

# THE HPT MODEL APPLIED TO A YOGA STUDIO'S PERFORMANCE

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This case study describes how the human performance technology model has been applied to enhance the performance of a small yoga studio—Salty Dog Yoga & Surf of Carolina Beach, North Carolina. An analysis of Salty Dog's organizational performance revealed several ongoing challenges, including issues with sales, strategic planning, and division of labor. An environmental analysis found that Carolina Beach's market is strong enough to support a full-time local yoga studio, while an organizational analysis uncovered multiple issues with strategic vision, resource deployment, and training policies.

WE USED THE International Society for Performance Improvement's 2012 HPT model (Van Tiem, Moseley & Dessinger, 2012) as a guideline for this case study and applied it to assess and evaluate the performance of a small yoga studio. This model has proven to be a useful guideline for visualizing process logic and communicating analytical sequencing to the client (see Figure 1).

## PROBLEM STATEMENT

Salty Dog Yoga & Surf of Carolina Beach, North Carolina, opened its doors to the Cape Fear area in January 2013. Throughout its charter year, it has sought to become a valuable part of the Carolina Beach coastal community; however, an analysis of Salty Dog's organizational performance revealed several ongoing challenges. First, the studio's retail and class package sales have not been performing as expected. Second, the organization's management lacks a clear strategic plan for long-term growth and market share. Third, the studio manager's responsibilities are overwhelming, to the point where she cannot effectively address all of her responsibilities; unfortunately, as the only full-time employee, there are few support systems available to her. This project was conducted by graduate students as part of their performance improvement course, and they carried out the performance analysis and intervention selection phases of the HPT process. Intervention recommendations were passed on to the client.

## ORGANIZATIONAL ANALYSIS

Salty Dog Yoga & Surf was analyzed for its small business organizational strategy and structure. While no publicized mission, vision, or values statements were available, several ad hoc responses about business strategy were given during interviews. These responses are displayed in Table 1.

In terms of organizational structure, Salty Dog Yoga & Surf is a solely owned business with one full-time employee, the studio manager. The manager hires teachers as independent contractors, training a few of them for additional desk-related reception duties. The studio manager and the teachers are paid, and they are occasionally assisted by work-for-trade clients who are willing to perform tasks in exchange for free classes. The studio previously hosted an unpaid for-credit business school intern from the nearby University of North Carolina, Wilmington (UNCW).

## ENVIRONMENTAL ANALYSIS

Survey results and client feedback aided in an analysis of Salty Dog's internal environment, revealing the company's strengths and weaknesses. An external environmental assessment included a review of regional demographics and local competitors. These findings helped to identify the types of opportunities and threats Salty Dog Yoga

# An analysis of Salty Dog's organizational performance revealed several ongoing challenges.

and Surf faces in the marketplace. The findings from this strengths, weaknesses, opportunities, and threats (SWOT) analysis are displayed in Table 2.

## World Analysis

Market research was conducted to determine the average demographics of Salty Dog's target audience of yoga practitioners (Yoga Paws, 2014). These findings are reported in Table 3.

To identify how area residents may affect business performance, these general findings were compared with

specific Carolina Beach demographics. According to local census materials, Carolina Beach is home to 6,000 residents; half of the population is female with an average age of 42 years (Carolina Beach, 2014). Carolina Beach receives an economic boost in the late spring to early fall from a large influx of tourists; meanwhile, year-round residents have an average income higher than the state's average. Both factors indicate that the economic climate is conducive for a local yoga studio.

The cost of a single class at Salty Dog is \$15; discounts are available for senior citizens, students, armed forces members, and children. Class packages are offered at variable rates and discounts, typically amounting to \$60 for 5 classes, \$110 for 10 classes, and \$250 for 25 classes. Each of these class packages lasts for one calendar year. The prices of workshops and special events range from \$65 to \$125 per session. Salty Dog's pricing and packages are on par with but not cheaper than other yoga studios within the Greater Wilmington area.

