People Learning and Development

People Learning and Development

Transforming people and organizations through learning

MONICA AFFLECK

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Introduction

This guide serves as an interactive resource for HR/business management students, HR professionals and anyone involved in employee development at work.

Developing a skilled workforce is top of mind for today's organizations. The world as we know it is changing and so are our workplaces. Equipping people with the skills they need to participate in the economy and drive organizational success is critical – now and in the future!

Invitation to the reader

As the authors, editors and collaborators of this resource, we hope that the information we created will be of help to you. We recognize that this work is neither perfect nor complete and bound to change over time. As such, we would like to invite you to actively engage with it.

This is an open resource, meaning that you can repurpose it, add to it, update it, or even translate it into another language based on guidelines of the Creative Commons License under which it is published. The work is meant to evolve over time to serve as many people as possible.

Acknowledgement

This resource on People Learning and Development was written by two groups of HR students in the HRMT Employee Development and Coaching class at Kwantlen Polytechnic University (KPU) in Surrey, British Columbia, Canada. The resource was created in 2021 and is licensed under a Creative Commons-Attribution-NonCommercial-ShareAlike 4.0 International license

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Content by in large reflects a North American lens of the application of employee learning and development in organizations. Gender-inclusive language is intentionally used to promote gender equality and eliminate gender bias. The word choice, phrasing, and organization of the content in each section reflect the different writing styles of the various authors.

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CHAPTER 1: STRATEGIC ROLE OF TRAINING AND DEVELOPMENT IN ORGANIZATIONS

In this chapter, you will learn about the important role that training and development initiatives can play for small to large organizations. Learning and development can have a significant impact on an organization and its employees, that can change how the organization evolves. Learning and development is a good investment for employees because it gives them a new challenge and allows them to advance in their career path and their organization.

Key Takeaways

1. Employee learning and development programs give employees the opportunity to grow further in their career path, which in turn can significantly impact an organization's success.
2. If organizations efficiently invest in the human workforce, they have the potential to stand out in the industry and establish a strong brand reputation, thereby creating a competitive advantage.
3. Analyzing the learning and development metric is of the utmost importance for organizations because without doing so, they will not be able to evaluate whether the program is suitable or effective for the business or not.
4. Digital or e-Learning should be adopted by organizations and it should be the basis for employees to learn and further develop even during the COVID-19 pandemic because it can be a potential solution for businesses to survive.

Authors: Priscilla Shumba, Varteni Barsoumian

Section 1.1: The Impact of Implementing Learning & Development

PRISCILLA SHUMBA AND VARTENI BARSOUMIAN

According to Wichtowska, employees become more agile, engaged and interested in the work they do when they gain knowledge and have the opportunity chance to learn and grow (2019).

Additionally, Nick Van Dam in Wichtowska's article explored the five ways in which learning and development can have an impact and what role it can play in an organization (2019). The five ways are:

1. **Attract and retain talent**: In this new era, people are focused on learning and developing their skills and abilities. In an agile industry, employees are constantly willing to grow, and if an organization lacks these opportunities, they can miss out on talented employees who will be looking to move to more competitive employers.
2. **Develop people's capabilities**: Consistently developing and investing in your workforce is important, especially as many industries are becoming digitalized. For example, if your organization is switching to a more data-based system, it is important to invest in training and teaching-employees the appropriate skills in order for the organization to see higher productivity levels and growth.
3. **Create a values-based culture**: Learning and development can help establish a shared organizational culture. This can be done by sharing organizational values and the organization's vision with the workforce; to allow employees to contribute and feel like they are a part of the organization.
4. **Build an employer brand**: Learning and development could be the key to improving an organization's reputation and retaining new talent. A strong employer brand indicates to its prospective employees how successful it is within the industry.
5. **Motivate and engage employees**: Employees work efficiently and to the best of their ability when they are motivated, empowered and encouraged to learn more (2019).

Section 1.2: Focus on Investing in the Workforce

PRISCILLA SHUMBA AND VARTENI BARSOUMIAN

Investing in the workforce is an important part of learning and development. The only way for an organization to move forward is if its employees are on board and are a part of the organization's vision (Willyerd, 2015). How can this be done?

There are many different ways, but we will highlight some of the methods successful organizations use to engage their workforce. Preparing and developing a future workforce requires developing talent, implementing learning programs, and performing succession planning; all of which must be done at all levels of the organization (2015). If these are implemented efficiently, it can help the organizations achieve high-performer status. HR departments must also prioritize training and coaching for their employees. These initiatives can help train and equip the next generation of leaders, especially millennials and members of younger generations. These groups are highly interested in learning and growing their skills, which is vital to developing their capabilities to lead future organizations as baby boomers retire (Willyerd, 2015).

Another way organizations can invest in their workforce is by changing their strategies to adapt to changing workforce demographics. As the workforce is becoming increasingly filled with millennials, organizations need to identify the best ways to invest in them (Willyerd, 2015). How do compensation plans need to change? And what learning and development training processes will be beneficial? Willyerd suggests that this can be done by providing constant feedback to workers, conducting regular performance reviews and incorporating developmental planning (2015).

Lastly, employees should be rewarded based on merit and not tenure. Workplace dynamics are constantly shifting. Some employees do not stay with the organization a long time because they are looking for growth opportunities that are not available or they feel unappreciated. Providing rewards based on effort, results, performance and contribution will engage the workforce for a longer period. This will encourage employees to continuously work towards promotions as they will be motivated by the rewards and the prospect of becoming top performers (Willyerd, 2015).

Section 1.3: Analyzing Learning & Development Metrics

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Metrics are key to determining how effective a learning and development program is for a business (BasuMallick, 2019). If an organization has data; but does not analyze it in relation to the organization's goals, metrics become meaningless, and the organization will not be able to identify whether the learning and development programs are contributing to the success of the business. This is why organizations need to implement and analyze relevant metrics to get valuable insights. The key metrics that could be included in the analysis are:

- What types of courses have been taken
- Whether different departments take different courses
- Courses that have been completed more than once
- How employees utilize the training programs
- Whether courses and outcomes are aligned with organizational goals (BasuMallick, 2019)

In addition to the above-mentioned data analytics, four other metrics are often ignored but are important to evaluating the effectiveness of a learning and development program. These four metrics are:

1. **The cost of training employees**: Training investment per employee is one of the important metrics to calculate because it shows the efficacy of the training and development program. If a training session has been provided once, it is not advisable to provide the same training one more time because it could mean the training has not been as beneficial to the employees as expected (BasuMallick, 2019).
2. **Increases – or decreases – in operational efficiency**: By analyzing this metric, the organization should be able to identify whether employees are more productive than before because of the completion of certain training sessions (BasuMallick, 2019). To do this effectively, baseline metrics need to be set to measure increase or decreases in performance. Performance management reviews should also indicate whether employees have more skills and if they are applying them in their positions (BasuMallick, 2019). On other hand, if employees are not benefiting from the training programs and are spending time completing these training programs without any advancement, it indicates the provided programs are not effective or there may be no clear career path aligned with the training. (BasuMallick, 2019).
3. **Benefits for both employees and the organization**: The training programs should benefit both the organization and its employees. This means that employees will be able to acquire skills and knowledge and not only use and apply them for their job roles but convert them into "personal value-addition" (BasuMallick, 2019). Additionally, organizations must have to have a return on investment for the provided training programs because just like employees, organizations also have to benefit from the money they spend on training and development programs (BasuMallick, 2019).
4. **The employees' feedback on the provided training**: Finally, organizations need to ask employees to evaluate the training sessions and instructors who delivered these sessions because at the end the training sessions have to be enjoyable and not simply an additional responsibility (BasuMallick, 2019). In addition, the skills acquired must be observable and measurable in the workplace.

Section 1.4: Learning & Development During COVID-19

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The COVID-19 pandemic that started at the beginning of 2020, impacted employees' workstyles in many organizations and work sectors. In dealing with public health measures and restrictions, organizations had to think critically to continue their operations with success (Corporate Learning and Development During the COVID-19 Pandemic. [n.d.]). Many organizations adopted remote working for their employees and developed policies for it.

To facilitate continued learning and development, organizations considered initiating eLearning for employees so they could continue to develop and advance, even in the virtual environment (Corporate Learning and Development During the COVID-19 Pandemic. [n.d.]). eLearning training programs are essential for organizations to consider to further grow their businesses and employees (Corporate Learning and Development During the COVID-19 Pandemic. [n.d.]).

Digital learning is also crucial to businesses because it helps them shape their workforce and keep everyone connected. While the pandemic changed everyone's lifestyle and working style, corporations needed to advance online learning and development programs to enable the continuation of a dynamic and productive workforce during these unprecedented times (Corporate Learning and Development During the COVID-19 Pandemic. [n.d.]).

Section 1.5: Test Your Knowledge

PRISCILLA SHUMBA AND VARTENI BARSOUMIAN

An interactive H5P element has been excluded from this version of the text. You can view it online here:
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CHAPTER 2: HOW DO ADULTS LEARN?

Adult learning theory, also known as andragogy, focuses on the way adults respond to learning methods and how they differ from children (O'Neill, 2020). It is necessary to remember that adults are in a different place in their lives, as they have multiple social and personal responsibilities that impact their day-to-day decisions and activities. Trainers and teachers need to understand that the needs and interests of adults differ from those of children, which is why they must "tailor [their training methods] to take advantage of qualities adult learners have" (Irish, 2019).

Key Takeaways

1. Understand the theory of adult learning

- Describe the challenges and benefits that occur with implementing adult learning
- Identify the principles of adult learning theory
- Explain the differences between how adults and children learn

2. Comprehend the sub-theories of adult learning

- Identify the five theories involved in adult learning theory
- Describe which of the theories will resonate with which learning styles

3. Apply adult learning in training programs and life

Authors: Alexandra Kerr, Chelsea McMullen, & Natasha Mehay

Section 2.1: What is Adult Learning Theory?

ALEXANDRA KERR; CHELSEA MCMULLEN; AND NATASHA MEHAY

Educators can maximize the success of a training program or workshop by tailoring the training methods used to their audience. Also, educators must be willing to explore their options and “tune them as needed… to find the right formula that works for [their] team and organization” (HR Daily Advisor, 2017).

To gain a better understanding of adult learning theory, it is critical to address and understand the differences between learners.

Adult learners are often self-directed and enjoy engaging in learning opportunities in which their experience is recognized. They draw from on their past experiences to incorporate them into the learning process. By doing so, adults build on what they already know. Allen-Solorio (2019) mentions that using existing knowledge helps ease the stress associated with the workplace transition; this allows adult learners to feel like capable contributors to the team and organization.

Since no two adults are in the same position in their lives, it is essential to ensure that life experiences are reflected upon when fresh content is being received. This helps them remain internally motivated while redefining the goals they wish to accomplish. Section 2.2 discusses the advantages and disadvantages of utilizing adult learning theory. It is necessary to understand the different adult learning theories and their strengths and weaknesses.

The a adult learning theories are: **andragogy, transformative learning, self-directed learning, experiential learning, project-based learning**. Further in this chapter, in section 2.3, these five theories will be examined in detail to discuss the insights they provide into how adults learn because they do not retain information in the same way.

Learner engagement is only one component of an effective training program. Educators should acknowledge other considerations such as ensuring that adults are respected, prior experience is recognized, a safe and inviting work environment is present, the applicability of what is being learned is clear, and adults find the learning relevant to their lives (AWENS, 2017).

Section 2.4 discusses the importance of incorporating adult learning theory into training so that organizations and trainers can build a custom [learning] program that derives people performance and organizational outcomes for the organization (Boyle, 2016). Utilizing adult learning theory allows adults to collaborate within a team environment to improve their practical skills and work better.

Also, studies have shown that adult memory increases when they hear and see something together, this allows them to remember about 90 percent of what is said and done (AWENS, 2017).

Section 2.5 highlights the uses of adult learning theory and how self-directed learning allows adults to experiment and resolve conflicts and critical thinking issues.

Section 2.2: Advantages and Disadvantages of Adult Learning Theory

ALEXANDRA KERR; CHELSEA MCMULLEN; AND NATASHA MEHAY

Advantages of Adult Learning Theory

When organizations understand how adults favour learning, training and educational programs can be tailored to ensure they leverage the qualities the adults possess to effectively share the knowledge they already have and what they have yet to master. Adult learning theory allows corporate training programs to incorporate practical uses that help increase an adult's competence and overall confidence. When adults are placed in a new learning environment, they are motivated to showcase their capabilities and what they bring to the table. It is simple to walk adult learners through a step-by-step workflow process when they already have real-life experiences and examples to reflect on.

Learning for an adult can be transformative, so when an organization focuses on excelling in providing adult learning, they assist their team with their personal development in the long run (Chen, 2012). Unlike children, adult learners are able to learn at their own pace. However, it does not take much to motivate adult learners because they are often eager to succeed and put their knowledge to use. Utilizing adult learning theory, in general, helps support lifelong learning; it allows adults to engage in formal and informal learning settings to further develop.

Disadvantages of Adult Learning Theory

It can be challenging to apply adult learning principles. Adults must be keen and driven to seek their goals. If not, resistance can occur, thus impacting the overall culture within a workplace. Mentors or coaches who do not understand the different adult learning theories will have a hard time developing and selecting an evaluation system. They will be unsure of what tools and instruments to utilize that measure the expected competencies and outcomes that keep the learners motivated. It can be challenging to motivate adults because, more often than not, they are driven by their internal values and needs and have few external motivators (Smith, 2014). For example, adult students may refrain from participating in specific learning activities, especially if they have had previous negative experiences they fear will occur again (Chen, 2012). Also, it is critical to remember that adults have other social and personal responsibilities they need to focus on. In other words, even though an individual might be interested in participating in a training program, they might struggle to maintain a balance between their work and other commitments.

The next section will discuss adult learning theories and insights into what motivates adults to learn.

Section 2.3: Different Adult Learning Theories

ALEXANDRA KERR; CHELSEA MCMULLEN; AND NATASHA MEHAY

Discover Your Learning Style

First, let's assess your learning style so you are better able to apply the adult learning theories to your own results. Click on the link below to take the following quiz to find out your learning style.

What's Your Learning Style?

Visual adapted by students from the self-assessment page

There are three learning styles:		
Auditory	Visual	Tactical

To find out more about your learning style, visit here.

Now that you have an idea of your preferred learning style, we will assess the main adult learning theories.

Andragogy

Andragogy is the art and science of helping adults learn in it was popularized in 1980 by Malcolm Knowles (Western Governors University, 2020). The theory is based on the notion that adults learn very differently from children, and that they need different things.

To effectively learn, adult learners must:

1. Know why they need to learn something
2. Have internal motivation
3. Know how it will help them specifically
4. Build on their experience is a foundation for learning
5. Be self-directed and take charge of their learning journey
6. Find relevance from task-oriented learning

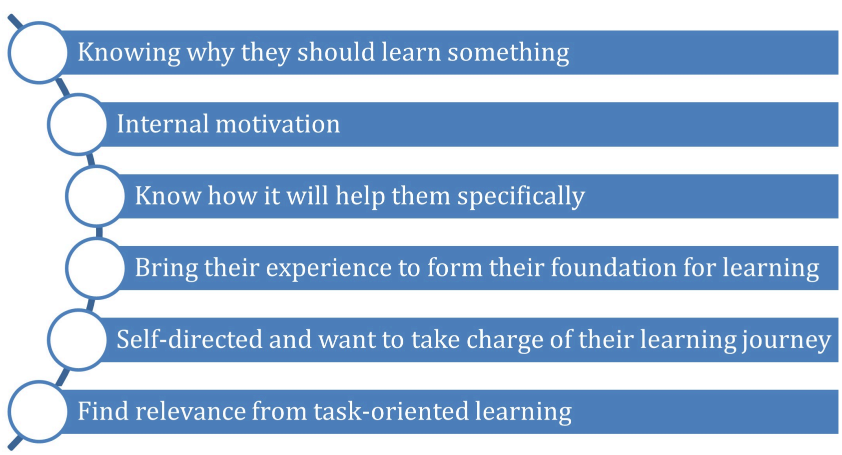

Image adapted by student authors from the Adult learning theories and principles text (Western Governors University, 2020)

The core of andragogy revolves around the fact that adult learners must want to learn and know how it will help them succeed in their lives. By focusing on hands-on experience and giving adults autonomy to go through materials on their own, using andragogy as a teaching model helps them continue their education (Western Governors University, 2020).

Transformative Learning

As people grow and engage in new experiences, there can sometimes be "aha!" moments that completely change their perspectives (Gutierrez, 2020). This is known as transformative learning. Developed in the 1970s by Jack Mezirow, transformative learning theory is centred on changing the way learners think about the world around them, and how they think about themselves (Western Governors University, 2020).

There are three stages of transformative learning:

Identification of a Dilemma or Crisis

- This requires understanding that we do not know everything and may be wrong in our assumptions
- These crisis moments can cause learners to look for more information and learn something new

Establishment of Personal Relevance

- Learners ask, "What's in it for me?" and "How does this apply to me?"

Critical Thinking

- Learners will need to evaluate their beliefs and values

These moments of transformative learning shape adult learners and help them along in their learning journey to improve in their personal or professional life.

Self-directed Learning

Self-directed learning became a formal theory in the 1970s with Alan Tough (Western Governors University, 2020) after having been in practice for hundreds of years. This adult learning theory is based on the learners' ability to plan, implement and evaluate their own learning (Western Governors University, 2020). Self-directed learning is preferable for adult learners as they are often excited about their education and feel confident in their ability to take it on themselves (Western Governors University, 2020). This way of learning can be easily implemented in the workplace as a professional development tool. Adult learners are usually excited about something that will enhance their career.

Experiential Learning

Experiential learning theory was promoted by David Kolb in the 1970s. It focusses on the idea that adults are shaped by their experiences, and that the best learning comes from making sense of your experiences (Western Governors University, 2020). A hands-on learning experience enables adult learners to utilize this theory and learn by doing, instead of just hearing or reading about something (Western Governors University, 2020).

Experiential learning takes place in four stages:

Concrete Experience	Experiences that leave a lasting impression
Reflective Observation	Reflect on their experiences
Abstract Conceptualization	Use critical thinking to be able to formulate concepts
Active Experimentation	Experiment through role-play to learn by doing

(Table adopted from Gutierrez, 2020)

Project-based Learning

John Dewey promoted project-based learning theory as early as 1900 as a learning by doing method (Western Governors University, 2020). By focusing on scenarios from the "real world", adult learners are able to learn through action. Projects can be chosen by the learners, so they are interested and invested in what they are doing (Western Governors University, 2020). This learning theory allows adult learners to apply their experience and knowledge to a project they are directing.

Section 2.4: Lifelong Learning in Everyday Life

ALEXANDRA KERR; CHELSEA MCMULLEN; AND NATASHA MEHAY

Learning is the most natural human instinct, and in a rapidly changing world, each individual has a personal challenge to remain adaptable, flexible, and versatile. Equally, "[everyone] has a personal challenge to recognize [their] own greater potential and [their] ability to achieve it, this can be done through motivating [themselves] to learn continuously" (Longworth, 2003). Adult learners are not immune from the need or desire to learn more. According to Longworth (2003), individuals may want to enrich themselves in their personal lives by developing new skills or improving old ones. Individuals may want to improve their performance and salary at work or they may want to give themselves and their families a better quality of life. Regardless of motive, Longworth (2003) suggests that lifelong learning is:

- For everybody throughout life, from cradle to grave, from hatch to dispatch, about making progress at work, about more enjoyable leisure, and a better quality of life – all those things which encourage individuals to live up to their own potential.
- About continuously acquiring new knowledge, skills and understanding.
- About learning in a variety of new ways in which individuals can focus on their own needs, circumstances and preferred ways of learning.

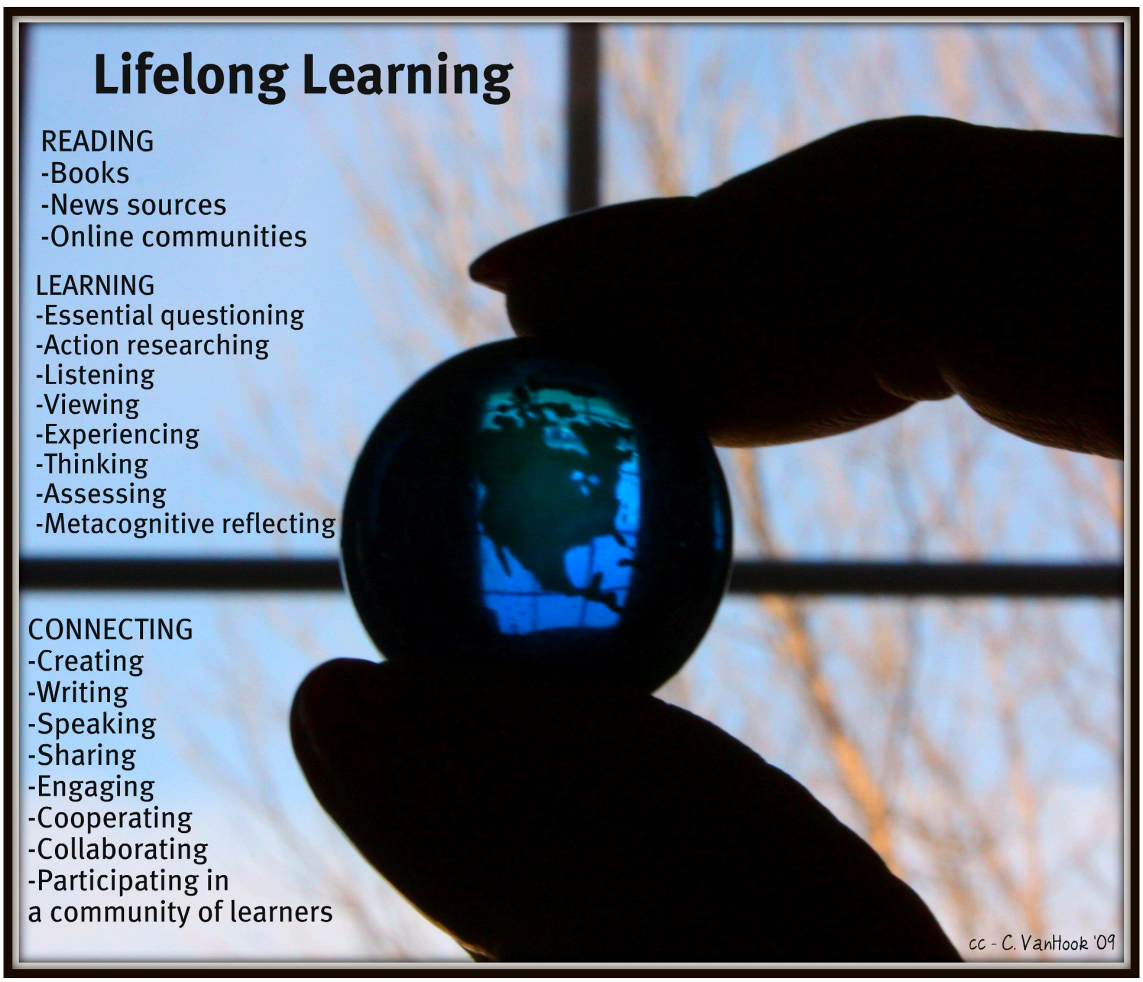

Figure 2.4a – Benefits of Lifelong Learning

Lifelong learning is comprehensive, and demands a greater level of understanding and knowledge compared to what is taught in educational systems today. The application of these new lifelong learning skills requires a level of self-reflection that inspires an individual to determine the areas where personal growth is needed.

Super Learners – Qualitative Learning

We all learn all of the time. But the quality of learning, and the way it is applied in the outside world, is what makes the difference between the learner and the super learner.

Image Attribution

Section 2.5: Test Your Knowledge

ALEXANDRA KERR; CHELSEA MCMULLEN; AND NATASHA MEHAY

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/peoplelearningdevelopment/?p=586#h5p-2

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CHAPTER 3: EMPLOYEE MOTIVATION AND ENGAGEMENT

In many organizations, significant components of productivity can be overlooked or overshadowed by just simply looking at the total output per employee or per department. Two of these overlooked components are **employee engagement** and **motivation**. This begs the question of what the difference is between the two. Also, are they both prevalent in the workplace at the same time? We'll take a further look into both of these components in this chapter but first, let's discuss them individually to determine how they are different from each other.

Key Takeaways

- Be able to identify the key distinguishing factors between employee engagement and employee motivation.
- Motivation and engagement are important factors required for an organization to successfully reach workplace goals, and for employees to reach their own personal goals.
- When employees see management heavily involved in the training and development, it shows them that their bosses want to better the organization, and the workers. This contributes to improving the performance, by increasing their motivation and engagement.
- The three key methods of increasing employee motivation are *improve communication, value individual contributions* and e*nsure the workplace is a positive environment.*
- The two-factor theory differentiates between factors that make lead people to feel dissatisfied on the job (*hygiene factors*) and factors that truly motivate employees (*motivators*).
- Maslow's hierarchy describes five categories of basic human needs: physiological, safety, belongingness and love, esteem, and self-actualization needs. These needs are sequentially ranked. As a lower-level need is satisfied, it no longer serves as a motivator.

