

E-book from InfoCaption

How to get started with Performance Support



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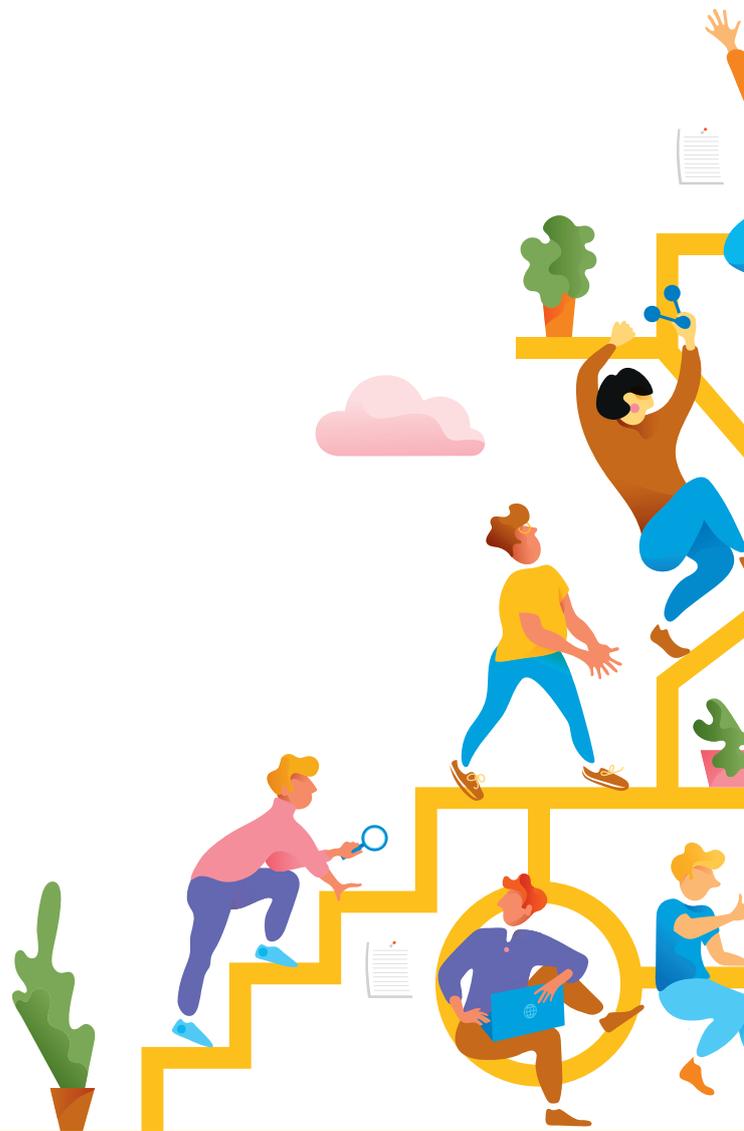
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Introduction

Have you ever heard of Performance Support?
Are you curious about how it can benefit your
organisation and what you need to get started?

In this e-book, we discuss how education is carried
out in most organisations and why it is time to think
differently. We explain what Performance Support is
and give you our best tips on how you can make the
working day more efficient.

To find out how we can meet the organisation's
educational needs, we should first define the need,
both for the employees and for the organisation.
Simplified, we can say that as an employee you need
sufficient knowledge to carry out your job in the
easiest way possible. The organisation wants
employees to perform their tasks as efficiently as
possible and, perhaps more importantly, to do so
correctly. Beyond this, there are many other needs,
such as employees being able to further develop their
skills and share their knowledge within the
organisation.



What is Performance support?

*"A tool or other resource, from print to technology-based, that provides
just the right amount of task guidance, support, and productivity
benefits to the user, precisely at the moment of need."*

Dr. Marc Rosenberg



We google for answers

How do we solve our learning needs outside of work? We humans are naturally inclined to look for the fastest way forward. This is what leads to inventions, innovations and subsequent paradigm shifts in how we live our lives. Easy access to the internet and its endless amounts of information has changed how we relate to knowledge.

We search for knowledge on Google, YouTube, ChatGPT, or similar AI tools. Whether we are looking for a recipe or instructions on how to change a car tyre, the information is just a click away. We no longer need to store knowledge in our memory in the same way as before; instead, we access it when we need it.