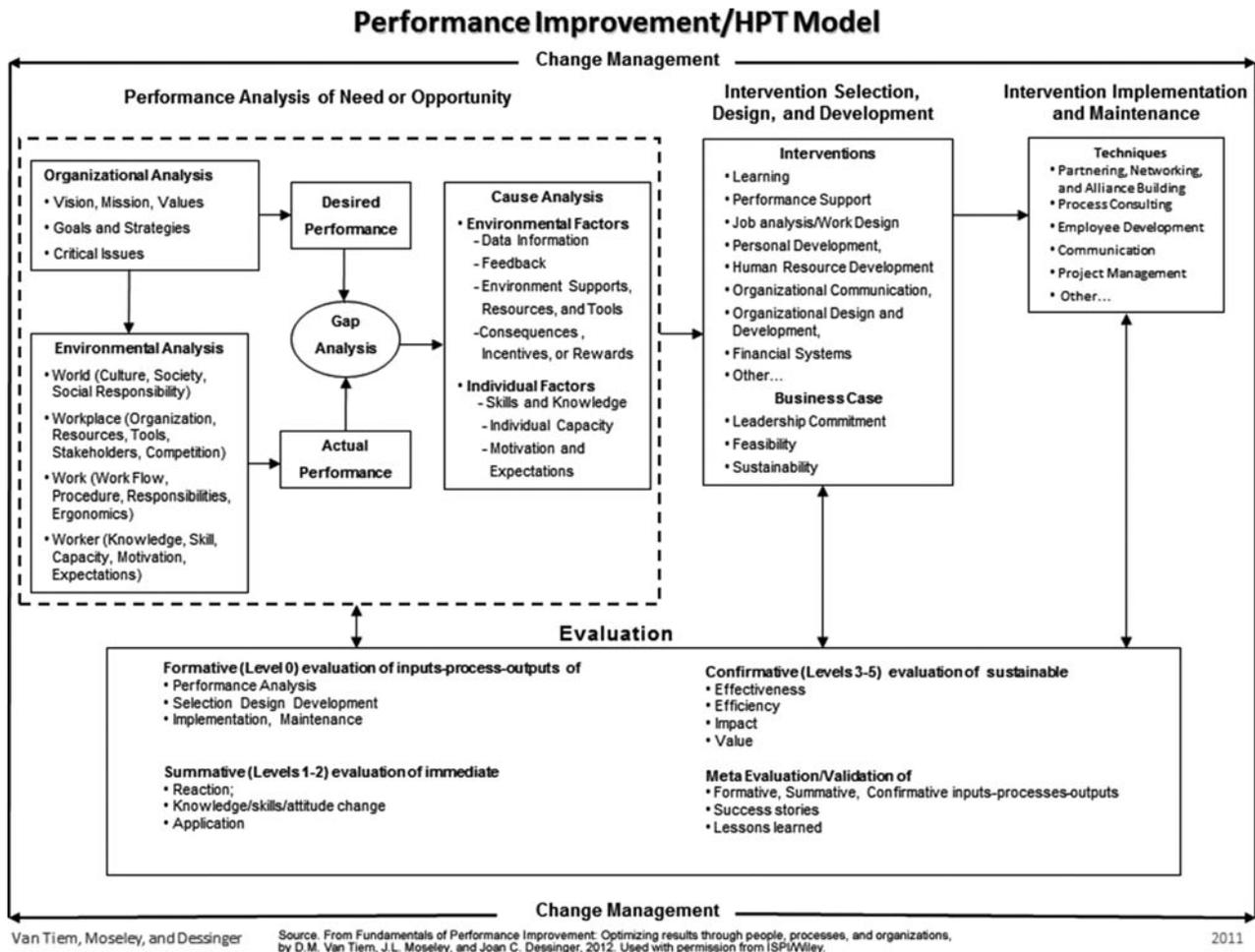


FIGURE 1. 2012 ISPI HUMAN PERFORMANCE TECHNOLOGY MODEL

TABLE 1 ORGANIZATIONAL STRATEGY	
Mission	"To offer Pleasure Island residents and visitors alike a community hub, as well as a venue for improving physical and mental health in a stress-free, non-intimidating environment."
Vision	Salty Dog's unofficial vision is to act as "a community hub on Pleasure Island for both residents and visitors, offering a fun, approachable yoga studio with a variety of accessible yoga classes to promote wellness in a Zen environment." The studio expressed an interest in being "more than just a business," desiring to be an "organization that has a positive impact on its community."
Values	Salty Dog's aligned values include "health, wellness, sustainability, community, love, tolerance, environmental responsibility, and service."
Goals	Salty Dog's goals include growth and expansion while maintaining existing client satisfaction. Its attendance goal is 25–30 students a day, while its monthly revenue goal is \$8–10k a month; it envisions supplementing its income with boutique merchandise sales.
Critical Issues	Some "critical issues" described by the organization include a "lack of budget and time for improvements and marketing, a lack of revenue, an inconsistent student base, and an unsustainable workload placed upon one person." The studio manager suggested that her position might need to be "split into two positions that work closely together." Salty Dog recognized that it required "a greater push in marketing and awareness" to maintain existing clients while growing its market share.
	When asked to give some background into these critical issues, the studio manager stated: "Many of our issues come from being a new business started with minimal capital. Our location, while in some ways a great asset, has also posed a challenge in that our studio is not very visible. We have had to be creative in order to get ourselves noticed."

