

# Overview of the **PACT Processes** for Performance Based Instruction

*Note: Performance Based Instruction includes both  
Performance Guides & Learning Experiences*



**Guy W. Wallace**

# ***Overview of the PACT Processes for Performance Based Instruction***

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*Focus on the  
Performance Requirements  
– and Enable Them*

Instruction includes both  
Performance Guides & Learning Experiences

By Guy W. Wallace

# Copyright Page

Overview of the PACT Processes  
for Performance Based Instruction

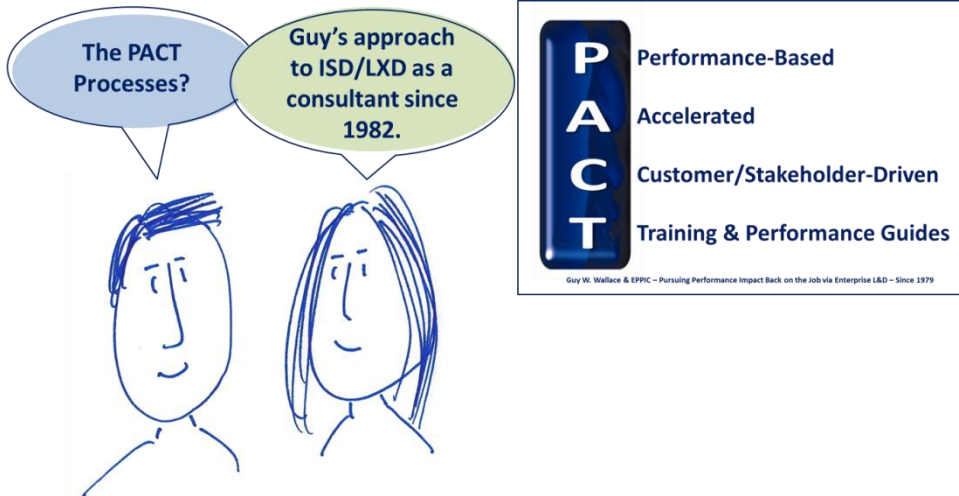
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# Chapter I: The PACT Processes



## **Chapter Introduction**

This chapter will quickly cover The PACT Processes, a set of formal, structured processes that Guy W. Wallace created and has been using as an ISD/LXD Consultant since 1982.

The following aligns with the chapters in this free ebook.

Each chapter also shares links to online resources – most of which are free.

## **Instructional Architecture**

An Instructional Architecture effort does not build any new content. Instead, it determines the Performance Based needs for Instruction and assesses existing content against that need.

An Instructional Architecture effort configures a modular Path and Planning Guide that are “as rigorous as required and as flexible as feasible.”

Instructional Architecture efforts generally follow a 4-phase approach.

**IA Phase 1** – In this phase, the project priorities, direction, and resources are defined. To ensure the success of later phases, the Project Steering Team, during *this* phase, must uncover and plan for potential issues and stakeholder requirements.

**IA Phase 2** – The purpose of this phase is to establish a common view of the Target Audience Performance Competence requirements and the enabling knowledge/skill requirements.

**IA Phase 3** – This phase produces an Instructional Architecture Design to address the performance tasks and knowledge/skills derived in the Analysis Phase.

**IA Phase 4** – In this phase, the Project Steering Team establishes priorities for all of the L&D Events and L&D Modules.

Instructional Architecture efforts lead into Instructional Development efforts for the priority Gaps of Existing Instruction as determined in the IA effort.

# Instructional Development

Instructional Development efforts build and/or buy Instructional Content.

My approach is a modified ADDIE effort. As a consultant who needed to plan, price, and schedule my efforts, I wanted to add the Phase 1 Planning & Kick-Off effort and modify Phase 4 by extracting Pilot Testing out as a separate phase.



Also, Implementation and Evaluation were always conducted by my clients, so I separated those efforts from my ID planning framework.

## The 6 Phases of an Instructional Development Effort

ID Phase 1: Project Planning & Kick-off. Project priorities, direction, and resources are defined; potential issues and/or stakeholder requirements should be uncovered and planned for during this phase to ensure the success of remaining phases.



ID Phase 2: Analysis. A common view of the personnel, performance requirements, knowledge and skill requirements, and appropriateness and completeness of any existing T&D is established; this common view will form the basis for the training design.

ID Phase 3: Design. In this phase, the Design Team is facilitated through a systematic design process; some details are completed after the design meeting.

Note: The intent of the team approach to design is not “to design by committee” but to influence “the designers by committee” during the actual design activities.

ID Phase 4: Development/Acquisition. In this phase, the training is developed and/or acquired/modified per the Design Document (produced in Phase 3).

ID Phase 5: Pilot Test. In this phase, the training is delivered (Pilot tested), and extensive evaluations are conducted.

ID Phase 6: Revision & Release. In this phase, all materials are updated (per the “revision specifications” from Phase 5) and are released into the training system.

## **Instructional Implementation, Evaluation & Maintenance**

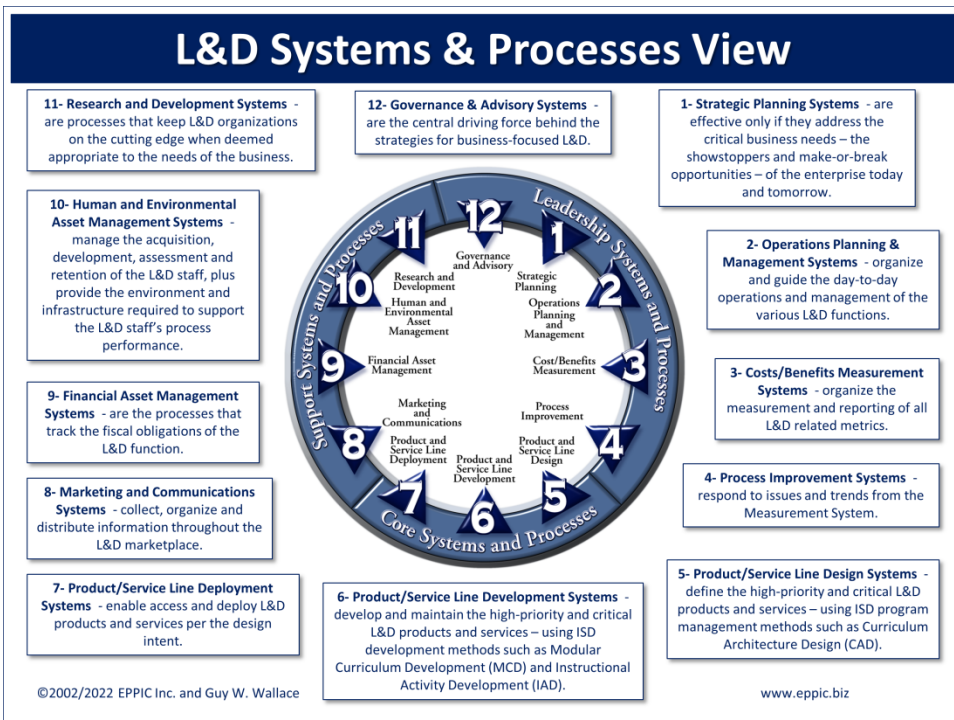
Once the Instructional content is Implemented and released to the Deployment and Access Systems, existing evaluation systems kick in, gather data, and report it out, or make it available for retrieval.



Additional Analysis data, therefore, could and should continue to roll in from both the Implementation and Evaluation Systems in place and trigger the need for Maintenance.

# The Processes are the Core Processes in an L&D Systems View

A Systems View of the 47 Processes of an L&D System is intended to help L&D Leadership get their arms around their function and assess it, and address any improvements necessary.



The goal is not to conduct Lean and Six Sigma efforts on each of the 47 Processes.

## Chapter Summary

This chapter quickly introduced The PACT Processes.

## Some Chapter-Related Resources & References

The following chapters will present additional related Resources and References.

But here is one that sets the Performance Orientation Stage, so to speak.

### Article

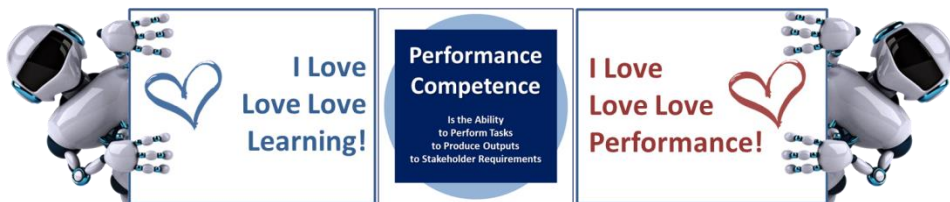
#### **Article: Modeling Mastery Performance and Systematically Deriving the Enablers for Performance Improvement**

– Chapter 11 of the Handbook of Human Performance Technology – 3rd Edition – 2006.

