

Of Mental Models and the L & P Process

ICD = Intercultural Competence Development

L & P = Learning and Performance

PBT = Performance Based Training

[The following excerpt is part of an ongoing series of interviews between Janet and Reinart. Janet is the editor of an Intercultural Competence Development (ICD) industry journal and Reinart is part of Talaria Intercultural, a provider of facilitated ICD services.]

Janet

Thanks once again for meeting Reinart. I have so enjoyed our previous conversations. As I mentioned on the phone, this conversation will be part of our journal's new "Primer" series of interviews regarding the technology of facilitated ICD services. Of course we aren't talking about anything electronic or IT-related. It's interesting that many people, even some people who are in the training industry, don't think of Training, or L & P as a technology. This series will give introductions to the specific technology areas of Assessment, Design, Development, Implementation and Evaluation of facilitated ICD Learning and Performance interventions. Our focus is on face-to-face ICD efforts.

Remembering back to our phone conversation last week, we agreed to put forth the notion of "Needed ICD L & P process mental models," selecting a few of the more significant ones and discussing those today. There is a fairly large part of our audience that has become more interested in all this due to a previous interview with you.

Reinart

Oh right, I imagine it was the one in which I was talking about our industry's need to pay more attention to the means – the L & P process – of facilitated ICD interventions. Oh and by the way, I like the discrete way you used several words already that together represent one of our core mental models – the ADDIE process.

Since this is for the purposes of a short primer, why don't we focus just on the A – the assessment process when it comes to L & P interventions. This will also be related to the larger mental model of Performance-Based Training (PBT). Our Talaria workshops, as you know, are performance-based, or as some people say, job-based.

Janet

That sounds good Reinart. I was just testing you to see if you would catch that ADDIE reference (laughing). I had a lot of feedback from consumers of facilitated ICD regarding that interview. Some were questioning whether or not their investments in intercultural training were paying off. You had some compelling perspectives, especially that if the L & P process doesn't match up with the content and the intended outcomes, the program likely won't be successful. The people I talked with were remarking on how little this question of the means comes up with their providers.

Reinart

Right. OK. First, let me bring out one underlying assumption we need to make for the scope of this interview. My assumption, and I think that of most of your readers, is that the intended result of any facilitated ICD intervention is improved concrete and specific workplace performance leading to effective management of cultural differences. This in turn contributes to increased intercultural organizational effectiveness.

Janet

OK, I know we have discussed managing cultural differences before and that it is a core ability for anyone working intercultural. Can you describe an end result of effective management of cultural differences?

Reinart

Why certainly Jannie. Managing cultural differences is largely about managing cultural adaptation behaviors. Adaptation is the end game, as they say. You know, people involved with intercultural work have a very challenging job. First, they need to have the same organizational abilities as people not working intercultural. Of course the number of people working only domestically is dwindling and will continue to do so at a rapid pace. Intercultural professionals (people working in an intercultural context) then need to determine if and how the behaviors that are skilled in their own culture need to be adapted to the intercultural context in which they are working.

Janet

When you put it that way, it reinforces to me the giant effort that is required to help organizations with their intercultural dynamics.

Reinart

Yeah Jannie. It also reinforces that a fairly complex L & P process is necessary for assisting people in the development of these abilities. This complex process requires L & P professionals to have a lot of specific L & P mental models whirling around inside their head.

For some examples of managing cultural differences, your readers can go to our website, TalariaIntercultural.com, and see examples of cultural difference management. For example, I could recommend the description of the Talaria Facilitation Method (TFM), which was the result of managing the cultural differences related to learning and workplace performance improvement.

Janet

Help me and my audience to understand this mental model concept. It is a bit of a weird term.

Reinart

First, a model can be thought of as a defined process which describes the interrelationship of its elements. This interrelated process is assigned a name. The model helps to make a complex process understandable so that we can manipulate it. Once you understand this model and have internalized it to the point of being able to expertly manipulate it, it becomes a “mental model.”

Janet

Reinart, you know I have inductive learning tendencies.....

