

E-book from InfoCaption

How to get started with Performance Support



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Introduction

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

In this e-book we discuss how education is carried out in most organizations 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 workday more efficient.

To find out how we can cover the organization educational needs we should first define the need, both for the employees and for the organization. Simplified we can say that as an employee you need enough knowledge to take care of your job in the easiest way possible. The organization wishes that employees perform their tasks as efficiently as possible, and perhaps more importantly, that they do it correctly. Beyond this, there are many others 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 technologybased, 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 lazy and always look for the fastest way to move forward. This is what leads to inventions, innovations and subsequent paradigm shifts how we live our lives. The easy access to the internet and it's endless amounts of information have changed how we relate to knowledge.

We search for knowledge on Google, YouTube, ChatGPT, or similar AI tools. Whether we're 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 the way we used to; instead, we access it when we need it.

When we use so many ways to gain information outside of work, why don't we do the same thing at work? [Why do most organizations still have a strong focus on courses as the primary way of educating employees?](#)

Well - most of what we do is usually organization-specific, such as processes, routines and systems. Finding answers to their questions on Google is less likely, and getting the wrong answer to a question 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 that describes how formal learning accounts for only about 10% of the total learning that takes place in an organization. The remaining 90% are various forms of informal learning.

Nevertheless, formal learning is still the focus of most organizations, either in the form of classroom teaching or as e-learning. Informal learning is more difficult to identify and can therefore be more difficult to provide support for. Performance Support is an excellent tool for informal learning.



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 every day life. Examples of this may be:

- 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 modell describes how we build our skills and knowledge.

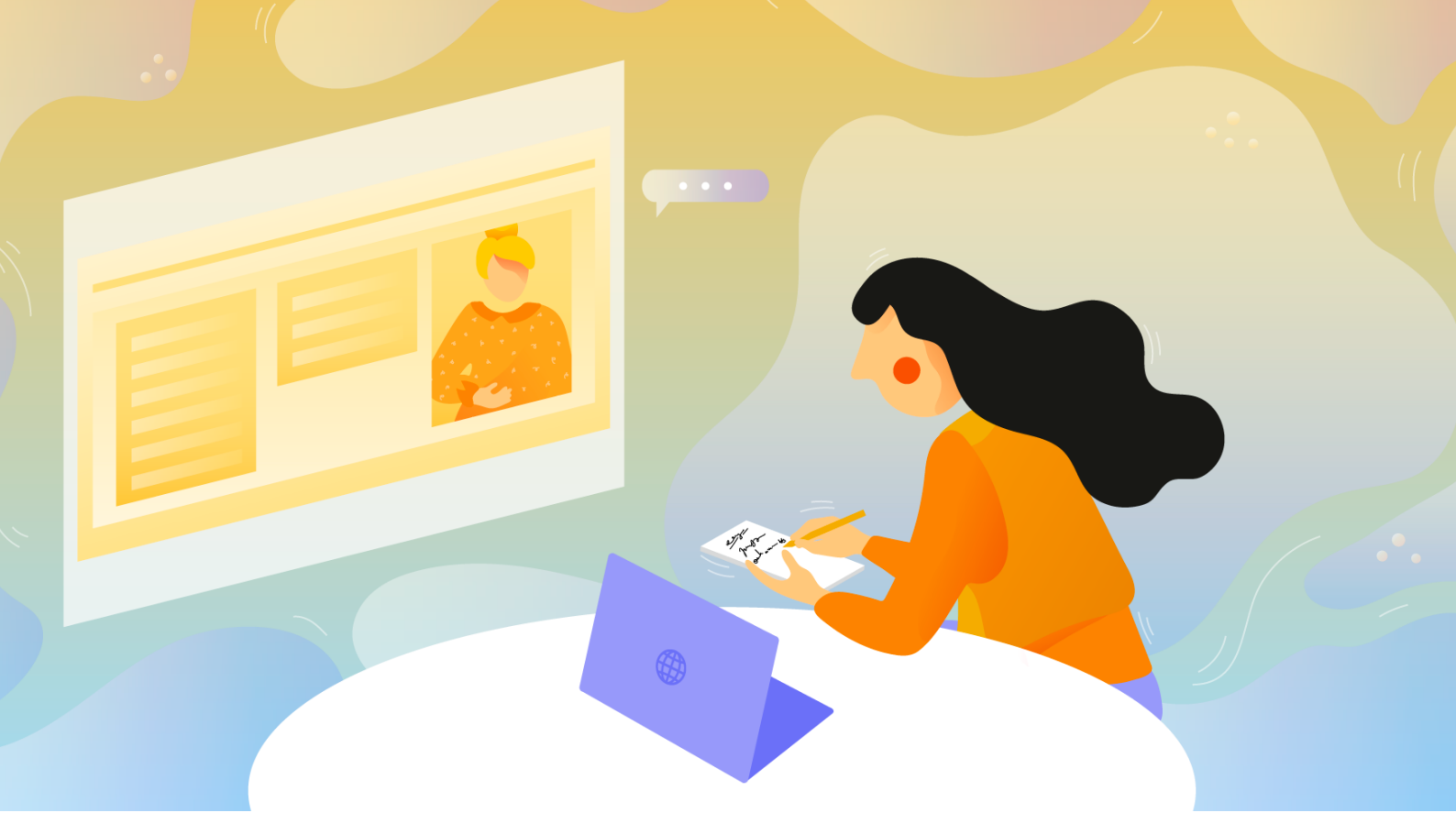
Reference: Morgan McCall and the Centre for Creative Leadership