## Workplace Analysis

**Structure and Resources.** Salty Dog is located on the ocean-facing side of the historic Carolina Beach boardwalk. The city hosts a state park, a reputation for good surf, and yearly festivals. The Carolina Beach

Boardwalk, dating back to the 1950s, is primarily home to seasonal businesses selling merchandise, desserts, or fast food. Year-round establishments like Salty Dog are attempting to innovate by reaching out to new client demographics.

TABLE 2 SWOT ANALYSIS	
<b>STRENGTHS</b>	<b>WEAKNESSES</b>
<ul style="list-style-type: none"> <li>❖ Variety of classes, levels of complexity</li> <li>❖ Location/beach</li> <li>❖ Studio atmosphere and materials</li> <li>❖ Dedicated instructors</li> </ul>	<ul style="list-style-type: none"> <li>❖ Off-the-beaten-path location (poor visibility)</li> <li>❖ Limited space (no concurrent classes)</li> <li>❖ Lack of strategic marketing plans and operational materials</li> </ul>
<b>OPPORTUNITIES</b>	<b>THREATS</b>
<ul style="list-style-type: none"> <li>❖ Increasing cultural demand for yoga</li> <li>❖ Changing Carolina Beach demographics</li> <li>❖ Support and involvement in local nonprofits</li> <li>❖ Local community business groups</li> </ul>	<ul style="list-style-type: none"> <li>❖ Rising rent and related infrastructure costs</li> <li>❖ Competitors (recreational center)</li> </ul>

TABLE 3	PROFILE OF A YOGI FROM YOGA PAWS (2014)			
	SEGMENT 1	SEGMENT 2	SEGMENT 3	SEGMENT 4
DESCRIPTION	WOMEN 23–34	WOMEN 35–55	MEN	YOGA INSTRUCTORS
Size	Women ages 23–34 represent up to 31% of people who report practicing yoga	Women ages 35–55 represent 41% of people who report practicing yoga	Men (ranging from 23–55) represent 27.8% of the people who report practicing yoga	Approximately 70,000 instructors report actively teaching yoga
Age range	23–34	35–55	Any	Any
Gender	Women	Women	Men	Men and women

Salty Dog’s studio has 1,000 square feet of practice space, along with desk reception, merchandise display, and seating areas. Amenities comprise water fountains, restrooms, and upscale refreshments for sale. The studio offers mats, bolsters, straps, and blankets free of charge to its clients. Workshop-specific props (e.g., hoops or aerial hammocks) are also offered to students who attend certain workshops. While some of these practices are consistent among competitors, other studios frequently charge for mat rentals.