<https://eppicinc.files.wordpress.com/2012/01/chapter-11-wallace-handbook-of-hpt-third-edition-2006.pdf>

## Time for Some Structured Reflection Regarding Your Possible Adoption and/or Adaptation

Before you get much further along in this, why don't you take some time to make a note of your initial thoughts, especially as they relate to my methods, models, tools, techniques, and language – and what you might be able to Adopt as I have presented them here, and what you might likely need to Adapt.





# Chapter 2: Instructional Architecture

Instructional Architecture designs modular Performance Development Paths, Planning Guides and specifies Gap Instruction.



The chart is titled "Code 900 Supervisor Leadership & Management Development Path" and includes the NAVSEA logo and the mission statement "Leadership by Design Vision: No One Left Behind". It is organized into four main columns representing different levels of development: "New Hire", "New Hire with 1-2 Years", "Intermediate with 3-5 Years", and "Advanced Developer with 6+ Years". Each column contains a grid of performance indicators, with some cells highlighted in green or yellow. A legend at the bottom left explains the color coding: Green for "Exceeds Expectations", Yellow for "Meets Expectations", and Red for "Needs Improvement". The chart also includes a section for "EPPIC Inc." at the bottom right.



# Chapter Introduction

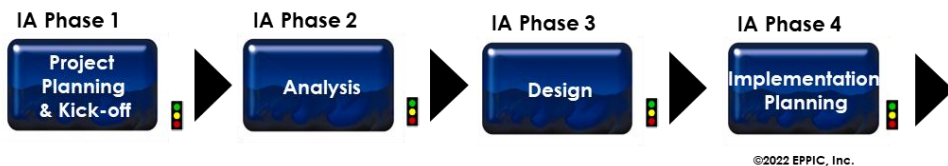
This chapter will quickly cover the processes and key outputs of an Instructional Architecture effort.

## Instructional Architecture

I conducted my first Instructional Architecture effort while still an employee at Motorola back in 1981.

Then I became an ISD/LXD consultant in 1982 who specialized in Curriculum Architecture Design.

I formalized my methods, processes, and practices to support my business partners, staff, subcontractors, and clients and typically conduct these efforts in 4-phases.



I've completed IA projects in as little as four weeks, but most usually take longer as we need to check in with the client and key stakeholders in formal Project Steering Team Gate Review



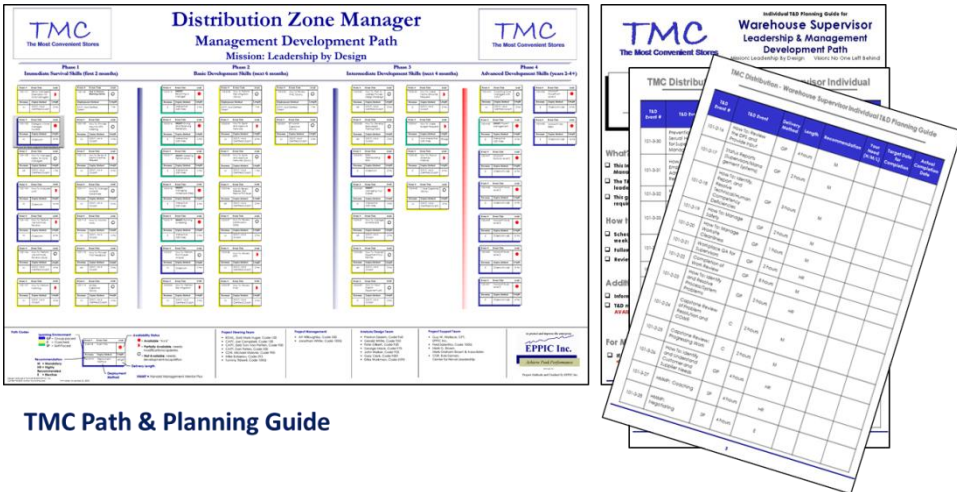
Meetings. See the upside-down Traffic Lights in the graphic above, which show the standard Gate Review Meetings in this ISD/LXD workflow.

Most IA projects focus on critical business operations and their job titles – and warrant the careful and deliberate support of the stakeholders, who live with the consequences of doing these efforts well or not.

## **The IA Outputs**

An Instructional Architecture effort does not build any new content. Instead, it determines the Performance Based needs for Instruction and assesses existing content against that need.

It configures a modular Path and Planning Guide that are “as rigorous as required and as flexible as feasible.”



TMC Path & Planning Guide

It also produces Event & Module Specifications for all of the Gaps in the existing Instruction – to help Stakeholders target investments in Performance Competence Development.



# The 4 Phases of an Instructional Architecture Effort

**IA Phase 1 – Project Planning & Kick-Off:** In this phase, the project priorities, direction, and resources are defined. To ensure the success of later phases, the Project Steering Team, during *this* phase, must uncover and plan for potential issues and stakeholder requirements.

**IA Phase 2 – Analysis:** The purpose of this phase is to establish a common view of the Target Audience Performance Competence requirements and the enabling knowledge/skill requirements.

**IA Phase 3 – Design:** This phase produces an Instructional Architecture Design to address the performance tasks and knowledge/skills derived in the Analysis Phase. Paths, Planning Guides, and Specifications for Modular Events & Modules are produced to help target worthy investments in L&D.

**IA Phase 4** – Implementation Planning: In this phase, the Project Steering Team establishes priorities for all of the gap L&D Events and L&D Modules.

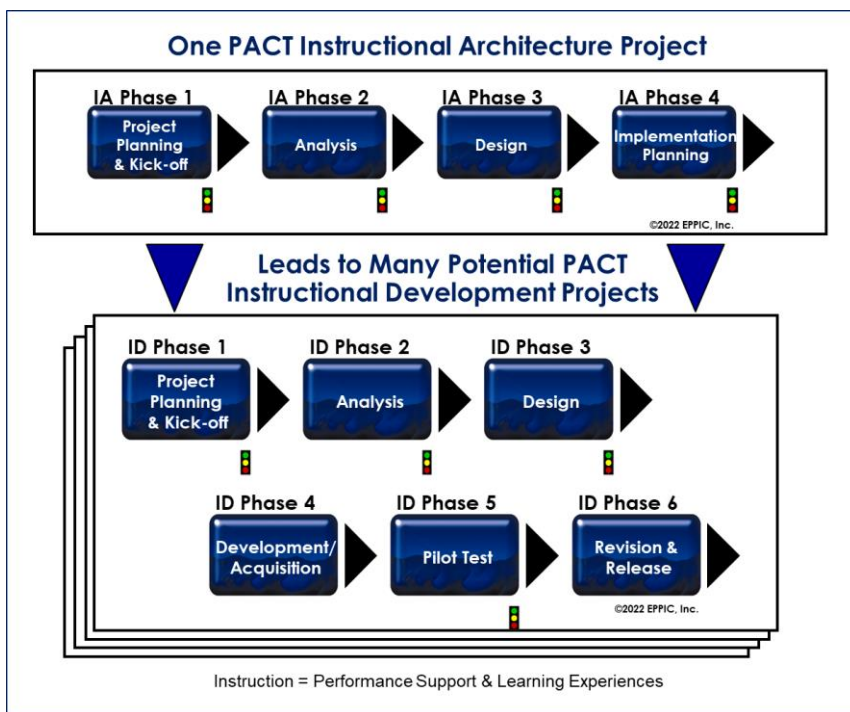
## **IA is Both Rigorous & Flexible**

I've conducted most of these projects using the 4-phase approach as well as in quicker approaches where Phases 2 and 3 were merged. I've even done them where Phases 2-3-4 were merged.

The most important thing about these efforts is the validity and credibility of the data and all of the project outputs that the processes' data informs.

## **Post-IA**

Instructional Architecture efforts lead to the building and/or buying the most critical Gaps in the existing inventory of Instructional content.



Next, we'll cover an introduction to Instructional Development.

## Chapter Summary

This chapter covered the processes and key outputs of an Instructional Architecture effort.

## Some Chapter-Related Resources & References

Here is a short list and links to some articles, books, podcasts, and videos that are free – other than the books.

