



Getting Serious About Results and Payoffs:

We Are What We Say, Do, And Deliver

by Roger Kaufman and Ryan Watkins

We are increasingly responsible for results, consequences, and payoffs of our actions and inactions. We

no longer have the luxury of leaving the big questions and issues to leaders, supervisors, and executives.

The new era we face is defining and achieving useful results for all stakeholders: including both internal and external partners. And we must prove the value we add in terms of empirical data about what we deliver, what it accomplished, and what value it added for all stake-holders (not just the value it added to our team, our department, or our organization, but to the entire system of internal and external partners). We can no longer get away with “feel-good” discussions of how we increased efficiency or effectiveness of processes that may or may not add value to all our clients, our clients’ clients, and society.

For example, governmental agencies¹ increasingly are required to prove the value they add to citizens. Likewise, orga

nizations worldwide are increasingly including societal value-added as an integral ingredient of their organizational purpose (Kaufman, 1998). Unfortunately, when we do talk about organizational results we too often stop short of societal and external client value added. We glibly refer to profits, client satisfaction, or funding levels..., and in so doing we miss the emerging paradigm (Popcorn, 1990; Kaufman 1972, 1992, 1998, 2000) that organizations—all organizations—are but means to societal ends. Currently, our focus is often far too narrow. We tend to talk only about “systems” and not an overall and encompassing system. We call all results “outcomes”² and we start our planning as if the only benefactor of our efforts was the organization itself. We narrow our focus and limit our value-added in both words and deeds.

Language May Rob Us of

Adding Value

Most of our performance improvement approaches and methods, including the language³ we use in describing our

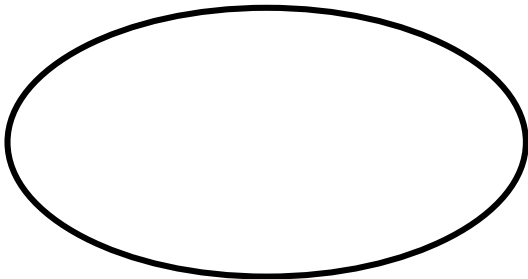
profession, commonly leave questions concerning value added unanswered. We tend to talk about means (e.g., online training programs, EPSS, CD-ROMs) rather than ends (e.g., reduction in poverty, client value, product quality). Our language seems almost to encourage a number of confusions that “allow” for lack of precision and consequences.

The performance professional of the future has to know how to both improve performance and justify why an individual or organization should improve performance. For in addition to justifying what we use, do, accomplish, and deliver, the new reality is that we must all now prove that there are useful results to both the client and society. From a societal perspective, value-added includes the survival, health, and well-being of all partners. Planning for and achieving results at the societal level—value-added for tomorrow’s child—is termed mega planning or strategic thinking (Kaufman, 1992, 1998, 2000). It is this system or supersystem (society) that best begins our planning and serves as the basis for our evaluation and continuous improvement. But to be successful in planning for and demonstrating value-added, we must speak with rigor and precision. Language that is crisp, to the point, and focused on results (including societal payoffs) is essential for professional success. And then we must match our promises with deeds and payoffs that measurably add value.

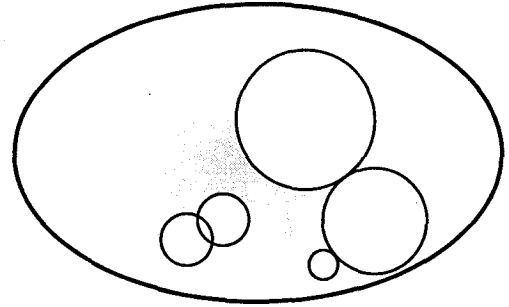
System, Systems, Systematic, and Systemic: Related but Not the Same

To set the framework, let’s define these basic terms, relate them, and then use them to put other vocabulary in context.