When we use so many ways to gain information outside of work, why do we not do the same at work? [Why do most organisations still focus so strongly on courses as the primary way of educating employees?](#)

Most of what we do is organisation-specific, such as processes, routines and systems. Finding answers to these questions on Google is less likely, and receiving the wrong answer can in some cases have serious consequences.

Does education have to be so formal?

Generally, learning can be divided into two broad categories – formal and informal learning. As early as the 1980s, researchers illustrated this through the theoretical 70-20-10 model, which describes how formal learning accounts for only about 10% of the total learning that takes place in an organisation. The remaining 90% consists of various forms of informal learning.

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Formal learning...

...is systematic education. It is not you who decides what to learn. For example, it could be:

- Classroom Teaching
- E-learning courses
- NanoLearning

Informal learning...

...is education where the need for knowledge determines what you should learn. This is how we learn in everyday life. Examples include:

- Google searches
- Questions to Superusers
- Performance Support



- 70% we learn through doing
- 20% we learn through others
- 10% we learn through courses

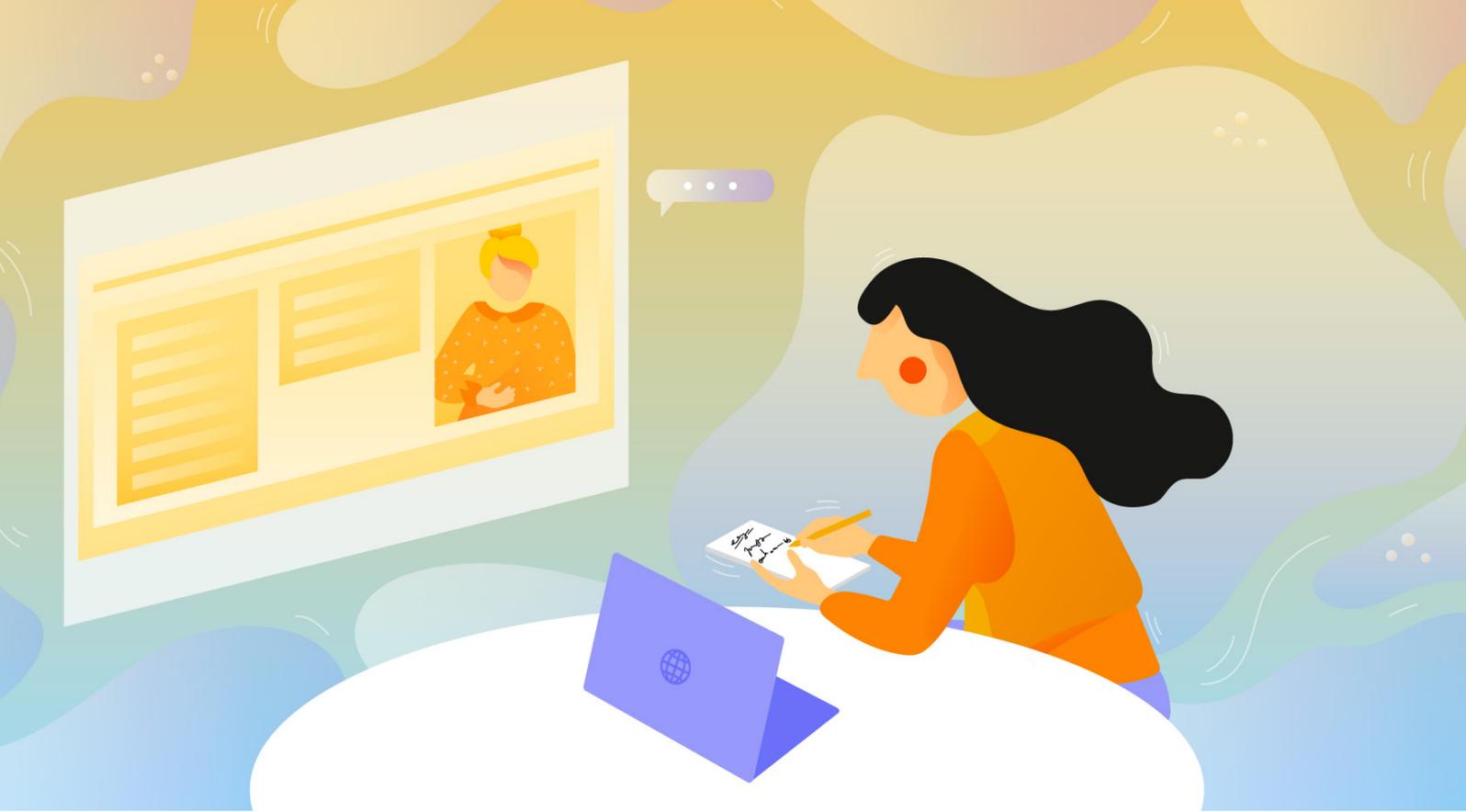
The 70-20-10 model describes how we build our skills and knowledge.
Reference: Morgan McCall and the Centre for Creative Leadership