### Articles

- Training Magazine article (1984):  
<https://tppannex.files.wordpress.com/2023/02/cad-training-mag-1984.pdf>

### Books

- lean-ISD (1999):  
[https://www.amazon.com/lean-ISD-Guy-W-Wallace-ebook/dp/B001ALCULU?ref=ast\\_author\\_dp](https://www.amazon.com/lean-ISD-Guy-W-Wallace-ebook/dp/B001ALCULU?ref=ast_author_dp)
- The PACT Process for Performance Based Curriculum Architecture Design (2011):  
[https://www.amazon.com/Processes-Performance-Based-Curriculum-Architecture-Design-ebook/dp/B005LW4MEM?ref=ast\\_author\\_dp](https://www.amazon.com/Processes-Performance-Based-Curriculum-Architecture-Design-ebook/dp/B005LW4MEM?ref=ast_author_dp)

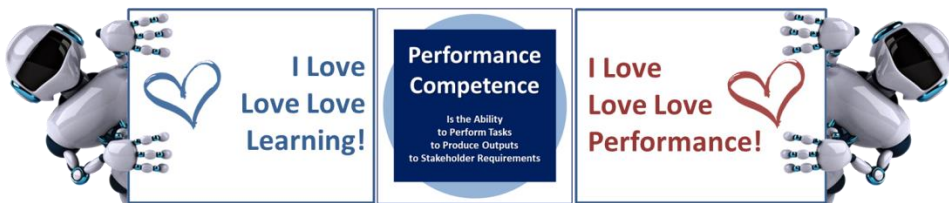
- **Aligning & Architecting Performance Based L&D (2022):**  
[https://www.amazon.com/Aligning-Architecting-performance-based-Learning-Development-ebook/dp/B09TX2LST4?ref=ast\\_author\\_dp](https://www.amazon.com/Aligning-Architecting-performance-based-Learning-Development-ebook/dp/B09TX2LST4?ref=ast_author_dp)

## **Videos**

- **Presentation to Eli Lilly HR Staff on Curriculum Architecture Design (CAD) (1995):**  
<https://youtu.be/SqnkePz8Yog>
- **ATD Central Florida Webinar - performance-based Curriculum Architecture Design via a Facilitated Group Process (2020):**  
<https://youtu.be/FNCXxXCA0WY>

# Time for Some Structured Reflection Regarding Your Possible Adoption and/or Adaptation

Before you get much further along in this, why don't you take some time to make a note of your initial thoughts, especially as they relate to my methods, models, tools, techniques, and language – and what you might be able to Adopt as I have presented them here, and what you might likely need to Adapt.





# Chapter 3: Instructional Development

Instructional Development develops modular Performance Events, Lessons, and Instructional Activities.



TMC		ISD Processes Practices for Project Planning & Management		Lesson Map of Instructional Activities
Lesson #:	Lesson Title:	How To: Conduct the ISD Intake Process		Version #: 1.0
Lesson Objectives:				
<ul style="list-style-type: none"> <li>• Able to conduct client and stakeholder interviews and collect the data necessary for drafting the ISD Project Plan</li> </ul>				
The Sequence of the Lesson's INSTRUCTIONAL ACTIVITIES				
Information:		Demonstration:		Application:
Open				
Conduct/line Initial File(s)				
<b>INFO</b> Information	<b>DEMO</b> Demonstration	<b>APPO</b> Application		
Interview Guide Conducting Follow Up Interviews with Stakeholders	Intake Interviews Conducting Follow Up Interviews with Stakeholders	Intake Interviews Conducting Follow Up Interviews with Stakeholders Conducting Interviews with Client & Stakeholders Using Interview Guide		
Close				



## Chapter Introduction

This chapter will quickly cover the Outputs and Phases of the PACT Process for Instructional Development.

## The Outputs of Instructional Development

The Outputs vary by Mode and Media.

### **Performance Guides & Learning Experiences**

The first type of Instructional Output is either a Performance Guide or a Learning Experience.

Learning Experiences may have Performance Guides and other types of Performance Support embedded in them.

### **Modes & Media**

My three types of Learning Experience Modes include:

- Self-Paced Instruction
- Coached Instruction
- Group-Paced Instruction

Each typically includes content for the learner and the facilitator and/or the learners' supervisors.

Any media type may be used for any of these three modes.

## The 6 Phases of Instructional Development Effort



### ID Phase 1–Project Planning & Kick-Off

This includes Stage 1 of the Intake Process, where the request is clarified and an initial go-no-go decision is made.

In Stage 2 of the Intake Process, additional and detailed data is gathered from Stakeholders, then another go-no-go decision is made.

Next, a draft Project Plan and Proposal are produced, then a Project Steering Team Gate

Review Meeting is scheduled, and a presentation for it is created.

Gate Review Meetings allow for a careful review of the plan with the client and key Stakeholders who are brought together to review and discuss the planned effort.

Command & Control, and Empowerment are concepts and mechanisms I use to bring the client and stakeholders along for the journey.

They usually lead to the full participation of the client and stakeholders during the project as well as to their support of the efforts after development is concluded and the implementation and ongoing deployment efforts “take the baton,” so to speak.

## **ID Phase 2–Analysis**

Four types of Analysis are conducted in Phase 2.

- 1) Target Audience Analysis
- 2) Performance & Gap Analysis
- 3) Enabling Knowledge/ Skill Analysis

#### 4) Assessment of Existing Training & Development Content for its reuse potential

A designated Analysis Team uses a Facilitated Group Process either Face-to-Face or Virtually. They generate Performance & Gap Analysis data and then systematically derive the Enabling Knowledge/ Skills from the Performance Model data.

Outputs include a draft Analysis Report and the creation of a Project Steering Team Gate Review Meeting Presentation that is used to review and discuss the Analysis data.

### **ID Phase 3–Design**

The Analysis data is processed into three levels of Design: Events, Lessons, and Instructional Activities.

Members of the Design Team, who were also members on the Analysis Team, usually add new data as seen fit. As with the other phases, a

Facilitated Group Process is used Face-to-Face or Virtually to conduct the design effort.

*The goal is not to design by  
committee,  
but to influence the designer by  
committee.*

A draft Design Document is produced, and then a Project Steering Team Gate Review Meeting Presentation is created to review and discuss the design details.

### **ID Phase 4–Development**

In Phase 4, additional details are gathered from Master Performers, Other Subject Matter Experts, and documents are reviewed to create at least three drafts of Instructional Content.

There are three drafts of Job Aids and Training labeled as 1) Alpha, 2) Beta, and 3) Pilot Test. Only what we generally call the *Lessons from Hades* (or Lessons from Hell), as determined during the Design Phase, go through additional versions.

I do not conduct “page-turning” reviews with the client, as happens in many ISD/LXD projects during or after development.

I also don't meet with the Project Steering Team until after the next Phase, Pilot Testing.

In ID the Pilot Test has its own separate phase for emphasis purposes.

The Development phase might take a few days to a few weeks to a few months, depending on the scope of the Instructional content to be developed and the availability of the content, and the expert resources required.

If you work in parallel with the development of new processes or new tools, etc., then those efforts will affect the overall cycle time and scheduling of this Phase's tasks.

## **ID Phase 5–Pilot Test**

In Phase 5, the Instruction is conducted as authentically as possible and feasible, along with additional evaluations.

I always describe the Pilot Test as a FULL DESTRUCTIVE TEST.

I emphasize to everyone involved with the Pilot Test—clients, Master Performers, Other Subject Matter Experts, and ISD/LXD practitioners—that our goal is to stress-test the Instruction enough to find all possible issues.

It's important to correct all issues before the final Instructional Content is released for ongoing deployment and access. While everyone tries their best to ensure the Instructional Content is as accurate, complete, and appropriate as possible, this FULL DESTRUCTIVE TEST is a stress test and an attempt to “inspect-in” the quality that was not “built-in” well enough by prior efforts.



To conduct it, the members of the Target Audience help us measure learning effectiveness through pre-and-post testing.

Master Performers and Other Subject Matter Experts help us measure the accuracy, completeness, and appropriateness of the content given the scope of what was intended to be learned.

Assessments and evaluations necessary to understand what needs to be addressed are conducted before the Instruction is released to the systems in place for deployment and access.

When Instruction is intended to enable High Stakes Performance, this usually makes business sense to the client and Stakeholders.

A draft Pilot-Test Report is produced, and then a Project Steering Team Gate Review Meeting Presentation is created to review and discuss the Pilot-Test Process, the evaluation result details, and Revision Recommendations.

## **ID Phase 6–Revision & Release**

In this phase the Instructional Content is updated as directed by the Revision Specifications that were approved by the Project Steering Team.

Information may need to be provided to the systems/processes in place that address the production of communications and marketing materials to announce the availability of the Instruction consistent with local practices.

This phase might take a few days to a few weeks, depending on how much content there is to update and how easy or difficult it is to get to the resources required.

## **ID Efforts Lead to IE&M**

Instructional Development releases Instruction products to the Implementation and Evaluation systems, which we'll cover next.

## Chapter Summary

This chapter quickly covered the Outputs and Phases of the PACT Process for Instructional Development.