System approach. This begins with the sum total of parts working independently and together to achieve a useful set of results at the societal level—adding value for all internal and external partners. We best think of it as the large whole. We can show it thus:



Systems approach. This approach begins with the parts of a system—subsystems—that make up the system. We can



show it thus:

It should be noted here that the “system” is made up of smaller elements or subsystems (shown as bubbles imbedded in the larger system). If we start at this smaller level, we will start with a part and not the whole. So when someone says he or she is using a “systems approach,” he or she is really focusing on one or more subsystems—focusing on the parts and not the whole. When planning

- and doing at this level, people can only assume that the
- payoffs and consequences will add up to something useful to society and external clients. This is usually a very big assumption.

Systematic approach. This approach does things in an orderly, predictable, and controlled manner. It is a reproducible process. Doing things, however, in a systematic manner does not ensure useful results.

- **Systemic approach.** This approach affects everything in the system. The definition of “the system” is usually left up to the practitioner and may or may not include external clients and society. It does not necessarily mean that when something is systemic it is also useful.

Interestingly, these terms are often used interchangeably. Yet they are not the same. Notice that when the words are used interchangeably and when one starts at the systems level and not the system level, it means that we might not add value to external clients and society.

Is this semantic quibbling? We suggest just the opposite. If we talk about a “systems” approach and don’t realize that we are focusing on splinters and not on the whole, we usually degrade what we use, do, produce, and deliver in terms of adding value inside and outside of the organization. When we take a “systems” approach, we risk losing a primary focus on societal survival, self-sufficiency, and quality of life. We risk staying narrow.

Primary Focus: Survival, Health, and Well-Being

Kaufman (2000) urges that we must focus on societal pay-offs—on a system approach for both survival and ethical reasons. He asks: *What organizations that you personally do business with do you expect to really put client health, safety, and well being at the top of the list of what they must deliver?*

Individuals are rare who do not care whether the organizations that affect their lives have a primary focus and accountability for survival, health, welfare, and societal payoffs. Most people, regardless of culture, want safety, health, and well-being to be the top priority of everyone they deal with.

What we do and deliver must be the same as what we demand of others. So if we want mega—value added for society—to be at the top of the list for others (e.g., airlines, government, software manufacturers) why don't we do unto others as we would have them do unto us? At best we give lip service to customer pleasure, profits, or satisfaction, and then go on to work on splinters of the whole. We work on training courses for individual jobs and tasks, and then we hope that the total adds up to organizational success. We too often don't formally include external client survival and well-being in our performance plans, programs, and delivery. We rarely start our plans or programs by stating an “outside-the-organization” outcome² clearly and rigorously before selecting the organizational results and resources (outputs, products, processes, and inputs).

The words we use might get in the way of a societal added-value focus. To keep our performance and value-added focus, we should adjust our perspective when reviewing the literature and as we listen to speakers. Far too often we read and hear key terms used with altering (or case-specific) definitions. There seem to be many words that sound familiar, and these words are often so comfortable and identify us as professionals that we neglect to question the meaning or appropriateness of use within the context. And when we apply the words and concepts inconsistently, we find that their varying definitions can abridge success.

What we communicate to others, through words and phrases, is important, as it operationally defines our profession as well as informs our audiences of our scientific basis, objectives, and processes. The terms we use are symbols and signs with meaning. When our words lead us away, by implication or convention, from designing and delivering useful results for both internal and external clients, then we must consider changing our perspectives and our definitions.

If we don't agree on definitions and communicate with common and useful understandings, then we will likely get a

“leveling” of the concepts—and thus our resulting efforts and contributions—to the lowest common denominator. Let's look at some frequently used words, define each, and see how a shift in focus to a more rigorous basis for our terms and definitions will help us add value to internal and external clients.

Individuals are rare who do not care whether the organizations that affect their lives have a primary focus and accountability for survival, health, welfare, and societal payoffs.