Salty Dog licenses a studio-management platform called MINDBODY ONLINE (MBO) to collect, track, and assess business data. This cloud-based software package serves as a point-of-sale system, an input for staff scheduling and payroll, and an online class-booking service with mobile accessibility. A limited marketing package is included with the software, through which Salty Dog manages and hosts its own website and blog; however, it uses an external service for newsletters.

**Competitive Analysis.** There are no other studios south of Wilmington, making Salty Dog the primary yoga destination for the greater Pleasure Island area. In season, freelance yoga instructors are sometimes brought in by local surf businesses for beachside classes, but not on a regular basis. Salty Dog has reached out to a few of these businesses, partnering with one of them. The Carolina Beach Rec Center offers the only class-based competition in the area, hosting bi-monthly yoga classes for half the cost of a class at Salty Dog. While the Rec Center’s courses typically draw from a different demographic than Salty Dog’s, their lower cost may prove as a growth obstacle.

**Social Analysis.** Salty Dog emphasizes the importance of community and routinely offers discounted classes for charitable organizations, donation-based classes in

support of local causes, and charity raffle packs for regional nonprofits such as Wounded Warrior, Soles4Souls, Lo Tide Run, and the Pleasure Island Sea Turtle Project.

In addition to these activities, the studio is involved with “The Thread” Pleasure Island, an island-based networking group that seeks to support and sustain year-round regional businesses. When Salty Dog opened its doors in 2013, it reached out to the Carolina Beach Chamber of Commerce, but the Chamber offered little support. Interviews suggest that the local Chamber is politically at odds with shifting demographics; its continued support of a seasonal carnival that takes up Salty Dog’s parking lot and disrupts classes led Salty Dog to discontinue its membership. More recently, Salty Dog has partnered with a splinter faction of the Chamber called “Island Local,” which seeks to incentivize Carolina Beach-specific business development.

## Work Analysis

**Salty Dog Employees.** The studio manager is the sole full-time employee and is the public face of the company, managing the studio on a daily basis. Her workload exceeds 40 hours per week, and her job responsibilities span several departments, comprising operations, human resources, management, outreach, and marketing.

Teachers are independent contractors and report to the studio manager. While most have been retained since Salty Dog opened last year, they are under no contractual obligations to remain with the company. Teachers work part time and work at other jobs; accordingly, scheduling is always an issue since teacher availability varies constantly. The studio also brings in monthly workshops, such as aerial yoga or hoop arts, among others. If courses or workshops do not meet attendance goals after two or three scheduling attempts, they are likely to be swapped out or dropped; however, there is no set policy in this area.

**Salty Dog Stakeholders.** The owner and chief investor works full time for another company, which also has a small investment stake in Salty Dog as the studio's building owner. They work at a screen printing business which routinely offers Salty Dog discounted wholesale pricing for studio merchandise. The owner corresponds with the studio manager on a weekly basis, but otherwise has limited interaction with the studio's clients and staff.

## Worker Analysis

**Job Tasks. Studio manager.** The studio manager handles teacher hiring, scheduling and management, community relations, website management, purchasing and merchandising, online store upkeep, and other daily operations. In addition, she teaches two to three classes each week—sometimes more since she is also the primary substitute when a teacher cancels. In her reports, she states that she fails to operate at an optimal performance due to time and resource constraints. Although stakeholders have established clear performance metrics, they did not provide strategic planning or sufficient resources to achieve these goals. Moreover, there are no feedback systems in place from clients or teachers to support or direct the studio manager.

**Owner/accountant.** The owner and primary investor handles payroll, taxes, and related business matters. He remotely manages weekly payroll based on reports from the studio manager. When asked, both parties expressed frustration with their time constraints, while issues related to haphazard record keeping and payroll processing were also brought up.

**Teachers.** Salty Dog has a number of teachers who have worked as part-time instructors since the studio opened. Teachers are expected to greet clients, plan and teach classes in various yoga styles, and straighten up the facilities afterward. Informally, they are also supposed to promote their own courses, although very few of them do. A handful of these teachers have been unofficially promoted and offered pay with expanded responsibilities to work the desk, sell merchandise, and check in clients. However, due to financial limitations, these teachers do not receive many shifts, leaving them without these additional performance incentives.