## Some Chapter-Related Resources & References

Here is a short list and links to some articles, books, podcasts, and videos that are free – other than the books.

### Articles

x

### Books

- lean-ISD (1999):  
[https://www.amazon.com/lean-ISD-Guy-W-Wallace-ebook/dp/B001ALCULU?ref=ast\\_author\\_dp](https://www.amazon.com/lean-ISD-Guy-W-Wallace-ebook/dp/B001ALCULU?ref=ast_author_dp)
- Conducting Performance Based Instructional Analysis - In Every Phase of an Instructional Development Effort (2020)

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[https://www.amazon.com/Conducting-performance-based-Instructional-Analysis-Development-ebook/dp/B097VKVRBH?ref=ast\\_author\\_dp](https://www.amazon.com/Conducting-performance-based-Instructional-Analysis-Development-ebook/dp/B097VKVRBH?ref=ast_author_dp)

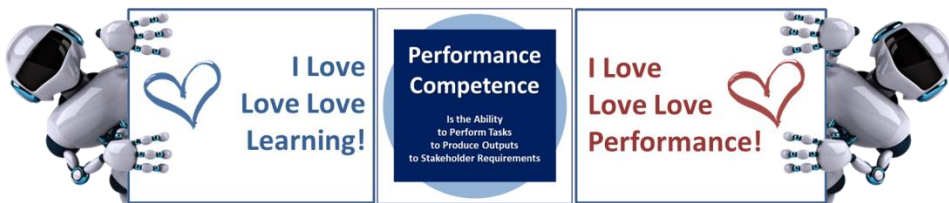
- Performance-based Lesson Mapping (2021)  
[https://www.amazon.com/performance-based-Lesson-Mapping-Instructional-Development-ebook/dp/B09FT9WN81?ref=ast\\_author\\_dp](https://www.amazon.com/performance-based-Lesson-Mapping-Instructional-Development-ebook/dp/B09FT9WN81?ref=ast_author_dp)
- Push-Pull Performance Enablement & Guidance Systems: A performance-based Twist on Knowledge Management Systems  
[https://www.amazon.com/Push-Pull-Performance-Enablement-Guidance-Systems-ebook/dp/B0B7GHLMTJ?ref=ast\\_author\\_dp](https://www.amazon.com/Push-Pull-Performance-Enablement-Guidance-Systems-ebook/dp/B0B7GHLMTJ?ref=ast_author_dp)

## Videos

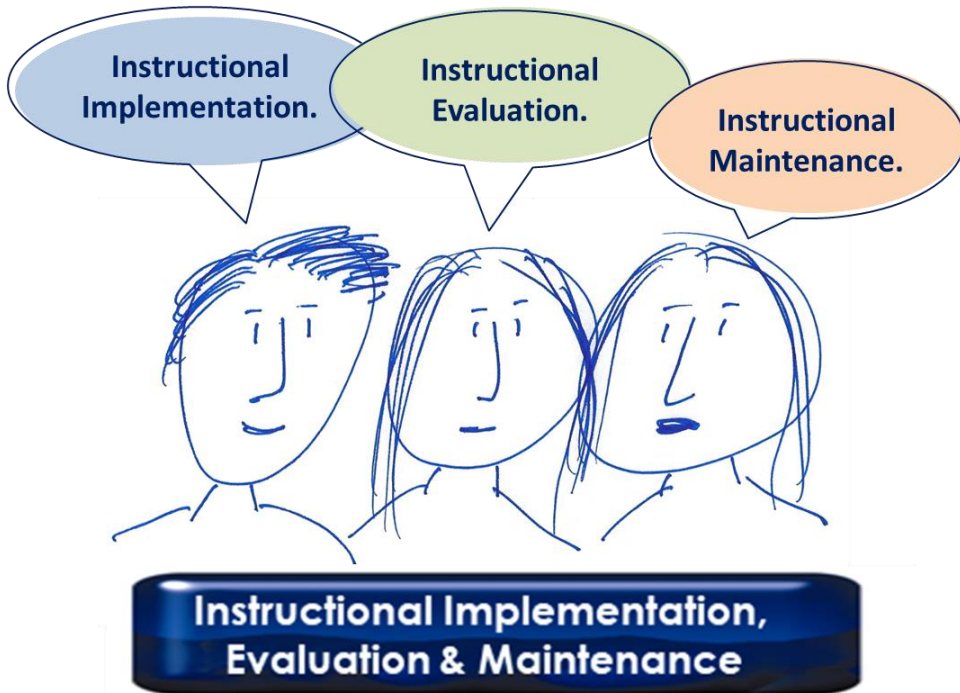
- performance based Lesson Mapping - ISPI SoCal Webinar (2021)  
<https://youtu.be/03f6bMIwBtM>
- ISD Analysis Data and Lesson Mapping – ISPI BABS Chapter(2019)  
[https://youtu.be/Rf\\_wbmx-T9M](https://youtu.be/Rf_wbmx-T9M)

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# Chapter 4: Implementation, Evaluation & Maintenance



## Chapter Introduction

This short chapter will quickly cover Guy's post-Instructional Development methods.

### Instructional Implementation, Evaluation & Maintenance



Once the Instructional content is Implemented and released to the Deployment and Access Systems, existing evaluation systems kick in, gather data, and report it out, or make it available for retrieval.

Additional Analysis data, therefore, could and should continue to roll in from both the Implementation and Evaluation Systems in place and trigger the need for Maintenance.

## Implementation

Implementation is guided by the Implementation Plans as agreed to by the Project Steering Team.

L&D can release the Instruction – both Performance Guides and Learning Experiences – into the Enterprise Deployment and Access Systems – but they may need to support the client and stakeholders in successfully implementing their program.

I do not believe that Implementation is controlled by L&D.

It is the client organization that must ensure that those who need it, take it, and use it.

Otherwise, the entire effort is for naught.

## **Evaluation of Transfer & Impact**

It is also the client's responsibility to Measure the Effectiveness of the Performance Guides and Learning Experiences using their measures of Performance – the performance of Tasks to produce Outputs that meet Stakeholder Requirements.





The client lives with the successes or failures of the L&D's Transfer and Impact.

### Impact Measurement

The client should be willing to put in the mechanisms to make meaningful Impact measures – as all L&D can measure are Learning Activities – which are only useful and meaningful if the Impact on the Enterprise Performance measures is inadequate and/or if Transfer back on the job fails.

Your Analysis efforts should have established the Meaningful Measures and their baselines and trends for the Process Performance in focus.

Measures that your L&D was targeting.

I was taught back in 1979 to focus on the ideal Outputs of Performance (the actual best by the exemplars or Master Performers – or simply the aspirational goals) – and then Measures and the Tasks – and then the current state gaps.

In the Quality World, they would determine this via measurements back on the job via a Gemba Walk. Pre and Post Development and Implementation.

### **Transfer Measurement**

Surveys with the Target Audience and/or their Supervisors can help you assess Transfer success or failures and any root causes for why it didn't happen well enough, if that's what you turn up.

That information can be shared with the client and stakeholders, who should then put in the mechanisms to communicate expectations, monitor adherence, and provide reinforcing and corrective consequences as needed.

## Maintenance

Maintenance should be triggered whenever the Evaluation data indicates that the content is no longer accurate, complete, or appropriate.

## Chapter Summary

This chapter quickly covered Guy's post-Instructional Development methods.

## Some Chapter-Related Resources & References

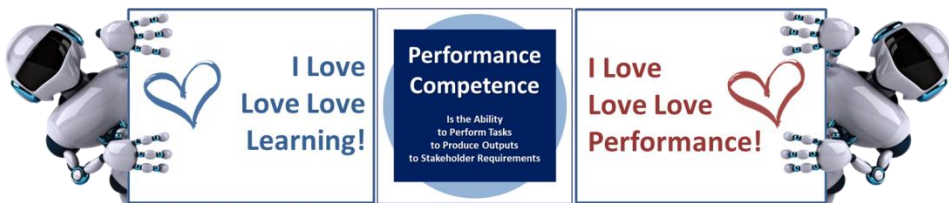
Here is book that you might find helpful.

- Conducting Performance Based Instructional Analysis - In Every Phase of an Instructional Development Effort (2020)

<https://www.amazon.com/Conducting-performance-based-Instructional-Analysis-Development-ebook/dp/B097VKVRBH?ref =ast author dp>

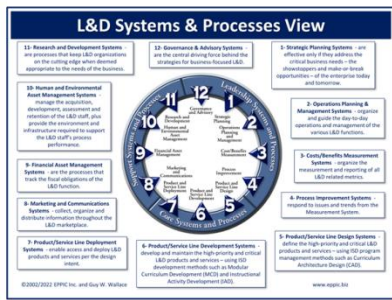
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# Chapter 5: PACT – The Core Processes of an L&D System

The PACT Processes exist in the L&D Systems View at 5, 6, and 7 O’Clock, the core Processes of L&D, but not the only ones.