Educators Bob Mosher and Conrad Gottfredson have examined learning needs in organisations and concluded that there are five situations in which we experience a need to learn, “Five Moments of Learning Need”. These five situations are referred to as new, more, apply, solve and change. The first two situations, new and more, are linked to what organisations often focus on – when we learn something new or learn more about something.

However, new and more are only two of the five learning needs described. As in the 70-20-10 model, Mosher and Gottfredson’s model also shows that [the learning situations that most affect our working day occur within informal learning](#).

Apply, solve and change are situations that directly affect how the employee performs his or her tasks. More on these later.

Of course, organisations should continue to invest time and resources in education and knowledge development, but it is important that the effort is directed where it has the greatest impact. It is better to adapt the educational format based on the situation. Facilitating only formal learning is not sufficient if you want to support the overall learning needs of an organisation.



Need-based learning is the solution

We have already reviewed two models. The 70-20-10 model has been instrumental in shaping how researchers view learning over decades. The model tells us that our greatest need for learning occurs during the actual execution of work. In “Five Moments of Learning Need”, this is referred to as the moment of Apply. We will return to this.

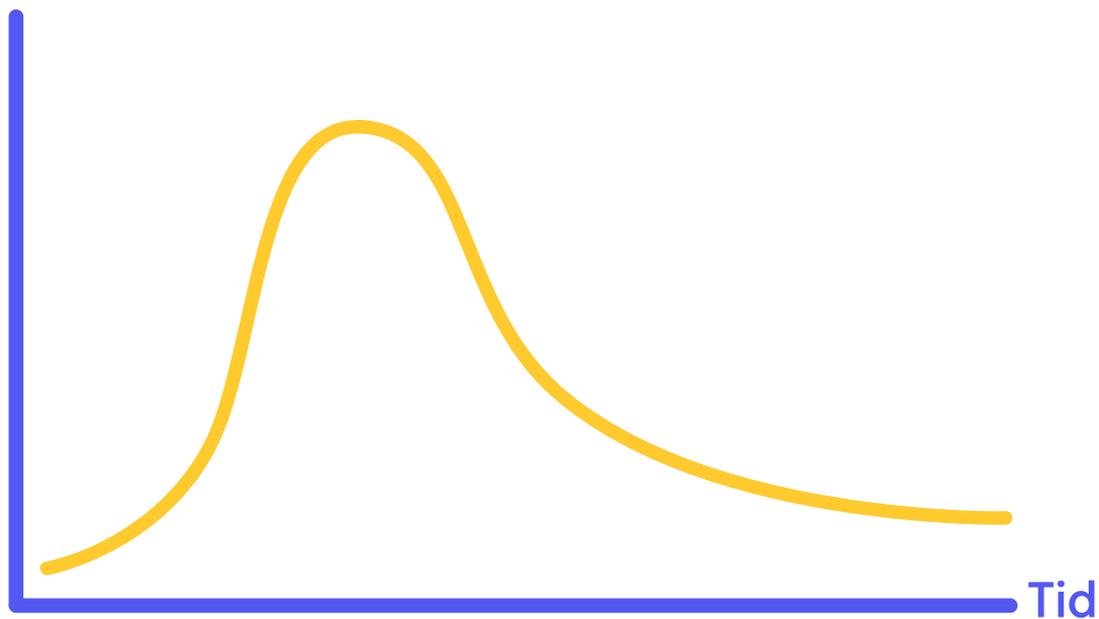
In a study conducted by IDC (International Data Corporation) a few years ago, it was shown that many organisations fail in “apply situations”. The study revealed that employees spent **36% of their working hours searching for work-related information**. On half of those occasions, they did not find what they were looking for.