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Section 3.1: The Difference Between Employee Engagement & Motivation

AMARJOT UPPAL; GAB SANDHU; AND GURNEET KALER

Employee Engagement

Employee engagement is the emotional commitment the employee has to the organization and its goals (Kruse, 2012). This does not necessarily imply that employee engagement is related to employee happiness or employee satisfaction. An employee can be happy and satisfied, but that does not necessarily mean they are engaged. Organizational benefits and compensation may keep an employee happy and satisfied, but that does not mean they will not jump at the opportunity to work for the next employer that offers better benefits or an increase in pay. This is why it is so important for employers to focus on engagement.

It is imperative that employers encourage and support their workers in working for the organization's goals as opposed to just working for the next promotion or pay cheque. When employees are engaged, they put forth discretionary effort. This means they are willing to go above and beyond to contribute to their duties, their responsibilities and the organization's objectives. For example, this could go as far as an employee working overtime without being asked or it could be as simple as an employee picking up the trash on the floor or cleaning up without their boss watching. Employee engagement leads to better business outcomes and higher net profit margins (Kruse, 2012). It leads to benefits for the organization and the employee by fostering the development of both.

Employee Motivation

Employee motivation is the level of energy, commitment, and creativity an organization's workers bring to their jobs (Inc.com, 2020). Employee motivation is all about how dedicated employees are towards achieving the organization's goals and how empowered they feel. Many different theories are used to describe and define motivation, and we will discuss these in the last subsection of this chapter. Essentially, motivation can be categorized into two types:

- intrinsic motivation
- extrinsic motivation

Intrinsic Motivation

Intrinsic motivation means people are are motivated from within. They have the desire to perform well at the workplace because the results are in accordance with their own belief system (QuestionPro, 2020).

Extrinsic Motivation

Extrinsic motivation means an individual's motivation is stimulated by external factors- rewards and recognition. Some people may never be internally motivated, and only external motivation will drive them to get tasks done (QuestionPro, 2020).

Employee Engagement vs Employee Motivation

Now that we know a little about each concept, we still have to answer our question: What is the difference between employee engagement and employee motivation? Let's circle back to the definitions:

Employee engagement: Employee engagement is the emotional commitment the employee has to the organization and its goals

Employee motivation: Employee motivation is the level of energy, commitment, and creativity an organization's workers bring to their jobs.

Engagement is an active agreement to do something for someone, while motivation is the will to do something. Both are critical to creating high performing teams, but employee motivation and engagement are two different factors (Skinner, 2020). As an employer, you want your workforce to be both engaged and motivated. As for employees, we all know that on some days it is hard to find motivation at work and your level of engagement can vary from day to day. That is why it is important to recognize the intangible things that make you want to come to work every day and give it your all. While organizations can not always make employees feel engaged, they can provide an inspiring workplace that encourages where people to bring their whole self to work.

Section 3.2: The Importance of Employee Motivation & Engagement

AMARJOT UPPAL; GAB SANDHU; AND GURNEET KALER

Employee motivation is the level of energy, commitment, and creativity an organization's workers bring to their jobs. Employee engagement is the emotional commitment the employee has to the organization and its goals. But why are these concepts so important? And why are they so necessary in the workplace? Let's explore these questions!

The Importance of Employee Motivation in the Workplace

Employee motivation is vital to a workplace. Motivation is high-level energy focused on productive action. According to Galloway (2016), it is the reason why we act, and it helps management meet the organization's goals. Motivated employees can lead to increased productivity and allow an organization to achieve higher levels of output (Heryati, 2019). If employees are not motivated and do not have the drive to work towards a goal, successfully reaching workplace goals becomes much more difficult. These are the reasons why employee motivation is important and needed in a workplace.

The Importance of Employee Engagement in the Workplace.

Employee engagement is just as important as employee motivation, and it is also as necessary in a workplace. Like employee motivation, employee engagement helps enhance productivity in the workplace. Employee engagement is also critical to retaining valuable talent (Brook, 2021). If employees are not satisfied in their jobs, they are not likely to be engaged. This makes them more likely to leave the job, which can contribute to higher turnover rates. There is just overall more trouble when employee engagement is tied to job satisfaction. Therefore, for the well-being of an organization it is important that employee engagement remains a priority. At the end of the day, employees are the ones who make up an organization, for the better or worse.

Training and Development

Employee training and development involves many employee learning practices. Training involves programs that help gain knowledge and learn specific skills to improve their short-term performance (Bester, 2019). Development involves more expansive plans, such as employee growth plans and the improvement of future performance (Bester, 2019). The overall purpose of training and development is to help with the career development of employees in the organization.

How does training and development relate to employee motivation and employee engagement? When employees see management heavily involved in the training and development of employees, it shows them that their bosses want to improve the organization and that they care about employees. When the skillsets and knowledge of employees are expanded, it makes them feel good. It gives the employees the opportunity to learn instead of being thrown into something they are unprepared for. Listening to employee feedback on training and development requirements helps the organization gain in-depth insight into what is working and what needs improvement. This also promotes employee empowerment by giving them a channel through which they can share their insights.

Section 3.3: What Drives Employee Motivation?

AMARJOT UPPAL; GAB SANDHU; AND GURNEET KALER

Methods to Improve Employee Motivation

Employee motivation has been discussed throughout this chapter. Now that you know and understand what it is and why it is so important to an organization, let's help you understand some methods an employer can use if he or she finds that motivation levels are low in the workplace.

There are several ways to keep an employee motivated. Some key methods of employee motivation include:

1. Improve communication
2. Value individual contributions
3. Ensure the workplace is a positive environment
4. Implement effective job design that is in alignment with employees' skills and organizational objectives

Improve Communication

Instead of sending an employee a "well done" email, going in-person and actually talking to them makes a big difference. Although the email may have a positive intention behind it, talking in-person ensures that positive communication really happens and is felt by both parties (Heryati, 2019). Even joining employees on coffee breaks makes them feel as though the employer is a part of the team. Inviting employee feedback and ideas is another tool organizations can use to help employees feel valued and heard.

Value Individual Contributions

Valuing individual contributions of employees helps to improve communication. Simple words of encouragement and appreciation can go a long way in this (Heryati, 2019). This is something that can be done to value individual contributions. Management should keep on top of this, as it leads to employees taking pride in their work and further engages and motivates them to do better. Meaningful words help build loyalty and encourage people to work harder (Heryati, 2019). Employees making these kinds of efforts is what leads to the most impactful results for the organization.

Ensure the Workplace is a Positive Environment

No one wants to be part of a negative organizational culture. Management must ensure the workplace is a positive environment. If it does not seem like one, something needs to change. Management can send out feedback surveys to gather more information on what is wrong and what can be improved (Heryati, 2019). They can even do simple things such as add plants to create a more serene workplace.

Implement Effective Job Design

How jobs are designed can significantly impact employee motivation, job satisfaction and commitment to achieving the organization's goals. Job rotation, job enlargement and job enrichment are all important methods managers and HR practitioners can implement. Together with providing employees with the skills they need to be successful and the autonomy necessary to perform their job, effective job design is an important factor in employee motivation.

Section 3.4: How to Engage Employees in the Workplace

AMARJOT UPPAL; GAB SANDHU; AND GURNEET KALER

Needs-based Theories

The basic concept of needs theories is that individuals are motivated to obtain outcomes at work that satisfy their needs. Therefore, needs theories attempt to identify the internal factors that motivate individuals (The Needs Theory: Motivating Employees with Maslow's Hierarchy of Needs, 2012). Needs theories suggest that to motivate a person to contribute valuable input to a job and perform at a high level, a manager must determine what needs the person is trying to satisfy at work and ensure that the employee receives outcomes that help satisfy those needs in return. There are several needs theories, and we will be going over Maslow's Hierarchy of Needs and the Two-Factor Theory by Frederick Herzberg.

Maslow's Hierarchy of Needs

Abraham Maslow is a twentieth-century psychologist who is well known for his contributions to human psychology (Selva, 2020). Maslow's hierarchy of needs is one of the best-known theories of motivation. Maslow organized human needs into a pyramid in a sequence – from the lowest level to the highest level that includes physiological, safety, belonging and love, esteem, and self-actualization needs. According to Maslow, an individual must satisfy lower-level needs before addressing the higher-level needs in the pyramid. Once a lower-level need is satisfied, it no longer serves as a motivator (MasterClass, 2020).

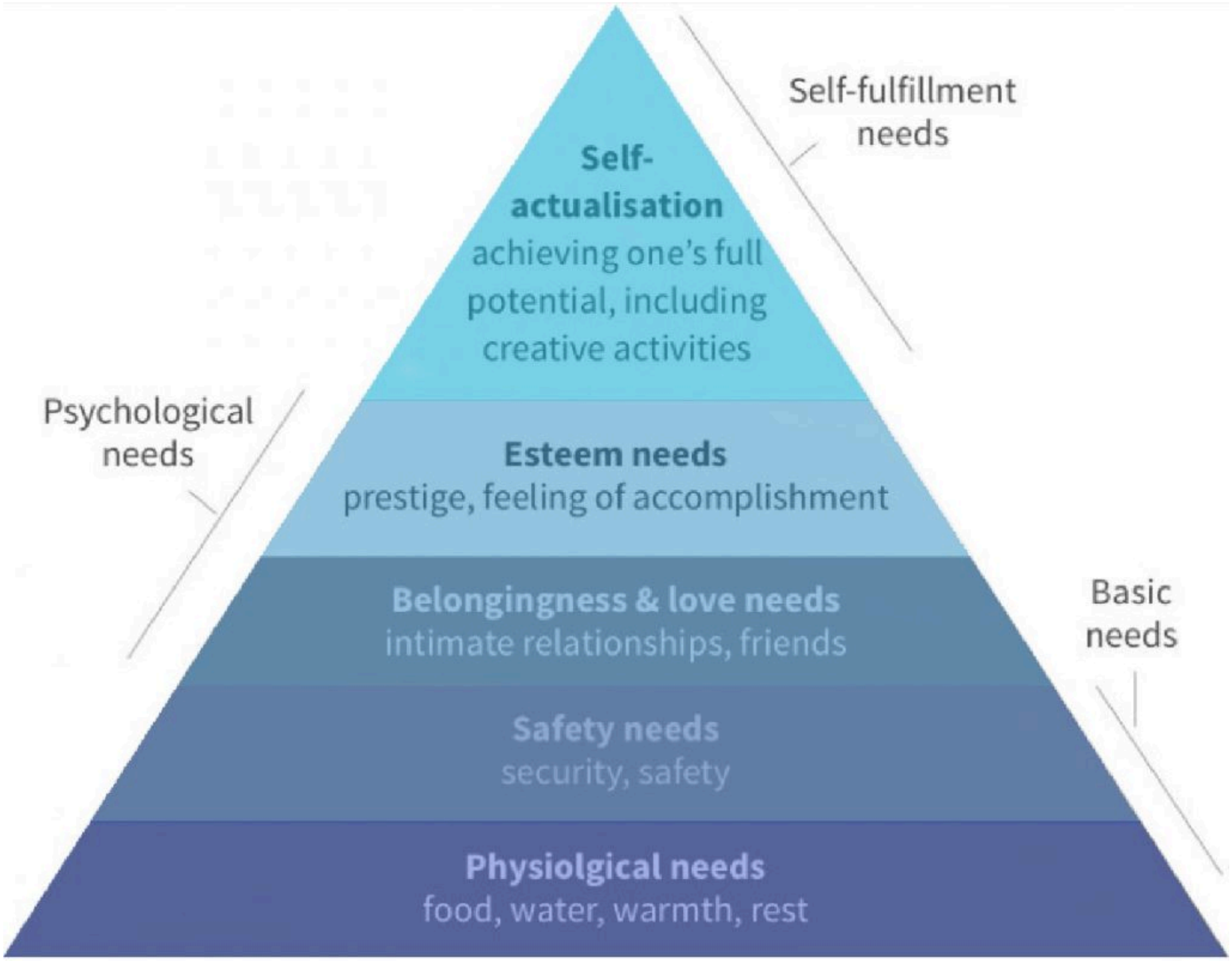

Figure 3.4a – Maslow's Hierarchy of Needs

Physiological Needs

Physiological needs are at the lowest level of the pyramid because these needs are the most basic. These refer to the requirements for human survival such as food, water, warmth, rest and shelter. In the working industry, this translates into money. A job satisfies an employee's basic needs when their employer pays enough money to allow the employee to afford their needs of survival such as rent, utilities and food.

Safety Needs

The next level is a feeling of safety and security. People want to feel protected and secure in their environment. In the workplace, this means that employees must be free from the threat of danger or an uncertain future. Employers should prioritize health and wellness by providing comprehensive benefit packages to employees. These benefits should include medical insurance to help cover the expenses that are not covered under the public health care plan to help satisfy safety needs.

Belongingness and Love Needs

Once safety needs have been met, the need for belongingness and love becomes more important. This includes the need to bond with other human beings, the need to be loved, and the need to form strong relationships at work (Cherry, 2020). Employers can help meet belongingness needs by providing an environment of continuous collaboration and communication with others. Furthermore, employers can host social get-togethers if they see that their employees are primarily motivated by social needs. Employers can avoid causing resentment by scheduling get-togethers at appropriate times so employees do not have to sacrifice their time off and everyone can participate.

Esteem Needs

Esteem needs are a higher level need because employees want to feel that they are making a contribution. Esteem needs refer to a person's desire to be respected by peers, to feel important and to be appreciated. Employers can assist with esteem needs by recognizing employees' accomplishments with meaningful job titles, perks, feedback, acknowledgement, etc.

Self-actualization Needs

Finally, self-actualization is the highest level of the hierarchy. This need refers to the desire to acquire new skills and take on new challenges to attain one's goals. Self-actualization needs may be satisfied by opportunities at work as a means of development and growth (Komninos, n.d.). This can be done by providing tasks to employees that are challenging and interesting to promote personal and professional growth. By doing so, employees will develop an understanding that personal achievement and business achievement are linked. Interesting and challenging work is attractive to employees. Additionally, employees spend the majority of their day at work, so it is important that they leave their worksite knowing that they have made a positive contribution to the business.

Herzberg's Two-Factor Theory

Frederick Herzberg was a clinical psychologist who is best known for his development of the two-factor theory (Toolshero, n.d.). His two-factor theory is used by organizations across the globe to increase productivity. Herzberg developed the theory based on data he collected from interviews with a large number of engineers and accountants. The purpose of the interviews was to find out what made these workers satisfied and dissatisfied on the job. He asked the employees two sets of questions. As part of his theory, he suggests that job satisfaction and job dissatisfaction both work independently of each other in the workplace.

In Herzberg's two-factor theory, we can see that employees usually fall somewhere on two spectrums (Contributor, 2020). The first is job satisfaction or a lack of job satisfaction (motivators). According to Herzberg, motivators encourage employees to try harder at work. Motivators include achievement, interesting work, increased responsibilities, advancement, and growth opportunities. The second is feeling dissatisfied at work; or not feeling dissatisfaction at work (hygiene factors). Hygiene factors include an organization's policies, working conditions, salary, safety, and security on the job.

Two Dimensions of Employee Satisfaction

Figure 3.4b – Two dimensions of employee satisfaction

Maintenance/Hygiene Factors	***Motivators***
Company policy	Achievement
Supervisor and relationships	Recognition
Working conditions	Interesting work
Salary	Increased reasonability
Security	Advancement and growth

According to Herzberg, having a work environment with high hygiene factors and motivators is important to keeping employees motivated. The following is a list of some primary hygiene and motivator factors to take into consideration:

Organizational policy

To decrease dissatisfaction, organizational policies need to be fair and apply equally to all. It is important to make written manual copies of policies and procedures to make them easily accessible to all employees and staff.

Working Conditions

Safe and comfortable working conditions are a basic need that all employees expect from their employers, and the work environment has a tremendous effect on one's level of motivation. Providing a safe and comfortable workplace is an example of a hygiene factor. For instance, having an office that is uncomfortable can contribute to a lack of motivation.

Salary

Although salary is not a long-term motivator, it is important. Employers need to take measures to provide fair and reasonable compensation. Employees want to feel that they are being compensated well for their performance. Thus, it is also vital to have clear policies in place for salaries, raises and bonuses.

Achievement

Another premise of Herzberg's theory is that most individuals want to do a good job at work. An employer can assist them by giving them the opportunity to work in positions that require their specific skills and talents. When setting clear goals, employees should be involved in the process and aware of what is expected of them.

Recognition

Workers at all levels of an organization want to be recognized for their achievements. Employers should keep in mind that the level of success does not have to be monumental before being deserving of recognition. Praise should be sincere, and if employers are doing well their work should be acknowledged immediately. This can be done by publicly thanking them during a meeting at the workplace or by writing them a kind note or email.

Advancement and Growth

Good performance can be rewarded with advancement to open positions that are well suited to a current employee. Also, employers can support employees by allowing them to pursue further education in order for them to feel professionally fulfilled.

Figure 3.4c – Job satisfaction vs. Job dissatisfaction

Although there are many motivational theories to take into consideration, Herzberg's theory offers a reasonable starting point for employers. By establishing a work environment that promotes job satisfaction, employees are motivated to contribute higher quality work. With high hygiene and high motivation factors, employees feel happier and more motivated because they are being treated fairly based on the above factors. With high hygiene and low motivation factors, workers tend to show up and do their job, but they will not necessarily be motivated to go the extra mile. Their job may lack motivating factors even if the workplace is fair in all aspects. The opposite of this would be low hygiene and high motivation factors, with some of the motivation factors including meaningful projects and recognition for work. On the other hand, low hygiene in this case would mean working too many hours, receiving low wages, and having an uncomfortable work environment.

Intrinsic Motivation vs. Extrinsic Motivation

Intrinsic motivation comes from within, while extrinsic motivation originates from outside. Motivational factors are intrinsic in nature, while hygiene factors are extrinsic. Intrinsic factors are related to the job, and these factors have a positive effect on job satisfaction while often resulting in an increase in total output (Cherry, 2020). Intrinsic motivation is based on the types of emotional needs identified in Maslow's hierarchy of needs. Intrinsic factors have a positive influence on morale, satisfaction, efficiency and productivity. On the other hand, extrinsic motivators are the kinds of basic needs included in the lower levels of Maslow's hierarchy of needs. Based on Herzberg's theory, extrinsic motivators include status, job security, salary, and benefits. When employees are dissatisfied or feel bad about their jobs, they tend to identify extrinsic factors as the main reasons.

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Section 3.5: Test Your Knowledge

AMARJOT UPPAL; GAB SANDHU; AND GURNEET KALER

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/peoplelearningdevelopment/?p=602#h5p-3

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CHAPTER 4: TRAINING NEEDS ANALYSIS

This chapter will describe a process to assist in the identification, analysis and implementation of training need analysis (TNA). TNA is the process an organization goes through to determine the training that needs to be completed in a certain period to allow teams to complete their jobs as effectively as possible as well as to progress and grow (Meij, 2020). TNA is considered the first step of the Instructional Systems Design Model of Training and Development. It also identifies the gap between the performance of employees and the organization. The main goal is to determine the current condition and desired condition. Recognizing the difference between these two conditions helps identify this gap.

Key Takeaways

- Understand the meaning of TNA.
- Explain the importance of TNA.
- Explain the TNA model.
- How to conduct TNA.
- Explain the problems in conducting the TNA.
- Identify the different types of TNA.
- Explain the different levels of TNA.
- Training evaluation method: 1.360 feedback 2. Surveys 3. Questionnaires
- Six Types of Workplace Training:1. Technical skills development 2. Soft skills development 3. Products and services training 4. Quality training 5. Safety training 6. Team training
- Training Delivery Methods:1. On-the-job training 2. Off- the- job training

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Section 4.1: Needs Analysis Process

HARPREET KAUR; ALAN ZHOU; AND HARVIN SIDHU

The Training Needs Analysis Process

Conducting a training needs analysis (TNA) is very important in determining the main operational issues and helps in identifying the solutions to those issues. The training needs analysis helps to:

- Make training more effective by providing various insights.
- Ensure the right areas are covered by the training.
- Prioritize and organize training needs.
- Provide solution development (Robertson, 2021).

Steps involved in the TNA process include:

A concern: Referred to as an itch or pressure point, that has captured the attention of the manager. For example, noticing that customers are being treated rudely or recognizing a change in the external environment, such as new legislation

Importance: Identifying if it is central to the effectiveness of the organization and what the cost implications of the problem are.

Consult stakeholders: Identifying and involving stakeholders who have a vested interest in the process and outcomes of the needs analysis process.

Data collection: Collecting of the information from three levels of analysis (organization, task, and person/employee).

Why Do You Need to Conduct a Training Needs Analysis?

TNA is a tool that contributes to the growth of the organization. There are various reasons for conducting a TNA, some of which are listed below:

To ensure the organization is running the required training session

TNA helps in finding the right training programs for the organization so every employee can perform their tasks by meeting the organization's specific standards (Morrison, 2019). TNA will also help in providing information related to the type of training required for employees. This ensures that the organization offers relevant training sessions to help employees receive the exact information they require for their job performance (Morrison, 2019).

Need to Escalate the Return on Investment

The training costs and time spent on the training and learning outcomes help identify the return on investment (ROI) for the organization. It is important for the business to think about the time and money invested in the particular training, as well as the benefits acquired from those training sessions (Morrison, 2019). TNA helps identify the most appropriate training requirements.

Helps in Understanding Performance Gaps

Organizations need various ways of improving their business requirements according to the demands of the market. To achieve their business goals, organizations need to train employees according to their job responsibilities (Morrison, 2019). TNA helps in identifying the gaps between the current state and the desired state of employee skills/performance.

The type of training and who is receiving the training are important factors in determining the appropriate training solutions to improve employee and organizational performance.

How to Conduct Training Need Analysis

Below, you can find the required steps in conducting TNA:

- **Define objectives:** The first step in the TNA process is to clarify business objectives that are specifically related to an organization's productivity and employee skills and also to determine the areas that need attention during the training program
- **Define the desired state:** The next step is to define the main goals the training needs to achieve
- **Collect data:** Collect data on the current state of employee performance as well as the productivity of the organization
- **Perform gap analysis:** Perform an analysis of employee performance and organizational development to identify skills gaps and training needs that can help address these gaps
- **Seek agreement on actions:** Throughout the process, seek agreement on actions in the performance gap analysis by involving stakeholders in the process
- **Create a training plan:** Create a detailed training plan that includes what kind of training, who receives the training will be provided, who will receive the training, who will provide the training, and when and where the training will take place
- **Create an assessment plan:** An assessment plan will help in ensuring that the gaps identified in the performance gap analysis will be covered
- **Design training courses or activities:** Organization can purchase or design their own training program. Designing your own training plan helps in controlling the desired training needs of the learners. Purchasing the training plan involves less effort and helps in focusing on the special areas of the training programs (Shawe, 2013).

Obstacles in Conducting TNA

Organizations need to consider the following barriers to conducting a TNA:

Time

Some organizations think that conducting a TNA is a waste of time and does not provide much of a benefit. However, when carried out correctly, a TNA saves the business time in the long term, as it helps determine the most effective type of training required for the organization (PulseLearning, 2019).

Relevant Information

When an organization changes roles and restructures departments, it has an impact on the training needs of employees. It is very important for the organization to conduct a TNA with updated information every year before the employee training reviews (PulseLearning, 2019).

Section 4.2: Types of Training Needs Analysis

HARPREET KAUR; ALAN ZHOU; AND HARVIN SIDHU

Components of the Training Needs Analysis Process

As discussed in the previous chapter, the TNA identifies who needs training and what kind of training is required. Organizations performing a TNA will benefit by avoiding training individuals who do not need it or providing them the wrong kind of training. There are three main levels at which a TNA can be performed: the organizational, operational, and individual levels.

Organizational

The first level of TNA is organizational. At the organizational level, what the organization's needs are and other reasons why training may be required are identified based on organizational goals and objectives. Important questions that should be answered by this analysis are: Why is training seen as a solution to the potential problem? What resources are required/available for training?

Task

Task analysis is another component of the TNA process. This is an analysis of the work performed at the job. It helps design training that is relevant to the actual skills or abilities employees require. Task analysis can also help pinpoint what skills are most important to the job.

Conducting Task Analysis

Task analysis can be conducted by interviewing employees, managers and supervisors to gain a thorough understanding of what employees need to know and do in their jobs. During these interviews, questions must be asked about the tasks they will perform, how important the tasks are, if they were trained to perform the tasks and how often they perform them. Differentiating the productivity levels of the employees will help determine what training is needed to improve their job performance.

Person Analysis

Person analysis is an assessment of desired performance standards, who needs training and what type of training is required. Employees' skill and motivation levels are assessed to determine if training is the most appropriate solution.

Other components of TNA

Performance Analysis

Performance analysis looks at whether or not employees are performing to standard. If the answer is no, training can help improve employees' performance to meet expectations.