The following definitions^{48,5} come from our review of the literature. Italics provide some rationale for a possible perspective shift from conventional and comfortable to societal value added. In addition, each definition identifies if the word or phrase relates most to a system approach, systems approach, systematic approach, or systemic approach (or a combination). The level of approach (system, systems, etc.) provides the unit of analysis for the words and terms as they are defined in this article. Alternative definitions should also be analyzed based on the unit of analysis. If we are going to apply system thinking (decisionmaking that focuses on valued added at the individual, organizational, and societal levels), then definitions from that perspective should be applied in our literature, presentations, workshops, and products.

ADDIE Model (systems approach, systematic approach, systemic approach): Acronym for the conventional instructional systems steps of ~nalysis, ~esign, ~evelopment, Implementation, and Evaluation. *It ignores or assumes a front determination through assessment of what to analyze. It also assumes that the evaluation data will be used for continuous improvement.*

Change Creation (system approach): The definition and justification, proactively, of new and justified as well as justifiable destinations. If this is done before change management, acceptance is more likely. *This is a proactive orientation for change and differs from the more usual “change management” in that it identifies in advance where individuals and*

organizations are headed rather than waiting for change to occur and be “managed.”

Change Management (systems approach, systemic approach, systematic approach): Assuring that whatever change is selected will be accepted and implemented successfully by people in the organization. *Change management is reactive in that it waits until change requirements are either defined or imposed and then moves to have the change accepted and used.*

Comfort Zones (system approach, systematic approach, systemic approach): The psychological areas, in business or in life, where one feels secure and safe. *Change is usually painful for most people. When faced with change, many*

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people will find reasons (usually not rational) for why not to make modifications. This gives rise to Tom Peters’ (1997) observation, “It is easier to kill an organization than it is to change it.”

Costs-Consequences Analysis (system approach, systems approach): The process of estimating a return-on-investment (ROI) analysis before an intervention is implemented. It asks two basic questions simultaneously: What do you expect to give and what do you expect to get back in terms of results? *Most formulations do not compute costs and consequences for society and external client (mega) level. Thus, even the calculations for standard approaches steer away from the vital consideration of self-sufficiency, health, and well-being (Kaufman & Keller, 1994; Kaufman et al., 1995; Kaufman, 1998, 2000).*

Criteria (system approach, systems approach, systematic approach,

systemic approach): Precise and rigorous specifications that allow one to prove what has been or has to be accomplished. Many processes in place today do not use rigorous indicators for expected performance. If criteria are loose or unclear, there is no realistic basis for evaluation or continuous improvement. Loose criteria often meet the comfort test but don’t allow for the humanistic approach to care enough about others to define, with stakeholders, where you are headed or how to tell when you have or have not arrived.

Deep Change (system approach, systemic approach): Change that extends from mega—societal value added—downward into the organization to define and shape macro, micro, processes, and inputs. It is termed “deep change” to note that it is not superficial or just cosmetic, or even a splintered quick fix. *Most planning models do not include mega results in the change process, and thus miss the opportunity to find out what impact their contributions and results have on external clients and society. The other approaches might be termed “superficial change” or “limited change” in that they focus only on an organization or a small part of an organization.*

Desired Results: Ends (or results) identified through needs assessments that are derived from soft data relating to “perceived needs.” “Desired” indicates these are perceptual and personal in nature.

Ends: Results, achievements, consequences, payoffs, and impacts. The more precise the results, the more likely that reasonable methods and means can be considered, implemented, and evaluated. Without rigor for results statements, confusion can take the place of successful performance.

Evaluation (systems approach, systematic approach): Compares current status with intended status and most commonly occurs only after an intervention is implemented. *Unfortunately, “evaluation” is used for blaming and not fixing or improving. When blame follows evaluation, people tend to avoid the means and criteria for evaluation or leave them so loose that any result can be explained away.*

External Needs Assessment (system approach): Determining

and prioritizing gaps, then selecting problems to be resolved at the mega level. This level of needs assessment is most often missing from conventional approaches. Without the data from it, one cannot be assured that there will be strategic alignment from internal results to external value added.