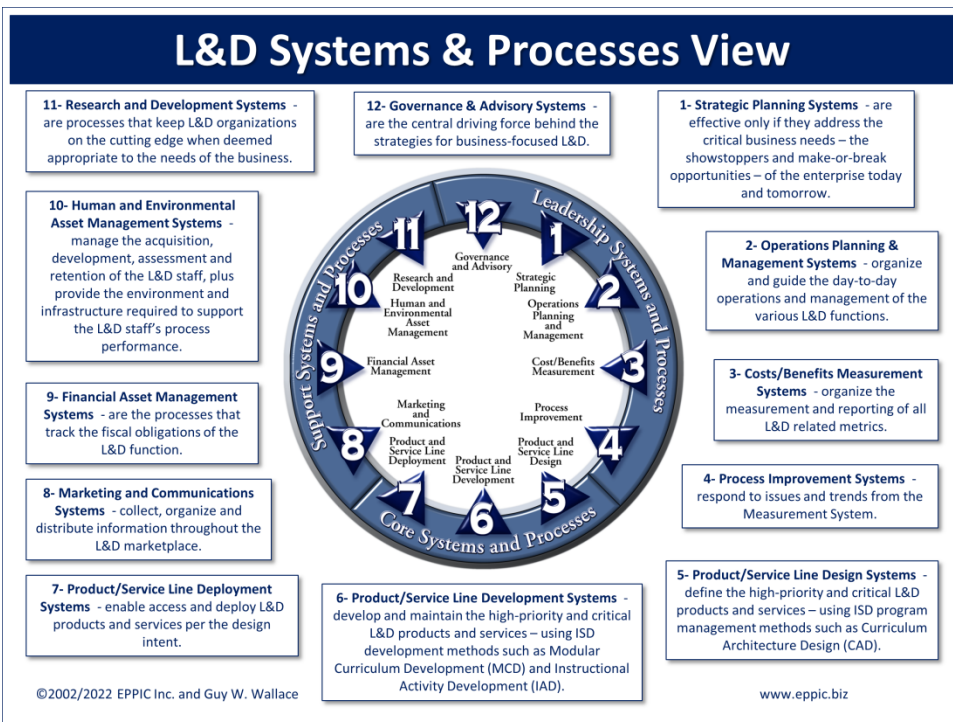
# Chapter Introduction

This chapter will quickly cover the L&D Systems View framework and position the PACT Processes within that framework.

## PACT at the Core

The PACT Processes are just a few of the 47 Processes in my L&D Systems View.

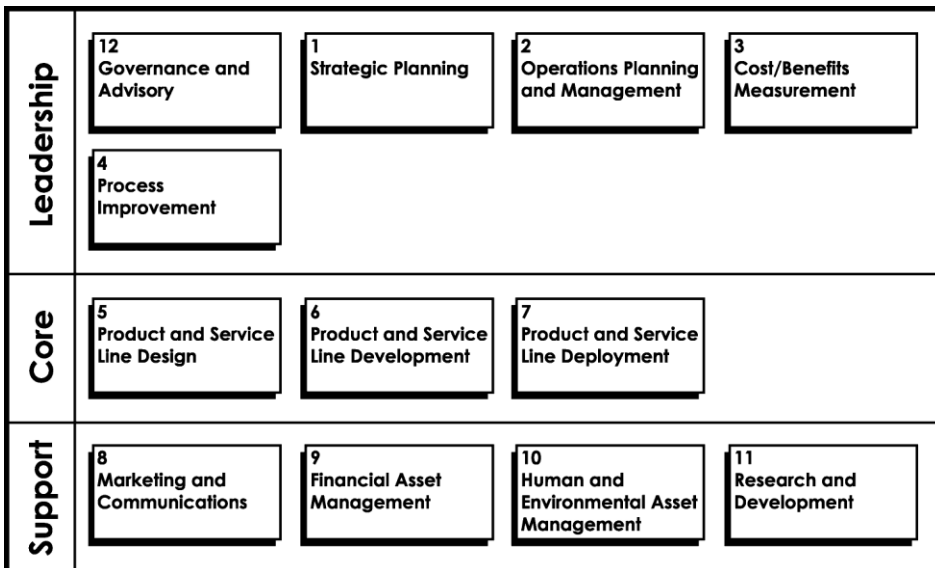
They sit in the Clockface model at 5-6-7 O’Clock.



I first developed this framework in the late 1980s for a client project where we wanted to define the T&D Processes and show the hand-offs of the processes Outputs as Inputs into other T&D Processes and inputs to Processes outside T&D.

Ultimately my client wanted to establish KPTs – Key Process (or Performance) Indicators for assignment to their staff.

Another view of the L&D Systems View follows.



I've been framing organizational processes into these three levels/tiers since seeing my former

business partner, the late Ray Svenson, do so with managerial responsibilities when I joined his consulting firm in 1982.

## **The Core Process of 5 O’Clock**

Here is the Core Sub-System portion of the model that is focused on Product/Service Management.

This system’s processes organize the efforts to systematically define the performance-based L&D product line and the L&D service line required to deploy those L&D products to the appropriate Target Audience for business high-payback, critical needs, not the needs of medium and low importance.

1. L&D Product and Service Line Program Management Process
2. L&D Product Line Design Process
3. L&D Service Line Design Process



## The Core Process of 6 O’Clock

Here is the Core Sub-System portion of the model that is focused on developing and acquiring L&D – plus Maintenance as needed.

This system’s processes organize the efforts to build, buy and use, or buy and modify L&D consistent with the performance-based requirements, the L&D product line architecture designs, and the services needed to meet the high-payback, critical business needs.

1. L&D Product and Service Line  
Development and Acquisition Program  
Management Process
2. L&D Custom Development Process
3. L&D Purchased Product Acquisition  
Process
4. L&D Purchased Product Modification  
Process
5. Existing L&D Maintenance Process

## **The Core Process of 7 O’Clock**

Here is the Core Sub-System portion of the model that is focused on Implementation Support.

This system’s processes organize the operations of the L&D distribution channels, including Group-Paced, Self-Paced, and Coached/Mentored modes of deployment using any media type.

1. L&D Master Materials Storage and Retrieval Process
2. L&D Master Materials Change Management Process
3. L&D Scheduling Process
4. L&D Facilitator and Coach Development and Certification Process
5. Group-Paced L&D Deployment Process
6. Self-Paced L&D Deployment Process
7. Coached/Mentored L&D Deployment Process

## **The Leadership Processes**

Here are the five Sub-Systems of the Leadership portion of the model.

## **12 O’Clock: L&D Governance and Advisory System**

This system’s processes organize all of the key Stakeholders of the enterprise to formalize the channels of communication for providing *advice* from the L&D internal marketplace customers and *governance* from the leaders of the enterprise.

1. L&D Governance Process
2. L&D Advisory Process

## **1 O’Clock: L&D Strategic Planning System**

This system’s processes organize all the strategic planning for L&D to ensure that L&D’s plans and efforts are consistent with the strategic plans of the critical elements of the enterprise.

1. Enterprise Strategic Plans Surveillance Process
2. L&D Strategic Planning Process

## **2 O’Clock: L&D Operations Planning and Management System**

This system’s processes organize and guide the day-to-day operations and management of the various L&D operations to ensure consistency with the strategies of L&D and the strategies of its key, critical Stakeholders.

1. Annual Operations Planning and Budgeting Process
2. Quarterly Operations Planning and Budgeting Updates Process
3. Forecasting and Accounting Process

## **3 O’Clock: L&D Cost/Benefits Measurement System**

This system’s processes organize the measurement and reporting of all L&D metrics and provide the data and interpretations, where appropriate, to the L&D leadership, staff, and all of the key customers and Stakeholders in the L&D marketplace.

1. Cost/Benefits Measurement System Design and Deployment Process

2. Ongoing Cost/Benefits Measurement and Feedback Receiving Process
3. L&D Project Lessons Learned Process
4. Results Reporting and Archiving Process

#### **4 O’Clock: L&D Process Improvement System**

This system’s processes organize the quality/process improvement efforts for both continuous improvement and discontinuous improvement to the processes of the L&D system as a whole.

1. L&D Issues Generation and Assessment Process
2. L&D Improvement Project Planning and Management Process

### **The Support Processes**

#### **8 O’Clock: L&D Marketing and Communications System**

This system’s processes organize all the communications and marketing/selling efforts to provide timely, easily accessible information to all

the customers and Stakeholders in the L&D organization's marketplace.