Training Sustainability Analysis

This method analyzes whether training is the best solution for the problem in at hand. Despite training being beneficial in many circumstances, there may be situations in which another solution is more effective.

Cost vs Benefit Analysis

In this method, organizations analyze whether the benefit of the training is actually worth its cost. This is done through ROI calculation. Improved efficiency and better performance are among the anticipated returns for the financial investment made by organizations in employee training and development.

Section 4.3: Training Plan

HARPREET KAUR; ALAN ZHOU; AND HARVIN SIDHU

Training Delivery Methods

Most employees will have areas for development in their workplace skills. A training program can be an effective solution to help employees improve their job performance. For job and career growth, a development program can help employees acquire the skills and knowledge needed for future opportunities. Providing the necessary training creates an overall knowledgeable staff with employees who can take over for one another as needed, work on teams or work independently without constant help and supervision from others.

Image 4.3.a Areas of professional development

On-the-job Training

On-the-job training is instruction for employees that takes place at work. On-the-job training typically involves a combination of observing others and hands-on experience in completing tasks under the supervision of a training manager, coworker or professional trainer. When undergoing on-the-job training, you learn the processes and procedures your employer uses. You may also learn how to operate any equipment, tools or machinery required for your position. Part of on-the-job training may include job shadowing or observing an experienced employee perform certain tasks (Indeed 2020).

On-the-job Training Methods

1. Coaching or one-on-one training

Coaching is a positive way to train new recruits. It is role-specific and seeks to comprehensively train new employees on the duties of their role. It also highlights what is required of them to work efficiently and successfully on a team and contribute to the business overall. The coach can be a manager, subject-matter expert, researcher or team member, but the central part of this on-the-job training technique is that it is conducted one-on-one and aims to increase the new recruit's knowledge and skills while, improving their confidence and competence. (Robert Half, 2020)

1. Mentoring programs

Mentoring is a mutually beneficial training technique in which a more senior staff member provides support and guidance to a new staff member. In addition to technical training and support, mentors also provide emotional advice and support to new recruits. This is important for onboarding, as it helps effectively develop bonds between the staff of varying departments, fostering cohesion throughout the business. A strong mentoring program has the capacity to build an organization that feels truly supported professionally and connected personally (Robert Half, 2020).

1. Computer or online-based training modules

Systems like Mind Flash, Velpic and Course Genius enable employers to create training modules, measure progression and test skills with assessment tasks such as quizzes. These programs are an easy on-the-job training solution, as they are comprehensive and do not require the presence or time of other staff. Most programs can be tailored specifically to the needs of your new recruit and the team on which they will work (Robert Half, 2020).

1. Job rotation

Job rotation is the practice of moving a new recruit between different roles in your organization. This can help to give them broader experience and train them in a variety of skills. This approach will improve your new recruit's knowledge of the work each team is responsible for on a daily basis. It will also help them understand who the best points of contact are for each team (Robert Half, 2020).

Off-the-job Training

Off-the-job training is a method of training, that is undertaken at a site, away from the actual workplace, for a particular period. Delivering training at a place other than the job location provides a stress-free environment to the employees where they can concentrate only on learning. Study material is supplied to the trainees to acquire theoretical and/or practical knowledge (Surbhi S, 2019).

Off the job training methods

1. Case Study Method

Discussion of a case generally occurs in groups. In these groups, each member is asked to present their analysis, suggest alternative solutions and offer comments on the analysis given by others. Since there cannot be an ideal solution to any problem, the group discussion can be lively and stimulating, with each member trumpeting their own analysis and trying to find loopholes in the alternatives suggested by others. Yet, the case study method of training is a valuable tool for developing analytical abilities among the trainees, thus facilitating decision-making (D Naorem, N.).

2. Role Playing Method

A "role" refers to a person's pattern of actions during their interactions with others. A major weakness of role-playing techniques is that they often do not accurately reflect real problem situations. There is often an element of drama rather than realism in such scenes. The participants may often overact their roles, as they know there is not going to be any adverse consequences. This technique is also time-consuming and expensive (D Naorem, N.).

Key Differences Between On-the-job and Off-the-job Training.

1. The training method used to provide training to employees while they are at the workplace performing their job is known as on-the-job training. Off-the-job training involves training employees outside the job location.
2. On-the-job training takes a practical approach, whereas off-the job training is theoretical.
3. On-the-job training involves the trainees gaining hands-on experience.
4. On-the-job training involves learning by doing the task while 'off-the-job' training involves learning by acquiring knowledge.
5. In on-the-job training, there is little to no work disruption as the training and production go hand in hand.
6. On-the-job training is carried out by experienced employees, whereas off-the-job training is mostly provided by subject matter experts.
7. On-the-job training is less expensive than off-the-job training.
8. On-the -job training is appropriate for manufacturing entities, while off-the-job training may be more suitable for organizations in other sectors (Surbhi S, 2019).

Different Types of Workplace Training

Many jobs require specific job skills. Employees in these roles need either to possess these skills upon hiring or they will need to be trained accordingly to ensure they can be successful in their job. Well-trained employees are more skilled in their jobs and less likely to make mistakes, resulting in greater efficiency and effectiveness. Depending on an employer's needs and goals, training can come in a variety of forms, ranging from orientation to safety training (Indeed, 2020).

1. Technical skills development

Technical skills training is a basic component of employee education because it is a primary way to develop the skills an employee needs in their role. Employees who are already competent in their jobs can undergo further training to gain new skills and stay current with the latest technologies and processes (Indeed, 2020).

Technical skills development includes content writing, social media management, data analysis, coding, programming.

2. Soft skills development

Employers expect employees to behave professionally and function well as part of a team. Soft skills refer to personality traits that enable people to communicate and work cooperatively with others. These are important skills, and they play a vital role in building a respectful, collaborative and efficient organizational culture (Indeed, 2020).

Soft skills training programs include topics such as communication, problem-solving, teamwork, conflict management, etc.

3. Products and services training

Products and services training may be a part of the organization's onboarding program or a way for employees to get reacquainted with the organization's offerings. An employer may also use this training when they introduce new campaigns. This type of training provides information on different aspects of a product or service (Indeed, 2020).

4. Quality training

Quality training is commonly used in production-focused organizations. This method trains employees to ensure that products meet quality standards imposed by the organization, industry or third parties. In some cases, employees who complete a quality training program will receive certification (Indeed, 2020).

Quality training includes compliance with quality standards, quality control processes, product observation techniques, the prevention/elimination of poor-quality products, and the evaluation and improvement of a production system.

5. Safety training

Safety training protects employees from work-related injuries, and it is especially important for organizations that use toxic chemicals or other hazardous materials. This type of training also includes fire drills, evacuation plans and workplace violence procedures (Indeed, 2020).

The safety training program includes: protective gear, safety best practices, first aid, foodservice safety, construction safety, asbestos information.

6. Team training

The purpose of team training is to empower team members to build stronger relationships with one another and work cohesively. Team training helps improve decision-making, problem-solving and team-development processes to achieve better results for the organization (Indeed, 2020).

Team training includes improving communication, creating a positive work environment, improving team collaboration, increasing team productivity, establishing good relationships with teammates, identifying and leveraging the strengths of team members, and keeping teammates motivated.

Training evaluation

1. 360-degree feedback

360-degree feedback is a method that gives each employee the opportunity to receive performance feedback from a supervisor, manager, peers, reporting staff members, coworkers, and customers. Most 360-degree feedback tools are responded to by each individual in a self-assessment.

Upsides:

- Provides feedback to employees from a variety of sources
- Develops and strengthens teamwork and accountability
- Uncovers procedural issues that can hinder employee growth
- Reveals specific career development areas
- Reduces rater bias and discrimination tendencies
- Offers constructive feedback to improve employee outputs
- Gives insight into training needs (Susan. M. Heathfield, 2021)

Downsides:

- Serves as only part of the overall performance measurement system
- Causes organizational issues if implemented in a hasty or incomplete fashion
- Can fail to add value if not effectively woven into existing performance plans
- Prevents recipients from getting more information because the process is anonymous
- Focuses on employee weaknesses and shortcomings instead of strengths
- Provides feedback from inexperienced raters, and groups can “game” the process
- Requires a large amount of data collection and processing in some cases (Susan. M. Heathfield, 2021)

2. Surveys

Surveys are a classic data collection method. They are flexible, easy to implement, and offer a nearly limitless range of data with reliable results. The data gathered during an effective survey provides a unique opportunity to obtain detailed insight into a program. Because you can gather large amounts of feedback directly from individuals who are affected by the program, surveys act as the finger on the pulse of your project and can measure its strengths (Patrick Parnab, n.).

3. Questionnaires

When most people think of questionnaires, they think of mail surveys. All of us have, at one time or another, received a questionnaire in the mail. There are many advantages to mail surveys: they are relatively inexpensive to administer, you can send the exact same instrument to a large number of people, and they allow the respondent to fill it out at their own convenience. But there are some disadvantages as well: response rates from mail surveys are often very low, and mail questionnaires are not the best vehicles for asking for detailed written responses (Research Methods Knowledge Base, 2006).

The second type of questionnaire is a group administered questionnaire in which a sample of respondents is brought together and asked to respond to a structured sequence of questions. Traditionally, these questionnaires are administered in group settings for convenience. The researcher could give the questionnaire to those who are present and be fairly sure there would be a high response rate. If the respondents are unclear about the meaning of a question, they can ask for clarification. They are also usually used in organizational settings where it is relatively easy to assemble a group of people to complete them (Research Methods Knowledge Base, 2006).

Section 4.4: Test Your Knowledge

HARPREET KAUR; ALAN ZHOU; AND HARVIN SIDHU

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CHAPTER 5: TRAINING DESIGN

This chapter on training design concepts will cover topics such as the learning outcomes of training, in house training vs external training, and training methods/design. Training design involves developing new training and educational courses and lessons for your employees. It identifies the gaps in training and fills them in with new material for better performance. It also allows your team to grow their skills rather than becoming static in their roles.

Key Takeaways

- Understand the difference between learning outcomes and training objectives
- Understand why learning outcomes and training objectives are important
- Be able to apply learning outcomes or training objectives to specific scenarios
- Learn the difference between both types of training
- Understand the benefits of both internal and external training
- Be able to determine which form of training is best for a particular situation
- Understand the difference between on-the-job training and off-the-job training
- Be able to name the training methods that fall under on-the-job versus off-the-job training
- Be able to choose training methods based on scenarios

Authors: Nicole Czerwinski, Reggie Mann, Sukhjeev Dhaliwal

Section 5.1: Learning Outcomes/Training Objectives

NICOLE CZERWINSKI; REGGIE MANN; AND SUKHJEEV DHALIWAL

Training design involves developing new training and educational courses and lessons for employees. It identifies the gaps in training and fills them in with new material for better performance.

Training design has five primary components:

Learning Outcomes: What will participants be able to do as a result of completing the training?

Training Materials: What materials need to be developed and what will they include?

Trainers and Content Experts: Who will facilitate the training and act as content experts to review materials?

Training Methods: What methods will be used to help participants meet the learning objectives and learn the content most effectively?

Logistics: Where and when will the training be offered? Who is expected to attend and how will participants be notified?

Learning objectives are statements that summarize the key lessons participants will leave the training with, and these objectives are reviewed at the beginning of a session. They are also used as assessment tools to evaluate the participants' learning after the session has been conducted. This helps keep the session organized and on track and allows the participants to be aware of what they will be exposed to in the session. This helps both participants and facilitators stay on topic and make meaningful use of the time allocated to the training.

Training objectives are statements that summarize what the training session should focus on. They can also be used as an evaluation tool for the training session to assess how effective the training was. Training objectives help facilitators keep their lesson plans structured and following a plan, to avoid getting sidetracked or distracted. This also plays a role in how the participants understand the material and perceive it, as the better organized the training is the more knowledge the participants will retain. Both learning outcomes and training objectives are related to teaching and learning in the classroom (Depaul, n.d.). The difference depends on who will be performing the activities stated in the outcomes/objectives.

Learning outcomes put emphasis on the participants and what they should take away from the training session. For example, a participant may refer back to the learning outcomes during the training session to refresh their memory on what key points they need to take away from this training session. On the other hand, training objectives put emphasis on the facilitator and what the facilitator should focus on during the session. For example, a facilitator may refer back to the training objectives when designing the training to make sure the training design and lesson plans meet the training objectives. Either way, the outcomes/objectives are used by both participant and facilitator simultaneously to assist them in the training session.

Learning outcomes are important because they help facilitators and students understand the purpose or goals of a training session (student learning assessment). Learning outcomes and training objectives are the foundation of a training session, and they help both the participants and the facilitators focus on what is important. Learning outcomes and training objectives also help keep from getting sidetracked onto other, topics since time is usually limited.

Section 5.2: In-house Training vs. External Training

NICOLE CZERWINSKI; REGGIE MANN; AND SUKHJEEV DHALIWAL

In-house and external training are both extremely valuable to an organization. In-house training also known as internal training, is when someone within the organization is doing the teaching. External training is when someone outside the organization comes in to teach or employees are sent off-site to another organization's training program (Proffitt, 2018). Both forms of training are great options for any organization (Proffitt, 2018). It is important to identify what training methods are best for the organization by assessing the goals for the outcome of the training session. Determining the required outcome helps in deciding which training option best meets the needs.

External Training

External training can be conducted by experts with valuable knowledge to help the organization (Proffitt, 2018). This type of training can also be conducted at outside events such as seminars and workshops (Proffitt, 2018). Having an external expert come in and teach can help bring a fresh perspective and break out of traditional ways of doing things (Proffitt, 2018).

In-house Training

Internal training sessions are a cheaper and quicker option because the trainees will already have the background knowledge needed (Proffitt, 2018). The person conducting the training session will also have an opportunity to bond with the trainees (Proffitt, 2018). There will also be opportunities for the organization to find gaps in the learning process when training is conducted from within (Proffitt, 2018). Internal training can be conducted by any member of the organization such as a manager, HR specialist, or subject matter expert. This training can come in the form of lectures, in-house seminars, or one-on-one training (Proffitt, 2018). Having someone from inside the organization conduct the training has its benefits; for example, the trainer will have background knowledge on the organization and what training has already been provided (Proffitt, 2018). This can enhance the training sessions because relationships have already been formed and the trainees feel comfortable.

Section 5.3: Training Methods

NICOLE CZERWINSKI; REGGIE MANN; AND SUKHJEEV DHALIWAL

The decision on what training method should be used is very important and can have a significant impact. When choosing which training method to utilize, it is important to take into consideration the type of training it is, who the trainees are, and where this training is taking place. Some examples of training methods are lectures, discussions, case studies, behavior modelling training, role play, simulation, games and action learning. Training methods fall under two main sub-categories –: on-the-job and off-the-job training methods. The main difference between the two is that on-the-job training methods are related to methods through on the job experiences, whereas off-the-job training involves more formal training methods.

On-the-job training methods involve performing an actual job in a real work setting. The training methods that fall under this category would be job rotation, coaching, job instruction/step- by-step training and committee assignments. These are all valuable training methods that are best utilized when the trainee is at their workstation (MBA Tuts, 2019).

Off-the-job training methods are mostly formal and take place outside the work area. These training methods include lectures, discussions, case studies, behavior modeling training, role play, simulation, games, and action learning (Haccoun, n.d.).

(LinkedIn Sales Solutions, 2020)

Both on-the-job and off-the-job training methods have benefits and when utilized correctly they can really have an impact. There are benefits to both; for example, on-the-job training is a cost-effective method as there is no need to bring in an external trainer. However, a significant advantage of off-the-job training is that the training will usually be provided by an expert, resulting in a strong knowledge transfer (Basariya, 2019). Choosing what training methods to use is an important decision when designing a training program. You first must analyze what the training is for, who the trainees are, and where the training is taking place. Once you have concluded those key points, choosing whether you want to incorporate on-the-job or off-the-job training, or a combination of both, is a big step in designing your training program.

Section 5.4: Test Your Knowledge

NICOLE CZERWINSKI; REGGIE MANN; AND SUKHJEEV DHALIWAL

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CHAPTER 6: TRAINING DELIVERY

Training delivery refers to how learning objectives are communicated, presented, and taught to an audience. It includes methods, techniques, and materials used to structure knowledge, experiences, and behaviors through learning development. Trainers need to ensure they find ways of delivering information to trainees/employees that are effective, well-received and applicable. This can be done through offering a variety of materials and using different tools, finding innovative ways to engage participants, administering assessments, evaluating learning, providing feedback, and re-evaluating current delivery styles to ensure the training's effectiveness and to support individual/group learning needs.

Training delivery needs to be relatable and should benefit the audience (Campbelltow, 2021). Throughout this open education resource, we will discuss what a lesson plan is, how to be an effective trainee/trainer, problems and challenges that can arise with delivery, Gagne's Nine Events of Instruction, and the impacts of technology.

Key Takeaways

- Understanding and being able to apply the different types of delivery methods to conduct a successful training session
- How to create and design an effective lesson plan
- How to effectively identify and resolve problems in training delivery
- How to use and properly leverage technology in delivery

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Section 6.1: Lesson Plans

ANALITA NAND; AMANDA KOONER; DARREN CHEN; KAREN LALLY; AND SONIA KAHLON

Once a training program has been designed, the trainer needs to create an effective lesson plan. The lesson plan is the blueprint that outlines the activities and a step-by-step breakdown of what will take place in the training session. A lesson is a cohesive unit of instruction with a specific learning objective. A good lesson should be prepared in advance of a training program and should be detailed enough so that any trainer can use it to guide themselves through the program.

Some of the things that should be listed in the lesson plan are the training objectives, time allocated for learning modules, supplies and handouts. The detailed lesson plan for each lesson should indicate the activities that will occur during the lesson as well as what the trainer and trainees will be doing and when they will be doing it. Developing a lesson plan is a critical phase in the design of a training program and it allows for the smooth operation of training activities.

There are seven steps and activities to carry out consider when delivering training: (Source: HRMT 3265 Online Handout).

1. Develop a lesson plan
2. Choose a trainer
3. Decide on the trainees (who should attend the training)
4. Determine the training materials and equipment required
5. Prepare the training site
6. Schedule the training
7. Facilitate the training

(Kraken Images, 2020)

Effective Training Methods

Effective training methods can consist of:

- Case studies, games, internships, job rotations, job shadowing, and lectures
- Mentoring and apprenticeship and role modeling/behavior modeling
- Role playing, simulation, stimulus-based training, team training, and discussions (Source: HRMT 3265 Online Handout)

Effective Trainers and Trainees

Trainers

Trainers should be well versed in the platforms they use to deliver the training. In many situations, technological issues can arise, and employees may have trouble accessing or navigating the platform. In these unforeseen circumstances, a trainer should possess the knowledge needed to troubleshoot these issues. An effective trainer has effective communication skills and is highly organized in their delivery of content. A trainer should structure their lesson and organize their materials to illustrate the lesson in the clearest way.

It is important for trainers to research current methodology and train employees in the most current ways. An effective trainer is also enthusiastic about the type of training being delivered. With their passion for the training, they are able to connect the training to its application to the workplace. Lastly, an effective trainer seeks opportunities to improve the delivery of their training. While recognizing that each training session is an opportunity to improve their delivery, they also value the learners' feedback and apply it to future lessons.

Learning Styles

Each employees has their own learning style and so the trainer must be able to adapt content to make it suitable for a specific learning style. While some learners require independent learning resources, others may prefer a hands-on approach. This also applies to assessing trainees in ways that fit their learning styles. Without the component of assessment, learners and trainers would not have measurable tools to use to evaluate the progress of a learner. Assessments help the learner see what they have accomplished, and with an effective assessment tool, the learner can see the skills they have gained from the training. Learning is dynamic not only in terms of the differences in learning styles but also in the content being taught and its delivery. Training is often required as a result of advancements and changes, an organization, company or industry.

Trainees

Along with an effective trainer, a motivated trainee/learner is crucial to effectively delivering training. A motivated employee will be eager to gain skills from the training and apply them to their workplace. The VARK model features four types of learning styles: visual, auditory, reading/writing, and kinesthetic. When a trainee is self-aware of the method of learning that works best for them, they will be more likely to advocate for that type of delivery.

Gagne's Nine Events

Created in 1965 by Robert Gagné, this series of events is associated with and addresses the mental conditions for learning (NIU, 2020). They are the following:

1. Gain the attention of the students – ensure that learners are engaged and ready to participate through the presentation of a stimulus.
2. Inform students of the objectives – ensure that learners are informed of objectives and outcomes for the course to help them understand expectations. This should be done prior to the start of the instruction.
3. Stimulate recall for prior learning – ensure that there is an opportunity for students to relate to previous knowledge and experience. This will help connect and make sense of new information.
4. Present the content – ensure that content is provided strategically to make it more effective. This could involve the organization and grouping of content in meaningful ways. Additionally, explanations should be given after demonstrations.
5. Provide learning guidance – ensure that learners are aware of strategies to help aid them in learning the content. Additionally, any resources available should be provided to the students so they can learn effectively on their own.
6. Elicit performance (practice) – ensure that students are able to apply what they have learned. This will help reinforce new skills and knowledge while confirming the correct understanding of the training concepts.

7. Provide feedback – ensure that timely feedback is provided to the students for their performance. This will allow learners to identify their gaps in understanding.
8. Assess performance – ensure there is testing to assess whether the expected learning outcomes have been achieved.
9. Enhance retention/transfer – ensure that there is help for learners to retain more information. This can be achieved by providing opportunities to connect course concepts with real-world applications.

(Dmitry Ratushny, 2017)

These nine events can help instructors build a framework to prepare and deliver instructional content. According to NIU, Gagné's nine events can be used in conjunction with Bloom's Revised Taxonomy to design engaging and meaningful instruction (2020). Trainers should apply Gagne's Nine Events of Instruction to their training program by using it as a rubric to evaluate the program design. The following questions can be asked: Does this gain the attention of the students? Are the objectives clear? Are there opportunities to connect prior learning? Is this an effective presentation of the content? How will the students' learning process be guided and facilitated? Does this training session offer an opportunity to practice what is learned? What is the feedback portion? How will performance be assessed? These questions will help the trainer craft an effective training program.

Technology

Technological advancements have improved the training process and training delivery to benefit organizations in many ways. Technology offers ease of use, breaks information down, facilitates learning retention, reinforces learning, and reduces the impact on productivity. Training can be provided through:

- PowerPoint slides
- YouTube videos/audio
- Gamification of scenarios
- Adaptive learning by participants learning at their own pace

Using different training methods with technology helps in understanding what does and does not work. Each trainee learns in a different way. Some trainees may prefer watching videos over PowerPoint slides to understand the material better. Helping the workforce become more technologically advanced creates a competitive advantage through implementing updated technologies and systems.

The most significant challenge reported in a 2013 survey was that of getting learners to take online courses. The most frequently reported reason for the failure of online learning programs was the paradigm itself – many employees consider Internet learning slow, boring, and of limited value (Beach, 2016). More recently, employees had to deal with online learning with no classroom and no social interactions during the COVID-19 pandemic. However, HR practitioners can effectively use technology to improve employee training to make it more engaging and memorable.

Section 6.2: Issues with Training Delivery

ANALITA NAND; AMANDA KOONER; DARREN CHEN; KAREN LALLY; AND SONIA KAHLON

Challenges and issues can potentially arise when designing and developing training. This is also the case when it comes to training delivery. According to Front Learning, it is important to create learning and development programs that address the training challenges faced by the organization and employees (Andriotis, 2017). Additionally, these challenges need to be addressed when one is delivering the training program. Here are some common training challenges:

- Considering the audience – be confident about what training needs to be delivered and to whom. Successful delivery will require the trainer to be cognizant of the intended audience.
- Considering the trainer – who will be doing the training? Will the trainer be internal and lean on knowledge and expertise or will they be external trainers who bring their own experience, skills and new concepts? Whatever the case, it is important that the correct trainer is selected for the training delivery, as this will facilitate easier and more applicable learning for participants
- Considering the development of the program – who develops the training materials? This question needs to be addressed to set the training session up for success. The delivery can be amazing but if the content is not valid or useful, the session will fail.
- Considering standardization – the training delivery will need to be consistent and produce the same learning outcomes from the same learning materials. This becomes a challenge when there are multiple sessions or when a wide range of learners need to be trained. The design, plan, materials, and training delivery all need to be simple and replicable.
- Considering cultural differences – in order for the training delivery to be effective, language and cultural issues need to be considered. Learning styles also vary around the world. What may make a session successful in one country may fall flat in another. This means that proper thought needs to be put into the resources being multilingual and multicultural.
- Considering generational differences – learners of all generations will likely be in the workplace. Just as different cultures have different learning styles, so do different generations. The training delivery must consider the learning style and preferences of learners of different generations.
- Considering the engagement of learners – ensuring that learners are fully engaged with the platform and session is another major hurdle in the delivery of training. The trainer must ensure that the trainee understands the objectives or sees the relevance of the training to him or her.
- Considering feedback loops – this is the exit process of training delivery. This is where trainers confirm whether learning objectives have been achieved. Adequate feedback loops will keep trainees engaged and they will feel more like stakeholders in their own development. The trainer will also acquire insights into what worked and what did not in the delivery of the training.