Educators Bob Moshier and Conrad Gottfredson have looked at the learning needs in organizations and have come to the conclusion that there are five situations when we have a need to learn, "Five moments of learning need". These five situations they call new, more, apply, solve and change. The first two situations, new and more, are linked to what organizations often focus on, that is, when we learn something new or learn more about something.

However, new and more are just two of the five learning needs described. As in the 70-20-10 model, Moshier and Gottfredson's model also say that [the learning situations that affect our working day most happen in the informal part of learning.](#)

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

Of course, organizations should continue to spend time and resources on education and knowledge enhancement, but it is important that the effort is made where it has the most effect. It is better to adapt the educational format based on the situation. It is not enough to facilitate formal learning if you want to support the overall learning needs of an organization.



Need-based learning is the solution

We have already gone through two models. The 70-20-10 model has been instrumental in shaping how researchers view learning through decades. The model tells us that the greatest need for learning we have during the actual execution of the work. In "Five Moments of Learning Need" This is the moment apply. We will return to that.

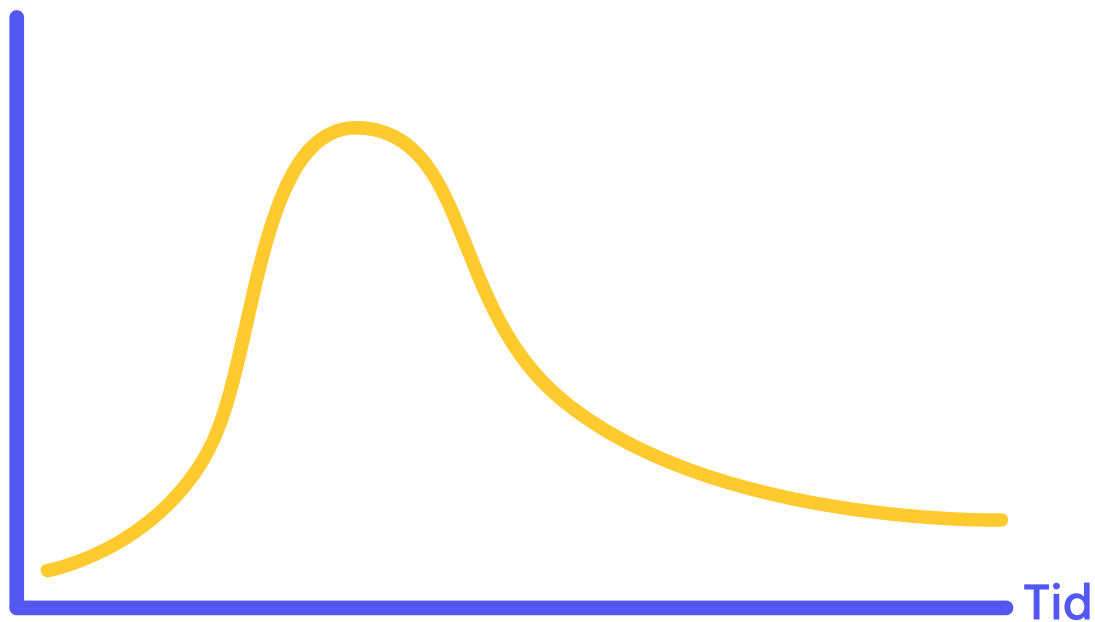
In a study done by IDC (International Data Corporation) a few years ago showed that many organizations fail in "apply situations". The study showed that employees spent **36% of their working hours looking for information** related to the work. Half the occasions, they didn't find what they were looking for.