Reinart

Indeed Jannie! We all need *lotsa* illustrations and examples when it comes to this stuff. Let’s take the mental model you already brought up – ADDIE. Imagine that you and I were starting to develop a workshop design for training American water/sanitation engineers to build and then teach people to build wells in a developing country – say Bangladesh. I could start out our first meeting in the following way.

OK, first Jannie we need to figure out and get input on the main problems that people have in building and maintaining wells today. Then we will need to analyze how many of the problems are structural, systemic, policy-related etc. and then how many problems are due to people’s lack of skills and knowledge. We will involve all stakeholders and create a pilot workshop, first determining the behavioral skill model and then writing behavioral

objectives. Oh, but of course we should design the evaluation process even before the workshop.....

Janet

(interrupting) OK Reinart, I see where you are going with this. What you said so far only faintly scratches the surface of doing the Assessment, Design, Development, Implementation, and Evaluation for this project.

Reinart

Exactly! But if you and I both possess the ADDIE mental model, we could simply say, “Let’s start our planning with the ADDIE process.” We would both immediately be on the same wavelength. Our human existence depends upon the constant and never ending use of mental models, as does the narrow reality of facilitated ICD L & P processes. We would all quickly become insane without mental models to make meaning of our world.

Some years back, I was involved in a project like the one I mentioned. I was leading the training part of the project, so in developing the workshop design I had water/sanitation engineers acting as Subject Matter Experts. At one point during the development of learning objectives, an engineer exasperatedly opined, “We need to just tell the participants what we are going to teach them. We don’t need all of this behavioral objective stuff and other jargon!” I responded, “ You are absolutely right that we should in no way bring up this training jargon with the participants, but it will be a cumbersome process for us to prepare for the training if we don’t have a few of these key concepts on which to draw. Let me put it this way; we don’t need to use training technology terminology as long as we can call the moving parts of the well *doohickeys and thingamajigs*.” It helped him to see the point and get a good chuckle besides.

Janet

(laughing) Yeah, I even see this kind of thing when I observe ICD workshops. Sometimes people are reluctant to use the cultural value language, such as monochronic and polychronic. They see it as jargonish.

Reinart

Hey, I think you just created a new word – jargonish. I like it! Regarding that, let’s tap into our monochronic orientation a bit more. I have a meeting at noon.

Janet

Sure.

Reinart

Right, so regarding mental models, it might also be helpful to think of a mental model as a particular type of structure, let’s say a window. But the window pane is not made out of glass. It’s made out of knowledge. Every experience is viewed through a window, or multiple windows. You have umpteen thousand windows, all constituting mental models, in your head all whirling around each other.

Janet

Jeez Reinart, I am beginning to feel like I’m in the middle of an old Star Trek episode.....

Reinart

(laughing). Good Jannie, good! Let’s just hope we can keep Spock out of the picture or things will get really muddy from all that Vulcan emotionless logic. Though you know, it would be great if Vulcan the Roman god came into our picture. You know, our organization’s name was inspired by both him and his brother.

Janet

I see.....I was wondering about that.

Reinart

At any rate, when your view of reality is filtered through the knowledge in these windows, you can make meaning of what you see. One person viewing a slice of reality will see that reality differently from another person if they have different mental models related to the situation. In today's ICD world, there are a lot of mental models regarding the 'what' of intercultural interactions. For example, if you have internalized the knowledge of Geert Hofstede's cultural value model, you would view intercultural interactions through the window constructed of that knowledge. If you saw a typical Chinese employee participating in a meeting and her boss was in the meeting, it is likely she wouldn't say much unless her boss asked her to do so. Looking through the Hofstede model window, you would likely see a normal Chinese employee following the norms of her role and understand that the probable reason for this was that Chinese culture, in general, values a relatively high level of "power distance." If you looked through a window that was not constructed with any type of intercultural knowledge, and if you were a typical American, you might see that Chinese woman as shy, or not really having any expertise to offer. You might even assume that women's perspectives in China are not as valid as men's. You would not actually be viewing it through a culturally-related mental model, since you would not be conscious of the situation even being related to cultural differences. So, mental models are windows in our consciousness.

