Solutions for Managing Performance through Training and Development 8th Edition by Saks

Solutions

CHAPTER 2
LEARNING AND MOTIVATION

ESSENTIAL OUTCOME

After completing the lesson on this chapter, students should have a grasp on what learning is and how it occurs. They should be able to identify and describe the stages of learning and appreciate how learning styles and preferences impact training effectiveness.

CHAPTER LEARNING OUTCOMES

After reading this chapter, students should be able to:

- Define learning and workplace learning and describe how individuals learn though formal and informal learning methods
- describe how to classify learning outcomes
- explain how people learn using the three stages of learning and resource allocation theory
- use Kolb's learning model and the VARK model to distinguish and describe the different ways people learn and the implications for training
- compare the different theories of learning and discuss their implications for training
- describe the six core principles of andragogy and their implications for training programs
- explain goal-setting theory and why training motivation is important for learning and training effectiveness
- describe the model of training effectiveness

KEY CONCEPTS: HOW DOES THIS CHAPTER CONNECT TO THE WORLD OF TRAINING AND DEVELOPMENT?

1. As students discovered in the previous chapter, learning is key to organizational effectiveness, therefore it is vital for training and development professionals to have a firm grasp of how learning occurs. Appreciating that while formal learning is important, the majority of workplace learning occurs informally (refer to the 70-

20-10 model on page 42) therefore having a grasp on how to facilitate informal learning in organizations (see The Trainer's Notebook 2.1 on page 46) is vitally important.

2. Training is not a goal in and of itself—learning and the development of skills and behavioural changes that result are the goals of training. Learning outcomes help trainers target training to achieve specific learning goals. Classifying learning outcomes using a model like Gagné's classification schemes (described on pages 46–48 and illustrated in Table 2.3) provides trainers with a useful framework for selecting appropriate outcomes, whether they be verbal (declarative knowledge), intellectual (procedural), cognitive, motor skills, or attitudinal.
3. Learning is a process and happens in stages. Learning theories such as ACT (adaptive character of thought) or resource allocation theory provide insight into how these stages occur and have real-world application for trainers in designing effective learning programs.

4. No two people are exactly alike, nor do they learn exactly alike. Learning style theories, such as Kolb's (described on pages 50–51 and illustrated in Table 2.5), and the VARK model (described on pages 51–52) are helpful for trainers tailoring lessons to accommodate the various learning styles and preferences of trainees.

5. An understanding of a few of the more common learning theories (such as conditioning theory, social cognitive theory, and adult learning theory) is also essential knowledge for trainers when it comes to designing and delivering effective training programs. In particular, the differences between how adults learn vs. how children learn (as illustrated in Table 2.6, Teaching Children versus Adults, on page 59, and The Trainer's Notebook 2.3, Implications of Adult Learning Theory for Training and Development, on page 60) should be emphasized.

6. Since motivation also plays a key role in learning, an appreciation of Goal-setting Theory (pages 61–63) helps trainers design and deliver training in ways that tap into both the intrinsic and extrinsic motivations of trainees to help them learn effectively and successfully. This part of the lesson should emphasize the importance of goals (proximal and distal goals and goal orientation), as well as the impact that training motivation has on training effectiveness.

7. Finally, the model of training effectiveness (described on pages 64–66 and illustrated in Figure 2.2) shows the linkages between training, personal factors, and attitudes, and learning and retention, individual behaviour and performance, and organizational effectiveness.

STUDENT MOTIVATION: WHY SHOULD STUDENTS CARE?

Students by their very nature have an inherent interest in learning and can readily identify with its importance and value, so they will easily associate themselves with the central concept of learning. However, they may find it challenging to grasp and assimilate the numerous theories introduced and described in this chapter. It is important, therefore, to emphasize the practical application of each of the theories presented. Students should be able to reflect on their own sources of motivation, which may help the various theories and approaches seem more applicable to their own reality. The Implications for Training section that follows each theory presented should therefore be emphasized and expanded upon where deemed necessary.

