
- Poster
- Paper extended (“quick start” guide)
- App / Digital
- Audio
- Video

Steps for Creating

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



JobAider App



Download from
Google Play
[ppg.fyi/6](https://play.google.com/store/apps/details?id=com.ppg.jobaid)
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Download JobAider for free, now!



- *Work w/ accomplished performers*
- 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





It may take multiple experts, reviewers, and iterations, to get to this!

On Drafting (1/3)

- Not as simple as it sounds
- Good *checklists*, for example, (per Atul Gawande):
 - Are precise
 - Are efficient/to the point
 - Easy-to-use even in the most difficult situations
 - Do NOT try to spell out everything—a checklist cannot fly a plane
 - Provide reminders of only the most critical and important steps
 - Practical



DO-CONFIRM :
Workers perform from memory and experience, but then stop and use job-aid to confirm everything that was supposed to be done was done.

READ-DO:
They carry out the tasks as they check them off— much like a recipe.

On Drafting (2/3)

When drafting, you must consider decisions like:

- Is this a DO-CONFIRM job aid or a READ-DO?
- What are the pause points when the job-aid should be used? What are the pause points within job-aid?
- What are the characteristics of the behaviors you're guiding, for example:
 - **Sequence** only
 - **Discrimination** only
 - **Discrimination within sequence**
 - **Initial discrimination** leading to **alternate sequences**



On Drafting (3/3)

Sequence Only (No important discrimination)

- 1. Depress signal light
- 2. Greet customer
- 3. Ask name
- 4. Ask address
- 5. Document in Contact Memo

Discrimination Only

If request is for Product A, take order. If for product B, and <10 units, take order. If for B and >10 units, refer to Marketing. If for product C, and before Wednesday....

Discrimination within Sequence

- 1. Greet customer
- 2. Ask for Service Number
- 3. *If number begins w/ 001, do X. If not, do Y.*
- 4. *If number ends w/ -CTN, do A. If not, do B.*

Initial Discrimination leading to Alternate Sequences

- 1. *If trouble is X, [follow these steps...](#)*
- 2. *If trouble is Y, [follow these steps...](#)*
- 3. *If trouble is Z, [follow these steps...](#)*



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
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Consider:

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

Revision questions:

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

Steps for Creating

1. Clarify desired output
2. Align with managers
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Get a Copy of this Presentation





Consider:

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Revision questions:

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Steps for Creating

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Steps for Creating

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You'll find these at
our resources page:
ppg.fyi/jobaids

Job-Aid Development Worksheets

Worksheet #6 – Test

About this Worksheet

Your job-aid is built. You've decided on a format and medium with which to present it. Now you must ensure that it works in the real-world environment of the job-aid user.

Testers

How will you find and secure “real-world” end-users?

How will you select your test demographic?

Ask

What questions will you ask of your job-aid testers? Consider starting with these:

- What worked well?
- Where did you have difficulty?
- Is this job-aid complete, accurate?

Gloria Gery coined the term and wrote a seminal book on the topic

Electronic Performance Support Systems – How and why to remake the workplace through the strategic application of technology

Performance Support Tools

Electronic Performance Support Systems (EPSS) have been around since the 80s.

Made possible by networking computers and enough bandwidth for multimedia to be broadcast over those networks.

Typically embedded in enterprise software applications.

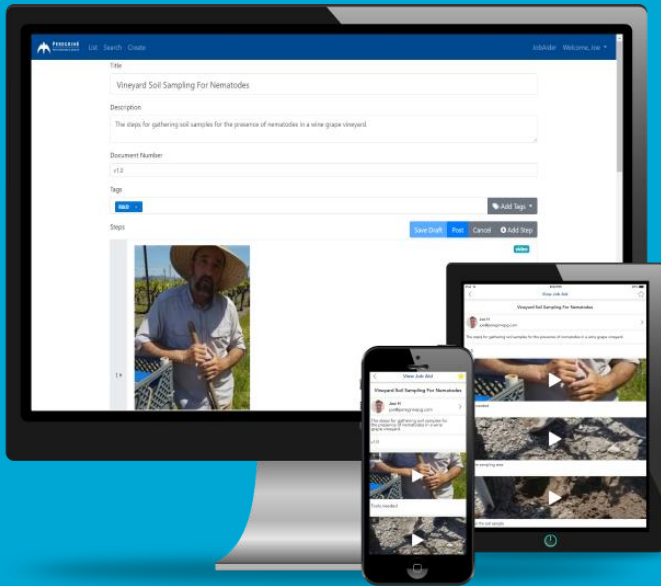
With the advent of mobile technology, performance support can be coupled more closely with work flow—not only embedded in a system.

JobAider App

JobAider is one of many tools that exist to create and share expertise and performance support resources with a workforce.

Can take many forms:

- Audio
- Video
- Textual
- Graphical
- Existing content – eLearning, animation, web sites, articles, etc...