Janet

That is helpful – thanks for beaming me up Scottie! (both laugh).

Reinart

In the context of our discussion, mental models are also the source of our expertise. When you work interculturally, having the Hofstede window generally makes you more capable than the person without it. So, many people who are involved with providing facilitated ICD services today possess many of those "what" mental models. However, in general, there is a lack of L & P (how to communicate the "what") mental models dancing around inside ICD providers' heads. These are the models which tell us how to transfer the learning in the program to workplace performance improvement.

Of course, ADDIE is a foundational mental model for anyone involved in training, or as we prefer to say, L & P. ADDIE can be thought of as a component of Performance-Based Training (PBT). Further, PBT is part of a larger methodology called Performance Improvement (PI). PI is a methodology for improving the quality of institutional and individual performance. PI grew out of the realization that poor job performance seldom is due solely to the performer's lack of skills and knowledge, but usually to other factors in the organizational system. The International Society for Performance Improvement (ISPI.org) defines PI as "a set of methods and procedures, and a strategy for solving problems, for realizing opportunities related to the performance of people. It can be applied to individuals, processes, and organizations. It is a systematic combination of three fundamental processes: performance analysis, cause analysis, and intervention selection."

If any of your readers are currently acting as ICD facilitators, or facilitators of any other kind of training activity, and they had to look up what ADDIE, performance-based training, and PI are.....

Janet

Then I would advise Scottie to beam them up.....

Reinart

So, as I mentioned earlier, let's get into breaking down the A, the assessment phase, and how it relates to PBT's role in facilitated ICD. Focusing on this one element should be fairly easy to do.

Janet

Now you're talking more like Captain Kirk. I like it.

Reinart

In order to improve employee workplace performance toward achieving organizational results, we go through four types of assessment:

--First, what are the **organizational needs**? What is the gap between needed organizational performance and current organizational performance?

--**Workplace performance needs are second.** What are the employee performance needs – what is the performance required to contribute to fulfillment of the organizational needs? What is the gap between required performance and current performance?

--Third, what are the **KSA needs (sometimes referred to as TNA, or Training Needs Analysis)**? What is the gap between required Knowledge, Skill, and Attitudes (KSA) and current KSA?

--Fourth, what are the **Work Environment needs**? What is the gap between current Work Environment supports and the supports necessary to achieve needed employee performance?

Janet

It sounds very mathematical!

Reinart

Yes, it is definitely rational and logical. You'd think this came from Spock himself.

Janet

So, in the typical current state of ICD, this isn't being done I presume?

Reinart

Well, some of it. But the key is that all four need to be accounted for - and in the order listed. Actually, let me take that back. Right now, in facilitated ICD we don't really assess the Work Environment needs in full. I will get back to this.

Organizational Needs

Take the organizational needs, for example. Sometimes providers and their clients over-complicate this and sometimes they don't address it enough.

On one level, in the corporate world, organizational strategy is fairly simple and universal. I think companies everywhere want to have profitable growth, cut costs and produce quality products and services. Whatever more specific strategies exist in an organization's strategic blueprint, we in the facilitated ICD industry help our clients within a very narrow – though deep – area of their organization's effectiveness improvement. That is, we help them to grow their organization through better management of cultural differences. Management of cultural differences primarily happens at the human interaction process level. Human interaction in any culture is the glue which unites people in an organization to achieve the strategies. The better the human interaction processes, the more likely it is that the strategy will be realized. Every interaction process is impacted by cultural differences, including project management, leadership behaviors, human resources management, problem solving and influencing others, negotiation, and decision making. Management of cultural differences is an extremely specialized ability. Facilitating development of this ability is even more specialized.