BARRIERS TO LEARNING: WHAT ARE SOME COMMON STUDENT MISCONCEPTIONS AND STUMBLING BLOCKS?

Theories are found interesting by some learners, while others may find their eyes glaze over as they quickly lose interest. Should this happen, and it is very likely, it presents a perfect teaching moment to show the practical implications of the theories to the field of training and development. The mixed response, if received, is an ideal time to engage the class in a discussion on why this happens, and what it says about learning styles and preferences and motivation for learning!

ENGAGEMENT STRATEGIES: WHAT CAN I DO IN CLASS?

1. During the first 10 minutes of the class, ask students to take a minute to think about and jot down their motives for taking this course. Ask them to call out their reasons as you record them on a white board or flipchart. Once a suitable number of reasons are cited, ask the class to review the list and identify which of the goal orientation foci (LGO, PPGO, or APGO) as described in page 62 applies to their particular motives. Hold a general discussion on the role motivation plays in learning and conclude this opening exercise by explaining the focus of this lesson is on learning, a topic with which everyone in the room has direct and relevant experience.

2. For In-Class Exercise 5, on page 69: Divide the class in groups of 4–5 students. Ask each group to focus on a specific theory of motivation and use the theory to answer the question. Each team is to present its list of suggested techniques. As an alternate exercise, divide the class in two and have them compete against the clock to brainstorm the most ideas for increasing motivation. Tell them there will be a prize for the winning team. Have a small prize (such as candy) for all members of both teams. Debrief and ask how they felt about competing, and about the motivational effects of rewards and punishments.

3. For In-Class Exercise 6, on page 69: Have students complete the exercise with the help of a learning partner to promote dialogue and deeper reflection and understanding. Have students present their assessments in class.

4. For In-Class Exercise 7, on page 70: Conduct as outlined. Option: Have students present their self-management programs in class or as an assignment.

5. For In-Class Exercise 8, on page 70: Conduct as outlined. Option: Have students present their classification of outcomes in small groups. As a second option, list the benefits on a handout sheet and have students label each to complete the classification exercise. Offer a prize to the student(s) who finish fastest, most accurately, etc. as another way to demonstrate the potential power of extrinsic motivation (rewards).

Suggestions for Large-Class Exercises

a) This is a quick activity to create opportunity for movement and to physically "see" who is in each learning style based on the VARK model as described on pages 51–52. Post four signs around the room, one for each learning style ("visual," "aural/auditory," "read/write," and "kinesthetic"). Ask students to move to the sign that best represents their learning style. In large classes, this may give you about 12+ students per learning style. It is valuable for students to see how many others share their learning style, so the large group is fine. Ask someone to count how many students are in each group and estimate the percentage of the class with that learning style.

b) Continuing from part (a), have the larger groups split up into 4–5 smaller groups (pairs or triads work well) and create a top five list of ways they like to learn. Have the groups come back together and see what elements they have identified are common, and add unique elements to one list. Post these on a flipchart (or white board) for the entire class to review.

Suggestions for Technology-Enhanced Classrooms

a) Use the Internet to locate the VARK learning style questionnaire (http://vark-learn.com/the-vark-questionnaire) and have students complete this.

b) Show photographs (or online images) of famous people who are successful in their field, and who are known to have a high degree of motivation, locus of control, persistence, or perfectionism. Suggestions include well-known sports figures such as Tiger Woods, Wayne Gretzky, Michael Phelps, or entertainers like Beyoncé. Have students discuss ways in which these individuals have shown a high degree of training motivation in learning their "craft" and the personal characteristics they exhibit that influence this.

Suggestions for Internet Classes

a) Ask students to research three famous people whom they believe have shown a high degree of training motivation; have students post their examples and rationale to the discussion board.

b) Have students discuss their decision to take an online course. What factors led to their decision? What factors related to learning style and motivation did they consider?

ASSESSMENT TOOLS

You may wish to make use of the Test Bank or PowerPoint slides, or at the end of a class ask a student to summarize the key points from the lesson.

