



THE RIGHT INTERVENTION

Decision Aid

A practical job aid for deciding whether a performance problem requires training, performance support, process change, management action, or a coordinated combination.

CORE QUESTION

What is preventing the required performance, and what is the smallest intervention that directly removes that barrier?

How to use this aid

- 1 Define the gap** State what people are doing now, what they should be doing, and why the difference matters.
- 2 Move through the gates** Answer each question with evidence. Stop where a barrier is found.
- 3 Match causes to interventions** Choose an intervention only when it addresses a verified cause.
- 4 Combine when necessary** Use multiple interventions when several barriers materially contribute to the same gap.

NON-NEGOTIABLE

Do not prescribe an intervention until the performance gap and its causes are clear. A request for training is a proposed solution, not evidence of a training need.



BEFORE THE DECISION GATES

Frame the Performance Problem

A useful diagnosis begins with observable performance, a defined standard, and evidence of consequence.

PERFORMANCE GAP STATEMENT

[Population] is currently [observable behaviour or result], compared with [required standard], causing [business or operational consequence].

Replace solution language with performance language

WEAK: starts with a solution	STRONG: defines the gap
Managers need accountability training.	Managers delay documented performance conversations beyond the five-day standard.
Employees need better communication.	Agents give inconsistent resolution information, increasing repeat calls.
People are resistant to change.	Employees continue using the legacy workflow despite the new process requirement.

1

Is the performance gap verified and worth solving?

CHECK

- Is the required performance clearly defined?
- Can current performance be observed or measured?
- Is there credible evidence of a meaningful gap?
- Is the gap recurring, high-risk, or strategically important?
- Would correcting it create enough value to justify the effort?

IF NO

Investigate or stop

Clarify the standard, collect evidence, observe the work, or confirm that the issue is consequential before investing in a solution.

IF YES

Continue to Gate 2.

DECISION RULE

A complaint, survey result, or leader opinion may justify investigation. It does not, by itself, prove a performance gap.



GATES 2 AND 3

Clarify the Standard and Test Capability

Separate unclear expectations from genuine gaps in knowledge, skill, or judgment.

2

Is the required behaviour clear?

CHECK

- Do employees know what result is expected?
- Are quality and timing standards explicit?
- Do managers communicate the same expectation?
- Are priorities clear when requirements compete?
- Do people know when to act and when to escalate?

IF NO

Clarify expectations

Define the result, quality, timing, decision rights, priorities, and examples of acceptable performance. Align managers before asking employees to perform.

IF YES

Continue to Gate 3.

DECISION RULE

Training cannot compensate for a standard that leadership has not defined.

3

Do people know how to perform?

CHECK

- Can people explain the task or procedure?
- Can they demonstrate the required skill?
- Can they recognize correct and incorrect performance?
- Can they make sound decisions in realistic situations?
- Can high performers succeed under the same conditions?

IF NO

Build capability

Match the intervention to the missing capability: instruction for knowledge, practice and coaching for skill, and realistic scenarios for judgment.

IF YES

Continue to Gate 4.

DECISION RULE

Training is justified only when a verified gap in knowledge, skill, or judgment materially contributes to the performance problem.



GATE 4

Decide Whether Support Should Replace Memory

Not every information problem requires training. Many are better solved at the moment of work.

4

Must people remember the information to perform?

CHECK

- Is immediate recall required to act safely or without delay?
- Does the person need this knowledge to recognize risk or judge guidance?
- Does the information change regularly?
- Could remembering an outdated answer create risk?
- Can approved guidance be used while the work is being done?
- Is there an authoritative source and accountable owner keeping it current?

IF NO

Use performance support

Place approved, current guidance in the workflow through checklists, decision trees, templates, prompts, AI support, or searchable reference material. Assign an authoritative source and owner.

IF YES

Continue to Gate 5.

DECISION RULE

Internalize what must endure. Practise judgment. Retrieve what will change.

Keep enough knowledge in the person to recognize risk, judge guidance, and act when support is unavailable.

Choose the intervention by the performance requirement

USE TRAINING	USE PERFORMANCE SUPPORT	USE BOTH
Build adaptable skill or judgment	Recall exact steps or changing information	Develop judgment, then support execution
Perform without guidance or under pressure	Complete infrequent or procedural tasks	Combine variable decisions with stable procedures
Practise, receive feedback, and improve	Prevent omissions and reduce search time	Train for exceptions; support routine work



GATES 5, 6 AND 7

Test the Work Environment

Capability cannot transfer when the process, tools, resources, or authority make correct performance impractical.

5

Does the process support correct performance?

CHECK

- Are the required steps logical and necessary?
- Do approvals and handoffs work?
- Does the official process match actual work?
- Are people relying on workarounds?
- Does the workflow create delay, duplication, or rework?

IF NO

Change the process

Remove unnecessary steps, simplify approvals, clarify handoffs and ownership, consolidate procedures, and redesign the workflow before training people on it.

IF YES

Continue to Gate 6.

DECISION RULE

Do not train employees to become more efficient at navigating a defective process.

6

Do tools and systems enable performance?

CHECK

- Do people have access to the required systems and data?
- Does the tool contain the needed functionality?
- Is it reliable and understandable?
- Does it prevent or create avoidable errors?
- Is correct performance technically possible?

IF NO

Fix the tools or technology

Correct access, configuration, reliability, usability, data quality, permissions, integration, or automation. Add training only when the tool works but people do not know how to use it.

IF YES

Continue to Gate 7.