**Work for Trade.** Cleaning services are maintained by specific work-for-trade clients or by the studio manager herself. Typically, a work-for-trade client will come in bi-weekly to deep clean the studio, including cleaning the bathrooms, vacuuming, and surface cleaning.

Work-for-trade clients are offered an hour of free class for every hour of work.

**Intern.** Salty Dog sponsored an intern from UNCW's Cameron School of Business during the spring semester of 2013, but the relationship was not very productive. Without clear tasks and goals, the intern was left to pursue independent marketing research on her own time, resulting in few useful leads. The studio manager suggested that the time required to adequately supervise an intern was too much of a business risk, due to her numerous other responsibilities.

**Job Policies.** Salty Dog has no employee manual for teacher or client reference; expectations are primarily communicated via word of mouth; no formal set of policies or procedures are in place, aside from a sticky note on the sign-in sheet. Although teacher agreement forms were developed, their use has been inconsistent and existing forms have been misplaced. Teachers may not be aware of their responsibilities, and the lack of standardized documentation means the studio manager must do everything by hand or in person. Until recently, there was no formal teacher observation period or other supervisory or onboarding process, resulting in partial teacher turnover and client dissatisfaction.

No formal policies have been instituted for training teachers to use the desk and to familiarize them with merchandise sales and the MBO platform. These desk responsibilities are currently labeled on a sticky note, and some areas are broken down into open and closing tasks; however, no guidelines or evaluation criteria have been established.

Teacher payment policies prohibit teachers from signing in their own students, as teachers are offered a payment bonus per head, above a minimum count, to incentivize attendance. This requires the studio manager or another desk-trained teacher to be present for every class; since class schedules range from early morning to late evening to accommodate clients, this means in practice that the studio manager frequently works 12-hour days.

The lack of any kind of formal onboarding, training, or supervisory materials has likewise negatively affected the studio's internship program. Its 2013 intern was not able to meet on-site regularly, resulting in frequent scheduling frustrations. The lack of established policies for attendance and other expectations meant the student was never given any clear guidelines.

**Job Procedures.** Teachers are asked to arrive 5 to 10 minutes prior to class to greet clients, then teach for 60

to 75 minutes. Teachers are responsible for designing the class sequence, providing a music playlist, and straightening up any accessories when class is complete. Teachers are asked to remain behind after class for 10 minutes to talk with students, but this is rarely enforced. Meanwhile, desk-trained teachers are responsible for light administrative and studio maintenance tasks, including signing in students, running payments, and selling merchandise.

Finally, when a work-for-trade client is not available, cleaning tasks are undertaken by the studio manager in addition to her regular workload—for example, all studio laundry is undertaken at her own out-of-pocket expense. The studio manager’s already busy schedule prevents her from accomplishing all of her weekly performance objectives, such as planning and implementing marketing materials and other new business outreach.

## GAP ANALYSIS

Data collected in the environmental and organizational analyses of Salty Dog’s practice helped identify the following three primary performance gaps, as summarized in Table 4:

- **Generation of revenue:** Salty Dog’s revenue from classes and training sessions, workshops, and merchandise sales averages \$6K per month. For the business to satisfy monthly debits and generate a profit, it must bring in \$8K per month at minimum.
- **Attendance:** Average class attendance fails to reach expectations. Management would like to record 30 students a day, but actual attendance typically averages around 15 students per day. Increasing regular student attendance would ultimately lead to increased revenue, closing two identified performance gaps.
- **Job analysis and time management:** The studio manager’s task list encompasses administration,

*Several drivers were identified as causes of Salty Dog’s performance deficiencies. The lack of data, information, feedback systems, and environmental support all significantly contributed to these performance gaps.*

human resources, client services and outreach, retail operations, studio maintenance, teaching, website development, and marketing. Her workweek frequently exceeds 50 hours, and her current responsibilities do not afford adequate time and energy to achieve studio performance objectives.