REFLECTIONS ON TEACHING: HOW CAN I ASSESS MY OWN PERFORMANCE?

Good teaching requires the practice of ongoing self-assessment and reflection. At the completion of this lesson, you may find it helpful to reflect on the following and consider whether you want or need to make any adjustments for subsequent lessons.

1. What worked in this lesson? What didn't?
2. Were students engaged? Were they focused or did they go off on tangents?
3. Did I take steps to adequately assess student learning?
4. Did my assessments suggest that they understood the key concepts?
5. What (if anything) should I do differently next time?
6. How can I gather student feedback?
7. How can I use this feedback for continuous improvement of my teaching?

Suggestion for quick feedback on your teaching: All too often instructors wait until the end of the course to ask students to provide feedback on them as teachers (often from the end-of-course evaluations). While the feedback data derived from these end-of-course evaluations are helpful for subsequent courses, they do nothing to help you adjust to the learning needs and preferences of your current students for this course. By this point in the course, your students should probably have a good idea of your teaching style, and it may be helpful to solicit some feedback from them in terms of how your teaching style and delivery methods help (or hinder) their learning and mastery of the course learning outcomes, so that you can consider making adjustments that might better facilitate their learning. This is an opportune time to execute this feedback exercise as you can readily make the connection between teaching styles and the learning styles explored in this chapter.

One quick and efficient way to accomplish this is by inviting your students to do a "stop-start-continue" exercise. Ask them to divide a page in three with these headings (or give it to them on a handout) and ask them to simply identify the things you do as a teacher that impede their learning (things to stop doing), things they would like you to do that would help them learn (things to start doing), and things you do that help them learn (things to continue doing). An alternate way to gather this data quickly is to supply students with a few sticky notes, and on their way out the door have them place the notes on the appropriately labelled flipchart papers you have strategically (and conveniently) put up near the classroom exit.

If you choose to use this method of gathering feedback, be sure to do the following:

1. Ensure confidentiality—don't ask students to put their names on the feedback and assure them you have no interest in trying to figure out their identity from their handwriting or printing.
2. Related to point 1, ask them to be honest, but in a constructive manner. Reinforce to them that you view your teaching and their learning as a sort of partnership, and that you will take their feedback seriously and in the constructive manner in which it was intended.
3. Be sure to follow up and share with the class a synopsis of the feedback received. Discuss with them what you intend to do with it—the things (big or small) that you are willing or able to change (to start, stop, or continue doing), and those suggestions you will not implement, along with some rationale as to why.

This exercise, if done thoughtfully and with proper execution, can make a significant contribution to creating a more engaging, respectful, and collaborative classroom learning environment.

ADDITIONAL RESOURCES

Chapter Summary

We began this chapter by stating that a major goal of training and development is learning. We then defined learning and workplace learning and explained the difference between formal and informal learning. Then two classification schemes for learning outcomes were described. The learning process was explained in terms of three stages of learning (declarative knowledge, knowledge compilation, and procedural knowledge) and resource allocation theory. Differences in how individuals prefer to learn or learning styles were discussed with respect to Kolb's model of learning styles and the VARK model. Three theories of learning (conditioning theory, social cognitive theory, and adult learning theory) were described along with their implications for training and development. The chapter also described goal-setting theory and different types of goals and their implications for training and development. Training motivation was also discussed along with its predictors and consequences. The chapter concluded with a model of training effectiveness that shows the linkages between training and development, individual factors, trainee attitudes, learning and retention, individual behaviour and performance, and organizational effectiveness.

Lecture Outline

COMMENTS	ACTIVITY

A. Introduction

We engage in learning every day, but how often do we pause to reflect on what learning really means, and how it occurs?

Ask students to provide their own working definitions of learning. After discussion, introduce the definition provided in the text. Define workplace learning and lead a brief discussion on the 70-20-10 model as described on page 42 and in Table 2.2 on page 44. Ask students if this notion fits with their own work experiences.

B. Learning Outcomes

It is helpful to organize types of learning into domains. Perhaps the best-known classification system was developed by Gagné and enhanced by Kraiger et al.

