Performance Architecture Roger Addison & Carol Haig

Performance Architecture: Tools You Can Use

In the spirit of full disclosure, as professional Performance Architects, we share information about a tool we have found to be particularly useful at the inception of a project. We have no financial interest in this product. We have used it, as you can, free of charge.

One of the great joys of using the Internet is the ability to search for resources to help us in our work. With the right query, we can usually pull up an array of web sites and then quickly survey them to determine which are likely to provide what we need.

As Performance Architects, we appreciate being able to rapidly research models and tools to use with our projects. And, as we have emphasized in previous Columns, what differentiates Performance Architects in their quest to help organizations improve how their employees perform is our focus on just the right type and amount of **analysis** at project inception.

Introducing Proofpoint Systems

Want a systematic way to input critical information, organize it, and produce a clear summary of the situation? Looking for guidance on next steps, solutions, success probabilities, and other critical project components?

In this, our first Column of the New Year, we share one of our favorite web sites, www.proofpoint.net, the cyber-home of Proofpoint Systems, Inc. This software company has built an impressive suite of diagnostic tools to help organizations do their best work, and has established itself as a reliable resource and partner for its clients. Even better, Proofpoint provides a number of valuable aids that are free to enterprising individuals.

Proofpoint.net Orientation

Site users at Proofpoint.net include everyone from Performance Architects and project managers to CEOs and government officials. They explore software that can help them analyze and solve challenging business issues.

In particular, the site offers software products to help make the lives of business process professionals easier and includes:

- Planning and performance management tools
- Analysis diagnostics

- Project and change management methods
- Measurement systems

Let's have a look at how Proofpoint.net is organized.

Site Navigation
To quickly learn your way around the Proofpoint site:
- Start with the drop-down menu for **About Us** and listen to the CEO's message for a solid introduction to the operating philosophy and goals of Proofpoint
- Next, take a look at the **Products** section to see what is offered
- Then, use the **Products** drop-down menu to explore in more detail
- You can drill down further to see the suite of tools available for each product family

Guided Project Example

Proofpoint has posted examples of selected products so that users can try free versions to learn about the kinds of information needed and see actual results for those examples. Two that we tested are:

- **Confirm a Solution –** helps users double check a performance solution in the context of a perceived issue or opportunity
- **Analyze an Issue –** provides a quick analysis tool for assessing a performance issue and generating a simple report

We have chosen **Analyze an Issue** for further exploration because gathering information is key to the work of Performance Architects and central to the success of business process specialists.

Registration
To see sample **Analysis** projects and work with the tools, users must register on the Proofpoint site—which is free. We encourage you to do this now so that you can explore the site in tandem with this Column and experience one of Proofpoint's tools firsthand.

Once you register, you will be able to access valuable examples and information with absolutely no requirements to do more. You will not be inundated with promotional materials or pinged by salespeople—we promise. Several tools useful for initial analysis are available to you. These are free tools you can easily access and use.

Analyze an Issue: A Quick Walk-Through
Effective Performance Architects approach analysis by starting with the results they want to produce. Then we go back to clarify and refine what it is we are going to analyze. We like to know where we are headed before we start out. This is true for models and tools as well: we like to see all the components before we begin so we can organize our information and proceed systematically and efficiently.

Proofpoint has screen-by-screen questions for users to answer as they work through each tool. Fortunately, we can page through the screens and enter a few random characters in each field to quickly see all the components of the tool before we begin

a real entry. You can move forward and back among the screens, even logoff, and data you enter will be there.