## CAUSE ANALYSIS

Several drivers were identified as causes of Salty Dog’s performance deficiencies. The lack of data, information, feedback systems, and environmental support all significantly contributed to these performance gaps. Low attendance and revenue is a direct result of a lack of sustained marketing efforts and client feedback mechanisms. These activities suffer due to the time and resource constraints resulting from poor division and distribution of operational labor. Finally, weekly business operations

**TABLE 4** GAP ANALYSIS

DESIRED RESULTS	ACTUAL RESULTS	IDENTIFIED GAP
Monthly revenue = \$8K	Monthly revenue = \$6K	Insufficient monthly revenue by at least \$2K
30 regularly scheduled students per day	15 regularly scheduled students per day	Lower than desired attendance rate by 50%
Studio manager will meet or exceed 5 to 7 weekly high-level performance objectives, including new business marketing, while reducing workload to 40 hours a week.	Studio manager’s tasks demand in excess of 50 hours per week, while only 3 to 4 high-level performance objectives are routinely fulfilled to the best of her ability, without additional time or resources to spend on new business marketing.	Studio manager’s workload needs to be reduced by 10 hours a week, while 2 to 3 additional performance objectives need to be met or delegated, particularly outreach and marketing.

suffer from a lack of standardized and streamlined organizational expectations, training materials, and overall strategic goals. These drivers are summarized in Table 5.

## PERFORMANCE INTERVENTIONS

Current organizational assets and challenges influenced intervention selection. Because one of the driving causes for these performance gaps is the organization's lack of revenue, several recommendations addressed the financial state of the business. Many interventions leveraged available resources, such as community partnerships and social media. Other recommendations promoted increased efficiency through cost-effective organizational planning, such as the creation of standardized training documents. Interventions were recommended to the client in the following seven areas: (1) organizational design and development, (2) human resource development, (3) performance support, (4) job analysis

and work design, (5) organizational communications, (6) sales and marketing, and (7) personal development.

## Organizational Design and Development Interventions

**Strategic Planning.** Salty Dog lacks an overall strategic plan that publicly states its vision, mission, values, and goals. In the past, organizational goals and values have been communicated only verbally or through ad hoc marketing materials. Establishing clear strategic direction will provide Salty Dog with tangible marketing assets to help differentiate itself from its competitors while ensuring future organizational consistency, regardless of personnel turnover.

**Marketing Guides.** To continue to grow a strong client base on the island and in the surrounding Wilmington region, Salty Dog will need a set of clear marketing guidelines for establishing goals, baselines, and other metrics for continuous improvement. Developing such

TABLE 5 CAUSE ANALYSIS FOR PERFORMANCE GAPS		
PERFORMANCE GAP	CAUSES	RECOMMENDATIONS
Insufficient monthly revenue by at least \$2K	Low attendance rate	Continue social and community involvement efforts to bolster word-of-mouth referrals.
	Underutilized space	Consider new regional alliances to bring in workshops and other relevant activities.
	Underperforming sales	Increase online and in-store promotions to drive purchases.
Lower than desired attendance rate by 50%	Off-the-beaten-path location	Increase signage and advertising; "how to find us" virtual video/map guide for inline distribution.
	Local competitors potentially eating into market share	Differentiate value to locals and tourists within marketing materials; revisit connections with local business networks (CB Chamber of Commerce); continue partnering with local businesses to increase visibility.
	Lack of cohesive organizational marketing plan	Coordinate and implement finalized business-marketing plan that solidifies the organization's mission, vision, values, and goals.
Studio manager's workload needs to be reduced by 10 hours a week, while 2 to 3 additional performance objectives need to be met or delegated, particularly new business marketing	Studio manager does not have the time or resources to work on marketing research or new business because she is overwhelmed, working an average of 50+ hours a week	Hire an unpaid intern through UNCW to handle marketing efforts or research.  Consider supplementing MINDBODY with other free online tools.
	Training materials and job descriptions have not been developed or put into place to reduce repetitive tasks, define specific responsibilities, or aid in weekly instruction	Establish a protocol guide for job descriptions, roles, and responsibilities.  Develop a handbook and training materials to streamline onboarding while firmly establishing position expectations.

criteria will allow the organization to measure its progress in a continuous, consistent manner while ensuring that the materials themselves are aligned with the overall organizational strategy. Writing up a set of clear marketing guidelines will enable the studio manager to delegate many of the tasks related to marketing materials and new business leads.