Show a slide of the learning outcome categories and refer to Table 2.3, Learning Outcomes Classification Schemes on page 47. Describe and ask students to suggest working examples for each.

C. Stages of Learning

Does learning happen all at once, or does it occur in stages?

Ask students to consider how they learn—such as right now, for example. Invite them to reflect on what they have learned today, starting from the moment they woke up. Describe Anderson's ACT theory and ask them to consider if it fits with their experience. Highlight an example that would be common to the class and have students discuss this experience.

D. Learning Styles

Do different individuals learn differently? Should we learn in only one way?

Describe Kolb's learning styles and ask students to share training or educational experiences that revealed their learning styles. Consider showing a Web page on Kolb (link listed under Web Links, below).

Consider having students complete the VARK Learning Styles questionnaire (see link in Web Links, below) and conduct the exercise as described in the Suggestions for Large-Class Exercises, above.

Discuss the implications of learning styles for training designers.

Show Table 2.5 on page 51.

E. Learning Theories

Learning has been researched extensively—the result is plenty of theories! They can help us understand how learning happens and use that knowledge to make training more effective.

Conduct this section using the "jigsaw" method. Have students work in "home" teams to first discuss learning generally, then organize them into "expert" teams each focused on a particular theory (Conditioning Theory, Social Cognitive Theory, and Adult Learning Theory).

Then have them return to their home teams to teach each other. Debrief by calling randomly on individual groups and group members.

Identify the differences between the theories. Identify their relation to learning.

F. Motivation

Highlight goal-setting theory and discuss the aspects of goal orientation as described on pages 62–63, emphasizing the implications for training. Remind students that our interest in this section is in relation to its impact on learning. Review the difference between distal, proximal, learning, and performance goals.

Ask students to identify one of their own distal, proximal, learning, and performance goals. Share these with a partner.

G. Training Motivation

What are the predictors and consequences of a trainee's motivation to learn?

Describe training motivation and discuss the importance of locus of control and ask students to consider their own. Ask students to think about a goal they have set for themselves, then have them pair up and share their goals with their partner. Have them consider and discuss how personally motivating their described goal is to them, and to consider how motivational goal-setting theory may be, and why it might not always be so motivating in many cases.

H. A Model of Training Effectiveness
Training and learning are linked to each other, as well as to individual and organizational performance.

Put up a slide or overhead of Figure 2.2. Describe it. Refer to Chapters 4 and 9 and introduce the topics of training design and transfer of training.

Web Links

Business Balls is a virtual treasure trove of resources for trainers. An excellent overview of Kolb's learning styles theory: https://www.businessballs.com/self-awareness/kolbs-learning-styles-64/

InstructionalDesign.org is another excellent resource. A link to its overview of Gagné's work:
http://www.instructionaldesign.org/theories/conditions-learning.html

Many free learning styles inventories are available online. Not all have been scientifically validated, but each is helpful to some degree in helping learners shed some light on their learning style preferences. Here is one from EducationPlanner.org that is appropriate for inclusion in an online class or as a takeaway assignment in a face-to-face class:
http://www.educationplanner.org/students/self-assessments/learning-styles-quiz.shtml

The VARK learning style questionnaire as described in the body of the chapter can be found here: (http://vark-learn.com/the-vark-questionnaire/)

Suggestions for End-of-Chapter Exercises

1. For In-Class Exercise 1, on page 69: Ask for a volunteer to describe a friend or acquaintance (no real names, please!). As a problem-solving exercise, ask the class to brainstorm ways to increase the subject's self-efficacy and list their suggestions on a board or flipchart. Review the list and ask the class to pick out the best suggestions and explain their choices.

2. For In-Class Exercise 2, on page 69: Conduct exercise as described, having students work in small groups of 3–5.

3. For In-Class Exercise 3, on page 69: Ask each student to submit a copy of their goals to you. Review and provide feedback. An additional option is to review the goals and actual achievements at the end of the course. Alternatively, discuss whether students have typically set goals in other courses they have taken. Discuss the nature of these goals and their impact on performance.