Hard Data (system approach, systems approach, systematic approach): Performance data that are based on objectives and are independently verifiable. *These type of data are critical. They should be used along with “soft” or perception data.*

Ideal Vision (+): The measurable definition of the kind of world we, together with others, commit to help deliver for tomorrow’s child. *An ideal vision defines the mega level of planning. It allows an organization and all its partners to define where they are headed and how to tell when they are getting there or getting closer. It provides the rationale and reasons for an organizational mission objective.*

Inputs (systems approach, systematic approach): The ingredients, raw materials, physical and human resources that an organization can use in its processes in order to deliver useful ends. *These ingredients and resources are often the only considerations made during planning—without determining the value they add internally and externally to the organization.*

Internal Needs Assessment (systems approach): Determining and prioritizing gaps, then selecting problems to be resolved at the micro and macro levels. *Most needs assessment processes are of this variety (Watkins et al., 1998).*

Learning Organization (systems approach, systematic approach): An organization that sets measurable performance standards and constantly compares its results and their consequences with what is required. Learning organizations use performance data, related to an ideal vision and the primary mission objective, to decide what to change and what to continue. They learn from their performance and contributions. Learning organizations may obtain the highest level of success by strategic thinking:

focusing everything that is used, done, produced, and delivered on mega results—societal value added. *Many conventional definitions do not link the “learning” to societal value added. If there is no external societal linking, than it could well guide one away from the new requirements.*

Macro Level of Planning (systems approach): Planning focused on the organization itself as the primary client and beneficiary of what is planned and delivered. *This is the conventional starting and stopping place for existing planning approaches.*

Means (systems approach, systematic approach): Processes, activities, resources, methods, or techniques used to deliver a result. Means are only useful to the extent that the deliver useful results—at all three levels of planned results: mega, macro,

and micro.

Mega Level of Planning (system approach): Planning

focused on external clients, including customers/citizens and the community and the society that the organization serves. *This is the usual missing planning level in most formulations. It is the only one that wilifocus on societal value added: survival, self-sufficiency, and quality of life of all partners.* Also termed “strategic planning plus.” *It is suggested that this type of planning is imperative for getting and proving useful results.*

Mega Thinking (system approach): Thinking about every situation, problem, or opportunity in terms of what you use, do, produce, and deliver as having to add value to external clients and society. Same as strategic thinking.

Methods-Means Analysis (systems approach, systematic approach): Identifies possible tactics and tools for meeting the needs identified in a “system analysis.” The methods-means analysis identifies the possible ways and means to meet the needs and achieve the detailed objectives that are identified in this mega plan, but does not select them. *Interestingly, this is a comfortable place where some operational planning starts. Thus, it either assumes or ignores the requirement to measurably add value within and outside the organization.*

Micro Level of Planning (systems approach): Planning

focused on individuals or small groups (such as desired and required competencies of associates or supplier competencies). Planning for building block results. *This also is a comfortable place where some operational planning starts. Starting here usually assumes or ignores the requirement to measurably add value to the entire organization as well as outside the organization.*

Mission Analysis (systems approach): Analysis step that identifies three things: what results and consequences are to be achieved; what criteria will be used to determine success; and what are the building block results and the order of their completion (functions) required to move from the current results to the desired state of affairs. *Most mission objectives have not been formally linked to mega results and consequences, and thus strategic alignment with “where the clients are” is usually missing (Kaufman, 2000).*

Mission Objective (systems approach): An exact, performance-based statement of an organization’s overall intended results that it can and should deliver to external clients and society. *A mission objective is measurable on*

an interval or ratio scale so it states not only “where are we headed” but also adds “how we will know when we have arrived.” A mission objective is best linked to mega levels of planning and the ideal vision to ensure societal value added.