(Sharon McCutcheon, 2021)

These challenges can be substantial and need to be addressed. The key to overcoming training challenges is consistency, logic, and flexibility, as well as the importance of considering the learners' needs (Andriotis, 2017). The important piece is that trainers are able to identify the potential causes behind the situation and adapt the session to address these issues. Additionally, trainers need to be able to apply different learning tools and skills to help rectify the issues and challenges stated above.

Training delivery looks at the proper communication of learning objectives and ensures that the outcomes match the original purpose and design. Effective training delivery depends on well-constructed lesson plans, effective trainers, engaged trainees, adequate technology, the utilization of Gagne's Nine Events and consideration of Bloom's Taxonomy. This is achieved through the use of consistent methods, techniques, and materials that structure knowledge, experiences, and behaviours. Training delivery is important because it is the transition between learning knowledge and applying knowledge. Trainers need to ensure they are able to present the information being taught in a way that is effective and relatable to the trainees. Everyone has different learning styles, so ensuring the transfer of knowledge is successful is key to training delivery.

Section 6.3: Test Your Knowledge

ANALITA NAND; AMANDA KOONER; DARREN CHEN; KAREN LALLY; AND SONIA KAHLON

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CHAPTER 7: ON-THE-JOB TRAINING

On-the-job training is instruction for employees that takes place at the job site. It involves a combination of observing others and gaining hands-on experience with the supervision of a training manager, co-worker or outsourced professional trainer (Indeed, 2021). The material used is provided by the employer. The process and procedures are created for the employee to follow and should be used as a guide while job shadowing or observing an experienced employee to acquire the knowledge needed to perform the tasks required for the job. The instruction and hands-on experience help the employee develop the required skills, competencies, and knowledge for successful job performance.

Key Takeaways

1. Understand the benefits of on-the-job training
2. Identify the types of on-the-job training
3. Identify the different methods of on-the-job training

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Section 7.1: Types of On-the-job Training

MANMEET BRAR; SONIA BOLINA; AND SHAZIA KAZANI

There are several approaches to on-the-job training that an employer may implement to help employees progress in their training and gain experience.

Structured on-the-job training is a plan that includes a checklist of tasks and details on who will supervise and set goals for the training. It contains the steps the employee will need to take to progress in the training. This approach takes more time to organize on the part of the employer, but it is considered an effective way of ensuring the employee is properly prepared for the position (Indeed, 2021).

Unstructured on-the-job training is an approach in which the employee observes an experienced employee for a certain amount of time, depending on the skills required to be learned. Unlike the structured approach, this type of training does not take as long to organize, and it is suitable for positions or tasks that do not involve difficult or specialized tasks. The training is easily customized to the role and the existing skills and knowledge of the employee (Indeed, 2021).

Benefits of On-the-job Training

There are several benefits of on-the-job training for employees and employers.

Employee benefits: paid training, skills development, improved retention, a team atmosphere and coaching is received during the training period.

Employer benefits: Focused and relevant learning, cost-effective, increased employee engagement and improved organization loyalty.

On-the-job training is focused on employees' needs and allows them to access information quickly without having to wait for a future training session. Employers can choose from the many flexible learning tools available to make learning relevant and engaging. Skills are learned when they are applied using the correct tools, and on-the-job training uses real-time experience, which allows the employees to explore their area more in depth (Bleich, 2018).

Section 7.2: Different Methods of On-the-job Training

MANMEET BRAR; SONIA BOLINA; AND SHAZIA KAZANI

The following sections will discuss the different methods of on-the-job training and how they can be applied in the workplace. They include helpful hints and multiple-choice and reflective questions that will assist you with learning the material in this chapter.

Peer Teaching

Peer teaching occurs when students or colleagues teach one another. Peer teaching is a method in which one person educates another person on any material the first person has mastered, but the second person is new to. This learning method is beneficial as it promotes active learning. It allows those teaching to reinforce their own learning, and it promotes greater comfort while peer teachers and students interact with each other (Briggs, 2017).

Leveraging Technology

With the rapid advancements in technology, many organizations leverage technology to support job training. Implementing these programs helps cut costs, provides mobile learning opportunities, and reduces the carbon footprint. Some examples of how organizations have been leveraging technology in the workplace in terms of on-the-job training are web-conferencing (Skype, Zoom, Big Blue Button), using social networks, learning modules, blogs, vlogs, podcasts, media-sharing, and mobile learning (U.S. Office of Personnel Management, 2020).

Stewardship

Stewardship involves promoting the well-being of employees at a given organization. It requires the careful and responsible management of something entrusted to one's care. There are four principles of providing stewardship.

1. The principle of ownership
2. The principle of responsibility
3. The principle of accountability
4. The principle of reward (Eldon's Porch, 2016).

Four Principles of Workplace Stewardship

(Mimi Thian, 2018)

Coaching

Coaching involves the development of one-on-one relationships between employees and managers. This training method provides guidance and feedback on how the coachee is performing their given task. The manager provides support and offers suggestions for improvement. Coaching helps instill the skills needed by giving employees the opportunity to apply them at work. This process is valuable because it is tailored to each individual's needs, and it helps establish a strong workplace culture and an environment of trust and continuous improvement.

Job Rotation

Job rotation involves the movement of trainees from one job to another. This is very important, as it allows the trainees to gain knowledge and experience in each job assignment. This gives them an opportunity to understand the challenges of other jobs and gain a sense of respect for their coworkers. This encourages professional development and gives employees a break from always doing the same job.

Apprenticeship Training

Apprenticeship training is a more formalized method of training. It combines education learned in the classroom with supervised on-the-job work. Most apprenticeship programs take up to 3-4 years until they are considered complete in that trade or profession. People who work in crafts, trades and technical areas are the ones who are most likely to have to complete an apprenticeship program. This is important not only for the employee but for the organization as well because it builds a skilled workforce, improves job satisfaction and allows organizations to save money as they do not have to spend as much on training their employees.

Committee Assignments

Committee assignments are when a group of trainees are asked to solve an organizational problem. The trainees work together and offer solutions to the problem. This is important, as it helps the trainees develop the teamwork skills needed to achieve a common organizational goal.

Special Project Assignments

Trainees are assigned a project related to their jobs. This could involve one or multiple trainees working together on a project that relates to their functional area. They analyze the problem and submit recommendations based on their analysis and what they have experienced. Special project assignments help in identifying organizational problems from a different perspective. When trainees work together, they obtain knowledge and learn how to work with others who have a viewpoint different from their own (Naorem, 2019).

Example: Someone may be interested in event planning, and so they are given the opportunity to work as part of a special events team. This is work they may not otherwise do but are interested in.

Mentoring

Mentoring is similar to coaching in that they both support growth establish confidence in relationships and provide constant guidance to the trainees. Coaching is a short-term process, whereas mentoring is a long-term process based on mutual trust and respect (Published: Feb 19, 2016).

A mentor is usually someone other than a supervisor or manager, who has but a high level of knowledge or expertise. They invest their time, and effort in the person over a period of time. Based on mutual consent, the mentor and mentee focus on career or professional development. The mentor and mentee relationship can be established through the organization if they are paired up, and it can could continue for nine months to a year depending on the type of mentorship (Naorem, 2019).

The mentor helps the organization by supporting their trainee to ensure they are working to the expected standards. Organizational values and processes are taught to the trainee through the mentor as developing the trainee is their objective (Naorem, 2019).

The trainee and mentee have constant access to support, friendship, information, learning, and coaching (Naorem, 2019).

Selective Readings

Selective readings are geared towards executives who are provided with reading tools to further develop their understanding and boost their knowledge in their functional area. The reading tools can vary from books, to journals, or articles (Naorem, 2019).

eLearning

eLearning is a cost-effective method organizations can implement that does not require the presence of an instructor. Employees can be trained remotely, and access to trainers can be made readily available through social networks and eLearning platforms. Techniques for delivering content can include audio and video recordings, presentations, quizzes, surveys, games, discussion groups and much more.

Trainees have the advantage of logging into the eLearning courses at their convenience, and they are not required to be at a specific physical location. Courses can provide the trainee with hands-on training, as they go through various scenarios on how to conduct a transaction as if they were in real time (Dutta, 2021).

Example: A bank teller can take an online course on how to complete a deposit transaction for a customer. They will be given the details as if there was someone in front of them, and they will go through the steps as they would in real time.

Organizations can develop customized courses to equip their employees with the skills necessary for their position. Ongoing training through e-Learning channels allows employees to stay current with the knowledge and skills they require throughout their duration of employment.

Section 7.3: Test Your Knowledge

MANMEET BRAR; SONIA BOLINA; AND SHAZIA KAZANI

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://kpu.pressbooks.pub/peoplelearningdevelopment/?p=642#h5p-7

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CHAPTER 8: OFF-THE-JOB TRAINING

Off-the-job training is a training method in which employees learn more about their current job/roles outside of day-to-day duties. This type of training usually takes place in a different setting away from their actual workspace (OJT Methods, n.d.). Employees are able to learn required skills and become well equipped to work with equipment, programs and systems in their workplace. This method allows employees to further contribute value to the business and have a bigger impact through improved performance and productivity (Duggan, 2020).

Key Takeaways

- Demonstrate an understanding of the TNA model and apply it to real life.
- Assess a scenario and determine which training methods should be used, along with when off-the-job or on-the-job training should be utilized.
- Understand the importance of off-the-job training, along with its advantages and disadvantages.
- Summarize each training method (i.e. simulations, action learning, etc.) and employ their learnings in the workplace.

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Section 8.1: On-the-job Training vs. Off-the-job Training

BHAVNIT SARAI; DANIELA SAN PEDRO; AND HANNAH DOYLE

Off-the-job training involves learning through acquiring knowledge away from the workplace. This method provides employees with the chance to learn in groups, meet other individuals and be trained by specialists and subject matter experts (Barker, 2018). Off-the-job training costs are significantly higher than for learning that happens on the job, as it needs to occur outside of the workplace. In addition, tools and resources also need to be acquired, which can be costly.

On-the-job training involves learning while in the workplace and directly applying the acquired knowledge (Agarwal, 2020). On-the-job training causes no disruptions to the organization's work processes, and it happens during an employee's working hours. This method allows employees to learn while they perform in their roles, enabling them to gain hands-on and practical experience as they learn (Surbhi, 2019). The training is imparted by the organization's own experienced employees, making this option more cost-efficient.

Advantages and Disadvantages

Off-the-job Training:	
Advantages	**Disadvantages**
Off-the-job training can bring new ideas into a business	It can be expensive
As off-the-job training is expensive, employees who receive it may feel more valued by the organization and therefore more motivated and loyal	There is a risk that the newly trained employee will leave the business
The trainer is more likely to provide high-quality training as they will be a skilled expert in this specific area	Training might not be tailored to the business and the employee has to spend time away from the workplace to complete the training
There are many options available	Productivity is lost while the trainee is away from their role

The table above shows the advantages and disadvantages of off-the-job training. First, employees will have more flexibility and space to bring new ideas to the table. However, a downside of this method is that it can be costly for an organization because they will need to provide resources, special software, tools and equipment for their employees. Second, employees may feel valued in the organization if they see leaders of their organization investing in costly training programs. This will encourage employees to stay motivated, improve their job performance, and increase employee retention. However, a negative impact may be that employees who have received this training may leave the organization and apply their newly gained knowledge elsewhere. Third, employees will gain expert knowledge and training from trainers in a specialized area. However, the employees will need to spend time away from their workspace.

Section 8.2: Effectiveness of Off-the-job Training

BHAVNIT SARAI; DANIELA SAN PEDRO; AND HANNAH DOYLE

Providing off-the-job training not only gives the employee and employer flexibility in training but also allows employees to pay attention and have more time to complete their tasks at work. Moreover, employees can completely focus their attention on training rather than completing tasks and training assignments at the same time. This can make employees feel rushed, and they may only gain a partial understanding of the material. An effective solution to ensuring that employees learn the training content is for organizations to offer seminars and workshops where employees are not distracted and are encouraged to stay off their devices.

Holding special events such as a ceremony for certification awards after these seminars and workshops creates memorable moments for employees and increases performance and retention in the organization (Duggan, n.d.). Here are some ways to test and improve the effectiveness of off-the-job training:

- **Align to Organizational Objectives:** Conduct a needs analysis to assess participants' and organizational needs before you offer specific training
- **Participant Feedback:** Offer surveys and feedback sessions to improve the program
- **Participant Interaction:** Offer rewards and incentives to employees who show outstanding performance on tests or have regular participation in completing modules and learning activities
- **Manager Evaluations:** After completing off-the-job training sessions, managers can assess the employees' performance. For example, holding online conferences on team building will allow managers to see the improvements in performance when the employees return to work (Duggan, n.d.).

Off-the-job training has short- and long-term impacts on the organization and its employees. Return on investment (ROI) includes employees staying up-to-date on work standards, job performance and employee engagement. It also ensures that employees regularly align their goals and values with the organization and participate in making a positive impact on the workplace (Duggan, n.d.).

Section 8.3: Blended Training

BHAVNIT SARAI; DANIELA SAN PEDRO; AND HANNAH DOYLE

Blended training is a combination of online learning and hands-on training that integrates theory and practice to increase the effectiveness of the training (Train and Develop, n.d.). By using a blended training approach, organizations have the flexibility of offering both online and face-to-face training. The approach has many advantages for leaders of organizations as well as managers and employees. Here is why:

Advantages

1. It is cost-effective when training a large group
2. Consistency in training and content delivery between hands-on and online training
3. Flexibility – it can be adapted to an individual's learning style or the type of training being provided (Train and Develop, n.d.).

(Jason Goodman, 2019)

According to *Blended Learning For Better Results*, incorporating the right blended training allows trainees to be trained effectively and increases the retention rate of trainees. If trainees are told what to do, they will remember less than 20% of the information -; if they are instead shown how to do it, they will remember up to 50% of the lesson; and if they can do the task themselves, they will remember up to 80% of the information (Mills, 2018).

Section 8.4: Training Process

BHAVNIT SARAI; DANIELA SAN PEDRO; AND HANNAH DOYLE

The first step prior to conducting off-the-job training for employees is to determine the training goals and identify whether they support the organization's strategic objectives.

1. ***Define the Future***

Identifying and setting strategic objectives for the organization will allow the identification of possible places of improvement across all functional areas. This will help with choosing appropriate training content that aligns with the overall organizational goals (Laskaris, 2020).

2. ***Conduct TNA***

This can be done by conducting a thorough analysis of the specific area that employees need to be trained on to meet the organization's strategic objectives (Shawe, 2013). To do this, an organization must identify gaps in its processes and areas for improvement to give them the ability to plan and implement a training program that resolves the identified gaps (Meij, 2020).

Important factors to consider:

- What issues will the training program resolve?
- What is the organization's definition of success?
- What is the value or ROI the training program will provide to the organization?
- How will the skill gaps be addressed?
- What is the budget for the training program?

Choose an Appropriate Training Method

An organization must define business objectives that relate to the skills identified in the needs analysis step, connecting them to the overall purpose of the chosen training method (Shawe, 2013). It should be defined what the organization's desired state is and what it plans to achieve after the training program.

Communicate the Training Process and Goals

Creating and sharing the training program's learning objectives allows participating employees to prepare, which promotes active participation. As a result, employees are more inclined to acquire knowledge from the training program and apply it to practice in their own roles (Laskaris, 2020).

Support Continual Learning

After delivering training to employees, it is imperative that the organization creates a work environment that encourages employees to apply newly learned knowledge into their jobs through a safe and open environment (Laskaris, 2020). Without continuous encouragement from managers and supervisors, employees will often revert back to old habits.

Training Methodology

To increase employee engagement, training programs should include details on the training process, which can include the skills to be trained in, delivery methods, the frequency of training, resources used, activities, which employees will receive the training and who will provide it (Shawe, 2013).

How to Choose a Training Method

It is essential that the instructor chooses the most appropriate training method. To gain the most value from a training course/system, the content delivery method must match the type of training. If the chosen training method is inappropriate, it can be extremely costly as it will leave the trainees without any gained value. For example, many firefighters go through simulation training, as it involves true-to-life scenarios they may encounter; thus, it is a valuable training method for their job. But not all jobs are straight forward, and it can sometimes be difficult to choose the most effective training method. In the previous subchapter, we discussed the differences between on-the-job and off-the-job training. In this section, we will discuss the variables that need to be considered when developing a training program.

(Jason Goodman, 2019)

Considerations in Choosing a Training Method

What is the Goal in Training the Employees?

The first step in determining the correct training method is identifying the goals and learning outcomes of the training course. This will help determine the types of instructional media needed to deliver the content. Please note that instructional media will be covered in depth in the following subchapter. The trainer will need to identify what the actual training will achieve. For example, will the training provide employees with new skills and abilities that can be applied directly to their job duties *or* will it be used to instill practices into the organization, such as diversity and inclusion training? These are the types of questions to ask when determining the learning outcomes and goals of the training.

How Many People Will Participate in the Training?

An important variable to consider when determining the correct training method is determining how many people will participate in the training *(this should be done during the needs analysis*). Understanding the training audience will have an impact on the training delivery methods used, as it will determine how much space will be needed for the training. If there is a small group of trainees, the use of an on-the-job classroom setting may be the best approach. However, if there is a large group (i.e. 100+ people) participating, it may make more financial and logistical sense to deliver the training content through an online training method. This depends on the subject being learned.

What are the Current Tools Available?

Now that we have determined the learning outcomes and number of people who will participate, we will need to determine the current tools available to the organization. This step is an important determinant in choosing between off-the-job and on-the-job training, as it can be extremely costly if the organization does not have many resources. As we know, off-the-job training can be highly beneficial, as it allows topic experts to teach the content; however, if the organization already has all the tools needed to deliver the content, it would not make sense to continue the training externally.

In summary:

To ensure success, an organization needs to have well trained and experienced employees to perform the activities in order to achieve organizational goals. This can be done by carefully following these interrelated steps in determining the need and urgency for an off-the-job training program to allow an organization to design an effective training program that will meet employee needs and enhance performance. This will allow an organization to maintain a viable and knowledgeable workforce.

Section 8.5: Different Training Methods

BHAVNIT SARAI; DANIELA SAN PEDRO; AND HANNAH DOYLE

Case Study

This training method allows employees to analyze and solve real-life problems related to the training objectives identified. It enables employees to apply what they are being trained on to possible real-world situations (Abudi, 2019). It also creates a clear connection to theories being learned and how they can be applied to solve a problem that is relevant in the employees' workplace. This approach has been found to increase employee engagement in the program, as it allows them to remember the content for longer. This method also aids in the improvement of decision-making skills, interpersonal skills, and analytical skills as well as promotes better communication and teamwork among employees (Shivakumar, 2012). It gives trainees the opportunity to tackle difficult problems before they are exposed to similar situations in the workplace.

To ensure the effective use of case studies, a trainer must consider all the factors below (Safarulla,2015):

1. Choose an appropriate learning environment: the environment chosen must give employees ample time, to sit down and analyze the case with each other. Trainers must also consider how trainees will communicate with each other, determine whether the communication should be face-to-face or online, and arrange a space where they can collaborate.
2. Encourage trainee involvement: trainees are expected to be fully involved in the process of analyzing and resolving issues in the case study to maximize the learning and development of skills using this method.

(Christina WocIntechchat, 2019)

Role playing

Role-playing allows trainees to practice and act out newly learned behaviours and procedures in curated situations that employees may encounter in the workplace. Learning is facilitated through active participation in a safe environment and relies heavily on trainee involvement (Sheetal, 2019). This method is useful for customer service-oriented positions as it allows trainees to assume and play the roles in the specific situation connected to the learning objectives of the training program. This allows trainees to practice quickly responding and adapting to certain real-life scenarios (OTJ methods, n.d.).

Classroom Learning

In this method, the trainer presents specific training content that needs to be learned. It is often used to train managerial employees, usually in educational institutions (OTJ methods, n.d.). It is most effective when used to introduce new policies and updates, or explain detailed concepts, principles and procedures (Chand, n.d.).

Classroom lectures are cost effective, as this learning method does not require many resources and can be used for large groups. The trainers are often professionals and experts in their fields. To ensure the effectiveness of this method, a trainer must immediately capture the attention of the trainees to keep them engaged throughout the lecture for a smooth acquisition of knowledge (Sheetal, 2019).

Simulations

This training method is popular among job training methods. It is often used for positions that require learning specific operations of machines and equipment (8 benefits of training simulations, 2017). The training equipment used is designed to be very similar to the actual tools and machinery in the employee's work environment. This method also prevents additional costs by allowing trainees to get hands-on experience without the large expenses, liabilities and risks they may otherwise run into in their workplace. A great example of this method is the flying simulations airplane pilots go through before they are allowed to fly. This method mimics real-life work and scenarios, providing trainees with hands-on and immersive experience related to their individual job roles (Srivastava, 2021).

This method appeals to all types of learners, but it is especially helpful for kinesthetic learners who learn best with hands-on experience in a controlled environment (Srivastava, 2021). It allows them to put the skills they have learned into action and integrate theoretical concepts into practice. It is also widely used in a variety of fields such as business, healthcare, transportation, military and life-saving occupations. It benefits employers as they can easily evaluate trainees based on the skills used and the decisions made in the simulations, and it also allows the identification of areas that need further development.

Vestibule Training

This type of training is given to technical staff, office staff and other employees who need to learn the tools and equipment they will use in their jobs (OTJ Methods, n.d.). Learning occurs through hands-on experience and active participation, meaning it facilitates the smooth transfer of learning to a trainee's job role (What is vestibule training?, 2020). This method is similar to simulation, but the difference is that the actual tools and equipment are used for training, but they are brought to a different location away from the actual work environment; this method is often referred to as "near-the-job training" (Vestibule training, 2016).

This method is also used to train employees when new and advanced equipment, tools and machinery are introduced to an organization, as it allows employees to get hands-on experience and minimizes the problem of transferring learning to the job. Training is provided by specialists or experts to maximize learning in a simulated workspace. This method is most useful for training big groups of people in the same position, when multiple employees are using the same machinery and when new technology is being introduced (Vestibule training, 2016).

Games

Gamification is the application of game-design elements in traditional non-game contexts (Fitz-Walter, n.d.). Essentially, it involves introducing games and game-like elements into the learning environment. Gamification is used in many different fields, but we will be discussing its implementation in education. Some examples of gamification in education are Kahoot and Archy Learning. These platforms allow the instructor to deliver content and quiz individuals using interactive methods forms such as quizzes, drag and drop, true/false and educational videos.

Action Learning

Action learning is the process of creating small groups in order to solve problems and develop leaders through critical thinking and collaborative work ("What is acting learning", 2021). Action learning encourages problem solving and the application of the learning to real-life scenarios.

Active Learning Components:

1. **A Problem**: Action learning centers around a problem (a project, challenge, issue etc.). The problem at hand needs to be significant, and the responsibility for solving the problem should fall to the specified team.
2. **An Action Learning Group or Team**: As mentioned above, the problem must be specific to a certain work/learning group. The group should consist of four to eight qualified individuals with a range of diverse experience in order to bring different perspectives and viewpoints.
3. **A Process of Insightful Questioning and Reflective Listening**: Action learning focuses on asking questions, holding discussions and engaging in reflection on statements and opinions. Questions will help foster a dialogue among group members and generate innovative and systems thinking. Moreover, this step focuses on questions as great solutions are contained within the seeds of great questions.
4. **Taking Action on the Problem**: In order for action learning to be successful, the group members must to take direct action on the problem. This involves the group members taking steps to reframe the problem and determine the goal.
5. **A Commitment to Learning**: Action learning provides multiple long-term benefits for the group members and organization, as it emphasizes the learning and development of individuals rather than immediate solutions to a problem.
6. **An Action Learning Coach**: An experienced action learning coach is essential as they will guide the conversation and help group members reflect on what they are learning and how they are solving problems. Moreover, the coach helps the team focus on what they have achieved and where they are running into difficulties. The coaching role can be assigned to one member, or it may rotate between group members. (Marquardt, 2004)

Instructional Media

Instructional media refers to the aids used by the instructor/lecturer and students during a training seminar and/or course (Matiru, Mwangi, & Schlette, 1995). Instructional media is essential in off-the-job training, as it allows for an easy-to-read, clear and visual resource to help students better understand the course content.

Type	Examples
Print	Pamphlets, handouts, study guides, manuals
Visual	Charts, real objects, photographs, transparencies
Audiovisual	Slides, tapes, films, film strips, television, video, multimedia
Static/Display	Chalkboards, felt boards, display easels, flip charts, cloth boards, magnetic boards.
Electronic	Radio computers, electronic mail, CD-ROMs, multimedia

(Matiru, Mwangi, & Schlette, 1995)

Moreover, instructional media can be used in different ways, depending on what the training intended to achieve. For example, to provide a clear and concise idea of something, a real object or model may be used. However, if the instructor wants to condense a large quantity of information, a diagram or handout may work best (Matiru et al., 1995). Furthermore, as discussed previously in this chapter, an instructor may want to use blended material and include a variety of print and visuals in order to best express their content.