4. For In-Class Exercise 4, on page 69: As an alternate to a course, ask students to consider an actual workplace training experience they have had recently.

5. For In-Class Exercise 5, on page 69: Without naming names, ask students to keep their favourite course and/or favourite in mind as they consider the question.

6. For In-Class Exercise 6, on page 69: have students pair up to discuss their responses to this exercise. Emphasize working together in a non-judging manner and to respect each other's confidentiality.

7. For In-Class Exercise 7, on page 70: conduct as described.

8. For In-Class Exercise 8, on page 70: assign half of the class to conduct the exercise using Gagne, and the other half using Kraiger, Ford and Salas.

9. For In-Class Exercise 9, on page 70: conduct as a small group or table group exercise.

10. For In-Class Exercise 10, on page 70: consider assigning as a take-home exercise (for marks or perhaps for bonus marks).

Case Incident: Management Training at IKEA

Suggested Answers to Case Incident Questions:

1. Students should refer to Table 2.3 on page 47 to answer this question. They should be able to ascertain that manager training would more than likely involve most of the categories in Gagné's classification, perhaps with the exception of motor skills. They should further be able to determine that the training would likely focus on the cognitive and affective domains in the Kraiger, Ford, and Salas classification scheme. In answering the second part of the question about management competencies, they should be able to list things like supervising people, managing projects and budgets, etc., and state that both formal and informal learning would likely be involved, as described in the chapter.

2. Students should conclude that the training program involves the three stages incorporated in the ACT theory: managers will learn facts and theory through the courses (declarative knowledge) and integrate their new learning with what they already know through their practicum assignments and job shadowing (knowledge compilation and procedural knowledge). A change that students might recommend could be further formal opportunities to apply their learning once back in their home store (with the support of a mentor, perhaps).

3. Students should be comfortable listing and describing Kolb's four learning modes, as illustrated in Table 2.5 on page 51. While answering the question specifically is challenging given the limited information provided about the Kolb model as well as about the case, they should be able to relate to the concept that people learn differently and have different preferences for how they learn, and that the IKEA training more than likely provides opportunities

for all four modes of Kolb's model to be used.

Case Study: The Performance Appraisal Training Program

Suggested Answers to Case Study Questions:

1. Students should be able to answer that the expected learning outcomes involve verbal information, intellectual skills, cognitive strategies, and, perhaps most importantly, attitudes (internal states)—which seems to be the aspect of the training most needed but most lacking.

2. Conditioning theory explains that learning is a relatively permanent change in behaviour in response to a particular stimulus. The conditioning process emphasizes the importance of consequences of behaviour—in this case, there did not seem to be any consequence (positive or negative) to the supervisors learning or applying what they were supposed to learn in their training, so it should come as little surprise that there was no real change in behaviour as a result of the training. Social cognitive theory might explain the power of peer pressure (in this case negative), which led the supervisors to not take the training seriously (for example, the role-play exercise). Having consequences for applying the skills acquired (positive or negative reinforcement) as well as some positive role modelling (either through supervisors who were committed to the performance management process leading by example, or by having senior leaders in the training modelling the training behaviours) might have improved the training outcomes significantly.

3. Students should be able to list and describe the adult learning principles listed in Table 2.6 on page 59. In their answers they might note the ingrained habits and attitudes (lack of openness to change) as the greatest single challenge in terms of the effectiveness of this training initiative. They should refer to the list of implications for training (The Trainer's Notebook 2.3 on page 60) and might comment that perhaps there was not enough emphasis on conveying the importance of the training, and that the role play may not have provided safe practice opportunities.

4. Students should likely be able to conclude that the training likely suited CE types (Kolb model) and Auditory Learners (VARK) the most; however, it is possible the training provided opportunities for all four learning styles to be used at some point during the training to varying degrees. To improve the program, they may suggest things like more practice opportunities, more use of visual material (e.g., infographics, videos, etc.), more time for reflection on what was learned (including modelling professionalism while participating in workplace training), or more time for group discussion.