You may have heard of the forgetting curve – a scientific model that explains how people forget things over time. It was originally developed by the German scientist Hermann Ebbinghaus in the 1880s.

The forgetting curve is still relevant today; the human brain has not undergone any noticeable changes since then. The model shows that formal learning needs to be reinforced so that knowledge does not disappear. If we do not quickly apply or repeat what we have learned, we forget most of it within a few days, and even more after a few months.

There are many theories on how best to “hack” the consequences of the forget curve with a few percent better results. But wouldn’t a better solution have been to not relate to the curve from the beginning?

Knowledge



Ebbinghaus forgetting curve – Here you see how the knowledge (which you can directly think of as competence) goes down quickly over time.

By providing educational support in the form of Performance Support, you do not have to relate to the forgetting curve in the same way. The focus is on knowledge being available when needed, rather than on the educational format itself. At each stage, it should be assessed whether Performance Support alone covers the support need, or whether it should complement other forms of education. A good Performance Support system should include built-in functionality for testing and monitoring users in cases where documentation of implementation is required.

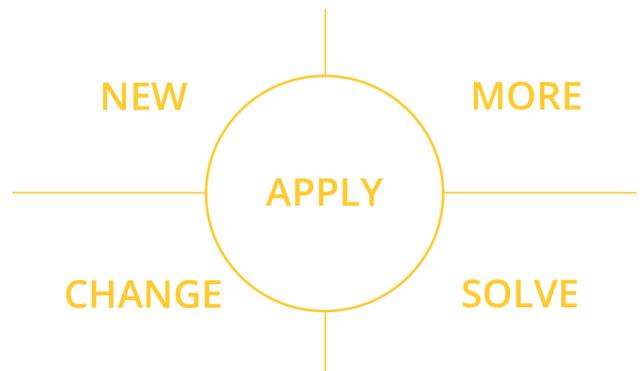
Does this mean it is unnecessary to learn? No – but we should explore new methods of maintaining knowledge instead of continuing in the same old way. If we reflect on the forgetting curve, would it not be better to flatten it? There are several ways to achieve this. [The goal is to maintain both interest and knowledge.](#) By offering Performance Support, we gain access to knowledge in different situations.

This places greater demands on availability and on employees knowing where to look for knowledge. There is a significant difference between the knowledge and learning objects in Performance Support compared to the traditional course format. While most courses focus on content and its structure, Performance Support places greater emphasis on learning linked to context. It is closer to the solution of the task or problem you are facing.

To establish a strategy for both formal and informal learning, you need to understand how people learn most effectively and what paths employees take when completing tasks. Is it a combination of informal and formal learning? Is it sufficient to have a half-day instructor-led course to cover the basics instead of the two days previously allocated, and make the rest of the training available as support material? Are there specific situations where an instructor-led course is necessary?

The five learning needs

Let us take a closer look at the five needs defined by Mosher and Gottfredson in their model. Not all needs are equally important. However, the more support you are able to provide for each of them, the easier it becomes for employees.



“Five Moments of Learning Need” are the five situations in which we experience a need for learning.”

New – This is the part of formal learning that has received the most attention, often in the form of instructor-led courses. This is common for new employees and for further training.

More – This is also a focus area for formal learning and refers to when we need to learn more about something we already know a little about. It may involve continuation courses that expand existing knowledge. As mentioned earlier, most organisations focus almost all their efforts on these first two.