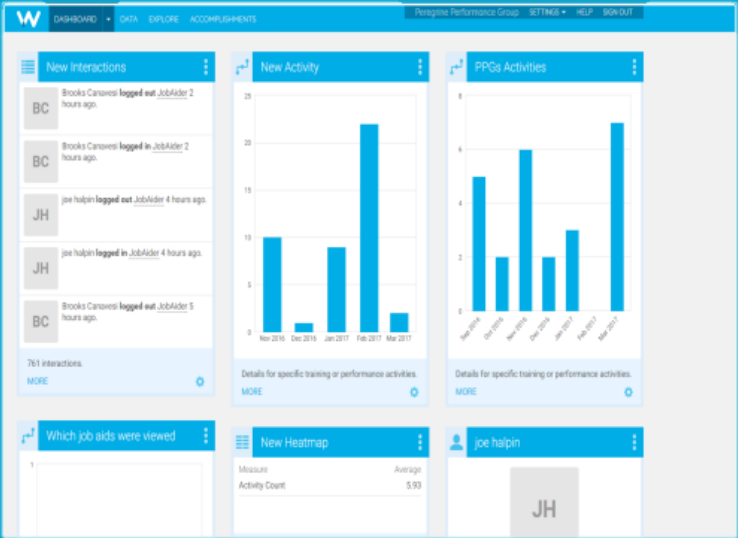




JobAider App

Can be used to support:

- Workforce
- Customers
- Partners



Data is the Differentiator

Today, EPSSs can collect data on every facet of user interaction.

Data can be analyzed and visualized in **real-time**.

Leads to questions which leads to investigation which leads to insight.

xAPI

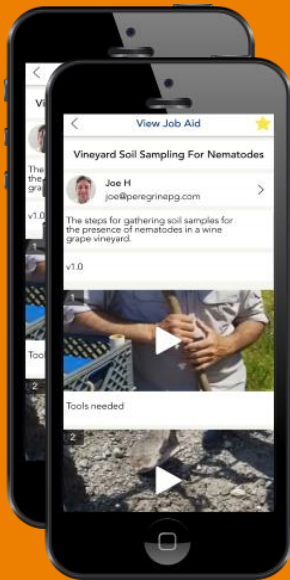
Experience API (xAPI)

The explosion of application programming interfaces (APIs) has made the real-time collection and analysis of data possible.

xAPI is the catalyst for the next generation of learning/performance/**experience** data collection and analysis.

xAPI is interoperable. It can communicate with many types of systems that learning and performance technologies have not been able to up to this point.

You can now gather data from any type of experience—online and offline.



Two JobAider Use Cases

1. Financial Services
2. Equipment Manufacturer

Financial Services



JobAider Use Case #1

Research, Products, and Marketing produce content to support sales and marketing efforts.

Many SMEs and exemplary performers producing video, text, graphics, and audio content.

Aggregate links to existing content on YouTube, Dropbox, SharePoint, etc.

Multi-level review and editing process to create final published materials.

Content shared with:

- sales to support customer relationships
- customers to support adoption

Equipment Manufacturing



JobAider Use Case #2

Technical documentation produced to support equipment operation, maintenance, and repair

Content is text and graphics

Serves as version control and knowledge repository

Content shared with:

- field engineers to support installation
- customer service to provide support
- sales to provide customer intelligence
- customers to support maintenance and repair

Primary Sources

- 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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How to Create Damn Good Job- Aids and Other Mobile Performance Support Tools

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Miscellaneous Additional Job Aids

Preparing for the Call (This should take you 15 minutes)			
Customer:	☐ New ☐ Existing	☐ Discovery ☐ Proposal ☐ Implementation	
Project:	☐ New ☐ Existing	☐ Engagement ☐ Presentation/Close ☐ Follow-up	
Call Details		Roles & Responsibilities	

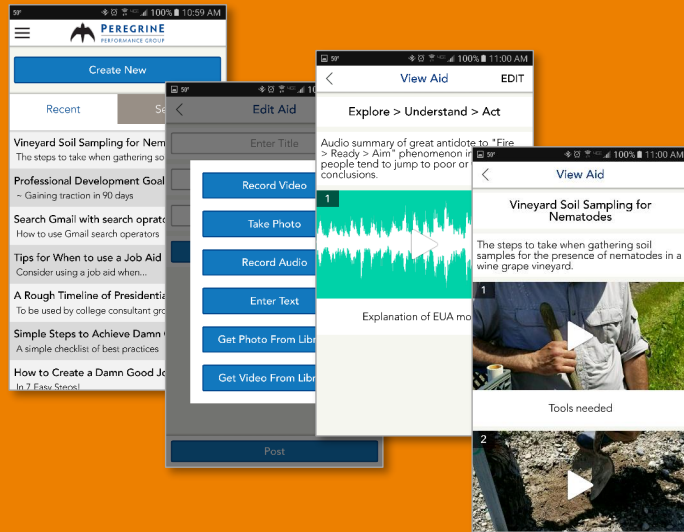
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The Call			
Opening - Greetings & Introductions - Establish rapport between participants - Communicate the value of the meeting - Confirm available time - Communicate meeting process, purpose, agenda - Confirm customer's agreement with plan - Recognize additional agenda items	Goals	Problems	Needs
Responding to Resistance - Clarify the concern or the source - Acknowledge the skepticism or misperception - Reaffirm the need and how Altera will address it - Probe for acceptance	Decision Process	Competition	Budget
Responding to Acceptance - Restate the goal/problem/need you're addressing - Define Altera's feature/benefit addressing the issue			

Post Call Review (Spend 5 to 10 minutes immediately following the call)	
- How did the call go? - How close did we come to meeting our objective(s)? - How well were we able to implement our strategy? - What went particularly well during the call? - What would we change about the call? - What is our next step in the account? - What did we learn?	







The Value of Performance Support Apps

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