There are many considerations an individual will need to make when deciding what training method will work best with the organization and the type of training delivered. To help make the decision, we discussed the main differences between on-the-job and off-the-job training, along with their advantages and disadvantages. We discussed the training process, including the needs analysis as well as how to choose an effective training method. Lastly, we detailed the different methods of training and how/when they are most effective.

Section 8.6: Test Your Knowledge

BHAVNIT SARAI; DANIELA SAN PEDRO; AND HANNAH DOYLE

Based on the following questions, write a journal entry

1. When was the last time you received off-the-job training at your job?
2. What was your experience like?
3. What kind of methods did your employer use?
4. What is something you would do differently from the employer's point of view?
5. Do you prefer off-the-job training or on-the-job training? Why?

Respond and reflect on the following two scenarios:

Scenario 1: You are a manager or HR practitioner for a mid-sized organization. The organization has decided to implement diversity and inclusion training for all employees. The organization would like the training to be available for all current employees and new hires. Should you choose off-the-job or on-the-job training, and what types of instructional media should be used?

Scenario 2: You are a training manager in a medium-sized business that is facing a decline in profits as reported by their finance team. You find that the performance of the sales department has been in steady decline for the last year. Sales volumes are decreasing more each month, and sales employees have told you there has been some confusion with the new sales tracking system implemented last year. As the training manager, which off-the-job training method would you implement to increase sales in the organization?

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CHAPTER 9: TRAINING PROGRAM EVALUATIONS

Training program evaluations are used to determine how effective training programs are within an organization. Evaluations should be aligned with the organization's goals and objectives. Training program evaluations can further assist in identifying opportunities for improvement in an organization.

Key Takeaways

1. Recognize the importance of conducting training program evaluations and the benefits associated with the evaluation process.
2. Identify the key criteria that can be used during the training program evaluation process to ensure organizations have a properly designed program that improves employee performance.
3. Understand the differences between the three tools that can be utilized during the training program evaluation process and apply them to various scenarios.
4. Understand the importance of the different aspects included in a questionnaire regarding post training evaluations. Develop questions based on the recommendations in each aspect.
5. Use the provided indicators to determine the effectiveness of the training program. Ensure to use the recommended methods of analysis to evaluate the program.
6. Be able to recognize the purpose of training program evaluations, including their importance, benefits, outcomes, and applications as an HR professional.
7. Reflect on the various aspects of the evaluation of training programs including issues, gaps, the collection of feedback, outcomes, Kirkpatrick's model, business goals, teamwork, and interactivity.
8. Have the goal as an HR professional or manager to implement a five-step process towards improving training programs through setting goals, having workplace expectations, focusing on improvements, incorporating changes, and engaging in reflection.

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Section 9.1: Purpose of Training Program Evaluation

EISHA BHANGU; JOVENVIR BIRK; AND XINYU CAO

Organizations invest large amounts of effort and money into designing and implementing training programs in the hopes of helping their employees acquire better skillsets and become more productive at work. However, a poorly designed training program will not only fail to achieve this goal but will also waste the resources and time devoted to the training program. Training programs are evaluated to ensure they are effective in helping organizations achieve their objectives (Keller, n.d.). Evaluating training programs is an essential part of ensuring the training process benefits the business (Keller, n.d.).

In this article, Bretz (2018) metaphorically describes an organization as a vehicle. A properly designed training program provides direction for the vehicle so it can move toward the destination, which represents the various objectives the organization is aiming to achieve (Bretz, 2018). During the evaluation process, organizations can identify areas for improvement in their current training programs and make the training more engaging and informative (Bahu, 2020). Another benefit of training program evaluation is that it can help ensure trainers and trainees are on track toward fulfilling the goals of the organization (Bahu, 2020).

(Jason Goodman, 2019)

Training programs that are consistently evaluated and adjusted provide employees with valuable learning experience and confidence in performing their daily tasks. This will help reduce employee turnover, which can ultimately reduce the effort and money invested in excessive recruitment and selection processes (Bahu, 2020). When employees receive better training, another benefit for the organization is increased ROI, as employees acquire better skillsets and improve their performance (Bahu, 2020). This can lead to increased productivity, thereby leading to an increase in profits.

Criteria for Evaluating Training Programs

Properly designed training programs are an efficient way of ensuring the employees can improve their current skillsets. This has led to organizations investing large amounts of money into training programs. To achieve the maximum results, it is essential that the programs are evaluated and improved regularly. When assessing a training program, several criteria should be considered.

1. Whether the training content is interactive:

Having interactive training content ensures the learning will be transferred to the learners.

2. Will the learners receive feedback from the training:

Receiving feedback from the process is essential when trainees are acquiring new knowledge and skills. Giving the participants the opportunity to practice and make mistakes during the training will help them develop better recall and gain an improved understanding of the concepts (Taylor, 2016).

3. Is the training taking place in a safe environment:

As the trainees will be practicing new knowledge and skills, it is essential to ensure the training is provided in a safe environment where mistakes are allowed and will not be judged. It is also important to notify the trainees that they are well-supported during the training sessions and can seek help if needed (Taylor, 2016).

4. Is the training motivating:

Organizations need to seek approaches that encourage trainees to participate in the training to achieve the maximum training results (Taylor, 2016). Therefore, it is necessary to ensure training is engaging and motivating for trainees.

5. Whether the training has a clear objective:

To help the learners understand the purpose of the training, the training itself must provide a clear objective so the trainees can have a goal to work toward (Mancini, 2013).

Section 9.2: Tools to Evaluate Training Programs

EISHA BHANGU; JOVENVIR BIRK; AND XINYU CAO

To ensure training programs are effective and to identify areas for improvement, organizations can utilize the following tools during the evaluation process:

1. Questionnaires:

Providing questionnaires is a cost-effective way of collecting data from the participants. However, to get the maximum results, it is essential for organizations to avoid including vague questions that could potentially confuse the participants. Organizations can develop a set of questions to determine the effectiveness of the training process and the trainees' overall experience during the sessions. The questionnaires should include open-ended questions to encourage trainees to fully reflect on their training experiences. By doing so, organizations can collect the most accurate data on trainees' opinions of the sessions (Training Evaluation Tools, n.d.).

2. Observations:

Organizations can decide to observe trainees' behaviour after training to evaluate the training program's effectively. During the observation, it is critical to focus on determining if the trainee is able to perform according to the standards and designed learning outcomes, to determine the success of the training. Observations are a cost-effective approach and are not difficult to perform. However, they can be time-consuming and can sometimes be biased, depending on who is performing the observation (Training Evaluation Tools, n.d.).

3. Interviews:

Organizations can utilize interviews to collect trainees' opinions toward training sessions. During the interview, the interviewer can ask follow-up questions to get more clarification on interviewees' opinions. By doing so, organizations will be able to collect the most accurate information and identify issues that were not clear before conducting the interviews. As interviews are generally conducted one- on- one, they are not the most cost-effective or time-efficient options. However, interviews can provide more insights compared to questionnaires and observations (Training Evaluation Tools, n.d.).

Post training Program Evaluations

After conducting a training program, it is important to evaluate the training program process based on the learner's feedback (Andriotis, 2019). This is a great way to determine how effective the current training program is and what improvements can be made.

Through the learner's feedback, organizations can assess the success rate of their training program so they can gain insight into the learner's experience and make changes accordingly.

The best way to evaluate a training program is through a post training questionnaire that addresses several aspects of the training experience. This questionnaire should assess the following five aspects of the training program (Andriotis, 2019).

1. Effectiveness:

When creating an evaluation questionnaire, assessing the effectiveness of the training program is the most important factor. This determines whether or not the learners gained the required knowledge as outlined by the program's learning outcomes. Through the learners' opinions, organizations can identify whether the learners benefitted from the lessons (Andriotis, 2019). Additionally, the assessment will inform the evaluators of what skills and lessons are to be gained from the training program and how satisfied learners are with the content. This is the most important factor to address because if a training program is not effective, organizations will not get the results they need to achieve their goals. To assess the effectiveness, the following questions can be asked (Andriotis, 2019):

1. How effective did you find the program in helping you improve?
2. What did you enjoy the most and what did you enjoy the least?
3. How do you think this program could be improved?

2. Comprehension:

This aspect of the post- training evaluation questionnaire defines how well the program was delivered to the trainees. This can be evaluated by asking questions regarding the way the program content was provided to the learners. It is important to evaluate this aspect to ensure that the delivery of the content is effective and that learners are able to gain sufficient understanding of the program material (Andriotis, 2019). Several factors including the learning environment and the trainer, highly impact the way learners understand the content. To evaluate the trainees' comprehension, the following questions can be asked (Andriotis, 2019):

1. What specifically did you learn in this training program?
2. How effective was the trainer in delivering the content?
3. How did the trainer provide assistance throughout the training?

3. Attractiveness:

The presentation and visual appearance of the program is another important aspect to evaluate when assessing the training program. By providing program related material, trainers can keep their learners more engaged. Therefore, the course content must include attractive factors and multimedia components. Assessing the attractiveness is important, as it determines whether the overall program was aesthetically appealing to the learners. This is an important aspect to address because if the training is not attractive, the learners may not be motivated to engage with the program and take knowledge away from it. To evaluate the attractiveness, the following questions can be asked (Andriotis, 2019):

1. How effective were the training materials (handouts, presentation slides, etc.)?
2. How did the multimedia components assist your learning?

4. Engagement:

To ensure the training program is effective, it is important to keep the learners engaged. By assessing the level of engagement of the trainees, trainers can identify how well the learners are understanding the program content. There are multiple active learning approaches to use to keep the trainees engaged such as quizzes, games and simulations (Andriotis, 2019). It is important to evaluate the effectiveness of the training program to decide which components are the most successful in improving performance. To assess the engagement, the following questions can be asked (Andriotis, 2019):

1. How engaging did you find the training program: *very engaging, neutral, or not very engaging*?
2. Did you find the interactive activities of the program helpful in your learning?
3. What did you take away from the engaging components of the program?

5. Suggestions:

To develop a questionnaire for the training program, trainers must ask for ways to improve to successfully complete the evaluation. Since asking for suggestions usually involves open-ended questions, learners are more likely to skip these questions as they require more time and thought (Andriotis, 2019). To ensure the learners complete this part of the evaluation, ask for 2-3 suggestions on how to improve the training program. This will encourage the learners to provide feedback on ways the organization can make changes for growth. To ask the learners for suggestions, the following questions can be asked (Andriotis, 2019):

1. What are three ways the training program could be improved?
2. What part of the program did you find the most effective and least effective in helping you improve your skills?

Section 9.3: Indicators of an Effective Training Program

EISHA BHANGU; JOVENVIR BIRK; AND XINYU CAO

To determine how effective a training program is, a combination of qualitative and quantitative measurements needs to be taken into account (Ayesha, 2021). Through consistent evaluations of the effectiveness of the program, organizations can recognize its strengths and weaknesses. The following are some of many indicators that can be used to assess efficiency.

Time to Proficiency

To determine whether the training program implemented is effective, it is helpful t to analyze the time to proficiency. To get the best results in a short time frame, the training program must allow trainees to learn quickly. Organizations can do this by ensuring the learning is concise and engaging. To assess time to proficiency, trainers can form focus groups and evaluate learners' performance. This can be accomplished before and after training to identify the time it takes to reach a certain level of proficiency (Ayesha, 2021).

Knowledge and Skill Retention

As many people easily forget information, organizations must find ways to maintain knowledge and skill retention among their trainees. Competencies can be retained by keeping training programs engaging, short and repetitive across regular intervals. To determine the effectiveness of the training program, trainers can assess learners' ability to retain knowledge and skills. This can be evaluated by determining the difference between the trainee's performance before and after training (Ayesha, 2021).

Transfer of Training

The main purpose of training employees is to allow them to turn knowledge into skills to provide better outcomes. The performance of employees impacts the overall performance of the organization. Therefore, it is important to ensure the training program is enabling trainees to successfully improve. The success of the transfer of training can be measured through various factors including training follow-up, performance data and observation (Ayesha, 2021).

Impact on Organizational Performance Metrics

By providing effective training, organizations can increase their productivity levels, service efficiencies and overall organizational performance. Therefore, training is a key contributor to an organization's success rate. To measure the impact of training on organizational performance, organizations should measure the performance metrics before and after training (Ayesha, 2021).

Employee Engagement

To ensure employees are fully engaged, businesses must prioritize employee satisfaction, confidence and commitment. Engaged employees are motivated and will perform more efficiently. To measure employee engagement, organizations can use analytic tools to ensure successful job performance. Through employee engagement, organizations can increase employee retention and reduce turnover rates (Ayesha, 2021).

Net Promoter Score

To ensure that customers are satisfied with businesses, the Net Promoter Score (NPS) can be used to assess customer experiences and satisfaction with the organization (Ayesha, 2021). This helps employers determine how well the employees are performing their jobs. To measure the Net Promoter Score, customers are required to evaluate how likely they are to recommend the organization's services to their friends and peers based on their personal experience. This same process can be used to measure an employee's satisfaction level at a workplace. Employees can assess how likely they are to recommend the training program to their co-workers. This helps organizations determine how effective their training programs are and identify improvements that need to be made (Ayesha, 2021).

Outcomes of Effective Training Program Evaluations

Why are Training Program Evaluations Important?

Training program evaluations allow organizations to recognize if the needs analysis, training design and delivery, and training evaluation are aligned and serving the organization's needs.

Andales (2021) states that the indicators of training effectiveness are the acquisition of new skills and knowledge, learning experience, employee happiness, efficiency and financial impacts.

Benefits and Outcomes of Training Program Evaluations

The benefits of training evaluation include employee retention, increased sales, higher quality ratings, improved customer satisfaction, and fewer complaints from employees.

Outcome and action-oriented results are obtained from training program evaluations, along with actionable steps and decisions for leaders, managers, and employees within organizations (Leading Effectively Staff, 2020).

Organizational Benefits

The benefit of effective training program evaluations is primarily related to organizational success. More specifically, organizational success refers to increased productivity, performance and employee morale. Evaluating the effectiveness of training programs, will lead to organizational benefits. This can be shown through key HR metrics such as increased retention rates and lower turnover rates, along with increases in top performer rates.

Application to the HR Industry

HR professionals can learn from both effective and ineffective training programs. HR professionals can build off successful training programs by continuing to offer the same training programs to employees. On the other hand, HR professionals can determine if a training program is inadequate by a lack of training retention and transfer into the workplace.

Overall, the outcomes and benefits of effective training programs include increased employee morale, knowledge, skills, abilities, and competencies. This leads to significant organizational benefits such as improved productivity, performance and customer satisfaction.

Section 9.4: Evaluation of Training Programs

EISHA BHANGU; JOVENVIR BIRK; AND XINYU CAO

Evaluations of training programs should:

- Determine issues within the program
- Highlight missing information (gaps)
- Collect feedback on the existing evaluation process
- Identify the outcomes of the program
- Focus on reaction, learning, behaviour and results
- Measure the impact on achieving organizational goals
- Assess whether the training encourages employees to participate and work in teams
- Determine whether it is interactive

Let's take a look at this in detail.

Determine issues within the program

It is key to determine the current issues within a training program by performing an in-depth analysis and understanding the root causes of these issues. Examining what areas of trainee retention and transfer are most affected is crucial. HR professionals should be able to:

1. Conduct an analysis
2. Assess areas of inadequacy in the program
3. Determine the root cause of an issue
4. Identify the areas most impacted by the issue

The training program should be assessed to determine whether there are gaps or missing information within the following elements of the Instructional Systems Design model:

1. Needs Analysis
2. Training Design and Delivery
3. Training Evaluation

Gaps that may exist in training programs include:

- Gaps in needs analysis in relation to organizational, task, and person analysis.
- Gaps in training design and delivery relating to training objectives, content, methods, and principles.
- Gaps in training evaluation relating to evaluation criteria and design.

(Affleck, 2021)

Collect feedback on the existing evaluation process.

Interviews, questionnaires, and surveys can be collected from the trainees to determine the level of effectiveness of the training program. HR professionals should be able to combine a variety of methods to gain insights on how to improve the training program, meet organizational needs and derive long-term benefits.

What are the outcomes of the program?

The training program evaluation can be linked to individual employee performance and productivity and how they affect organizational success. Key indicators for determining whether the training program is efficient and effective are individual and organizational benefits. There are two types of benefits associated with incorporating efficient and effective training programs:

1. Individual benefits (performance, productivity, morale, satisfaction)
2. Organizational benefits (profits, financial metrics, performance, productivity)

Focus on reaction, learning, behaviour and results

The Kirkpatrick evaluation model should be implemented by HR professionals and trainers during the training program. This model is the gold standard for evaluating training programs based on the following five levels:

Level 1: Reaction

Observe the trainee's reaction, the learner's satisfaction and the level of engagement during the training. This can be measured through observation, surveys, interviews, and learner feedback.

Level 2: Learning

Observe if new learning and intended knowledge, skills, and abilities have been acquired from the training. Principles, facts, techniques, processes, and procedures gained through training should be observed. This can be measured through performance, testing or work samples during training.

Level 3: Behaviour

Signs indicating the successful transfer of learning should be looked for. Observe to what extent trainees can showcase the transfer of learning into the workplace. Specifically, look for technical skills, motor skills, or behaviours acquired and determine the learners' attitudes toward the training. These can be measured through tests, observations, ratings, work samples, surveys and interviews. This evaluation should take place after the training to observe changes in behaviour and performance in the workplace.

Level 4: Results

Watch for targeted outcomes resulting from the training. Determine to what extent targeted outcomes were achieved from the training and its reinforcement. Evaluation should be geared towards improved productivity, employee and customer morale, and job satisfaction. This will be evaluated through observation and performance data.

Level 5: Return on Investment (Added Level)

Compare the cost of the training to the results. The organization and external environment and learning benefits and costs are evaluated. Some of the measurements used could include financial indicators, economic value indicators, or key HR metrics. (McPheat, 2022)

Does it focus on achieving organizational goals?

Organizational goals refer to the organization's mission and vision, targeted performance and productivity levels and key targets in financial metrics. In other words, these organizational goals are SMART (specific, measurable, achievable, relevant, and time-bound) goals that need to be met for an effective training program evaluation.

Does the training encourage employees to participate and work in teams?

The training program will encourage teamwork by enabling employees to participate and work together. The employees will learn from each other and there will be a common understanding to ensure the transfer of training takes place in the workplace. This will align with the organization's goals and the outcomes of effective training program evaluations.

Is it interactive?

The training program should be designed to be interactive and involve the engagement and collaboration of employees. Employees should be excited to learn and develop and the program should allow them to participate. The interactive component will allow recognition of the VARK (Visual, Auditory, Reading/Writing, Kinesthetic) learning styles.

According to research by Grensing-Pophal (2019), HR professionals need to be aware of four steps and considerations. For instance, participants in the training program should be aware of the knowledge, skills, and abilities required for the training and the workplace. Furthermore, learning outcomes should correlate specifically to the job requirements. This is key when evaluating the training program because there must be a successful transfer of training. If the link between the learning outcomes and job requirements is broken, then job performance will be negatively impacted, and the entire training program will be rendered useless. Furthermore, the assessment of performance before and after the training is completed by employees is important to determine if the learning outcomes have been met. Finally, it is significant and worthwhile to determine the training effectiveness given a specified period of time (Grensing-Pophal, 2019).

Andriotis (2019) mentions the following training program evaluations:

- Kirkpatrick's Four-level Training Evaluation Model
- The Phillips ROI Model
- Kaufman's Five Levels of Evaluation
- Anderson's Model of Learning Evaluation
- Summative vs Formative Evaluation

The most commonly used method for evaluating training programs in the HR industry is Kirkpatrick's Four-Level Training Evaluation Model. Deller (2019) reiterates that Kirkpatrick's Four-Level Training Evaluation Model is among the best, if not the best, method to use evaluate training effectiveness.

Section 9.5: Improving Training Programs

EISHA BHANGU; JOVENVIR BIRK; AND XINYU CAO

After conducting an evaluation of the training program, areas for improvement within the training program will almost certainly be found. This is not necessarily a negative sign, as this step is important for the training program to be successfully modified to allow for improved individual and organizational performance. If this step is not taken, training programs will be ineffective and produce the same mediocre results both in employee and organizational productivity. Therefore, training programs can be improved to enhance the performance of the individual and business. This can be accomplished through the following:

1. Define organizational goals, objectives, and achievements during the training program.

HR professionals should present the requirements prior to the training to ensure that both the trainer and trainee realize the purpose of the program.

2. Set workplace expectations within the training program.

HR professionals should present clear expectations at work in the training program to allow trainees to understand and apply what they have learned to the workforce.

3. Emphasize and highlight the improvements required in the training program.

HR professionals should let the trainer know whether or not improvements are required within the training program for the future.

4. Incorporate improvements and make the necessary changes to the orientation information and structure within the training program.

HR professionals and the trainer should work together to restructure the training program to make changes collaboratively.

5. Reflect on the effectiveness of improving the training program.

HR professionals and management will engage in strategic discussions on employee learning based on a continuous improvement focus to ensure employee training remains relevant and impactful.

Section 9.6: The Process of Training Program Evaluation

EISHA BHANGU; JOVENVIR BIRK; AND XINYU CAO

The process of training program evaluation involves:

1. Identifying the Purpose of the Training
2. Selecting an Evaluation Method
3. Designing Evaluation Tools
4. Collecting Data
5. Analyze and Report Results (The Peak Performance Center, n.d.)

Identifying the Purposes of the Training

Why do we want to evaluate the training program? Possible answers could be to evaluate:

- If the learning outcomes have been met
- If a business issue has been resolved
- If the trainees benefited from the program
- If the KSAs acquired in training were transferred to the role
- The effect of the training program throughout the business
- The advantages and disadvantages of the training program
- Whether the training program was valued in terms of the resources and time put into it
- Trainees for future training programs
- Methods to use improve forthcoming training programs (The Peak Performance Center, n.d.).

Selecting an Evaluation Method

Use the **Kirkpatrick Model** (reaction, learning, behaviour, results and evaluation) for the training program evaluation. Methods for evaluating the training program evaluation can involve:

Questionnaires

Trainees answer questions based on key learnings from the training program.

Interviews

Trainees are be interviewed by the trainer regarding the effectiveness of the training program.

Focus Groups

The trainer and the trainees would be engaged in discussions regarding researched-based questions on the topic of training program evaluation (The Peak Performance Centre, n.d.).

Observations

The trainer observes the trainee throughout the training program to see if the trainee has applied the knowledge, skills, and abilities to the role.

Designing Evaluation Tools

In designing evaluation tools, the trainer needs to consider the time, questions, and learning goals when evaluating training programs (The Peak Performance Center, n.d.).

Collecting Data

The HR professional along with the trainer will collect and organize the data regarding the effectiveness of the training program. The data will be collected from the trainees participating in the training program. The data will come from primary research and the methods listed above including questionnaires, interviews, focus groups, and observations.

Analyzing and Reporting Results

As the HR professional, it is important to analyze and report the results of the training program evaluation. This can help business leaders understand whether or not the training program is effective, should be reconsidered, or should be replaced. Therefore, with the help of the trainee and the data collected using specific methods, including the Kirkpatrick Model, leaders can successfully analyze results. Moreover, an evaluation report can be developed for future reference.

The evaluation report will consist of:

- Executive Summary
- Introduction
- Evaluation Method
- Results/Findings
- Discussion
- Conclusions and Recommendations
- Appendices (The Peak Performance Center, n.d.).

Section 9.7: Test Your Knowledge

EISHA BHANGU; JOVENVIR BIRK; AND XINYU CAO

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/peoplelearningdevelopment/?p=696#h5p-8

Reflective Question

- Have you ever received training in your workplace? Does the organization you work for invest efforts into constantly improving training programs?
- Have you ever had a chance to evaluate a training program? If so, what are the criteria you used during the evaluation process? If not, what do you think should be included as one of the criteria?
- Does your workplace have an effective training program? If it does, how is it evaluated and what are the benefits and outcomes of the specific training program?
- Think about the workplace you are in now. How is the training program being evaluated? Is your HR department incorporating Kirkpatrick's Four-Level Training Evaluation when evaluating the training program?
- What do you think the consequences are of not improving training programs? Why is it crucial to make changes or improvements to training programs?
- If you ever completed a similar process, whether as a student or an employee, what would be the benefit of engaging in the program evaluation process.

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CHAPTER 10: TRANSFER OF LEARNING

The transfer of learning happens when new knowledge, abilities, and skills are *transferred* to perform tasks. This process happens in our everyday lives at work, at home, and when we are not even thinking about it. HR professionals often ask themselves how the transfer of learning can be effectively applied through instructors, managers and employees.

Key Takeaways

1. Understand the full scope of the transfer of learning along with the factors that impact this concept.
2. Integrate learning transfer into program planning and be able to identify the barriers and bottlenecks that can arise.
3. Demonstrate how to facilitate learning transfer.
4. Apply strategies to enhance the transfer of learning.

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Section 10.1: What is the Transfer of Learning?