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

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

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 forgetcurve – 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 forget curve in the same way because the focus is on the knowledge being available when you need it, instead of the educational form itself. At each occasion, it should be assessed whether Performance Support covers the support need on its own, or whether it should be an addition to other educational forms. A good PS system should have a built-in function for testing and monitoring users for cases where there is a need to document the implementation.

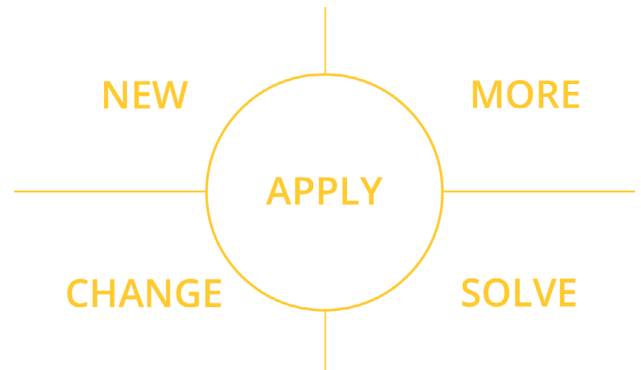
Does that mean it is unnecessary to learn? No - but we should look at new methods of maintaining knowledge and not continue in the same old tracks. If we elaborate on the forget curve above, is it not better to make it flatten out? There are several approaches how this can be done. [The goal is to keep the interest and knowledge up.](#) By offering Performance Support we gain access to knowledge in different situations.

This places higher demands on availability and employees know where to look for knowledge. There is a significant difference in the actual knowledge and learning objects in Performance Support compared to the regular course format. While most courses focus on the content and its construction, Performance Support has a greater focus on learning being linked to the context. It is closer to the solution of the task or problem you are facing.

To be able to set up a strategy for both formal and informal learning, one needs to understand how people in the best way learn and what paths employees take to move forward with tasks. Is it a combination of informal and formal learning? Is it enough with half-day teacher-led course to learn the basics instead of the two days previously set aside and let the rest of the training be available as support material? Are there any specific situations where people need a teacher-led course?

The five learning needs

Let's take a closer look at the five needs Mosher and Gottfredson defined in their model. Not all needs are equally important, However, the more support you manage to give each one of them the easier it makes it for the employees.



"Five moments of learning need" Are the five learning situations where we experience a need for learning."

New – This is the part of formal learning that has received the greatest attention, often in the form of teacher-led courses. This is a fairly common form for newly hired and further training.

More – This is a focus area for formal learning and when we should learn more about something we already know a little about. It can be continuation courses that expands once knowledge in subjects. As we have mentioned, most organizations focus almost all their energy on these first two.