1. L&D Stakeholder Communications Process
2. Individual L&D Planning Process
3. L&D Ordering and Registration Process

## **9 O'Clock: L&D Financial Asset Management System**

This system's processes organize the financial planning and reporting activities for the L&D system and links to the enterprise financial systems.

1. Organizational L&D Plans and Budget Roll-up and Adjustment Process
2. L&D Physical Property Management Process

## **10 O'Clock: L&D Human and Environmental Asset Management System**

This system's processes acquire and organize all the human and otherwise assets to conduct all the

work inherent in the L&D system's leadership, core, and support processes.

All people; facilities and grounds; machinery, equipment, and tools; data and information; materials and supplies; and consequences (positive and negative) are put into place to bring the enterprise processes and systems to life.

1. L&D Staff Recruiting and Selection/Succession Process
2. L&D Staff Training and Development Process
3. L&D Staff Assessment Process
4. L&D Staff Compensation and Benefits Process
5. L&D Staff Rewards and Recognition Process
6. L&D Organization Structural Design Process
7. L&D Facilities Development and Deployment Process

8. L&D Equipment and Tools Development and Deployment Process
9. L&D Materials and Supplies Acquisition and Deployment Process
10. L&D Information Systems Development and Deployment Process
11. L&D Methods Deployment Process

## **II O’Clock: L&D Research and Development System**

This system’s processes organize the surveillance and testing of various new L&D methods and L&D technologies for the potential purposes of internalization.

1. L&D Methodology and Technology Surveillance Process
2. L&D Internal and External Benchmarking Process
3. L&D Methodology and Technology Pilot-Testing Process



## Chapter Summary

This chapter covered xxx

## Some Chapter-Related Resources & References

Here is a short list and links to several books that you might wish to review for greater detail.

### Books

- T&D Systems View (2001)  
[https://www.amazon.com/Systems-View-Guy-W-Wallace-ebook/dp/B001ALH1BY?ref=ast\\_author\\_dp](https://www.amazon.com/Systems-View-Guy-W-Wallace-ebook/dp/B001ALH1BY?ref=ast_author_dp)
- The Curriculum Manager's Handbook (2011)  
[https://www.amazon.com/Curriculum-Managers-Handbook-Guy-Wallace-ebook/dp/B005LW4M2E?ref=ast\\_author\\_dp](https://www.amazon.com/Curriculum-Managers-Handbook-Guy-Wallace-ebook/dp/B005LW4M2E?ref=ast_author_dp)
- Assessing the L&D Function for Performance Improvement: Take a Systems View and a Process View of your L&D

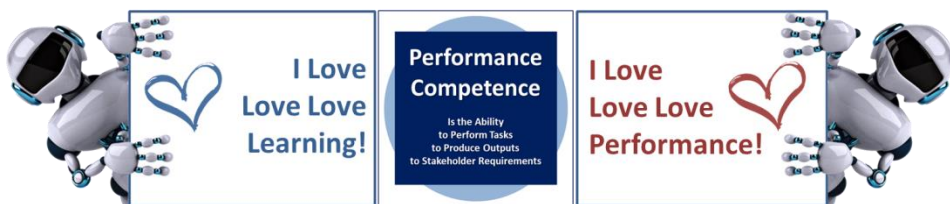
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Function to assess it for its upside improvement potential (2022)

[https://www.amazon.com/Assessing-Function-Performance-Improvement-improvement-ebook/dp/B09RHLJ219?ref=ast\\_author\\_dp](https://www.amazon.com/Assessing-Function-Performance-Improvement-improvement-ebook/dp/B09RHLJ219?ref=ast_author_dp)

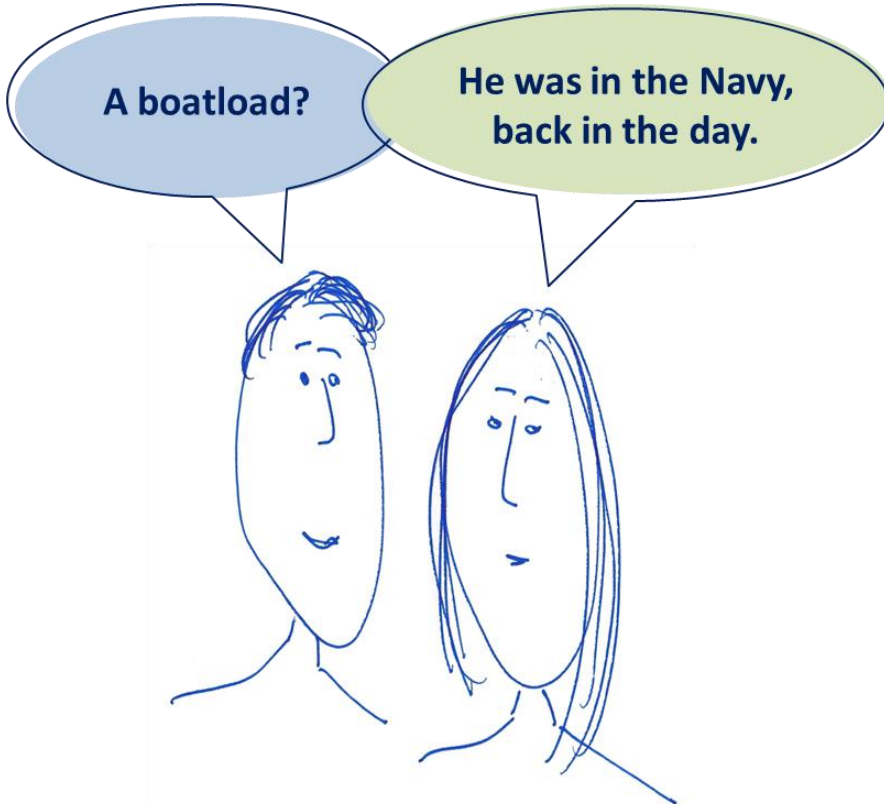
## Time for Some Structured Reflection Regarding Your Possible Adoption and/or Adaptation

Before you get much further along in this, why don't you take some time to make a note of your initial thoughts, especially as they relate to my methods, models, tools, techniques, and language – and what you might be able to Adopt as I have presented them here, and what you might likely need to Adapt.



# Appendices

## A Boatload of Resources – Mostly Free.



## Appendix A: A Suggested Set of Resources for Starting Your Professional Development Journey

These free resources by Guy will allow you to dip your toes into the waters of Performance Based Instruction before you dive too deep.

### First...

- Video: Demystifying Performance 2022 (38:45 minutes in length)  
<https://youtu.be/vDXbT7oZ7pM>

### Second...

- Article: A Deep Dive into Conducting a Learner Needs Analysis from A to Z – on the 360 Learning site:  
<https://360learning.com/blog/learner-needs-analysis-deep-dive/>

### Third...

- Article: Modeling Mastery Performance and Systematically Deriving the Enablers for Performance Improvement – Chapter 11 of

the Handbook of Human Performance  
Technology – 3rd Edition – 2006.

[https://eppicinc.files.wordpress.com/2012/01/chapter-11-wallace-handbook-of-hpt\\_third-edition-2006.pdf](https://eppicinc.files.wordpress.com/2012/01/chapter-11-wallace-handbook-of-hpt_third-edition-2006.pdf)

## **Fourth...**

- Article Series: Performance-based ISD – 122-page PDF – an update in 12-parts to my 1999 book: lean-ISD – which covers all of my ISD/LXD methods: The PACT Processes for T&D, Learning, and Knowledge Management. Published in ISPI’s PerformanceExpress during the 12 months of 2007.

<https://eppicinc.files.wordpress.com/2010/07/performance-based-isd-ispi-px-12-part-series-2007.pdf>

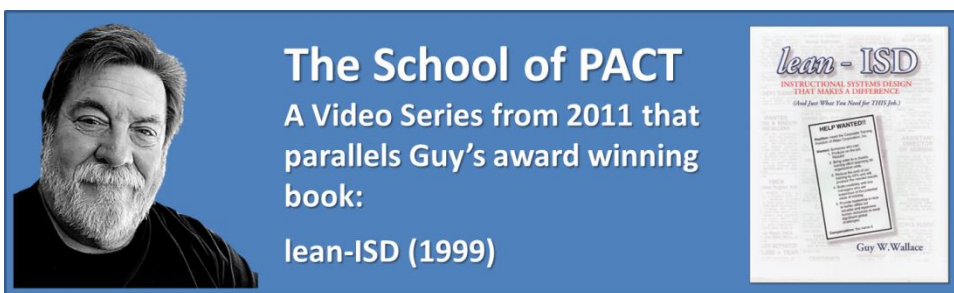
## **Fifth...**

- lean-ISD (1999):  
[https://www.amazon.com/lean-ISD-Guy-W-Wallace-ebook/dp/B001ALCULU?ref=ast\\_author\\_dp](https://www.amazon.com/lean-ISD-Guy-W-Wallace-ebook/dp/B001ALCULU?ref=ast_author_dp)

## Next..

If you are interested in even more, you glutton for punishment, er, glutton for proven approaches to Performance Based Instruction, you might be interested in my free video series.