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Transfer of learning can have slightly different definitions depending on the context, such as a workplace context or a theoretical point of view. However, these definitions all involve the effective application of learned knowledge and skills gained from an educational program.

How effectively employees can transfer learning in the workplace is determined by the following conditions:

1. The training content has to be specific and applicable to the job.
2. The trainees must learn the content.
3. The trainees need to be motivated to change their job behaviour and apply what they have learned
4. The trainees must receive supervisor support in applying the learning

An organization can facilitate the transfer of learning in several ways. This aspect is often referred to as the "so what?" or "now what?" phase of the learning process. The transfer of learning occurs whenever our prior knowledge, abilities, and skills influence our learning or the performance of new tasks. Without this transfer occurring, employees cannot achieve the end goal of utilizing their education and training. According to Baldwin and Ford (1988), there is a transfer problem in many organizational training programs. They also mention that while North American industries spend over a hundred billion dollars on employee training and development each year, it is estimated that only ten percent of these expenditures result in the transfer of learning in the organization.

Factors that Influence the Transfer of Learning

Several barriers reported by Newstrom (1986):

1. There is a lack of on-the-job reinforcement to assist trainees in applying their training to their jobs.
2. Interference from the immediate environment.
3. A lack of active support by the organizational climate inhibits the transfer of the program's content or skills to the workplace.

Several factors inhibiting learning transfer identified by Kemerer (1991):

1. Structural expectations
2. The improvement of skills
3. Establishing rewards

Caffarella (1994) identifies five categories of key influencing factors:

1. The perceptions of program participants
2. The program design
3. The program content
4. Changes required to apply learning
5. The organizational context

Several factors influence the transfer of learning. Writers such as Newstrom (1986) have identified key influencing factors that explain why employees do or do not apply what they have learned after to attending a training program. Similarly, Kemerer (1991) suggests that managers can organize factors inhibiting learning transfer around three specific areas. As a result, the introduction of new or changed work expectations must be carefully timed so participants are ready to learn when the training program is offered. Transferring skills in multi-layered, complex organizations requires total vertical integration in which one succeeding management level reinforces the behaviours of subordinate levels.

According to Ottoson (1994), program planners in workplace education have varying degrees of control over their decisions regarding the factors influencing learning transfer. They have the most influence over program design and implementation but probably less influence over the organizational context. As planners have the most influence over the design and implementation of a program, instructors must consider the transfer of learning planning as an integral part of the planning process.

Section 10.2: Integrating Learning Transfer into Program Planning

ALISHA NARESH; EKTA NANDHA; IVAN GALAY; AND RISELLE PERALTA

Integrating Learning Transfer into Program Planning

The following are four science-based recommendations to help establish a learning culture in a team or an organization (Chamarro-Premuzic & Bersin, 2018).

1. **Reward continuous learning**

Create an organizational climate that nurtures critical thinking, and encourages challenging authority and speaking up.

2. **Give meaningful and constructive feedback**

Highlight knowledge gaps for employees and make them aware of areas of improvement.

3. **Lead by example**

Leaders have a strong influence on their team's behaviour and performance.

4. **Hire curious people**

Proper selection focuses on increasing the individual's willingness and motivation towards learning and performance.

An organization can incorporate learning transfer into the planning process of workplace education programs by considering many important factors, such as when management should use transfer strategies, how to identify key players, and how learning transfer can best be facilitated. To summarize, there is no need to rely only on your organization's formal learning and development programs if you want to foster curiosity and learning in your employees. Reinforcing positive learning behaviours, providing constructive and critical feedback to align employees' efforts with the right learning goals, displaying your curiosity, and hiring people with high learnability and a hungry mind will likely foster a stronger learning culture in your team and organization.

What Barriers Arise? What is Primarily Responsible for these Barriers?

Perspective from the ADKAR change management process (ADKAR: Awareness, Desire, Knowledge, Ability, Reinforcement).

Newstrom's three factors that act as barriers to the transfer of learning:

1. Lack of on-the-job reinforcement
2. Interference from the immediate environment
3. Non-supportive organizational climate (Newstrom, 1986)

Kemerer's three areas that inhibit the transfer of training:

1. Structural expectations
2. The improvement of skills
3. Establishing rewards (Kemerer, 1991)

Three critical factors that act as barriers to the transfer of learning are a lack of on-job reinforcement, interference from the immediate environment and a non-supportive organizational climate (Newstrom, 1986). A lack of reinforcement can translate to employees reverting to their old ways before the transfer of learning occurs. Additionally, employees can face obstacles from their immediate environment due to understaffing, time constraints, or obsolete equipment (Maurice, 1997). In other words, despite the efforts of employees who are willing to apply their training, if the environment is not supportive and interferes with their ability to use their training, they cannot apply their new skills. Also, a non-supportive climate stunts an organization's transfer of training. It is difficult for employees, supervisors, and trainers to change when management and leaders do not support the activity.

Kemerer asserts that the factors that inhibit the transfer of training relate to three areas:

1. **Structural expectations**: An employee who does not have the desire to change cannot be effectively trained or motivated to learn new skills and knowledge. Thus, expectations must be carefully timed so trainees accept a

training program's offerings.
2. **Improvement of skills:** The elements of design and implementation do not effectively improve the skills of all employees, for example, if the training lacks information about the job's responsibilities.
3. **Establishing rewards:** A workplace that cannot reward staff or fails to reward staff with an appropriate level of recognition will impede the transfer since employees may not commit to training without a proper reward for their efforts (Kemerer, 1991).

In the paper "Back to the workplace," the authors mention that organizational leaders identified that developing managers can provide significant competitive advantage if this process is done correctly. To help from competent managers in the workplace, they should take several "educational and development routes, including universities and independent business schools" (Belling, Kim, & Ladkin, 2004, p. 234).

Whatever the method, the transfer of learning serves as an essential component to building an employee's knowledge, skills, abilities, and other attributes (KSAOs). Barriers include the following:

1. **Lack of peer support**
2. **Lack of reinforcement**
3. **Time and work pressures**
4. **Lack of authority**
5. **Perceived irrelevance of the educational program**
6. **Lack of support from the organization**
7. **Group resistance to training**

The three barriers to the transfer of learning are the pressure to prioritize short-term financial targets, day-to-day pressures, and a lack of planning time (Belling, et al., 2004, p. 243). Participants rated these three variables as the greatest threats to applying their learning.

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Section 10.3: Facilitation & Strategies to Enhance the Transfer of Learning

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How Can Learning Transfer Be Facilitated?

The following are three primary ways to improve the facilitation process of learning transfer:

1. Modelling practice
2. Providing feedback
3. Use of cooperative learning

Apply Kemerer's framework, which focuses on the three areas of structural expectations, into a guide that improves employee skills and knowledge. Use the ADKAR model to effectively guide the learning transfer process.

In the same article, "Back to the workplace," Belling, Kim & Ladkin (2004) discuss their findings on four variables or facilitators that support the learning process: job aid, rewards, supervisor and peer support and the opportunity to use learning. Job aid refers to simplified instruction to perform a task. Employees can use this resource as a cheat sheet to accomplish a task, and over time they can memorize the content without having to refer to the job aid. Additionally, management can compensate employees who have successfully demonstrated skills and knowledge from training programs by rewarding their development. The rewards can include increases in wages or salary, one-time bonuses, and job advancements, all of which serve as an incentive for employees to commit to the transfer of the learning process.

Supervisor and peer support are essential components of a learning organization. Employees and managers are not punished for their mistakes and are free to ask questions to develop their KSAOs. In addition, opportunities should be give to use newly acquired skills and knowledge through practical exercises or work, so management can test employee abilities and validate their training and development.

ADKAR

The transfer of training can be facilitated using the ADKAR model. The model guides the change management of a project. In the case of the transfer of training, knowledge and skills are gained through an educational program. In other words, an employee changes by taking part in undergoing a training program. Therefore, an organization can use the same principles in the ADKAR model to guide the transfer of training. The model is an acronym made up of five words: Awareness, Desire, Knowledge, Ability, and Reinforcement (Creasey, n.d.).

1. **Awareness:** Recognize the need to change. Management should take action to build awareness of the training, which can include discussing why the current process is failing, sharing the benefits of the training program, and bringing in sponsors that can advocate for the training (Creasey, n.d.).
2. **Desire:** This is one of the most challenging stages in the model. Management must convince employees to undergo the training; this phase is difficult because it is ultimately reliant on the employee to have the desire to commit to training, despite the efforts of managers.
3. **Knowledge:** This phase will start training for the organization. Training can only be practical when the organization passes the first two stages first.
4. **Ability:** The time when employees employ their newly gained skills and knowledge in practice sessions.
5. **Reinforcement:** The organization must reinforce the new training. Actions that can support learning transfer include engaging leaders who can hold employees accountable for applying new skills in their job (Creasey, n.d.).

Also, monitoring the progress to track success and ultimately celebrating the success of finishing training can improve morale and reward employee efforts.

Strategies to Enhance the Transfer of Learning

Training Strategies Prior to Creating the Program:

- Involve trainers and trainees in the planning process
- Identify outcomes and work backwards, create opportunities to practice

Strategies During Program Creation

- Gagne's Nine Events of Instruction
- Visual, auditory, tactile, & kinesthetic learners

Strategies for After Program Creation

- Where and how trainees can receive support if needed
- Prepare feedback surveys
- Develop ways to recognize individuals during training
- Prepare trial runs of the training to receive feedback prior to rolling it out

For the Supervisor
Pre-, During, and Post training Strategies for the Supervisor:

- Make sure you are an expert in something before you provide training on it!
- Gain attention & identify the transfer of learning objectives to trainees

During Training Strategies for the Supervisor: (Gagne's Nine Events of Instruction)

- Gain the attention of the trainees
- State the objectives of the learning and recall prior learning
- Present content
- Be available for questions and guidance
- Practice, feedback, assessment
- Enhance retention and learning transfer

Post training Strategies for the Supervisor: (Gagne's Nine Events of Instruction)

- Recap
- Be available for questions and guidance
- Practice, feedback, assessment
- Enhance retention and learning transfer

For the Trainee
Pre-training Transfer Strategies for Trainees

- Provide input into program planning
- Actively explore the training situation
- Participate in advanced activities

During- Training Transfer Strategies for Trainees

- Link with a "buddy"
- Maintain an ideas and application notebook
- Plan for applications
- Anticipate relapse

Post-training Transfer Strategies for Trainees

- -Review training content
- -Develop a mentoring relationship
- -Maintain contact with training buddies

If you are a manager who develops training content, a manager or supervisor who has to teach content, or even a trainee or a student looking to learn new skills or stay current on existing skills, how you transfer the learning to others and yourself is key. You must remember, understand, apply, analyze, evaluate, and ultimately create strategies to enhance the transfer of learning to achieve educational goals set by yourself, your managers, and your organization (Bloom's Taxonomy, 2002).

Strategies for Program Development

This section will discuss pre-transfer, during transfer, and post-transfer strategies for the instructor, supervisor, and trainee. For this section, those who develop the training content will be referred to as instructors. Those who aid in teaching the material to trainees are referred to as supervisors or managers. Those to whom the learning is being transferred will be referred to as supervisors' trainees.

Prior to creating training programs, instructors must consider involving trainers and trainees in the planning process. Below are some best practices to identify strategies for the instructor:

Involve Trainees and Supervisors in Program Development

Supervisors and trainees should be involved in program development as they are the people for whom the training is intended. Also, involving them in TNA and program design provides insight into and helps garner feedback on the program (Transfer of Learning: Planning Effective Workplace Education Programs, 2021).

Identify Learning Objectives Using Bloom's Taxonomy

Bloom's taxonomy is a widely used model when creating learning objectives to classify and define levels of learning into a hierarchy of understanding. At the bottom of the pyramid, there is "remember, understand, apply, analyze, evaluate, and create" at the top of the pyramid (Bloom's Taxonomy, 2002).

During Training Program Development

During the program creation, it is important to develop application-oriented objectives, answer how the training investment is relevant for the trainee, provide personal feedback, and test knowledge.

Gagne's Nine Events of Instruction

Incorporating Gagne's Nine Events of Instruction helps accommodate all types of learners, particularly when used in conjunction with Bloom's Taxonomy. The beginning of the training program should incorporate an activity in which the student's attention is gained through a series of icebreaker activities. Next, instructors must inform students of objectives and check their understanding of the topic. This should be followed by the presentation of the learning materials along with learning guidance. Students should practice the application of learning alongside the instructor, who can provide feedback (Gagné's Nine Events of Instruction, 2020).

Visual, Auditory, Kinesthetic, and Tactile Learning

There are four different types of learners: visual, auditory, reading/writing, and kinesthetic learners. Content that is attractive to each type of learner should be included. Learners usually can not categorized into one only type of learner, as most people are a combination of different types of learners. It is essential to take this into account during the training design process (Malvik, 2020).

After Training Program Development

After creating the training program, trainers must:

1. Inform trainees of where and how they can receive support if needed
2. Prepare feedback surveys regarding the training
3. Develop ways to recognize individuals' needs after training
4. Prepare trial runs of the training to receive feedback before rolling it out

Strategies for Supervisors and Managers

A study conducted by an Australian energy organization tested the importance of supervisors' roles in how well-equipped new hires were prior to receiving training, during training, and post-training. The results showed that certain supervisor behaviours contributed to the transfer of learning, including modelling, providing frequent feedback, creating a supportive network within the office, and giving encouragement (Bretz, 2018).

We always think about our role as the trainee, but do we ever consider the supervisor's role in the transfer of learning? Below are strategies that will help a supervisor facilitate the transfer of learning before it even starts, during training, and post-training.

Supervisor's Pre-Training Strategies

- **Ensure You're an Expert in the Training Before You Deliver it**

Supervisors and managers need to ensure they are fully competent in the material before they train others. Think of it this way – you don't want to learn a sport from someone who is not an expert in it. In organizations with a learning and development department, supervisors can receive support and coaching to help them facilitate training effectively (Bretz, 2018).

- **Gain Attention & Identify the Transfer of Learning Objectives to Trainees**

In Gagne's 9 Events of Instruction, the 1st and 2nd events of instruction gain attention and inform trainees of learning objectives before facilitating the learning session. Gaining attention can be achieved through icebreaker activities such as asking thought-provoking questions, introducing one another, a quick game, and ultimately engaging your audience through interactive conversation prior to the learning starts. In the 2nd event of instruction, you want to list your transfer of learning objectives, so the trainees can understand the purpose of the training and what they can take away from the training (Gagné's Nine Events of Instruction, 2020). For effective learning objectives, consider "Bloom's Taxonomy," as mentioned earlier in the text.

Strategies During Training for the Supervisor

Effective strategies while executing the transfer of learning can include a variety of ways. The most important thing not to do – is read off the slides and not engage your audience. Here, we will discuss practical strategies for the transfer of learning during training:

- **Stimulate Recall of Prior Learning**

Ask trainees to recall any of their prior experiences with the subject being taught. This way, it'll help the trainees bring to life the content you are about to teach, and they'll carry this example in their heads throughout the entire facilitation (Gagné's Nine Events of Instruction, 2020).

- **Present the Content**

It's important to know that there are 4 different types of learners: visual, auditory, reading/writing, and kinesthetic learners (Malvik, 2020). Often, learners aren't just categorized into a single type; many learners are a combination of a few. You'll be successful in presenting content if you can include content that attracts each kind of learner.

- **Provide Learning Guidance and Recognize Participant Training**

Give trainees tips on retaining and understanding and applying the content (whatever your learning objectives are) in between presenting the content. This strategy can be done using scenarios, acronyms, visuals, models, and even role-playing (Gagné's Nine Events of Instruction, 2020). Let the trainees know that it's okay to raise their hand with questions and make them understand that no question is a "dumb" question.

- **Practice, Feedback, Assess**

Ensure to pause the facilitation and provide time for practice to help them transfer learning to a quiz to demonstrate their comprehension of the learning objectives, reading/writing, collaborating individually or in groups. Give them a scenario on a real scenario they'd come across in their role at work and let them apply what they have learnt. After, provide feedback which could include confirmatory, evaluative, remedial descriptive, peer or self-evaluation type of feedback (Gagné's Nine Events of Instruction, 2020). Lastly, assess if the learning transfer outcomes have been achieved as a group or individually depending on the size.

- **Enhance Retention & Transfer**

Help trainees retain information by giving them opportunities to connect with learning objectives through real-life scenarios to apply what they've learned. It's important not to talk about course content but to transfer the learning so trainees can use this to past, present, and future scenarios. Have trainees remodel what they've learnt through another format and connect course concepts to ideas. Continually ask questions to reinforce the content being taught (Gagné's Nine Events of Instruction, 2020).

Post-Training Strategies for The Supervisor

After training, it's essential to give trainees opportunities to apply what they have learnt, have time to debrief with the trainer, provide role models, give positive reinforcement of any kind, and celebrate any small wins. We will also discuss Kirkpatrick's 4 level training model in this section (Kurt, 2018).

- **Debrief, Questions, and Feedback**

It is crucial to have time for questions and feedback after the training to answer any burning questions and receive feedback from the trainees on the overall effectiveness of the training to incorporate into future sessions. Here, supervisors or managers can utilize evaluation tools that embody Kirkpatrick's 4 Level Training Evaluation Model, as mentioned earlier in this section (Kurt, 2018).

- **Provide Role Models**

The trainees need to know who they can reach out to for guidance after the training or course is complete to help retain and apply their learning.

- **Celebrate Training Wins**

Positive reinforcement and recognition for participation and successes during training give the trainees a higher motivation to participate.

- **Practice & Continuous Follow Up**

If trainees cannot practice or aren't followed up with after the training, retention and ROI will diminish. Managers and supervisors should follow up with employees in the short and long term to reinforce knowledge and skills. Management should also ask employees how they will apply the course learnings in their work. Additionally, management should be evaluating trainees' application of the transfer of learning from class to job. During the training, managers need to provide opportunities for trainees to practice, provide feedback, and assess to reinforce the transfer of learning and ensure the trainee is on the correct path (Gagné's Nine Events of Instruction, 2020).

Transfer Strategies for Trainees

Pre-Training Transfer Strategies for Trainee

This subchapter will contain details on transfer strategies that trainees can take before their involvement in the training. It will include details on what strategies are helpful for trainees to help aid them in their training process. Below are three transfer strategies that trainees can take:

- **Provide input into program planning**

Trainees can gain a lot of knowledge if they are directly involved in the planning process. Giving input into the program design or in the needs assessment are ways to get involved. Another way to get involved would be to request training and identify areas that may need development.

- **Actively explore the training situation**

A second strategy for trainees is to ask supervisors questions regarding why and how managers made the selection and what can be accepted from the program. Asking questions such as what kind of employees can take learnings back to aid with the job, what opportunities are available to demonstrate the new skills, etc., can help a trainee develop a deeper understanding of the training situation. Trainees should be eager to delve into the different training options, as they will assess what type of training is best for them.

Transfer Strategies for Trainees during Training

This subchapter contains details on the transfer strategies that trainees will take during the training. There are four transfer strategies that trainees will use during training that will guide their learning. Below are the four transfer strategies:

- **Link with a "Buddy"**

During the training, an easy strategy is for trainees to establish support groups with one or more trainees. The development of these relationships will foster a good environment where everyone is supported and encouraged. This strategy occurs quite quickly during training, whether through seat selection or employees in the same unit.

- **Maintain an ideas and application notebook**

The idea of this notebook is to convert the general principles learned into specific practices. It will help in seeing what ideas are useful.

- **Plan for applications**

Another strategy is for trainees to set goals for themselves as a motivational tool. After every session, trainees should ask themselves, "What will I do with what I have learned?" Application planning is a great way to manage one's performance, sort of like self-management. Accountability is created for follow-up and learning.

- **Anticipate relapse**

It is quite common to revert to old patterns once trainees get back to work. Supervisors and trainees can expect this to to occur. Anticipating a relapse will help trainees recognize what is happening and how to deal with it.

(Jacob Lund Photography, 2020)

Post-Training Transfer Strategies for Trainees

This subchapter will be about the transfer strategies that trainees should consider after training. Three post-training transfer strategies will explain the plan that will come in handy for trainees when they finish with the training process.

- **Review training content**

An essential strategy after training is to review the content learned regularly. It is quite common to have difficulty recalling the things learned during the training. By periodically checking, there are fewer chances of forgetting. Trainees will be able to transfer knowledge and skills from short-term to long-term memory.

- **Develop a mentoring relationship**

A second strategy is to have a mentor. Trainees can rely on their mentors to guide them and provide helpful information. Employees can use mentors to give feedback and constructive criticism on applications of new skills. Trainees will be able to assess the progress and where assistance is needed. In addition, the trainees can collaborate with mentors and “plan additional needed training or coaching based on their experience of applying the learning on the job” (Heathfield, 2019). It helps to have a mentor that shares the same cultural background as they can provide valuable assistance.

- **Maintain contact with training buddies**

Creating those relationships with other trainees increases the chances of transfer through interpersonal commitment, mutual support and goal setting. Trainees will receive encouragement and support from the connections made during the training, which comes in handy in the future. But this doesn’t mean that trainees complain to one another about the work when allowed to have a meeting, which all buddies must agree not to do.

Image Attributions

“Business woman writing on sticky note on glass wall with coworkers standing by in office” by Jacob Lund Photography is licensed under CC BY-NC-ND 2.0 from Noun Project

Section 10.4: Test Your Knowledge

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An interactive H5P element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/peoplelearningdevelopment/?p=710#h5p-9

Reflective Question

Consider a time when you participated in a training program. Choose two of Caffarella's five key influencing factors and explain in a paragraph why they were important in determining the training program's outcome.

Define & Explain

- What were the three identified conditions for transfer?
- What strategy is learned in a workplace education program that management might use to solve new problems on the shop floor?
- What are the four science-based recommendations to help create a learning culture on the team? Why are they necessary?
- What are Newstorm's three factors that acted as barriers to the transfer of learning?
- What is an obstacle an employee can face in their immediate environment? Provide an example and discuss why it impedes training.
- What are Kemerer's three areas that inhibit the transfer of training?
- What was a previously unconsidered barrier to the transfer of learning?
- What does ADKAR stand for?
- How does the ADKAR model relate to the transfer of Learning?
- What is one strategy for program development that can be used prior, during, and after creating training programs?
- What is one strategy a supervisor/trainer can use prior, during, and after training?
- What are the transfer strategies trainees can use during the training process?
- Why is it good to take transfer strategies before the training?
- What is the importance of planning for application as a strategy?

Section 10.5: Chapter References

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CHAPTER 11: EMPLOYEE TRAINING AND TECHNOLOGY

A survey conducted by the Harvard Business Review revealed that 22% of 2,100 survey respondents associated AI with the word “robots” (Gaines-Ross, 2016). This is further exemplified by Hollywood blockbusters and the myth that AI is only related to robots. However, “artificial intelligence (AI) refers to the simulation of human intelligence in machines that are programmed to think like humans and mimic their actions” (Frankenfield, 2021). Advanced AI will be able to more accurately mimic human intelligence to achieve the goals of learning, reasoning, and perception (Frankenfield, 2021).

AI is used throughout a range of industries and many organizations have already started adopting the use of this technology to enhance the customer/user experience. For instance, Amazon collects customer data based on purchasing patterns and searches to predict what the consumer will buy next (Marr, 2019). Not only does Amazon have a strong AI presence online, but their brick-and-mortar stores are using it as well. Amazon Go shops in the U.S. track what consumers pick up off the shelves and automatically charge the purchases (Marr, 2019). This is just one of many examples of how AI can be used to mimic human intelligence and improve the customer experience.

Key Takeaways

- Understand the difference between deep and machine learning.
- The benefits of using e-Learning from an organizational perspective.
- How to measure the effectiveness of e-Learning.
- The role of learning management systems and functions within an organization.
- Gagné’s types of learning styles and how AI plays a factor.
- The complexities of AI in fairness/equity.
- Standardizing learning processes and training with AI.
- How AI can be used to minimize human bias.
- How varied demographics in the workplace can be used as an advantage in training with technology.
- The challenges of using AI in training with varied demographics.

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Section 11.1: e-Learning

IVAN AU; CARLOS LIU; AND MARIA OBAID

Machine vs Deep Learning

There are two sub-sets of AI: machine learning and deep learning. The following table summarizes some of the key differences and introduces you to key terms that will be used throughout the following chapters:

Machine Learning	**Deep Learning**
A subset of AI.	A subset of AI and machine learning.
Uses thousands of data points.	Uses millions of data points
Identifies relationships, uses predictive analytics, and makes decisions.	Uses training data to predict patterns when new data are revealed.

AI can be used in the workplace to improve and enhance learning outcomes when training and developing employees. Through the integration of machine and deep learning, AI and other technologies can predict patterns and enhance the learning experience of employees. It can also be used to eliminate routine tasks and leave more room for more creative tasks. Therefore, the following section will introduce you to eLearning and how employees use it for on-the-job training, the differences in learning styles and using technology, and how AI training impacts different demographics in the workplace.

eLearning

Tai (2008) describes eLearning as instruction and training provided by a teacher or self-paced learning using a program database housed on a local area network, and it is the type of AI that most organizations use in training. It can lead to better performance, quicker time to market, improved operational productivity, increased retention, and a higher return on investment (Tai, 2008).

eLearning is an essential component of training programs for many organizations that work towards achieving their strategic goals and gaining a competitive advantage.