However informal learning is more about:

Change – When changes mean that we have to learn something new, like when tasks change or when an organizational change occurs.

Solve – Are the typical support situations. When a problem occurs in a program or when we are stuck on a task. External errors may be cause to the problem, but it can also be due to a lack of knowledge for the employee.

Apply – Is the most central situation in Performance support. How often have you experienced that the course you attended was too general and not adapted to your work or organization? Maybe it's been a while since you took the course and you've been hit by the forget curve. Maybe the assignment you are going to solve differs from what you learned during the course. The best thing would be if you could refresh your memory or gain a more specific understanding of how to solve this problem.

We can put the five situations into the learning curve and the forgetfulness curve and see how some are used for education and how some can be used to make sure that knowledge remains.

We see that New and More is about training for something or acquiring a competence. The other situations are to support our failing memory: Solve, Change and Apply. These situations traditionally do not receive much focus, but they are the ones who contribute and maintain the knowledge, skills and quality of work at the desired level in the organization.



Four tips for good Performance support

1

Use as few clicks as possible

The shorter the way to help - the greater the chance that it will be used. It is important to not make the way too long or advanced.

Make the help available in all places where it is natural to look for it.

2

Use various tools

Some ways of presenting content fit better than others for specific tasks. If you are to explain a work process, it is easier to explain it as a visual process. If you want to show how something should be done in a system, it may be more appropriate to show it as a video with screen recording.

3

Introduce the help during the course

Use the informal tools actively in the course. This way, you make the employees familiar with the support that is available and give them the confidence that they can also get help when they are back at work. It also removes the fear of not remembering, so that they can focus on understanding instead.

4

Allocate responsibility for the content

There are many people who sit on knowledge and are in daily contact with the users and the most important issues. Let those who have the knowledge describe and share it digitally. Don't let content production become a bottleneck where only a few employees does it.

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

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

Så hur återanvänder jag det som Performance Support?

Accessibility is the most important part. Help that no one can find is no that helpfull. If the help is on a search page or in a manual that tells a little about the context, it provides much better support than help stored in a folder in an unrelated location. Read more under "Accessibility" 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 to provide the best possible support. If you come up with natural cutting options, don't be afraid to split up the help. Shorter and more concise auxiliary particles are easier to find. If what you have been looking for is the only result, you have found the right one. But if you find a long document where have to look for it, you will lose confidence in the help over time.

Evaluate whether parts of the help should be presented in other ways - everything is not suitable as text. Sometimes video works best, other times it may be good to present the content as a process or as a manual.

In short - use the best tool for every single purpose.

PS: The biggest job is done - the idea of what to do and a script on how to tell it. Transferring to other formats is very easy as you do not have to do the whole job from the beginning.

What should I think about?

Once you have set the framework for a good Performance Support system, it is important to continue development. Performance Support is much more dependant on living material than courses. But what should you think about when you start producing your new content? We have created a list of important things to consider when turning a Performance Support solution from good to great.