In keeping with our focus on starting with the results, Figure 1 shows a sample of the **Project Summary** this application produces:
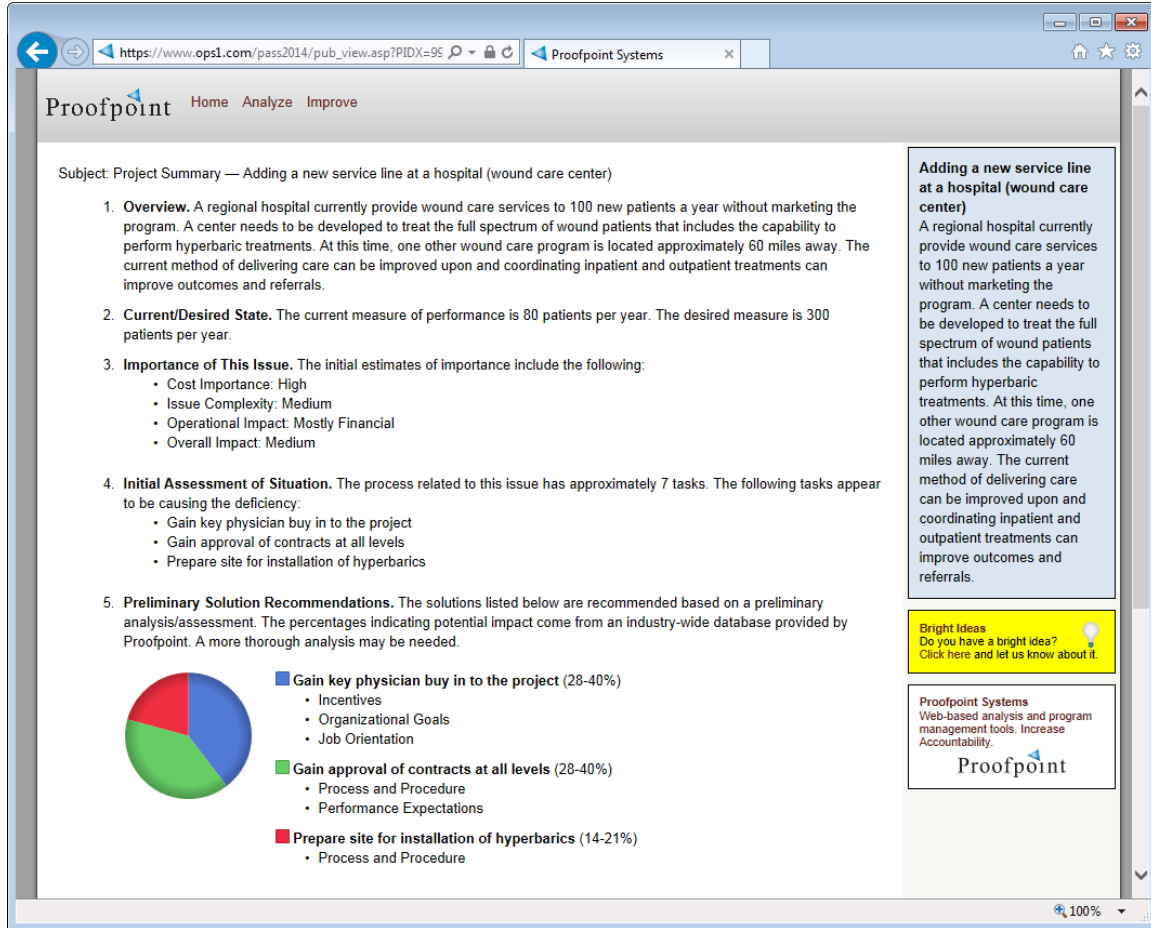

Figure 1

Now that we know where we are going, let's try it. This can be done quickly.

- Logon to www.proofpoint.net and sign in
- Follow the tabs as the titles shown below appear, entering random characters as needed to progress
- Take a few minutes to explore each screen as you move forward
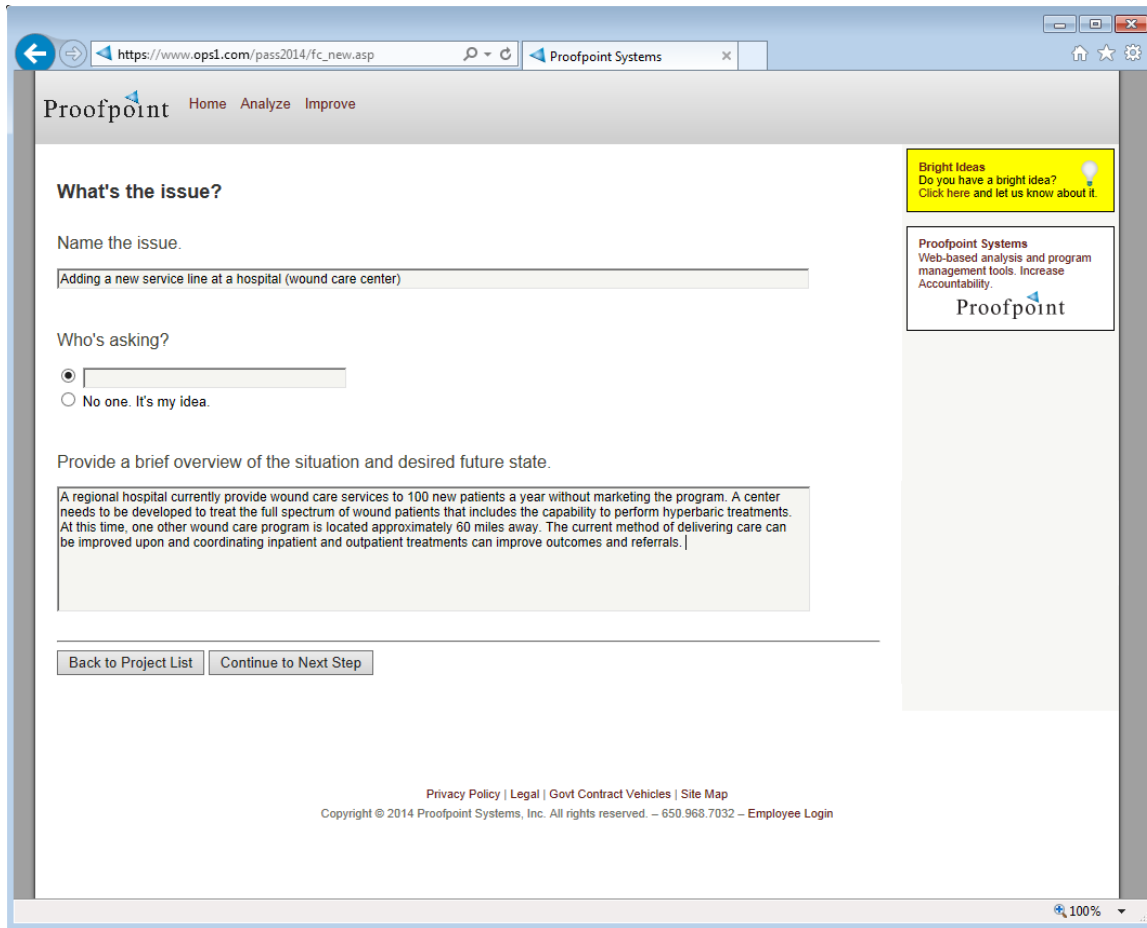- Check in for advice as suggested below:

Figure 2

The **Analyze an Issue** application is tab-driven and simple to use. While it is very intuitive, here is some advice to make your initial exploration easier:

Tab Title	Advice
Set up	Enter free-form text/point and click to set up your project, establish a goal (current/desired), and determine the importance of the issue. Built-in choices help you pinpoint your responses, so explore them all.
How	Enter the way the work gets done – the tasks that lead to accomplishment of the issue or opportunity. Enter as many as you need to describe the workflow. (Click *Need an example?* to see how to describe tasks at a high level.) This is also where you do a quick analysis of each task under "Task Deficiency".
Fixes	For each deficiency, click one or more solution areas that you think are appropriate for improving the current situation.
Benefit	A summary report of your quick analysis. The percentages are based on Proofpoint's comprehensive, research-derived database.

Team	Enter the names of those on your project team, by role. This will also allow you to share the project.
Share	Two choices here: (1) share with your team or (2) share with the public. For sharing with your team, just enter their email addresses and they will get an alert.

Now that you are familiar with the **Analysis** tool, and if you have not already done so, do explore the other tabs across the top of the screen. Use the *back* button at the bottom to return to your analysis.

Completed Analysis Report — Samples

Proofpoint has included several examples of completed analyses. While you will not be able to view the step-by-step input that you just experienced, you can read the resulting reports. Go back to the **Analysis** tab and choose *Public Projects* from the drop-down list.

Read the project summaries most closely related to the industry you work in or the types of projects you take on as a consultant. And, do read any others that interest you. You will see that the **bold** titles come directly from the main screens you just explored.

The **Preliminary Solutions Recommendations** are just what they say: *preliminary.* However, they are very useful in the early stages of project development and may help you gain sponsorship and buy-in.

Exercise: Your Own Project

Now it's your turn. The best way to determine if a particular work tool is for you is to try it for a real project. If you have all the information the tool requests, and you now have an idea of what that will be, you can complete a high-level analysis in about 30 minutes.

Choose a project you are just starting or perhaps one that is already complete:

- Logon to www.Proofpoint.net
- Choose **Analyze** from the *What do you want to do today?* screen
- Choose **Start an Analysis** if you have selected a new project or, choose **Confirm a Solution** for a project you have completed or are thinking about
- Fill in the requested information for each field on the screens that follow, working your way through your analysis
- Remember to avail yourself of choices offered, examples, and other support as you work
- Review the resulting Analysis Report and use it to develop your project further or to help wrap-up a completed project

Advice to Users

Proofpoint tools are constructed to help you efficiently produce fine work and enhance communication across your organization. The **Analysis** tools are versatile. Use them:

- For a high-level first pass at the beginning of a new project
- As a quick check on a completed project
- In a team where each member completes an analysis and shares the results
- To build a reference library of process solutions for future access and re-use

Summary

Proofpoint Systems began with an analysis tool and has steadily expanded and enhanced its' analysis capability. With tools developed, added, and constantly refined, much of which the Proofpoint site offers supports business processes used by many private and public sector companies.

We invite you to register at Proofpoint.net and complete the **Analysis Walk-Through.** Then choose a tool and a project to work with. Do avail yourself of the built-in explanations and helpful lists. Proofpoint invites your questions and feedback. Good luck!

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www.bptrends.com | 6