What are the benefits of launching e-Learning?

There are various benefits for organizations that use e-Learning for job training. The following table summarizes some of those key benefits (Hartley, 2001):

Availability	*When and where the learner has access to the organization's e-Learning applications.*
Learner control	*Learners can access only the information they require at the time they require it. They can practice skills until they master them without the rest of the class seeing them make mistakes.*
Object-level learning	*Most of the learners want a direct, object-based approach to learning since the information and knowledge they need might be buried in a large amount of content. Organizations switch the training from time-bound, event-based learning to just-in-time, process-based learning that can help learners focus on the information they need.*
Relevant information	*Given their job function, time in service, business unit, and other factors, portal technology allows information and knowledge to be delivered to people just before they need it. This trend toward just-in-time information access could force human resource development (HRD) professionals in charge of an organization's HRD data to fundamentally alter how people obtain information.*
Efficiency	*Technology allows people to complete tasks more quickly than they could without it. For example, when using paper and pencil, most people are not as efficient as when using a calculator.*
Reinforcement	*People are more likely to use technology in a similar situation if they use it to complete a task correctly on a regular basis.*
Immediate feedback	*When a user uses technology to complete a task, the user frequently receives immediate feedback on the task's success. When someone orders food on Uber Eats, for example, they receive confirmation immediately.*
Appeal	*Graphics, animations, and voice recordings can be revisited by learners.*
Reduced cost	*Technology transactions are normally cheaper than people transactions in e-Learning since creating e-Learning is a one-time cost, while people transactions are a repeating cost for the organization.*
Easy to find	*People are becoming more comfortable with web browsers and other related technology, so e-Learning and learning objects are becoming more readily available.*
Reduced time in training	*e-Learning applications that are well-designed can reduce traditional classroom time by as much as two-thirds since all the training material in online which reduces training time.*

How can e-Learning be used for job training?

According to Allen (2016), organizations typically employee one of the following tactics when implementing instructional strategies:

- they provide information so participants can follow instructions,
- they provide **more** information so that instructions can be remembered, and
- they provide **even more** instructions to help trainees perform at an expert level.

Misaligned Instructional Strategies (Allen, 2016)

The reason for launching eLearning is to increase the productivity of individuals to maximize the net profit. Therefore, management in organizations often see providing large amounts of information as being key to success, as shown in the graphic above. However, this is a misguided concept since information overload will inhibit trainees from reaching the desired outcome (Allen, 2016).

The three primary outcomes of eLearning are: preparing learners to follow instructions, preparing learners to perform without real-time aids, and helping learners become expert performers (Allen, 2016). For learners to follow instructions, providing information is an appropriate instructional strategy but not for other outcomes since learners need to understand the background to follow the instructions (Allen, 2016). Learners will need to practice on the job to better retain the information and fully develop their skills. Lastly, expertise is best developed through challenges with simulated outcomes as they allow trainees to adapt to unfamiliar situations with ease (Allen, 2016).

Adapting e-Learning strategies to primary performance outcomes (Allen, 2016)

If the task for learners is simple and safe, providing information will play a larger role in the e-Learning process compared to simulation (Allen, 2016). In contrast, guided practice and simulation are important for complex or potentially dangerous tasks for learners (Allen, 2016). For example, cashiers who face simple and safe tasks in their duties will benefit from being given more information at the beginning of learning and less simulation time since mistakes are harmless in this position. In contrast, surgeons who face more complex and riskier tasks on a daily basis, need more time for guided practice and simulation to minimize the risk to their patients.

What can undermine the effectiveness of e-Learning?

Tai (2008) suggests that the learner, learning material, and organizational level can undermine the effectiveness of eLearning. Learners who do not understand the purpose of the training can be poorly equipped and unmotivated. If the training content is not relevant or useful, learners will not be engaged (Tai, 2008). On an organizational level, the lack of a corporate structure or a clear strategy can impact the effectiveness of e-Learning.

How can the effectiveness of e-Learning be measured?

Kirkpatrick's model defines how to measure effectiveness (Kirkpatrick & Kirkpatrick, 2016):

- Level 1: The effectiveness perceived by a trainee; is determined through a survey on learner satisfaction.
- Level 2: The effectiveness is measured through a learning evaluation; an examination of the content is given to make sure the learner has mastered the content of the training module.
- Level 3: The effectiveness of the training is reflected in performance improvement; learners are observed to see how their knowledge is translated into workplace performance.
- Level 4: The effectiveness of the training is determined by measuring its business impact; specifically the ROI.

Section 11.2: Do Different Individual Learning Styles Impact Training that Uses AI?

IVAN GALAY; CARLOS LIU; AND MARIA OBAID

Gagné's 5 Types of Learning & AI

Gagné's theory suggests that the effectiveness of learning is highly dependent on the trainer's awareness of the trainee's level of learning (1984). Learning tasks for intellectual abilities, according to Gagné (1984), can be arranged in a hierarchy based on their complexity: stimuli identification, response generation, protocol following, vocabulary usage, discrimination, idea creation, rule enforcement, and problem solving. The hierarchy's main purpose is to define prerequisites that must be met to promote learning at each step.

1. **Intellectual Skills**

Intellectual skills involve "knowing how to do something" or mental processes that allow individuals to react to concepts within a given environment (Gagné, 1984). Internal conditions include prerequisite skill recall, interacting in new ways, and applying learned skills to a variety of situations and contexts.

2. **Cognitive Strategy**

Internal processes that allow the learner to plan, control, and monitor how they think and learn. Instructional design that involves internal and external activities is the core of this cognitive strategy perspective (Richey, 2000 as cited in Gagné, 1984).

3. **Verbal Information**

This is the learner's ability to share what they have learned. The key principles to this concept include the meaningful internal coding or classifying of information, elaboration and imagery used as cues, and information organized in chunks.

4. **Attitude**

The attitude refers to the individual's beliefs, values, or biases towards an activity or individual. In this case, some individuals may be more reluctant to interact with the technology because of existing biases. Those attitudes and biases act as barriers to training and development using AI. To prevent these barriers, learners can be encouraged with positive reinforcement.

5. **Motor Skills**

Motor skills are the learner's abilities to put words into action in chronological order. This involves following steps and procedures to carry out the steps of "motor performance" (Gagné, 1984). The ability to complete a series of physical movements involves three stages: learn the steps, practice them, and refine using feedback.

The Impact of AI

According to Peter Sondergaard, former executive vice president of Gartner Research information is the oil of the 21st century, and analytics is the combustion engine (Haupt, 2016). In learning and development, one of the primary reasons for the buzz around analytics is the need to evaluate the effectiveness of training programs.

A More Personalized Approach

One of the most significant benefits of AI technology in general is that it allows organizations to approach every situation in a much more personalized manner while drawing on the strengths of each employee. This is an improvement from the non-personalized approach organizations used to take not too long ago. This will likely progress to result in even greater personalization with the acquisition of new data.

Constant Feedback Loop

Organizations are now better able to gain information on the current status of their training, and they can easily see how each piece of the puzzle comes together with the rest. Organizations no longer have to invest in training that ultimately does not lead anywhere.

Improved Overview of Effectiveness

Analytics provide leaders the opportunity to have a direct overview of the current state of the work done in their organization, including training. This gives leaders better tools to make informed decisions that will impact the organization's bottom line. It used to be very difficult to identify what works and what does not simply by looking at data. However, we now have complex systems that can analyze the data for us and predict the outcomes.

More Intuitive Solutions for Employees

Employees undergoing training are now able to make use of better, more intuitive interfaces and general solutions for their training processes, which has had a huge impact on the streamlining of corporate training. There is still a long way to go in this area, but there have been noticeable improvements in the quality of interfaces that employees are given access to when tasked with going through training, and AI has played a big role in these improvements (Shah, 2018).

AI has a significant impact on employee training. Organizations now have a large amount of data they can analyze and use to optimize training programs. Training can be personalized to meet the needs of the learner, focus on areas of learner weakness, recommend appropriate content based on past behavior, predict needs based on roles, and even automatically generate content using content creation algorithms.

The key differences between using AI and other methods of training

One of the most important qualities of AI training is that it is suitable for people with different learning styles. Organizations can deploy AI to train employees by optimizing content to fit user-preferred learning styles. This not only makes participants' learning experience more enjoyable but helps with knowledge retention and job performance. AI training can help create a more personalized mentoring experience as well. Learning insights helps in developing a broader understanding of learner behavior, leading to improved predictive capabilities. By using these insights, organizations can create smart, more intelligently targeted content that is adaptive, intuitive, and responsive to the learner's personal needs.

Fairness/impartiality in training using AI

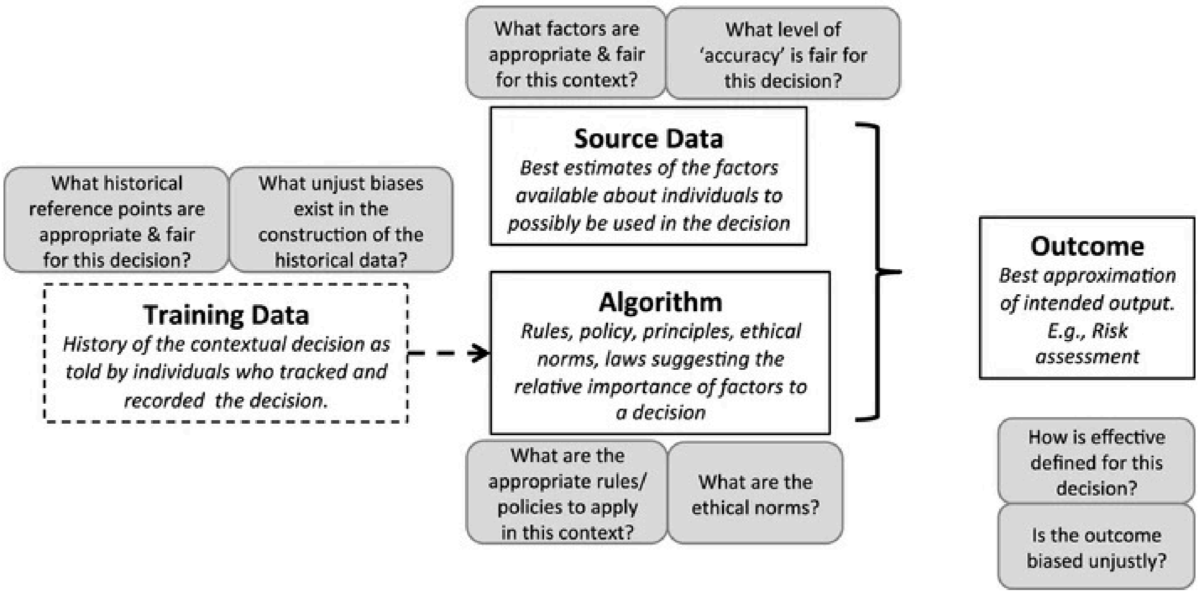

Fig 11.2a Fairness/impartiality in training using AI (Martin, 2018, as cited in Baylé, 2019)

One of the key principles of the use of AI is that it should be designed so it can be audited and any inherent biases removed. This will ensure that employee training is fair and equitable.

Sudarshan's (2019) research shows that AI in the education industry will grow by 47.5% throughout 2021. The author further suggests that technology will be employed from kindergarten through higher education to corporate training, as it provides the opportunity to create adaptive learning features with personalized tools to improve learners' experience (Sudarshan, 2019). This shows how important it is to have a solid understanding of AI and how it can be implemented in the workplace to accommodate different learning styles.

Image Attribution

Section 11.3: Demographics and AI

IVAN AU; CARLOS LIU; AND MARIA OBAID

Today's workplaces are changing rapidly. Research shows that AI is changing the working world with an anticipated 75 million routine jobs being replaced by AI while creating 133 million new jobs that require emotional intelligence and technical skills (Firstcall HR, 2019).

In addition to eliminating and creating jobs, AI is transforming learning and development through the following (Zhidkov, 2020):

Personalizing learning pathways.	Providing accessibility.
Integrating training into the routine workflow.	Measuring learning and training effectiveness.
Reinforcing training and development.	Focusing on AI-based digital tutors.
Improving completion rates.	

Therefore, the following discussion will focus on workplace demographics and the effectiveness of AI in training, as well as address any advantages and disadvantages of using AI in training with diversified demographics.

Demographics

Individuals have their own preferred learning styles. AI and predictive analytics can help develop intuitive learning content and curate training plans that are tailored to the needs of each individual (Gautam, 2019). This is especially relevant right now, as there are multiple generations in the workplace with various levels of comfort with using technology.

The way different generations have been raised impacts their ability to absorb and adapt to new information. Older generations may find it more challenging to engage in workplaces in which training is delivered using technology. Andriotis (2017) suggests having generations who are more adaptable to new technologies become ambassadors. To provide training that is effective for all employees, the human aspect of training must be incorporated with the technological aspect. For example, millennials and members of Gen Z can become ambassadors for new technologies and teach their colleagues on how to use them to their advantage. This would allow less technologically savvy employees become more comfortable with using online learning modalities.

To increase employee engagement, employees should be involved in the training and provide feedback. For example, asking employees to answer questions about their preferred styles of learning through surveys or face-to-face informal interactions can help employers identify the most effective form of training using technology. This can also be used to identify the most and least technologically savvy members of the group and inform the training strategy.

AI Training and Effectiveness

Livingston & Risse (2019) suggest that through machine learning, algorithms can be trained to identify relationships, develop predictive models, and make decisions. The effectiveness of algorithms is dependent on the training data used since it is also used in "deep learning" and "reinforcement learning." Deep learning uses training data to predict patterns when new data are provided. With reinforcement learning, the focus is "…on improving the performance of an algorithm over multiple engagements with a problem, adjusting actions based on continuous feedback from past actions" (Livingston & Risse, 2019). The use of deep and reinforcement learning helps eliminate the human biases associated with training data which allows the creation of more standardized training programs. Both concepts can further support employers in revising their training and development plans to better suit the needs of their employees and maximize knowledge retention.

In relation to workplace demographics, deep and reinforcement learning can be used to minimize biases associated with different age groups, races, and genders. To be more specific, AI will help predict employee behaviors and patterns based on performance and key performance indicators as opposed to individual characteristics. Attention must be paid to ensure algorithms do not create systemic bias.

Challenges with Technology

One of the key challenges is to make sure employees are engaged and effectively retain the knowledge from the training program. Different generations in the workplace may find it more difficult to engage in training programs that employ technology. According to Maity (2019), a major challenge with the use of AI systems in training and development is interpreting training feedback and linking it to performance, training transfer, and trainee characteristics. When it comes to measuring the effectiveness of the systems, it may be challenging to interpret results and standardize processes with such a diverse workforce.

Advantages and Disadvantages of Using AI in Training

Advantages	**Disadvantages**
· Integration of deep learning and machine learning minimizes the risk of human biases, i.e., confirmation bias.	· Employers still risk some human
· Standardized processes result in the same learning outcomes.	· AI systems have difficulties with performance management.
· Tailoring training programs to individuals can help maximize knowledge retention through AI analytics and technology.	· Ensuring each individual achieve
· Ensures that training is completed in full and maximizes the budget for learning and development programs.	· Employees may be less engaged
· Improve the organization's bottom line through more efficient processes and devoting less time to routine tasks.	

Section 11.4: Test Your Knowledge

IVAN AU; CARLOS LIU; AND MARIA OBAID

An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://kpu.pressbooks.pub/hrdevelopmentcoaching/?p=724#h5p-10

Reflective Questions

- Do you think using AI can eliminate human biases in training?
- How do you best retain information? Do you think AI helps learners better learn and retain knowledge?
- Does your workplace incorporate AI in training & development? Whether or not this is the case, how do you think having employees of different ages, sexes, family statuses, and races impacts the effectiveness of this technology (AI) in training?

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CHAPTER 12: FUTURE OF LEARNING

This chapter focuses on the future of learning. Due to the many recent advancements in technology, there are now many different forms of delivery of learning and training methods. For example, during the COVID-19 pandemic, businesses have realized that they are able to carry on with their operations while employees are working remotely from home. This has led organizations to hire and train employees through online platforms. We will discuss the different methods of training that have been introduced and their potential positive and negative implications.

Key Takeaways

- How learning will be different in the future
- Acquire knowledge about different types of employee training required by organizations.
- Understand the use of learning management systems (LMSs) in organizations
- Learn about learning on demand and forms of delivery that keep employees motivated and engaged

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Section 12.1: Types of Employee Training Required by Organizations

SANJIV BASSI; VIDHIA FOWDAR; DAMAN GILL; AND VINAY PILLAI

Training is vital in both employee onboarding and employee retention. New employees, as well as existing staff members, need training to learn and to develop their skills. Technological advancements have provided employers and human resources representatives with additional training methods.

Many organizations recognize the importance of employee training and development and are using different technological solutions to offer effective training to their employees. Eight training methods are most effective at targeting all three learning styles:

1. Technology-based learning

Technology-based learning allows trainees to work through the material at their own pace and removes the need for an in-person facilitator. This type of training often imitates traditional classroom-style teaching by providing a voiceover with visuals that support the content. Resources such as videos and additional readings are also included in the course material to aid in the training process. The best way to keep employees engaged is to incorporate quizzes and interactive modules into the digital classroom *(The 8 Best Types of Training Methods for Your Employees, n.d.).*

2. Simulations

Simulations are an effective training technique for fields that require a specific set of skills for operating complex machinery such as medical equipment. Successful simulations reflect actual work situations, and they allow learners to encounter issues and situations they are likely to face on the job *(The 8 Best Types of Training Methods for Your Employees, n.d.).*

3. Films and videos

Films and videos help organizations train employees more quickly and efficiently. There are several approaches to training videos, including animation, live action and camera/screen recordings. Using films and videos makes learning material more interactive, and making videos engaging is relatively affordable but it can be time-consuming *(The 8 Best Types of Training Methods for Your Employees, n.d.).*

4. On-the-job training

On-the-job training allows trainees to gain practical, hands-on experience in the workplace. This training style allows new hires to learn their job more quickly and early on in the employment process (*The 8 Best Types of Training Methods for Your Employees, n.d.*).

5. Case studies

Case studies are an effective training technique when developing analytical and problem-solving skills. Trainees are given scenarios that represent common work situations. Employees are asked to analyze the case and develop ideal solutions (*The 8 Best Types of Training Methods for Your Employees, n.d.*).

6. Instructor-led training

Classroom-style training and lecture-style presentation are examples of instructor-led training methods. When engaging in classroom-style training, instructors need to be skilled facilitators and subject matter experts to make the learning engaging and valuable for trainees (*The 8 Best Types of Training Methods for Your Employees, n.d.*).

7. Roleplaying

This technique is usually performed with trainees and a facilitator, with each person having an opportunity to act out various potential work scenarios. This method allows employees to gain practice in handling challenging situations in a safe learning environment (*The 8 Best Types of Training Methods for Your Employees, n.d.*).

8. Coaching/mentoring

Coaching and mentoring can be invaluable for all parties involved. A mentorship program creates employee development opportunities and develops relationships that help new employees feel welcomed and supported.

However, this type of program must be implemented strategically, as it will require employees to invest time in connecting with their mentor/coach (*The 8 Best Types of Training Methods for Your Employees, n.d.*).

Modern Training Methods

The following are two methods that support today's learning needs:

Social Learning

Introduced by Albert Bandura in the 1970s, social learning is typically described as learning from others by observing, imitating, and modeling their behavior. Social learning does not often appear in common training methods as it is difficult to structure; yet, it can be effective because employees are pushed beyond the boundaries of their daily roles, which encourages them to acquire new perspectives and problem-solving skills.

Online Training

eLearning has become one of the most commonly used solutions for training employees effectively. Online workplace training programs include videos, webinars and eLearning courses. eLearning also allows information to be presented and tested in many different ways, and thus employees can learn according to their style and immediate needs. Its drawback is the initial development cost and service fees of a reliable LMS.

Traditional Methods

Below are some traditional training methods we are all likely to be familiar with. While they have merit and are still used today, they also have disadvantages.

Classroom-based Training Programs

Qualified facilitators offer the training in a physical venue or somewhere off-site. Staff are shown a series of presentation slides and perform activities, such as case study assessments. The benefit of classroom-based training is that a group of employees can acquire extensive knowledge (Andriotis, 2021). However, this learning method can be boring, time-consuming and costly.

On-the-job training

In this training style, employees are engaged in learning as they participate in real activities related to their current or future job. It is considered as one of the most effective training methods for succession planning because it results in rapid learning (Andriotis, 2021). Its disadvantages are that it may be too stressful for some employees and it takes time away from the regular work day.

Section 12.2: Learning Management Systems and Learning On-demand

SANJIV BASSI; VIDHIA FOWDAR; DAMAN GILL; AND VINAY PILLAI

Learning Management Systems (LMS) as Delivery Models

On-demand training that is delivered digitally is the future of corporate learning. As technology continues to evolve and take over the delivery models, we will talk more about on-demand training, specifically in this section.

Online employee training software helps employees grow through the development, delivery and management of staff training programs. LMS are software applications or web-based technological platforms that assess and implement specific learning processes (Brush, 2019). LMS platforms can be used by large or small organizations to offer interactive and relevant training as well as track individual learners' success.

How LMS systems work according to Brush (2019):

- **Responsive design**– Platforms can be easily accessed by trainees by using devices such as phones, desktops, and laptops.
- **User-friendly interface**– Trainees are easily able to find the content they are looking for.
- **Reports and analytics**– By using eLearning assessment tools, instructors can easily view and track their training initiatives to gauge whether they are effective or need to be readjusted.
- **Gamification**– These are features within the platform that allow instructors to create interesting courses that keep the audience engaged.
- **Localization**– This helps the program overcome language barriers so the audience is able to understand the lessons.
- **Artificial intelligence**– This allows the instructor to receive recommendations for future courses based on those already completed and learn what the audience may be interested in.

Different Types of Learning Management Systems:

- Cloud-based
- Self-hosted
- Desktop Application
- Mobile Application

Benefits of LMSs, (Brush, 2019):

- Easily monitor user progress and performance.
- Increased eLearning accessibility without geographic limitations.
- Ability to personalize the online training and learning experience.
- Ability to easily update modules and learning activities.
- The use of automation allows the user to ignore tedious and repetitive tasks and focus on more important activities.

On-demand Learning Delivery

As technology continues to evolve and be integrated into the workplace, the need for just-in-time learning has also increased. On-demand training is a strategy that involves making learning solutions available anywhere and anytime. As employees' expectations of workplace learning have changed, they can take control of their own learning and challenge traditional learning and development structures. On-demand training can help increase employees' engagement, productivity and overall contribution to the organization.

Benefits of On-demand Learning

Firstly, on-demand learning opportunities help learners direct their own learning by providing immediately accessible knowledge. Real-time learning is knowledge acquired based on immediate needs. By understanding the needs of learners, learning and development teams can create a learning platform that delivers rich digital resources to employees.

According to Bastiaan, (2021), some key characteristics of real-time learning are:

- Its lessons are usually short (3 to 5 mins long)
- It can be applied for both formal and informal training.
- It is designed to meet a particular learning goal.
- Its lessons are created in various media formats, such as video.
- It is easily accessed and completed.
- It is available on demand.

How Does Real-time Learning Benefit Organizations?

- Real-time learning is cheap to build, the lessons are short, and there are few material and trainer costs.
- Real-time learning is fast to organize and update because the lessons' development and implementation take little time and can be done efficiently.
- Real-time learning is highly effective as knowledge on demand enables employees to learn what they need to directly. Employees can quickly learn new skills and easily adapt to changes (Bastiaan, 2021).

Secondly, learning on demand is flexible. Employees are usually busy, and on-demand learning allows them to access training anytime and anywhere. In other words, employees can engage in learning at a time and place that is convenient for them. Learning content is more relevant when it is acquired at the point of need, and this allows employees to utilize the new information right away. By supporting employee learning in real-time, organizations can provide more value by addressing performance and knowledge gaps.

Thirdly, on-demand learning increases engagement because employees can take control of their own learning and learn at a pace that suits them. Learning at work enables employees to become better at their job which contributes to employee motivation and satisfaction. Organizations need to focus their training efforts to help increase employee performance and capabilities. Research shows that learners retain 90% of what they learn when they use it immediately. (Markovic, 2021). Hence, organizations benefit from on-demand training as it results in increased productivity and better performance.

Section 12.3: Test Your Knowledge

SANJIV BASSI; VIDHIA FOWDAR; DAMAN GILL; AND VINAY PILLAI

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/hrdevelopmentcoaching/?p=761#h5p-12

Reflective Question

Describe a time when you participated in online training. Did you find it effective? Why or why not?