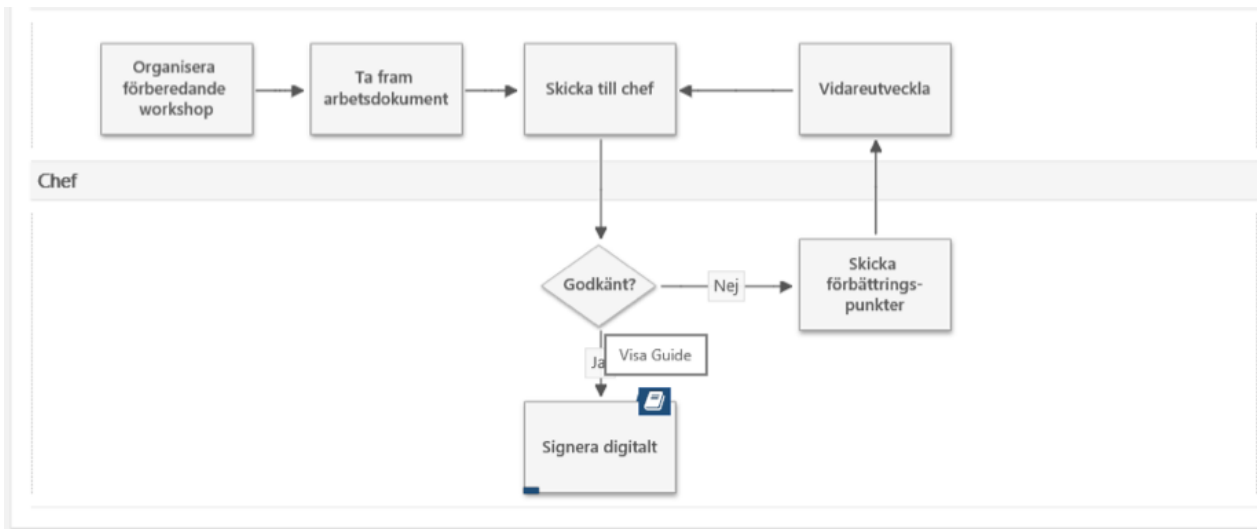
Availability

People are lazy by nature. Create proximity with as few clicks as possible to help you get satisfied employees. By constantly pointing out where help is available instead of explaining and solving the problem, employees will learn how to find help when they need it.



Anchoring

In our experience the most successful examples of Performance Support are where the working method is firmly rooted in the organization. If management recognizes the importance of meeting learning needs and thus sets requirements, there is better opportunity for people with knowledge to dedicate their time to content production.



Simplicity

Creating materials for Performance Support should be easy. Those who create the content are usually not educators, but officials who will document what they know that employees need to be able to do their job. The advantage is that they know where problems can occur and can create contextual help that explains exactly what it is needed.

The content can also be simplified in relation to how it would have looked in course format. The motivation for accessing learning material when faced with a specific problem in a job situation is much higher than if you had the same material presented on a course. Thus, there is not the same need for professional production to make the content selling and motivating.



Independence

Design the support for Performance Support so that it can work independently - without the need to put the knowledge in a context, as they often do in courses. You do this by reusing parts of formal learning and making them available after the course. Thus, what you learned in the classroom or course is easy to find back to again when encountering the questions at work.

A course puts the knowledge in context and often provides a basic understanding of how things are connected. In everyday life, it is not always about the whole, for example when a user is stuck in a specific part of a system. By dividing the knowledge and showing smaller parts, the user gets on faster and easier in everyday life and does not have to contact the help desk or support when they encounter problems.