Performance Needs

Managing cultural differences is the core performance competency for anyone whose work depends upon getting results in an intercultural context. Helping clients understand this is usually the first step in the

assessment process. In the current facilitated ICD state, a gap is created when providers jump directly to conducting the Training Needs Analysis, without dealing with the performance needs. The question becomes, “on what are you basing the training (KSA) needs if you don’t have a clear behavioral workplace skill model?”

Janet

So, managing cultural differences can be looked at as a universal ability within the intercultural organization context?

Reinart

Right. This means that anyone involved within the general domain of intercultural work needs the ability to manage cultural differences. Whether you are a senior leader, global team member, from Canada or Kenya, in a corporation or a nonprofit, or whoever or whatever else you are, this ability will enable you to significantly contribute to your multicultural organization’s goal accomplishment and achievement of organizational results.

If a senior leader from Argentina can effectively manage cultural differences, she will be better able to formulate strategy and vision within the intercultural context of her organization. If an individual contributor from Nigeria on a global marketing team can manage his own cultural adaptation, then he will be able to better contribute to his intercultural organization’s marketing and sales function.

Janet

I see. So, it is not just the client directing the provider, but the provider helping the client to understand the nature of intercultural differences and how that impacts their organizational effectiveness. It seems that a lot more education and advice needs to be provided to organizations as to how they can achieve better organizational results through the management of cultural differences.

Reinart

Yes, dearie. Of course the first step there is that the owners of their organization’s ICD efforts need to develop a high level of intercultural competence before they can understand this. In the current state, this is usually not the case – another big challenge for facilitated ICD providers!

Janet

The way you described it, it makes me see that the ICD industry will have an almost endless demand for ICD as time goes on.

Reinart

We are, my dear, sitting on a gold mine (chuckling). The current level of intercultural competence, defined in this case as the ability to manage cultural differences, is overall quite low worldwide. However, to mine for more gold, we need to help clients see this clearly and to provide L & P approaches which successfully change behavior in the workplace. We need to educate and advise clients on what effective workplace performance is in the intercultural context. That’s why this phase of performance assessment, before moving to KSA assessment, is critical.

Janet

You mentioned that we need to provide more education and advice to clients?

Reinart

That’s true. We need to formulate and then realize the vision of being Trusted Intercultural Advisors to clients. That is part of the role when working within a PI context. Professionals who work through PI

methodology are called Performance Consultants, not trainers. Our use of the L & P term comes out of PI. In addition, there will be more emphasis on providers needing the same kind of organizational experience as their clients and L & P participants. Working inside a large global organization is invaluable experience for a facilitated ICD provider. A great book for being introduced to PI and Performance Consulting is Robinson & Robinson's book simply entitled *Performance Consulting*.

Janet

What makes you think that the facilitated ICD industry will shift more toward PI methodology?

Reinart

(rubs his thumb against his index and middle fingers in the \$\$ sign) It's economics my dear. The wider human performance improvement industry began realizing some years ago how much money was being squandered in organizational training program efforts due to many programs not linking training to organizational results. The beginning chapter of the Robinsons' book outlines this dynamic.

Let me say a bit more about PI. I can do that and at the same time bring in the fourth needs assessment level – Work Environment needs.

Janet

Great. The Starship Enterprise keeps rolling.

Work Environment Needs

Reinart

The Performance Improvement (PI) world has recognized this need to address Work Environment needs as well as KSA needs. Worldwide, in non-intercultural Learning and Performance programs, this shift has occurred and continues to gain momentum. So, we are behind the curve, as they say. As I mentioned before, the most important professional association involved in this shift is the International Society for Performance Improvement (ISPI). If you aren't familiar with them or Performance Improvement (PI) methodology, a tour of their website would really be beneficial – check out ISPI.org. Since ISPI was created, ASTD has also shifted much of its attention to PI and performance-based training.

Janet

You know, I have visited ISPI's site and know a little bit about it. A few years ago, I was working at a bank in Toledo. They were getting into PI as the basis for their performance management process and to support a new strategic direction. I left for my current position before they got going strong. But from what I remember, PI is a systems approach. Also, it seemed like it required a lot of involvement from managers. They contrasted PI with what they called "traditional training."