However, informal learning focuses more on:

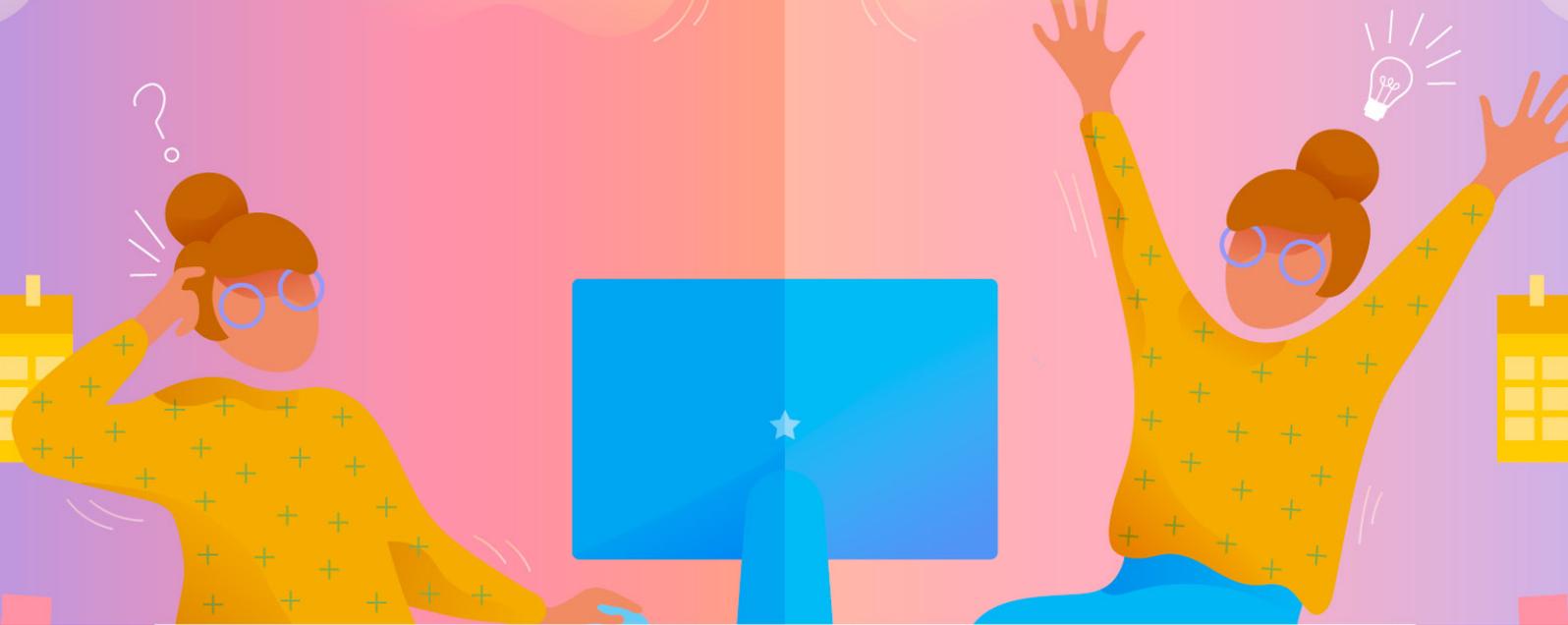
Change – When changes mean we need to learn something new, such as when tasks change or when organisational changes occur.

Solve – Typical support situations. When a problem arises in a system or when we are stuck on a task. The cause may be external errors, but it may also be due to a lack of knowledge.

Apply – The most central situation in Performance Support. How often have you experienced that a course was too general and not adapted to your work or organisation? Perhaps some time has passed since you attended the course and you have been affected by the forgetting curve. Maybe the task you are about to complete differs from what you learned during the course. Ideally, you would be able to refresh your memory or gain a more specific understanding of how to solve the problem.

We can map these five situations onto both the learning curve and the forgetting curve to see how some are used for education and others to ensure that knowledge is retained.

We see that New and More relate to acquiring competence. The other situations – Solve, Change and Apply – support our memory. These situations traditionally receive less attention, yet they are the ones that maintain knowledge, skills and quality of work at the desired level within the organisation.



Four tips for good Performance support

1

Use as few clicks as possible

The shorter the path to help, the greater the likelihood that it will be used. Avoid making access too long or complicated. Make the help available wherever it is natural to look for it.

2

Use various tools

Different types of content suit different tasks. If you are explaining a work process, a visual process description may be most effective. If you want to demonstrate how to perform a task in a system, a screen-recorded video may be more appropriate.