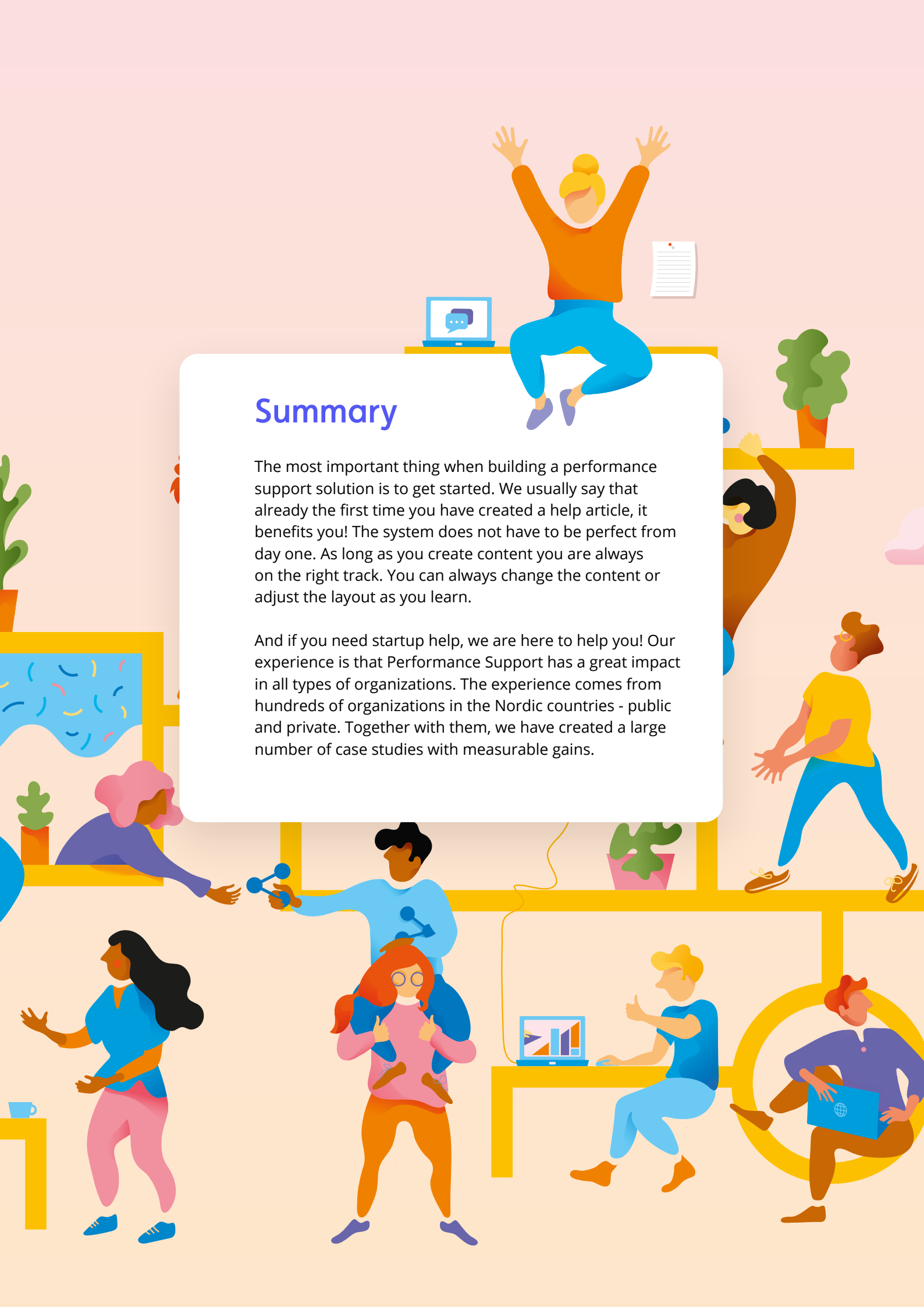
Change

One of the biggest objections to concepts such as e-learning or Performance Support is the continuous work that must be done. The tools you use during your work day change and require constant attention so they don't become irrelevant.

But it is not impossible! With all the benefits that comes with it. It's a safe bet!

First and foremost, you should be prepared that the course content may change over time. Make the information easy to change and update so the content is always relevant and of good quality. Divide the content into smaller parts so when something changes it is easier to change the small part, instead of it being a big job that you prefer to ignore.

Our experience is that it is those with knowledge, specialists or teachers, should be responsible for updating the information. If the development and content upkeep has to be done by a education specialist who does not work in the system regularly good communication is needed to achieve a good result. Instead, when the person with the knowledge is also the one who produces the content, a satisfying result is reached more quickly and easily. The most important thing: employees should be able to trust and use the information and not have to think about whether it is old or outdated.



Summary

The most important thing when building a performance support solution is to get started. We usually say that already the first time you have created a help article, it benefits you! The system does not have to be perfect from day one. As long as you create content you are always on the right track. You can always change the content or adjust the layout as you learn.

And if you need startup help, we are here to help you! Our experience is that Performance Support has a great impact in all types of organizations. The experience comes from hundreds of organizations in the Nordic countries - public and private. Together with them, we have created a large number of case studies with measurable gains.

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 co-workers or customers.

We would like to give you a call. talking about your organisation, and your knowledge and learning needs to see 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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