Mission Statement (systems approach): An organization’s macro-level “general purpose.” A mission statement is only measurable on a nominal or ordinal scale of measurement and only states “where are we headed” and leaves rigorous criteria for determining how one measures successful accomplishment.

Need (system approach, systems approach, systematic approach, systemic approach): *The gap between current results and desired or required results. This is where a lot of planning “goes off the rails.” By defining any gap as a “need” one fails to distinguish between means and ends and thus confuses what and how. If “need” is defined as a gap in results then there is a triple bonus: (1) it states the objectives (what should be), (2) it contains the evaluation and continuous improvement criteria (what should be) and (3) it provides the basis for justifying any proposal for by using both ends of a need—what is and what should be in terms of results—proof can be given for the costs to meet the need as well as the costs to ignore the need.*

Needs Analysis (systems approach): Taking the determined gaps between adjacent organizational elements and finding the causes of the inability for delivering required results. A needs analysis also identifies possible ways and means to close the gaps in results—needs—but does not select them. Unfortunately, “needs analysis” is usually used interchangeably with “needs assessment.” They are not the same. How does one “analyze” something (such as a need) before knowing what should be analyzed? First assess the need, then analyze it.

Needs Assessment (system approach, systems approach): A formal process that identifies and documents gaps between current and desired and required results, arranges them in order of priority on basis of the cost to meet the need as compared to the cost of ignoring it, and selects problems to be resolved. *By starting with a needs assessment, justifiable performance data and the gaps between what is and what should be will provide the realistic and rational reason for both what to change as well as what to continue. When the needs assessment starts at the mega level then the ‘4-’ is appropriate.*

Objectives (system approach, systems approach): Precise statement of purpose, or destination of where are we headed

and how we will know when we have arrived; the four parts to an objective are what result is to be demonstrated, who or what will demonstrate the result, where will the result be observed, and what interval or ratio scale criteria will be used. *Loose or process-oriented objectives will confuse everyone (Mager, 1997). A mega level result is best stated as an objective.*

Outcomes (system approach): Results and payoffs at the external client and societal level. *Outcomes are results that add value to society, community, and external clients. These are results at the mega level of planning.*

Outputs (systems approach): The results and payoffs that an organization can or does deliver outside itself to external clients and society. *These are results at the macro level of planning where the primary client and beneficiary is the organization itself. It does not formally link to outcomes and societal well-being unless it is derived from outcomes and the ideal (mega) vision.*

Paradigm (system approach, systems approach, systematic approach, systemic approach): The framework and ground rules individuals use to filter reality and understand the world around them (Barker, 1992). *It is vital that people have common paradigms that guide them. That is one of the functions of the mega level of planning and outcomes so that everyone is headed to a common destination and may uniquely contribute to that journey.*

Performance Accomplishment System (PAS) (system approach, systems approach, systemic approach): Any of a variety of interventions that are results oriented and intended to get positive results (such as “instructional systems design and development,” quality management/continuous improvement, benchmarking, reengineering, and the like). These are usually focused at the micro/products level. *This is a preferred alternative to the rather sterile term “performance technology” that often steers people toward hardware and premature solutions (Kaufman, 1999, 2000).*

Processes (systems approach, systematic approach): The means, processes, activities, procedures, interventions, programs, and initiatives an organization can or does use to deliver useful ends. *While most planners start here, it is dangerous not to derive the processes and inputs from what an organization must deliver and the payoffs for external clients.*

Products (systems approach): The building-block results and payoffs of individuals and small groups that form the basis of what an organization produces, delivers inside as well as

outside of itself, and the payoffs for external clients and society. *Products are results at the micro level of planning.*

Quasi Need (systems approach, systematic approach): A gap in a method, resource, or process. *Many so-called “need assessments” are really quasi needs assessments, as they tend to pay immediate attention to means [such as training] before defining and justifying the ends and consequences* (Watkins et al., 1998).

Required Results (system approach, systems approach, systematic approach, systemic approach): Ends identified through needs assessment that are derived from hard data relating to objective performance measures.