3

Introduce the help during the course

Actively use informal tools during training. This familiarises employees with the support available and gives them confidence that they can access help once back at work. It also reduces the fear of forgetting, allowing them to focus on understanding instead.

4

Allocate responsibility for the content

Many people hold valuable knowledge and are in daily contact with users and key issues. Let those with expertise describe and share it digitally. Avoid creating a bottleneck where only a few employees are responsible for content production.

But I already have a lot of documentation – is it possible to reuse it?

Of course! Many organisations have documentation or support documents stored on a server or intranet site. The documentation is available, but it is often difficult to find. It is also common to gather all support into a relatively long document that describes, for example, an entire system. This makes it more difficult to quickly locate the specific part you are looking for. The only thing required is to break up the documentation and make it accessible.

So how do I reuse it as Performance Support?

Accessibility is the most important aspect. Help that no one can find is not very helpful. If the help is available on a search page or within a manual that provides some context, it offers much better support than help stored in a folder in an unrelated location. Read more under “Availability” below.

You should also evaluate the length of the documents. Help in Word or PDF format tends to be very long, and it is not always optimal for providing the best possible support. If you identify natural points where the material can be divided, do not hesitate to split it up. Shorter and more concise sections are easier to find. If what you are looking for appears as the only result, you have found the right one. However, if you encounter a long document in which you must search extensively, you will gradually lose confidence in the support.

Evaluate whether parts of the support should be presented in other formats – not everything is suitable as text. Sometimes video works best; at other times, it may be appropriate to present the content as a process or as a step-by-step guide.

In short – use the best tool for each specific purpose.

PS: The biggest part of the work is already done – the idea of what to do and a script for how to present it. Transferring it to other formats is very straightforward, as you do not have to start from the beginning again.

Anchoring

In our experience, the most successful examples of Performance Support are those firmly rooted in the organisation. When management recognises the importance of meeting learning needs and sets clear expectations, individuals with expertise are more likely to dedicate time to content creation.



Simplicity

Creating materials for Performance Support should be straightforward. Those producing the content are usually not educators but professionals documenting what employees need to do their jobs. They understand where problems may arise and can create contextual help that explains exactly what is required.

The content can also be simpler than in a course format. Motivation to access learning material when facing a specific problem at work is much higher than in a general course setting. Therefore, the same level of production polish is not required to make the material engaging.



Independence

Design the support so that it can function independently – without needing to place the knowledge in a broader context, as is often done in courses. This can be achieved by reusing parts of formal learning and making them available after the course. In this way, what was learned in the classroom or during training is easy to find again when questions arise at work.

A course places knowledge in context and often provides a fundamental understanding of how things relate to one another. In everyday work, however, it is not always about the whole picture – for example, when a user becomes stuck in a specific part of a system. By dividing knowledge into smaller parts and presenting them separately, the user can move forward more quickly and easily without needing to contact the helpdesk or support when problems arise.