The School of PACT, with over 55 videos on the specific steps in the PACT Processes for producing Performance Based Instruction.



**The School of PACT**  
A Video Series from 2011 that parallels Guy's award winning book:  
**lean-ISD (1999)**

See the home page and index for that series here:

<https://eppic.biz/resources/the-pact-video-short-series-home-page/>

## EPPIC – Pursuing Performance

To Protect and Improve the Enterprise for ROI



**Pursuing Performance**

Performance Based Instruction  
Performance Guides & Learning Experiences

*Guy W. Wallace*  
Performance Analyst & Instructional Architect

<a href="#">Blog</a>	<a href="#">EPPIC Inc.</a>	<a href="#">Guy W. Wallace</a>	<a href="#">83 Clients</a>	<a href="#">Publications</a>	<a href="#">Presentations</a>	<a href="#">HPT Videos</a>	<a href="#">Videos</a>	<a href="#">Resources</a>	<a href="#">Books</a>	
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## The Pursuing Performance Annex

Performance-Based Enterprise Learning & Development



**The Pursuing Performance Annex**

Performance Based Instruction  
Performance Guides & Learning Experiences

*Guy W. Wallace*  
Performance Analyst & Instructional Architect

<a href="#">Home</a>	<a href="#">About Guy</a>	<a href="#">Guy's Awards</a>	<a href="#">Guy's Books</a>	<a href="#">Guy's Clients</a>	<a href="#">Guy's Mentors</a>	<a href="#">Guy's Podcasts</a>
<a href="#">Guy's Presentations</a>	<a href="#">Guy's Publications</a>	<a href="#">Guy's Social Media</a>	<a href="#">Guy's Videos</a>	<a href="#">Guy's Websites</a>		

## About Guy W. Wallace

Guy W.  
Wallace is a  
Performance  
Analyst and  
Instructional  
Architect.



He joined the profession in 1979, and after working at Wickes Lumber and then Motorola, he became an ISD/LXD consultant in 1982.

As an Instructional Systems Design consultant, he has worked with over 80 clients since 1982.

Prior to that, he worked in training functions for Motorola 1981-1982 as a Training Project Supervisor, and before that, for Wickes Lumber 1979-1981 as a Program Developer.

In 2010 Guy was the recipient of the Honorary Life Member Award from ISPI—the International Society for Performance Improvement—its highest award requiring unanimous approval by two



successive boards - for his contributions to both the technology of Performance Improvement and his contributions of the Society.

In 2021 he was recognized by Thrive as one of the top 20 US influencers in L&D; and in January 2023 he was recognized as a Top 100 Learning Influencer by Eduflow (located in Copenhagen).

Guy and his teams have won awards over the years for their work at AT&T, Change Healthcare, General Motors, HP, Imperial Oil, and Siemens Building Technologies.

He is the author of over 35 books and over one hundred published articles.

His 1999 *Lean-Instructional Systems Design* book received an ISPI Award of Excellence for Instructional Communications in 2002.

He has presented more than 110 times at international conferences and at local chapters of the International Society for Performance Improvement (ISPI), the American Society for

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Training & Development (ASTD), and at BPM–Business Process Management, the Conference for Nuclear Training & Education (CONTE), Midwest Nuclear Training Association, Association for Behavior Analysis, ASEE, and several Lakewood-Training Conferences, since 1983.

Guy was the treasurer and an executive director on the 1999–2000 board of the International Society for Performance Improvement (ISPI); he was elected to the position of President-Elect for 2002-2003, serving as ISPI’s President for 2003-2004.

His professional biography was listed in Marquis’ Who’s Who in America in 2001.

Guy was designated a Certified Performance Technologist (CPT) in 2002. He last renewed the CPT in 2014.

He was recruited in 2004 as an ISPI Professional Community Thought Leader for the Instructional Systems ProComm.

Guy was recruited in 2010 by ASQ as a founding member of its Influential Voices campaign to raise the Voice of Quality. He served in that role until 2015.

Guy was a partner at the consulting firm of SWI—Svenson & Wallace Inc 1982-1997 when he joined the late Ray Svenson's firm, where he helped grow the firm from three consultants and two staff members to a team that ranged over the years between fifteen and fifty-two total staff.

Guy was then the founding partner at CADDI Inc. 1997-2002, overseeing a consulting and office production staff ranging in number from twelve to twenty.

Guy founded EPPIC Inc. in 2002 to operate as a solo practitioner leveraging his growing network of seasoned practitioners familiar with his methodologies.

Guy is active on various Social Media and has two websites/Blogs:

## EPPIC – Pursuing Performance

[www.eppic.biz](http://www.eppic.biz)

## The Pursuing Performance Annex

[www.tppannex.wordpress.com](http://www.tppannex.wordpress.com)



Guy and his supervisor, Bueller

## **Guy's Clients**

Guy's 83 Clients – since 1982 – and the number of Projects (#) he has done with each...

- Abbott Laboratories (3)
- ALCOA (2)
- ALCOA Labs (2)
- Alyeska Pipeline Services Company (3)
- American Management Systems (1)
- Ameritech (1)
- Amoco Corporation (13)
- Apotex (1)
- Arthur Andersen (1)
- ARCO of Alaska (3)
- AT&T (4)
- AT&T Communications (1)
- AT&T Microelectronics (1)
- AT&T Network Systems (25)
- AT&T Network Systems International (7)
- Bandag (11)
- Bank of America (2)

- Bath Fitter (1)
- Baxter (1)
- Bellcore Tech (1)
- British Petroleum-America (1)
- Burroughs (1)
- Change Healthcare (1)
- Chamberlin Edmonds – Emdeon (1)
- Channel Gas Industries/Tenneco (1)
- Commerce Clearing House (1)
- Data General (1)
- Detroit Ball Bearing (1)
- Digital Equipment Corporation (2)
- Discover Card (1)
- Dow Chemical (4)
- EDS (1)
- Eli Lilly (9)
- Exxon Exploration (2)
- Federal Express (1)
- Fireman’s Fund Insurance (3)
- Ford Design Institute (1)
- Ford Motor Company (1)
- General Dynamics (12)
- General Motors (25)

- GP Strategies (1)
- GTE (1)
- H&R Block (1)
- Hewlett Packard (5)
- Illinois Bell (5)
- Imperial Bondware (1)
- Imperial Oil (1)
- J.K. Somers & Associates (2)
- Johnson Controls (1)
- Kodak (1)
- Lockheed (1)
- Lucent (3)
- MCC Powers (18)
- Motorola (1)
- Multigraphics (1)
- NASA (1)
- NASCO (1)
- NAVAIR (1)
- NAVSEA (2)
- NCR (2)
- Norfolk Naval Shipyard (4)
- Northern Telecom (1)

- Northern Trust Bank (1)
- NOVA (2)
- Novacor (1)
- NSA (1)
- Occidental Petroleum Labs (1)
- Opel (1)
- Pacific Gas & Electric (1)
- Performance Design Lab (1)
- Quaker (1)
- Qualitest (1)
- Siemens Building Technologies (1)
- Spartan Stores (1)
- Sphinx Pharmaceuticals (1)
- Square D Company (2)
- SunTrust Banks (2)
- Valuemetrics (1)
- Verizon (3)
- Verizon Information Services (1)
- Wells Fargo Advisors (1)
- Westinghouse Defense Electronics (1)
- ZS Associates (1)



Plus, several additional clients who contractually must remain anonymous.