### Human Resource Development Intervention

To directly reduce the studio manager's weekly workload, additional work-study students should be hired to take over specific studio maintenance tasks, and unpaid interns should be brought in to assist with market research and new business development, thereby supplementing the number of performance objectives achieved each week. The studio's proximity to multiple state educational institutions, all of which offer credit-based, unpaid internship programs, suggests a ready pool of potential talent that the studio manager could draw upon to reduce her workload. Clearly establishing strategic materials, marketing guidelines, position descriptions, and employee rules will streamline intern onboarding while ensuring organizational consistency throughout semester-based intern turnover.

### Performance Support Intervention

Salty Dog has no standardized employee handbook or internally publicized documentation regarding the rules and policies of the organization. Performance standards and goals are informally set, but they are not publicized or coordinated. Position descriptions, tasks, and rules have been created haphazardly and are communicated only verbally; there is no internal location where an employee could look up rules, expectations, incentives, or punishments. Creating an employee handbook that lists these areas will help to standardize Salty Dog's job descriptions, providing tangible value to the organization by reducing the studio manager's workload, streamlining onboarding, communicating expectations, and ensuring future personnel continuity.

### Job Analysis and Work Design Interventions

**Job Description.** The studio manager position needs to be more clearly defined, as do all of the other positions at Salty Dog Yoga & Surf. The tasks for which the studio manager is responsible should be broken down and itemized to establish consistent expectations, set long-term goals, measure successes and milestones, and delegate responsibilities. Currently, the studio manager position is responsible for daily operations and administration, human resources, client services, studio maintenance, teaching, and outreach and marketing. The tasks associated with each of these categories should be further broken down and clarified; this will streamline potential

future personnel change and simplify the delegation of subsidiary tasks and performance objectives. This has the potential to assist in reducing the studio manager's workload to a manageable 40 hours per week.

**Job Specification.** In addition to clarifying the studio manager's tasks, other organizational roles should also be established. Since many freelance teacher and work study roles are already in place, job descriptions should be created to encompass these existing expectations. Creating these templates will streamline future hiring and training, while establishing a consistent set of expectations for each position, assisting with future personnel change, organizational turnover, onboarding, and supervision.

### Organizational Communications Interventions

**Signage.** Salty Dog's location on the Carolina Beach boardwalk offers excellent beachside proximity; however, there is very little visibility or accessibility. Surrounded by dirt lots, poor signage, and seasonal shops, the Carolina Beach boardwalk is a mixed blessing. While tourists are drawn to perennial favorites, it is hard to find parking and easy to miss the studio's location at the rear of the boardwalk. The lack of signage is not helping; currently, the studio has a small hanging sign in front of its entrance and some window decals facing the ocean. A larger hanging sign would increase visibility to passersby at the mouth of the alleyway, and additional signage should be placed throughout the boardwalk, particularly near the dirt parking lots, to promote the studio's unconventional location to tourists.

**Social Media.** While physical signage may be cost prohibitive, Salty Dog could also make use of low-cost digital solutions. One method would be to create a series of *how to* videos or *parking guides* to assist potential customers and clients in finding parking and navigating to the studio. Depending on their format and length, these might be uploaded to Vine, Instagram, YouTube, or Facebook, plastering Salty Dog's social media platforms with clear digital directional signage, thereby turning a weakness into an opportunity.

### Sales and Marketing Interventions

**Promotions.** To add value to Salty Dog's nascent online boutique and in-store merchandise inventory, Salty Dog should offer specific promotions tailored for each type of marketplace. Such promotions should follow the clear marketing guidelines established as part of the organizational design and development intervention, offering specific deals to increase sales traffic through in-person or online promotions. Supplementary marketing

materials should be created and distributed to educate new and existing customers about the types of in-store and online items available, and effort should be made to differentiate online and in-store items to further drive business. Such promotions do not need to be limited to merchandise but could also be applied to class packages and workshops.