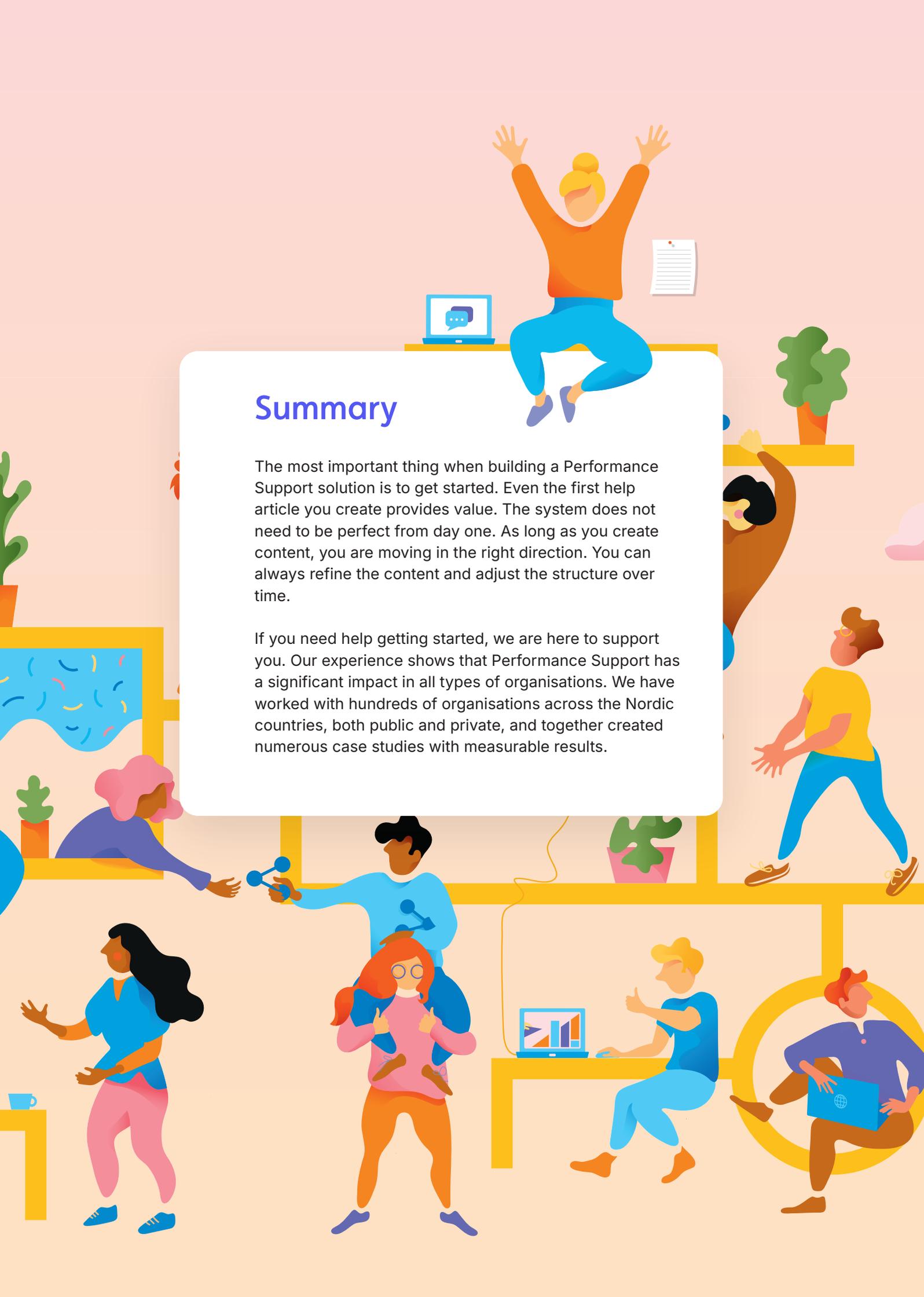
Change

One of the most common objections to e-learning or Performance Support is the continuous work required. The tools used during the working day change and require constant attention to avoid becoming outdated. But it is not impossible – and the benefits are significant.

First and foremost, be prepared for course content to change over time. Make information easy to update so that content remains relevant and high quality. Divide content into smaller parts so that when something changes, it is easier to update a small section instead of facing a large task that risks being postponed.

Our experience is that those with the knowledge – specialists or instructors – should be responsible for updating the information. If development and maintenance must be handled by an educational specialist who does not work regularly in the system, strong communication is required to achieve good results. Instead, when the person with the knowledge is also responsible for producing the content, satisfactory results are achieved more quickly and easily.

The most important thing: employees must be able to trust and use the information without having to question whether it is outdated.



Summary

The most important thing when building a Performance Support solution is to get started. Even the first help article you create provides value. The system does not need to be perfect from day one. As long as you create content, you are moving in the right direction. You can always refine the content and adjust the structure over time.

If you need help getting started, we are here to support you. Our experience shows that Performance Support has a significant impact in all types of organisations. We have worked with hundreds of organisations across the Nordic countries, both public and private, and together created numerous case studies with measurable results.

We review your needs

InfoCaption is Scandinavia's leading solution for Performance Support. With InfoCaption, it is easy to create guides in different formats that can be shared with colleagues or customers.

We would be pleased to speak with you about your organisation and your knowledge and learning needs to explore how you can benefit from Performance Support.



Want to see how InfoCaption works?
Get a video demo by scanning or clicking the QR code



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