You can see brief project overviews from most of these projects here:

[www.eppic.biz/clients](http://www.eppic.biz/clients)

*Guy's Clients for 76 CAD Projects Since 1982 and the First Article on CAD Published in 1984*

Abbott Laboratories Market Management, Product 1993  
Alcoa Labs Scientists, Engineers, Technicians, 1984  
Ameritech Distribution Services 2nd-level Management 1989  
Ameritech Network Services Management 1989  
Amoco ISD Staff Coaching and Support 1996  
Amoco Project BEST 1996  
Amoco Team Training 1993  
ARCO Alaska AMPs 1990  
AT&T AETM 1984  
AT&T Microelectronics Product Management 1988  
AT&T Network Systems Global Contract Management 1994  
AT&T Network Systems Marketing Personnel 1991  
AT&T Network Systems Network Systems Sales 1989  
AT&T Network Systems Product Management 1993  
AT&T Network Systems Product Management 1986  
AT&T Network Systems Switching Business Unit Sales 1988  
AT&T Switching Technician 1984  
Bandag, Inc. Franchise Dealership Management 1996  
BankAmerica Corporation Financial Relations Managers 1998  
BankAmerica Corporation Retail Branch Personnel 1997  
Bellcore Tech Web Masters 1996  
British Petroleum—America Front-line Retail Personnel 1983  
Burroughs Information Specialists 1984  
Change Healthcare Sales 2018  
Channel Gas Industries/Tenneco Fixed-rate Personnel 1983  
Commerce Clearing House Sales Representative 1993  
Data General Sales 1993  
Detroit Ball Bearing Field Sales Managers 1992  
Digital Equipment Corporation Program Management 1991

Dow Chemical Safety Training 1987  
Dow Chemical Secretarial/Administrative 1986  
Dow Chemical Top Operator 1986  
Eli Lilly and Company Clinical Trials Process participants 2004  
Eli Lilly and Company District Sales Managers 1999  
Eli Lilly and Company Leadership and Management 1997  
Emdeon Healthcare Reps 2013  
Exxon Exploration USA 1982  
Ford Design Institute Engineering 1992  
Ford Motor Company Engineering 1994  
General Dynamics CATIA System Designers 1991  
General Dynamics Composites Bonding & Fabrication 1990  
General Dynamics Electrical/Electronics Assembly 1991  
General Dynamics MRP II—Manufacturing Personnel 1991  
General Dynamics Quality 1989  
General Dynamics Software Engineering 1991  
General Motors Product Engineers 1996  
General Motors Tool & Die Supervisors 1997  
General Motors University Brand Management—Europe 1999  
General Motors University Brand Management—No. Am 1999  
General Motors University Global Dealer Auditors 1998  
General Motors University Internal Controls 1998  
General Motors University MFD Area Managers 1998  
GTE/Verizon Wholesale Billing Call Center 2000  
Hewlett Packard Information Technologists 1989  
Hewlett Packard Information Technologists 1991  
Hewlett Packard Order Fulfillment Order Processing 1993  
Illinois Bell Data Technician 1986  
Illinois Bell Second-level Manager 1986

Imperial Bondware/Federal Paperboard Sales Training 1993  
MCC Powers ATC Branch Personnel 1983  
MCC Powers Fire and Security 1985  
Motorola Design & Manufacturing Engineering 1983  
Multigraphics In-Branch Sales Orientation 1986  
NASA Middle Manager 1987  
NCR Supply Line Management 1990  
Norfolk Naval Shipyard Production Supervisor & Managers 2003  
Northern Trust Bank (Chicago) Trust & Financial Services 1988  
Novacor, Corunna Site Operations Management and 1994  
Occidental Petroleum Labs Laboratory Personnel 1991  
Siemens Building Technologies, Inc. Sales Engineering 1998  
Spartan Stores/ISSC Companywide 1993  
Sphinx Pharmaceuticals Combinatorial Chemists 1996  
Square D Quality Training 1990  
Valuometrics, Inc. Associate and Senior Associate 1995  
Verizon Consumer Sales Call Centers 2001  
Westinghouse Defense Electronics Technical Operators 1983



**Guy W. Wallace**

**Pursuing Performance**

**EPPIC Inc.**

**www.eppic.biz**

## Guy's Books

Guy's previous books, the year published, and his co-authors:

- *The Quality RoadMap* (1994)—Ray Svenson, Karen Wallace, and Bruce Wexler
- *Lean-Instructional Systems Design* (1999)
- *Training & Development Systems View* (2001)
- *Management Areas of Performance* (2007)
- *Performance-based Employee Qualification/Certification Systems* (2007)—Ray Svenson
- *The Curriculum Manager's Handbook* (2011)
- *Analysis of Performance Competence Requirements* (2011)
- *Performance-based Curriculum Architecture Design* (2011)
- *Performance-based Modular Curriculum Development* (2011)
- *Developing Your Management Areas of Performance* (2011)

- From Training to Performance Improvement Consulting (2011)
- The 5<sup>th</sup> Management Foci (2011)
- Lessons in Making Lemonade Volume 1 (2011)
- Lessons in Making Lemonade Volume 2 (2011)
- Conducting performance-based Instructional Analysis (2020)
- The 3 Ds of ThoughtFlow Analysis (2021)
- Performance-Based Lesson Mapping (2021)
- Structured Social Learning (2022)
- Assessing the L&D Function (2022)
- Aligning & Architecting Performance-Based L&D (2022)
- Instructional Request Intake, Planning & Management (2022)
- Performance-Based Instructional Analysis (2022)
- Performance-Based Instructional Architecture (2022)

- Analyzing Management Performance Requirements (2022)
- Designing & Developing Performance Support (2022)
- The Facilitated Group Process in L&D (2022)
- Developing Performance Competence Tests (2022)
- The 7 Levers of L&D Return on Investment (2022)
- Lesson Mapping for Performance Impact (2022)
- EPPI Thinking (2022)
- Simulation Exercise Design for Interpersonal Communication Skills Development (2022)
- Push-Pull Performance Enablement Guidance Systems (2022)
- Demystifying Enterprise L&D (2022)
- Performance-Based L&D Thought Provocations (2022)
- The Cult of Performance in Enterprise L&D (2023)

# The Cult of Performance in Enterprise L&D

*Ensuring Performance Impact  
Back on the Job from  
Performance Based Instruction*



**Guy W. Wallace**

*Available as of May 30, 2023*

[https://www.amazon.com/dp/B0C6L1R7B5?ref=ast\\_author\\_dp](https://www.amazon.com/dp/B0C6L1R7B5?ref=ast_author_dp)

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- The L&D Pivot Point (Coming in mid-2023)

See all of Guy's current books on his Author's Page on Amazon here:

[www.amzn.to/369htzU](http://www.amzn.to/369htzU)



## Final Thoughts...

The default in Enterprise L&D should be Performance Guides.

If the Performance Context **ALLOWS** a Referenced Performance Response – provide Performance Guides and other forms of Performance Support (such as diagrams, maps, photos, etc., without Task/Procedural Instructions).

If the Performance Context **DEMANDS** a Memorized Performance Response – provide a Learning Experience.

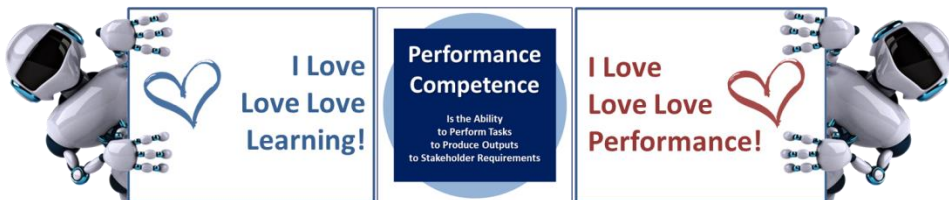
And if the job itself doesn't require performance often enough and/or provide adequate reinforcing and/or corrective feedback – you'll likely need Spaced Learning Experiences of some sort.

And make sure that whatever is provided is “as

short as possible but as long as necessary” to enable Performance – Back on the Job.

Because THAT’S what it’s all about.

*“It’s not all about Learning.  
It’s all about Performance.  
Even in a Learning  
Organization.”*





**The PACT Processes  
have been in use since 1982  
when Guy W. Wallace first became  
an ISD/LXD Consultant and have  
been used on hundreds of projects by Guy,  
his business partners, staff, and clients.**

Guy W. Wallace is a Performance Analyst and Instructional Architect. He is particularly known for his work in performance-based Instructional Architecture, formerly known as CAD – Curriculum Architecture Design – which he has been doing since his first effort in 1981.

He entered the ISD – Instructional Systems Design field in 1979 and became an ISD consultant in 1982. His work was significantly influenced by the methods of Geary Rummler, Tom Gilbert, Joe Harless, Bob Mager, Dick (Richard E.) Clark, and dozens more influences from the worlds of Instructional Systems Design and Total Quality Management.

Guy and his teams have won awards over the years for their work at AT&T, Change Healthcare, General Motors, HP, Imperial Oil, and Siemens Building Technologies.

Guy was the 2010 recipient of the International Society for Performance Improvement's highest award, the Honorary Life Member Award for his contributions to the technology of Human Performance Improvement and to the Society. He was also recognized as one of the top 20 US influencers in L&D in 2021 by Thrive, and in 2022 as one of the 100 Top Learning Influencers worldwide by Eduflow.

Guy has published more than 100 articles, 5000 blog posts, 1000 videos, conducted over 160 professional presentations, and authored over 35 books since 1994, all addressing aspects of Performance Based Instructional Systems Design/Learning Experience Design, and Enterprise Process Performance Improvement.