Reinart

Right Kiddo! I imagine what they called traditional training is pretty much what we call the university approach. Simply put, PI recognizes that simply addressing Knowledge, Skill and Attitudinal orientations - in our training language the "KSA" – often won't result in workplace performance improvement, no matter how effective the training intervention is. It's necessary for managers to provide support in the workplace to help their employees be able to apply the learning back at their jobs. Managers need to set workplace performance expectations, reward improved performance, provide time and conditions for employees to practice new skills learned in training, and provide regular and ongoing feedback on their new performance, just to name a few things. Now, most of the people we work with in facilitated ICD programs are in fairly autonomous positions so this need for manager involvement is not as strong as it used to be in more of a manufacturing environment and economy.

Janet

So, you mentioned that Talaria’s approach is performance-based. Do you get your participants’ managers involved in this way by helping them to provide Work Environment supports?

Reinart

No, we don’t Jannie. This is a bit of a quandary dearie. The problem is that most managers in today’s world have a relatively low level of intercultural competence so they can’t really effectively support their people in this way. I used to work as a leadership development trainer in a large domestic healthcare company. When we did a training program to improve new managers’ ability to delegate, generally speaking, the participants’ managers already had a fairly high level of delegation skill. Therefore, they could support their employees accordingly.

Janet

Right, I can see that.

Reinart

So, until there is widespread acceleration of intercultural competence, our focus is primarily on the KSA. However, it is a performance-based approach – not the university approach. The performance-based approach increases the potential for learning transfer to the workplace considerably more than the university approach. The performance-based approach also is more effective in awareness raising. Action in the form of skill practice is necessary to activate awareness raising. Awareness raising and action feed off of each other. You can’t have fluent levels of one without the other.

Janet

So then, how do you know how much people are actually changing their workplace performance?

Reinart

It is problematic and right now mostly anecdotal. However, since we do a lot of practice in the workshop, we of course evaluate people’s ability to perform skills at that point. From the information we do receive from people once they return to the workplace, we find that they are generally self-motivated. At the level of our participants, all of whom have strategic roles, practice of the skills in the workplace makes it easier to do their jobs. We at Talaria would love to partner with an organization which would like to become involved with systematic follow-up back in the workplace.

Janet

I am now remembering having lunch with you a couple of months ago and you were talking about your experience working in a large global organization’s L & P organization. If you remember, the restaurant was very crowded and noisy. I was having a hard time concentrating on what you were saying. Now it is coming back to me that you were using some of this PI-related language. You spoke of conducting large-scale performance assessments and so forth. I do remember you talking about your largest internal client who would say to you something along the lines of, “Reinart, at first I hated those performance assessment meetings when you would drill us about our business needs. We had been used to just, as you called it, doing the order giving and taking process with the training department. We would tell them we wanted a training program on something and they would say, “OK.” But after a few of those meetings with you, I began to realize that your approach was helping create a more productive performance improvement program, and at the same time helping me to clarify my strategy and what I was really trying to accomplish business-wise.” So, you have internal experience as a Performance Consultant. Does Patrick also have this kind of experience?

Reinart

Sure Jannie. He transformed a traditional training department into a performance consulting organization as Training and Performance Director at a retail financial institution. Then, at a 40,000 employee national healthcare organization, part of his role as Senior Leadership Development Trainer was that of a performance consultant. A third significant experience for him was in Nepal. He did a three-month consultancy within the Management Training Division of the National Ministry of Education. In a Management Training Specialist role, he collaborated with a large team of Nepali consultants to develop a strategic educational manager performance improvement plan based on PI methodology. Obviously, that was a huge intercultural experience for him as well. It required a lot of adaptation versatility.

I think he and I, as well as many others, had similar experiences; way back when, if you were involved in traditional training long enough, you couldn't help but see that it was often ineffective at producing workplace performance results. Then when we ran into ISPI and learned about PI, it put it all into perspective. PI is a huge mental model with many sub-models within it. Most important for our discussion now is that within PI methodology, KSA is addressed by performance-based training.