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CHAPTER 13: PERFORMANCE MANAGEMENT

Performance management is a process that helps managers monitor and evaluate employees' work. The goal of a performance management system is to create an environment where people can perform to the best of their abilities to efficiently and effectively produce the highest-quality work (Tardi, 2019). An effective performance management process focuses on clear goal expectations, ongoing communication and feedback, and provides insight into how the employee's work contributes to the organization's goals and objectives.

Key Takeaways

- Understand why it is important for managers to plan for performance management to support employee success.
- Understand the importance and impact of regular check-ins and feedback.
- Understand how to prepare for a performance review conversation from a manager and employee perspective.

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Section 13.1: Planning

MANPREET BINNING; TANJIT RAI; AND JOLENE NEUFELD

Actions, Behaviours and Results

For employees to perform well, they must be aware of what is expected of them. An organization needs to set clear expectations for employees to ensure organizational success. It is important to review employees' performance expectations, including both the behaviors employees are expected to exhibit and the results they are expected to achieve (Pulakos, 2004). An accurate and up-to-date job description will provide employees with a guideline on what is expected of them during their course of employment. This description should cover the general areas of knowledge and the skills needed to be successful in the job.

Behaviours refer to what is expected of the employee based on key competencies (Pu-lakos, 2004). Managers are responsible for discussing behaviours and work outcomes in performance reviews to ensure the employee is on the right track. Behaviour standards are a strategic part of the job, as they directly relate to how the job is done. The results expected of the employee should be tied directly to the organization's goals. Development goals should be set to improve employee performance or set new goals. Performance expectations help in communicating about performance and the basis for reviewing employee performance. Managers and employees should set clear expectations about the results that must be achieved and the means to achieve them (*Performance management: Concepts & definitions*).

Finalizing Performance Expectations

It is important that all performance expectations (results and behaviours) are clearly communicated and put into writing, as this reduces ambiguity among management and employees. Putting these into writing will also ensure the performance objectives are clearly understood by everyone.

Performance expectations should be verifiable. Managers and employees should identify how and where evidence about the employee's performance will be gathered.

To verify performance, employers can assess the following:

- Specific work products (the outcomes of work being produced).
- Reports and records, such as attendance, safety, inventory, and financial records.
- Checklists that can be completed by a supervisor that list criteria that are needed to meet expectations.
- Direct observation
- Rating scales for different levels of performance (e.g. behaviorally anchored rating scales).
- Constructive comments received about the employee's work from others or observers (*Performance management: Concepts & definitions*).

Creating Development Goals

It is vitally important that managers and employees set development goals in order for the employee to work towards improving their skillset and performance. Goals must be SMART (specific, measurable, achievable, realistic, and time bound). Development can include things such as on-the-job training, cross-training and workshops. It is important that employee goals align with the organization's goals and strategies. Managers should remember to revisit these goals when they are conducting performance reviews.

Guidelines for Establishing Effective Performance Goals:

- Goals must clearly define the end results to be accomplished.
- To the extent possible, goals should have a direct and obvious link to organizational success factors or goals.
- Goals should be difficult, but achievable, to motivate performance.
- Goals should be set in no more than three areas – attempting to achieve too many different goals at once will impede success.

(Pulakos, 2004)

Section 13.2: Check-ins

MANPREET BINNING; TANJIT RAI; AND JOLENE NEUFELD

Providing Observation and Feedback

Before providing any observation or feedback, a job description and performance objectives needs to be established so employees are aware of performance expectations. Employee performance should be reviewed regularly by scheduling one on one check-ins and providing ongoing feedback. This helps to determine if an employee is on the right track with meeting the organizational goals or if further training is required. It is important to "recognize and reinforce strong performance by an employee, and identify and encourage improvement where it is needed" (Check-In: Providing Observation and Feedback | People & Culture, 2021).

Certain jobs and responsibilities have built-in feedback. In these jobs, knowledge of the results comes from the work activity itself. For example, when an electrician repairs a broken switch and it begins to work, the feedback is immediate (Check-In: Providing Observation and Feedback | People & Culture, 2021). Feedback or coaching should happen informally, on a daily basis, as this allows employees to continuously develop their skills and abilities. Frequent feedback promotes high team morale and increases employee motivation to meet/exceed performance expectations.

Effective observation and feedback can:

- Strengthen communication between supervisor and employee
- Help the employee attain performance objectives and meet standards
- Increase employee motivation and commitment
- Maintain and increase the employee's self-esteem
- Provide support

(Check-In: Providing Observation and Feedback | People & Culture, 2021).

Coaching strengthens communication between the supervisor and employee, which is critical to effective performance management. Coaching helps shape performance and increases the likelihood that the employee's results will meet expectations. Coaching sessions provide the supervisor and employee with the opportunity to discuss progress toward meeting mutually established standards and objectives (Check-In: Providing Observation and Feedback | People & Culture, 2021). It is helpful to schedule two coaching sessions per month: one session to discuss performance and another session to discuss career development/growth. Coaching sessions should be focused on one or two aspects of performance/development, whereas a formal performance appraisal should be more of a total review or a summary of activities over a specified period of time.

Key Elements of Coaching

To make your coaching session effective, you must understand the key elements of coaching:

- Coach when you want to focus attention on any specific aspect of the employee's performance.
- Observe the employee's work and solicit feedback from others.
- When performance is successful, take the time to understand what is working and the reasons why.
- Advise the employee ahead of time on issues to be discussed.
- Discuss alternative solutions.
- Agree on actions to be taken.
- Schedule follow-up meeting(s) to measure results.

- Recognize successes and improvements.
- Document key elements of the coaching session.

(Check-In: Providing Observation and Feedback | People & Culture, 2021)

Questions to Consider When Coaching

To provide effective feedback, it is important to understand the elements of performance and analyze marginal performance. Keep these questions in mind:

- How is the employee expected to perform?
- Does the employee understand these expectations? If not, why not?
- Does the employee know what successful results look like? How do you know?
- Does the employee know the performance is marginal? How do you know?
- Are there obstacles beyond the employee's control? Can you remove them?
- Has the employee ever performed this task satisfactorily?
- Is the employee willing and able to learn?
- Does unsatisfactory performance result in positive consequences such as an undesirable task being reassigned?

(Check-In: Providing Observation and Feedback | People & Culture, 2021).

Coaching Behaviors

To make the most of coaching employees, consider the following guidelines:

- Focus on behavior, not personality.
- Ask the employee for help in problem identification and resolution. Use active listening to show you understand.
- Set specific goals and maintain communication.
- Use reinforcement techniques to shape behavior.

(Check-In: Providing Observation and Feedback | People & Culture, 2021).

During the Coaching Session

When conducting a coaching session to provide positive feedback, keep the following in mind:

- Describe the positive performance result or work habit using specific details.
- Ask the employee to identify elements that contributed to their success.
- Discuss ways you and the employee can support continued positive results.
- Reinforce for the employee the value of the work and how it fits in with the goals of the work unit or department.
- Show your appreciation of the positive results and your confidence that the employee will continue to perform satisfactorily.
- If appropriate, document your discussion for the employee's file.

When you conduct a coaching session to improve performance, you may want to use the following format:

- Describe the issue or problem, referring to specific behaviors or expectations.
- Involve the employee in the problem-solving process to identify the problem.
- Brainstorm and write down possible solutions.
- Decide on specific actions to be taken by each of you to correct the problem.
- Agree on a follow-up date.
- Document key elements of the session. Give one copy to the employee and place another in the employee's file.

If your coaching session is conducted to address poor work habits such as continued tardiness, keep these steps in mind:

- Describe in detail the poor work habit observed.
- Say why it concerns you, in terms of its specific impact on the department.
- Ask why it occurred and listen non-judgmentally to the explanation. Describe the need for change and ask for ideas.
- Discuss each idea and offer your help.
- Agree on specific actions to be taken and set a specific follow-up date.
- Document key elements of the session. Give one copy to the employee and place another in the employee's file.

(Check-In: Providing Observation and Feedback | People & Culture, 2021).

Follow-up Discussion

To conduct a follow-up discussion, consider the following steps:

- Review the previous discussion(s).
- Discuss the business reason for why the situation/problem continues to be a cause for concern and ask for reasons why the situation is ongoing.
- Indicate the consequence of a continued lack of improvement. (Do not use threats! This is not an oral warning.)
- Agree on action to be taken and set a follow-up date, if appropriate.
- Convey your confidence in the employee.
- Document key elements of the session. Give one copy to the employee and place another in the employee's file (Check-In: Providing Observation and Feedback | People & Culture, 2021).

Section 13.3: Performance Reviews

MANPREET BINNING; TANJIT RAI; AND JOLENE NEUFELD

Performance Reviews

The last step of the performance management process is the review. A performance review is a formal assessment in which the manager assesses how well the employee is performing and communicates to the employee about which areas they are succeeding in and in which areas they need to improve (BambooHR, 2021). During this stage, the manager and employee will work together to set clear goals and create a well-defined action plan for the employee so they have a better chance of achieving their goals.

Why are Performance Reviews Important?

Performance reviews are important because they can play a vital role in the success of an organization and its employees. A good performance review can help motivate and encourage employees to do their best work (Bates, 2017). For instance, if an employee who is performing at a high level is recognized for their contributions during their performance review, it can boost their confidence and encourage them to continue performing at a high level (Bates, 2017). As a result, both the organization and the employee will benefit greatly. The employee may get opportunities to advance in their career and the organization gets to reach certain targets in relation to profit/productivity. On the other hand, if an employee is not performing at the standard level, a performance review can be a great opportunity for a manager to offer guidance and insight to the employee (Bates, 2017). As a result, the employee will be better equipped to meet performance standards in the future.

Evaluating how well an employee is performing helps employers make decisions about compensation, such as bonuses, pay raises, extra benefits, and allowances (Bates, 2017). Providing a more attractive compensation package for top talent can increase the organization's chances of retaining them, which gives them an edge over competitors. Reviews can also help managers or supervisors create more effective training programs or policies (Bates, 2017). If employees are not performing well, employers can identify performance gaps and design training programs that address those gaps to help get the desired behaviours. By looking at the strengths and weaknesses of an employee, supervisors can better determine whether an employee is the right fit for the job and make adjustments to future requirements and positions (Bates, 2017). Additionally, open communication during the review process encourages more honest conversations about performance and can lead to better decisions and more effective strategies (Bates, 2017). This creates a supportive culture in which employees feel like they are taken care of and their concerns or ideas are heard (Bates, 2017). Thus, it strengthens relationships between managers and employees, which increases trust and loyalty.

Preparing for a Performance Review

To conduct an effective performance review, the manager and employee must prepare beforehand, so they can have a productive conversation without wasting any time.

Manager Perspective

As the manager, it is important to first plan everything out. The manager must identify a time to schedule the performance review meeting that works for both the manager and employee (Adams, 2020). It should not be held during the organization's busiest time or conflict with other work demands, as this may cause the review to be rushed or poorly done, which can result in missing important performance issues or not recognizing good performance (Ad-ams, 2020).

Tell Employees to Prepare Beforehand

Managers should ask employees to compile all their results or documentation in regard to performance (Adams, 2020). This can be any official forms that cover the employee's job responsibilities, current tasks they are completing, and reviews of their goals and accomplishments (Adams, 2020). In addition, it is beneficial to have the employee complete a self-evalu-ation (Adams, 2020). Self-evaluation instills a sense of responsibility in the employee and gives them the opportunity to hold themselves accountable. Some questions to consider including on the self-evaluation are:

- What accomplishments are you most proud of this year?
- Where have you fallen short of the expectations and goals of the team or yourself?
- What are your areas for growth and how are you addressing them?
- Are there things your manager can do to further support your progress and success? (Adams, 2020).

How to Prepare as a Manager

A manager should bring together their own results and notes they have taken throughout the year such as sales reports, call records, deadline reports, customer feedback, personal observations, and notes from check-in meetings (Adams, 2020).

Arrange All Necessary Documentation

Prior to the performance review, the manager should collect any relevant documents or information including the employee's self-evaluation, external feedback, and any other relevant data (Adams, 2020). The manager can then use all the data collected to explain their feedback, formulate the main topics they want to discuss, and make notes for the next steps (Adams, 2020). Lastly, the manager needs to schedule a performance discussion and plan how to facilitate the meeting.

Employee Perspective

Be Open to Receiving Feedback

Performance reviews tend to include both positive and constructive feedback and employees should expect to receive both (Kalish, 2020). Therefore, it is important to be open-minded and accepting of feedback as well as to respond appropriately. An employee should pay close attention to the feedback they are receiving and if there is any constructive feedback, they should acknowledge their mistakes and offer solutions or show initiative to perform better (Kalish, 2020).

Keep Track of Accomplishments

An employee should spend time collecting data that pertains to their accomplishments since the last performance review discussion. The information may include how they have contributed to higher revenue for the organization, the skills they have acquired, any important relationships formed, and any projects they helped finish (Kalish, 2020). This way, if an employee wants to ask for a raise, they will have a strong case (Kalish, 2020).

Reassess Current and Previous Goals

It is important for an employee to go over any goals they set at their previous performance review meeting and see if they have achieved them or not (Kalish, 2020). Some things to consider when reassessing previous goals that have been met include learning outcomes from meeting those goals, which achieved goal was the most fulfilling, and how to further expand on those goals (Kalish, 2020). On the other hand, if goals were not met an employee should consider how close they got in achieving their goals, whether or not priorities changed, what were some of the barriers that stopped them from reaching their goals, and how they can improve for next time (Kalish, 2020). It is crucial that the employee makes note of this information, so they can discuss it with their manager at the review and get any assistance or guidance that is needed.

Establishing New Goals

After the employee measures their progress, they should look at where they want to go next and the goals they want to accomplish. An employee should make sure their goals are ambitious, but also within the limitations of what they can reach (Kalish, 2020). When coming up with new goals, employees should consider the following questions:

- What skills would I like to master by the next review?

- What responsibilities do I want to take on?
- What projects am I passionate about pursuing?
- What weaknesses would I like to improve upon?
- What goals would I like to continue to build on?
- What role do I want to aim for one to three years from now? What can I do now to put myself in the running? (Kalish, 2020).

Be Ready for a Difficult Conversation

A manager may want to discuss serious matters during the performance review. The employee should be ready to address these concerns and be prepared to discuss anything that may be impacting their performance (Kalish, 2020). For instance, employees who are not happy with their job or want to be transferred to a new role must be willing to share this with their manager; that way, both parties can come up with a mutually beneficial plan (Kalish, 2020).

Relax and Congratulate Oneself

Before the review, employees should congratulate themselves on how far they have come and what they have done so far (Kalish, 2020).

During the Performance Review Meeting

During the performance review meeting, it is crucial that both parties have a chance to talk. A manager should actively listen to what the employee is saying, provide constructive feedback, and ask open-ended questions for clarity and more in-depth answers. A manager should assess both their assessment of the employee and the employee's self-review so that the reasons for any differences can be discussed. In addition, the conversation should cover what is going well, accomplishments, and any areas for improvement. Furthermore, the manager should make sure the employee feels comfortable so that they can speak honestly, which will result in a more meaningful conversation. Next, the manager should make note of what has been discussed in the meeting and help craft a well-defined action plan with the employee for what they need to achieve or what is expected of them for the future. After the performance review, the manager should follow-up with the employee to ensure they are on the right track (*Achieve Together Check-ins*, 2021).

Section 13.4: Test Your Knowledge

MANPREET BINNING; TANJIT RAI; AND JOLENE NEUFELD

An interactive H5P element has been excluded from this version of the text. You can view it online here: https://kpu.pressbooks.pub/hrdevelopmentcoaching/?p=780#h5p-13

Reflective Questions

- Planning is the first step in the performance management cycle. It is crucial that an organization plans how it will manage performance within an organization in order to achieve optimal success. Suppose you are given the task of setting a few performance management objectives for a cashier at a retail store. What would you include? Why would this be useful? How would you measure this?
- Describe how regular check-ins benefit the employee/manager relationship.
- Reflect on a coaching session you have had with your manager/supervisor. What did you like, and what did you not like?
- You are to give a performance review to an employee that has not performed well in this period. How will you start this conversation? How will you make sure you get your points across in order to see changes in the near future? Explain.
- Describe one of your performance review meeting experiences. Did you feel the manager helped guide you? Was there anything the manager could have done to improve your experience?
- Are goals clearly defined at your workplace? How does your workplace measure your progress in terms of meeting your goals?

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CHAPTER 14: COACHING FOR PERFORMANCE

Coaching is an interactive process in which an individual benefits from improving, learning, or taking their performance to the next level (Payne, 2007). By receiving coaching, employees can learn how to overcome a problem, master a new skill, or maximize one's potential through growth. Coaching occurs at all levels of an organization, and it is important to integrate it into the culture of the organization to achieve its business goals. Coaching programs have been proven to be effective in integrating skills learned in a classroom setting and applying them on the job by enhancing and improving performance in a wide range of areas, including interpersonal skills, communication skills, leadership skills, cognitive skills, and self-management skills. The process of coaching involves using opportunities in the work environment to build upon the strengths and potential of employees (Saks & Haccoun, 2018).

Key Takeaways

- Frequent structured and unstructured feedback is helpful for developing employee goals and keeping the employee motivated to achieve these goals.
- Coaching for performance is tied to employee behaviour, motivation, leadership and individual and organizational success.
- The GROW Model, open-ended questions and FeedForward are successful methods that can be applied in the workplace to address performance gaps and guide employees to improve.
- Coaching for performance drives an improvement plan. It steers away from blame and fault and shifts towards cause and plans for the future.

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Section 14.1: Coaching Methods & the Grow Model

NAVY GILL AND SYDNEY MAYER

The process of coaching is initiated by discussing a defined set of objectives, followed by identifying coaching opportunities, and, finally, developing a measurable long-term plan. This chapter will review some of the relevant tools and theories that can be applied towards coaching for performance. These coaching practices will help employees develop goals, navigate their career path, and move toward a promising future within an organization. Coaching for performance is a way for employers to tie feedback specifically to their employees to help achieve strategic organizational goals. The following methods will be discussed in further detail throughout this chapter:

- The GROW Model
- Open-Ended Questions
- Feed-Forward

In addition, we will discuss the value of coaching as well as using coaching for performance in leadership and how it can positively impact an organization's ability to achieve its strategic goals. One of the most influential coaching models, referred to as the GROW model, was initially published in 1992 by Sir John Whitmore and continues to be recognized as the most well-established and successful coaching model to date (MindTools, 2021). This simple, yet powerful model "enables the manager to structure a coaching conversation and deliver a meaningful result without telling the employee what to do" (KWELA Handout, 2021). The acronym represents each stage of the model: Goal, Reality, Options, and Will.

Image designed based on the GROW model by Sir John Whitmore at Performance Consultants

GOAL: What Do You Want?

The first stage of the model focuses on the behaviour you want to change or improve upon by using another business acronym referred to as a SMART goal. A SMART goal is one that is Specific, Measurable, Attainable, Realistic, and Time-Bound. By following this outline, you can establish what you want to achieve and how you will determine if you are successful (MindTools, 2021). This is the most important step in the process, as it will facilitate the rest of the coaching.

REALITY: Where Are You Now?

The next step in the process is to analyze the current situation and gather information about the environment, which is important to reaching the desired goal efficiently. During this step, it is also important to ensure that the goals set do not conflict with any other goals of the business (MindTools, 2021).

OPTIONS: What Could You Do?

The options stage is where brainstorming takes place to identify all the possible options for reaching the objective (MindTools, 2021). Once options have been determined, the employee must analyze each of the options and make considerations by factoring in all the advantages and disadvantages while using this criterion to make an informed decision.

WILL (or WAY FORWARD): What Will You Do?

In the final step of the GROW model, the employee will need to commit to specific actions to ensure the employee is motivated to achieve the goals (MindTools, 2021). This will encourage the employee to be accountable for their actions, which should also be supported with follow up and review in case any adjustments need to be made to the process.

Over the years, many modifications have been made to change and update the model, with additional components being added such as the GROWS Model or the T-GROW Model.

GROW	**REALITY**
What do you want to achieve?	What is happening now?
What does success look like to you?	Why is this happening?
Why is that important to you?	How is this impacting you/others?
What other benefits are there?	What have you tried so far?
What would make you happy?	What is holding you back?
OPTIONS	
What options can you think of?	
What else could you do?	
How can you improve on these ideas?	
WILL (or WAY FORWARD)	
Which ideas have the most potential benefits?	
Which ideas will you choose?	
What barriers do you foresee in taking these steps?	
What will you do to eliminate these barriers?	
Who needs to know what your plans are?	
What support do you need from others and how will you get it?	
How will we know you are succeeding?	

Nonetheless, we have attached a short clip of Sir John Whitmore himself, speaking about his original version of the model below.

GROW MODEL: YOUTUBE LINK

https://www.youtube.com/watch?v=I4uSjBKYM3Y

Section 14.2: Open-ended Questions

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During a coaching session with an employee, it is important to consider the type of questions you will ask. These questions should be prepared ahead of time to set up the flow of the discussion. A coaching session should be designed to be a valuable discussion, which can be evoked by asking open-ended questions, ones that cannot be answered with a simple "yes" or "no" (Cates, 2020). Using open-ended questions helps the employee to think critically and come up with answers and new possibilities. (The Non-profit Association of Oregon, 2016).
As the coach, you want to be careful not to lead the employee to a certain solution or ask very specific questions. Instead, the coach should simply guide the discussion by asking broad and expansive general questions, which can leave a lot of room for the employee to fill in what is right for them (The Non-profit Association of Oregon, 2016).

Some Examples of Open-Ended Questions

- How do you think you'll overcome these obstacles in our project?
- Tell me about your thought process?
- What would you like to accomplish from this presentation?
- How do you think we can make the product better?

Examples of What NOT to Ask

- Do you think this process is efficient?
- Why didn't you do *this*?
- Do you not think we could improve performance by changing *this*?
- Did you find this meeting helpful?

Asking open-ended questions allows the employee to critically think and share their answer with no assumption that the coach has a preconceived opinion. This gives the impression that the coach is looking down on them, and the employee might get defensive in response (The Non-profit Association of Oregon, 2016).

When asking open-ended questions, a key aspect for coaches to focus on is listening; therefore, it is important that the coach talks minimally to allow the employee to share their thoughts and speak for the majority of the conversation (The Non-profit Association of Ore-gon, 2016). This ensures the employee feels heard and understood while also allowing them to develop their own solutions to the issues they are facing, which will motivate them to change behaviour patterns to reach their goals (Jimenez, 2020).

A benefit of asking the employee open-ended questions is that it encourages critical thinking. It is important to give the employee time to gather their thoughts, which gives the coach time to contemplate the employee's viewpoint (Schneider, 2018). While an employee is giving their answer, the coach can look for common themes and have some time to develop their response.

Feedforward

The idea of feedforward is that a coaching session focuses on the future performance and pathway of the employee's career instead of giving feedback on events that happened in the past (Kruse, 2012). This vision dispenses with the idea that an employee has not succeeded and needs to be critiqued and instead emphasizes how they will achieve their goals in the future. This positive approach drives employee engagement as well as growth and development (Kruse, 2012).

According to Kruse, there are four key elements to the Feed Forward Coaching Model:

- **Focus on goals, not standards.** Instead of explaining the standards and expectations, speak to the goals the employee is seeking and ask them what they think they can do to get there.
- **Include career guidance.** A coaching session is not just about what is currently happening. The session should include guidance on how the employee can grow and develop in their careers, boosting the employee's motivation to get there.
- **Include data points, not just the manager's opinion.** Feedback may stem from opinions. Feedforward allows you to review data points and identify ways to change them in the future.
- **Takes place during the year, not once annually.** Feedforward is a continuous process. The discussion follows through, throughout the year.

Giving feedback is said to be an ancient practice, and employers are heavily encouraged to implement feedforward check-ins between managers and employees (C, 2018). Studies show that managers and employees both dread annual performance reviews (C, 2018), which is why the feedforward model is now being used in more and more organizations. The feedforward model encourages positive behavioural change under a specific context that drives an employee to reach personal and organizational goals.

The Value of Coaching

Research has proven that coaching is highly effective for individuals and organizations, indicating that individuals who participate in coaching demonstrated dramatic improvements in specific skills and overall performance (Saks and Haccoun, 2018). For employees, coaching can improve working relationships and job attitudes within the organization, which can ultimately lead to an increase in the rate of advancement and salary increases. In addition, coaching unlocks latent potential and reinforces strong skills where they already exist. The company itself will also benefit from coaching, as it is effective in improving productivity, quality, customer service, retention, cost reductions, and reducing customer complaints, enabling the organization to reach peak performance levels (Payne, 2007).

Section 14.3: Test Your Knowledge

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An interactive H5P element has been excluded from this version of the text. You can view it online here:
https://kpu.pressbooks.pub/hrdevelopmentcoaching/?p=795#h5p-14

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Hello, my name is Monica Affleck, and I am an instructor at Kwantlen Polytechnic University, in Surrey, BC, Canada in the School of Business (HR degree program).

The content of this resource was written entirely by 3rd year Human Resources students in the BBA program. It was a great project and learning opportunity for all of us and my appreciation goes to all the students who worked hard to make this a valuable resource for future students and anyone interested in people learning and development.

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