**Partnerships.** Salty Dog should continue partnering with local businesses to increase its visibility, thereby bolstering word-of-mouth referrals. Although it already takes part in many local charity and community-related events, more emphasis should be placed on developing business relationships with potential competitors to turn them into stakeholders—for example, targeting in-season partnerships with tourism-related businesses such as surf camps or hotels. In the future, the organization may also revisit connections with the Chamber of Commerce to shore up its legitimacy in the eyes of an older client base.

### Personal Development Interventions

Partnerships should also be approached with other yoga studios to form regional yoga alliances. Such alliances

may help attract a broader base of diverse workshops or yoga-related talent; these costs could even be shared among various local studios. Since Salty Dog is currently the only full-time yoga studio in the Carolina Beach area, its outsider status within the greater Wilmington yoga market share may make such alliances easier to form, while aligning the organization’s short- and long-term strategic goals. Another method of framing such an alliance would be to suggest the establishment of a shared community of practice, offering southern yoga-related business owners a regional network within which to share ideas and strategies for personal development and professional gain.

### FEASIBILITY ANALYSIS

A feasibility analysis was conducted, and the proposed interventions were rated on a scale of one to five, with five being the most favorable to the organization, across the categories of time, cost, and value. Scores were averaged to assign an overall rating. Higher scores indicate the most efficient, effective use of company resources to address performance gaps. These results are displayed in Table 6.

RECOMMENDATION	TIME (1–5)	COST (1–5)	VALUE (1–5)	OVERALL RATING (1–5)
Continue social and community involvement to bolster word-of-mouth referrals.	2	3	4	3
Consider new regional yoga alliances to bring in workshops and other relevant activities.	3	2	4	3
Increase online and in-store promotions to drive purchases.	4	2	4	3.67
Increase signage and advertising; “how to find us” virtual video/map guide for online distribution.	4	4	5	4.3
Differentiate value to locals and tourists within marketing materials; revisit connections with local business networks.	3	2	3	2.67
Coordinate and implement a finalized business-marketing plan that solidifies the organization’s mission, vision, values, and goals.	3	5	5	4.3
Hire an unpaid intern through UNCW to assist with marketing efforts or research.	4	5	5	4.67
Supplement MINDBODY with other (free) online tools.	4	5	5	4.67
Develop a handbook and training materials to streamline onboarding while establishing position expectations.	2	4	5	3.67

## IMPLICATIONS AND RECOMMENDATIONS

In conducting this analysis, our team relied heavily on ISPI's 2012 HPT model, which provided a scaffold for our analysis that was useful internally and externally. The model helped us to communicate more effectively with our client, while providing us with actionable objectives for our preliminary analysis. We began by interviewing the organization's primary stakeholders, which revealed many potential performance gaps; supplemental information was gained through research and material review. Based on these experiences, our team recommended the following:

1. Frontload your time by gaining a concrete understanding of your clients' business structure.
2. Collect more data than you think you may need, as this will save time later by helping to contextualize your findings.
3. Resist the temptation to make assumptions about the root causes of performance issues before conducting a proper analysis.
4. Describe obstacles as opportunities and project an upbeat outlook when identifying performance gaps in order to build client confidence.
5. Frame your analysis in a positive manner by encouraging clients to focus on their strengths and to relate your findings to their existing practices.
6. When possible, connect complementary interventions in a systematic and interrelated manner that maximizes their adoption value for the organization.
7. Finally, build a business case by aligning performance improvement suggestions with client values, positioning your recommendations as logical extensions of their strategic goals.

One shortcoming of the 2012 HPT model is that it underemphasizes the importance of building a strong business case to support intervention implementation. This limitation could be addressed within future HPT model iterations by reconceptualizing the processes involved in intervention design, development, and implementation. 🌟

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