Results: Ends, products, outputs, outcomes; accomplishments and consequences. *Usually misses the outputs and outcomes are ignored or assumed.*

Soft Data (system approach, systems approach): Personal perceptions of results. Soft data are not independently verifiable. While people’s perceptions are reality for them, they are not to be relied on without relating to hard—independently verifiable—data as well.

Strategic Alignment (system approach): The linking of mega/outcomes, macro/outputs, and micro/product-level planning and results with each other and with processes and inputs. *By formally deriving what the organization uses, does, produces, and delivers to mega/external payoffs, strategic alignment is complete.*

Strategic Planning Plus-Mega Planning (system approach): Three phases—scoping, planning, implementation and continuous improvement—for defining and planning to create and contribute to a preferred future. *Often confused with tactical and/or operational planning which ignores or assumes starting with external client and societal value added.*

Strategic Thinking (system approach): Approaching any problem, program, project, activity, or effort noting that everything that is used, done, produced, and delivered must add value for external clients and society. *Strategic thinking starts with mega.*

System Analysis (system approach): Identifies and justifies what should be accomplished based on an ideal/mega vision and is results-focused. It is a series of analytic steps that include mission analysis, function analysis, and (if selected) task analysis. It also identifies possible methods and means (methods-means analysis) but does not select the methods-means. *This starts with rolling-down (from outside to inside the organization) linkages to mega.*

Systems Analysis (systems approach): Identifies the most

effective and efficient ways and means to achieve required results. Solutions and tactics focused. *This is an internal—inside the organization—process.*

Tactical Planning (systems approach): Finding out what is available to get from “what is” to “what should” be at the organizational/macro level. Tactics are best identified after the overall mission has been selected based on its linkages and contributions to external client and societal (ideal vision) results and consequences.

Wants (systems approach): Preferred methods and means assumed to be capable of meeting needs.

The linking of mega/outcomes, macro/outputs, and micro/product-level planning and results with each other and with processes and inputs.

What Is: Current operational results and consequences; these could be for an individual, an organization, and society.

What Should Be: Desired or required operational results and consequences; these could be for an individual, an organizational, and society.

Wishes (-): Desires concerning means and ends. It is important not to confuse “wishes” with needs.

Making Sense of Definitions and Their Contribution to a Mega Perspective

What can we surmise by a close consideration of the above definitions and the consideration of the possible perspective (unit of analysis) differences between conventional use and what is suggested here? Here are some points to consider:

1. System approach _ systems approach _ systematic approach _ systemic approach.
2. Mega level planning _ Macro level planning _ Micro level planning.
3. System analysis _ systems analysis.
4. Means _ ends.
5. Outcome _ output _ product _ process _ input.

There are three levels of planning—mega, macro, and micro—and three related types of results: outcomes, outputs, and products.

7. Need is a gap in results, not a gap in process or input.
8. Needs assessment _ needs analysis (nor front-end analysis, or problem analysis).
9. Strategic planning _ tactical planning _ operational planning.
10. Change creation _ change management.

Nitpicking? No. To assure that we help bring about positive change, we have to design, develop, and deliver that change. And we have to prove our contributions. So the words and concepts we use are much too important to leave loose and open to confusion. **A**

Endnotes

¹The so-called US Government Performance and Results Act (GPRA) does exactly this and demands links to a strategic plan. Evolving in this initiative is the linking of strategic planning to societal return on investment (Watkins, Leigh, Foshay, & Kaufman, 1998).

²This word is used in a fuzzy way by most people for any kind of result.

³Danny Langdon (1999) speaks to the language of work and the importance of the terms and concepts we use and understand.

⁴This section, at first, might sound a bit tedious. I feel it important to carefully consider each term, definition, and implications in order to make a rational decision on whether or not to participate in a perspective adjustment.

⁵These are in alphabetical order. At first, some of the definitions won't "follow" but please scan the list for words not yet defined.

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