KSA Needs and the Link to PBT**Janet**

OK, let's get into it.

Reinart

Right, the **Knowledge, Skill and Attitudinal orientation needs**. Once we have established the required performance needs, then the KSA will follow. Let's focus on the S first. The workplace performance skill model needs to be established first and then the K and A will support that.

Janet

I swear this discussion seems more like discussion of a math theorem.

Reinart

Yes, it has some of that quality, doesn't it? Remember that we have established management of cultural differences and related adaptation as the core foundational performance for all workers in the intercultural organization domain. This is at least partly understandable on a conceptual level, but needs to be operationalized by a model of concrete and observable progressive skill development. This kind of tangible comprehensive skill model is often missing in current ICD efforts. The universal Talaria Intercultural Interaction Skills (TIIS) model narrows this gap. It describes 11 interrelated and progressive interaction skills needed to effectively manage cultural differences for anyone in the intercultural domain.

The skills act as guidelines for managing cultural differences. Skill guidelines are strategic in that they apply to a constantly changing environment. The employee needs to adapt the guidelines to fit each situation. Once skill fluency is reached, employees are agile in making decisions about adjusting according to circumstances.

The defining quality of the Talaria workplace interaction skills is that they empower and enable intercultural counterparts to proactively, directly and openly communicate around cultural differences and work together to determine and act upon needed adaptation to reconcile the differences in the moment of interaction.

Janet

How about the Knowledge and Attitudinal orientations then?

Reinart

Much of the K and A content supporting development of the skills is stuff that is familiar to most people in the facilitated ICD field. Content regarding selective perception, stereotyping vs. generalizing, cultural values etc are included. There is also a fair amount of idiosyncratic content as well in our workshops. The main point is all of the K and A content is funneled into how the K and A will help perform the S – the skills in the workplace. The K and A is not included merely as informational topics or nice-to-know information. Your readers can go to the Talaria website for a detailed description of the Talaria Intercultural Interaction Skills workshop.

Janet

OK, so we have fleshed out the four levels of needs analysis for our primer.

Reinart

OK Jannie. As an ending, let me give you a hand-out. You may be able to use this information in your article. It includes a brief definition of PBT and a couple of references if your readers want to get into it more. And of course it gives me another chance to promote Talaria...(hands the following document to

Janet):

Performance-Based Training

The following definition is taken from Dale Brethower and Karolyn Smalley's book entitled *Performance-Based Instruction: Linking Training to Business Results*:

Performance-based instruction has a narrowly defined purpose: reducing the gap between novice and competent performance (or the gap between typical and excellent performance). Performance-based instruction is designed to enable people to bridge the gap between their initial knowledge, skills and attitudes (KSA) and the KSA they need to perform well on the job. Performance-based instruction enables training participants to achieve high levels of performance quickly. Their energies are channeled into learning just what they need to perform the job well, not nice-to-know, or tangential material.

Talaria workshops are based on performance-based training practices, including the following six select practices:

1. Performance Models - The foundation of any intervention is based upon a job-based specific performance model. The model consists of skills that answer the question, "what is the workplace performance needed to accomplish organizational goals?" Exercises and activities simulate the job tasks described in performance model.
2. Content is skill and application-based.
3. A large proportion of workshop time is used for participant skill practice.
4. Content information is based upon the "need to know" – information that will lead to practice.
5. Materials are designed to be used as job aids back in the workplace.

In addition to the five practices above, workshops apply related key adult learning and neuroscience principles as well as experiential problem-solving learning methods. These elements are all wrapped up inside the Talaria Facilitation Method (TFM).

Jannie, another book I would recommend is Ruth Colvin Clark's *Developing Technical Training*.

Janet

And since I've been beamed up to the starship, I understand that the book's title is not referring to IT programming.

Reinart

Exactly Jannie. Clark defines technical training as, “ *a structured learning environment engineered to improve workplace performance in ways that are aligned with bottom-line business goals.*”

Janet

OK, today's voyage is over. Let's eat!