GATE 7

Test Capacity and Authority

Even capable people will fail when workload, staffing, resources, or decision rights make the standard unrealistic.

7

Do people have enough capacity and authority?

CHECK

- Is workload realistic?
- Are staffing, time, equipment, and materials adequate?
- Do people control the decisions for which they are accountable?
- Are competing priorities consuming the required capacity?
- Are service expectations compatible with available resources?
- Does performance depend on unavailable people or information?

IF NO

Change resources or governance

Adjust workload, staffing, priorities, equipment, decision rights, service expectations, or dependencies.

IF YES

Continue to Gate 8.

DECISION RULE

Training cannot create time, staffing, equipment, authority, or organizational capacity.

ENVIRONMENT CHECK

Before moving to management or motivation, confirm that the process, tools, resources, and authority make correct performance realistically possible.



GATES 8 AND 9

Test Management and Consequences

Determine whether people lack capability or whether the organization is failing to reinforce the required performance.

8

Is the required performance actively managed?

CHECK

- Do managers set clear expectations?
- Is performance observed?
- Do employees receive timely and specific feedback?
- Is poor performance addressed consistently?
- Are barriers escalated and removed?
- Do managers model the required behaviour?

IF NO

Use manager development or management action

When managers lack skill, build their capability. When they know what to do but do not follow through, clarify accountability, establish review routines, measure action, and apply consequences.

IF YES

Continue to Gate 9.

DECISION RULE

Do not prescribe manager training until you know whether managers lack capability or lack accountability.

9

Do incentives and consequences support the behaviour?

CHECK

- What happens when people perform correctly?
- What happens when they do not?
- Is speed rewarded at the expense of quality?
- Does correct performance create more work or personal risk?
- Do informal norms contradict formal expectations?
- Are strong and weak performers treated the same?

IF NO

Realign the environment

Change measures, targets, recognition, informal norms, accountability, and consequences so that correct performance is practical and worthwhile.

IF YES

Continue to Gate 10.

DECISION RULE

When the environment rewards the wrong behaviour, additional training may increase frustration without improving performance.



GATE 10

Verify Transfer and Build the Right Combination

The final test is whether people can perform under real conditions and whether every material cause has been addressed.

10

Can people perform under realistic conditions?

CHECK

- Can people perform when situations become complex or unfamiliar?
- Can they handle exceptions and trade-offs?
- Can they perform under time or emotional pressure?
- Does performance remain consistent in the workplace?
- Does the skill fade because it is used infrequently?

IF NO

Add applied practice and reinforcement

Use realistic simulations, coached workplace application, progressively difficult scenarios, spaced practice, observation, feedback, and performance verification.

IF YES

Do not add another intervention automatically. Recheck the diagnosis, evidence, population, and standard.

DECISION RULE

Knowledge demonstrated in a course is not proof that performance will transfer to the job.

Combined intervention rule

1. Every intervention must address a verified cause.

Do not add a course, tool, communication, or process change because it is familiar or politically convenient.

2. Every material cause must have an intervention.

Leaving one major barrier untouched can undermine the entire solution.

3. Fix enabling conditions before expecting learning to transfer.

Finalize the process, correct the system, clarify authority, and align managers before holding people accountable for new performance.



DECISION SUMMARY

Intervention Selection Quick Reference

Use this page after the gates to document the primary response and any required supporting interventions.

DIAGNOSTIC FINDING	PRIMARY INTERVENTION	TYPICAL ACTIONS
Gap is unverified	Further investigation	Clarify the standard, collect evidence, observe work
Expectations are unclear	Expectation clarification	Standards, examples, priorities, decision rights
Knowledge is missing	Instruction	Explanation, demonstration, worked examples
Skill is missing	Practice and coaching	Guided application, feedback, observation
Judgment is weak	Scenario-based learning	Cases, simulations, consequence-based feedback
Information is hard to access or recall	Performance support	Checklist, job aid, template, decision tree
Workflow prevents performance	Process change	Simplify steps, approvals, handoffs, ownership
Tools prevent performance	Tool or technology change	Access, configuration, usability, automation
Time, staffing, or authority is insufficient	Resource or governance change	Capacity, priorities, decision rights
Managers lack capability	Manager development	Practice, coaching, manager tools
Managers lack follow-through	Management action	Accountability, review routines, consequences
Incentives reward the wrong behaviour	Incentive alignment	Measures, targets, recognition, consequences
Performance fails under real conditions	Applied practice and reinforcement	Workplace practice, spacing, verification
Several barriers are verified	Coordinated combination	Sequence interventions by dependency



DOCUMENT THE CALL

Decision Record

Record the evidence and rationale so the intervention can be challenged, improved, and evaluated.

1. Performance gap	2. Evidence
<i>Who is doing or not doing what, compared with what standard, and with what consequence?</i>	<i>What confirms the gap? Separate operational evidence, observed behaviour, and stakeholder perception.</i>
3. Verified barriers	4. Assumptions to verify
<i>Which gates identified material causes? Record only causes supported by evidence.</i>	<i>What remains uncertain, and how will it be checked?</i>
5. Selected intervention	6. Rejected options
<i>What should change first? What supporting interventions are required?</i>	<i>What was considered but not selected, and why?</i>
7. Implementation sequence	8. Success evidence
<i>What must happen first so the intervention can work?</i>	<i>What workplace behaviour or operational result will show improvement?</i>

FINAL CHECK

The selected intervention should be the least complex response that addresses every material cause and produces observable improvement in workplace performance.