5. Students should be able to identify that learner motivation was a significant problem, and that both intrinsic and extrinsic motivation was lacking (intrinsic because the supervisors did not see value in the training, and extrinsic because there did not seem to be any consequence tied to applying the skills that were to be acquired through the training). The consultant could have worked with administration to increase training motivation through the setting of training goals, establishing expectations for application, and establishing some consequences for behaviours exhibited by the trainees both during and after the training session.

Flashback Answers

1. Benefits of performance appraisal training:
    - Refer back to Figure 1.1 in Chapter 1 (page 6) and note how performance goals start the process, on which feedback is provided, leading to the evaluation of the performance, all the while supported by appropriate employee development interventions. Having supervisors trained in this process helps the organization achieve its goal of implementing the new nursing job requirements and assist the nurses by identifying the training supports they require in order to be effective. Without this training and support it is unlikely the new nursing model skills expected will be evenly practised, resulting in uneven quality of care.
2. Training vis-à-vis the instructional systems design (ISD) model (refer back to Figure 1.4 on page 25):
    - It is evident that a proper needs analysis was not conducted. Assumptions were made that the problem (performance appraisals were not being conducted) was a training problem. Lack of skill on the part of the supervisors in knowing how to conduct proper performance appraisals may have been part of the problem, but attitudes and motivations toward appraisals were also a significant barrier to performance. Had this been taken into account during the person analysis stage of the needs analysis, it could have been addressed both within the training design and delivery context (dealt with in terms of the training objectives, content, and methods), as well as outside the training context in terms of providing incentives to implement, removing obstacles inhibiting implementation, or both.

Flash Forward Question

Students should refer to Figure 3.1, The Needs Analysis Process (page 83) and work their way through the flow chart to assist with answering this question. The Trainer's Notebook 3.2, The Training Solution Checklist on page 98 and Table 3.3 Performance Problems and Training on page 99 would also prove quite helpful. Students should be able to ascertain that the gap or deficiency related to the fact that the supervisors were not conducting the performance appraisals as required;

however, it is unclear whether that was due to a skills deficiency (which may require a training solution) or some other obstacle or barrier, which may not require a training solution but could be addressed by other means (such as introducing incentives/consequences, for example).

Rewrite the Case Question: Kolb's Learning Cycle

Using Table 2.5, Learning Styles (page 51), students should write something along the lines of the following:

"The training consultant delivered a training session designed around Kolb's Learning Cycle. The consultant first gave the nursing supervisors an opportunity for a concrete experience by having them run through a mock performance of an appraisal session with a learning partner (learning by experience), followed by having them observe and critique a video of a properly run performance appraisal session and then comparing it to the one they just experienced (learning by reflecting). The nursing supervisors then had an opportunity to work with their learning partner to consider how they might adapt the mock session they ran to be more like the properly run session they observed in the video (learning by thinking). Finally, the nursing supervisors re-did their mock performance appraisal session, incorporating the changes they identified with their learning partners (learning by doing)."

Running Case Study: Dirty Pools

Suggested Answers to Case Questions:

1. Both declarative and procedural knowledge involved; the outcomes will need to include cognitive strategies and attitudinal training, and to some extent motor skills will be involved (e.g., manipulating equipment used to collect and test water samples). Similarly, cognitive, skill-based, and affective outcomes will apply.

2. Conditioning theory can be put to good use as the trainees learn specific skills (shaping) and have them reinforced by the trainer (or virtual trainer, if the training is delivered online); learn to perform complex tasks such as running tests (chaining); and applying what was learned during training on the job in conditions that could be different (generalization). Social cognitive theory could apply through the use of behaviour modelling by the trainer or experts, having trainees learn collaboratively (learning teams, learning partners, etc.), and by being sure to help build self-efficacy in the trainees as they attempt to learn new skills.

3. Adult learning principles could include involving trainees in the design of the training, emphasizing the value and importance of the training, drawing on the trainee's prior experiences where feasible, and possibly providing options for how to receive the training (e.g., classroom or online).

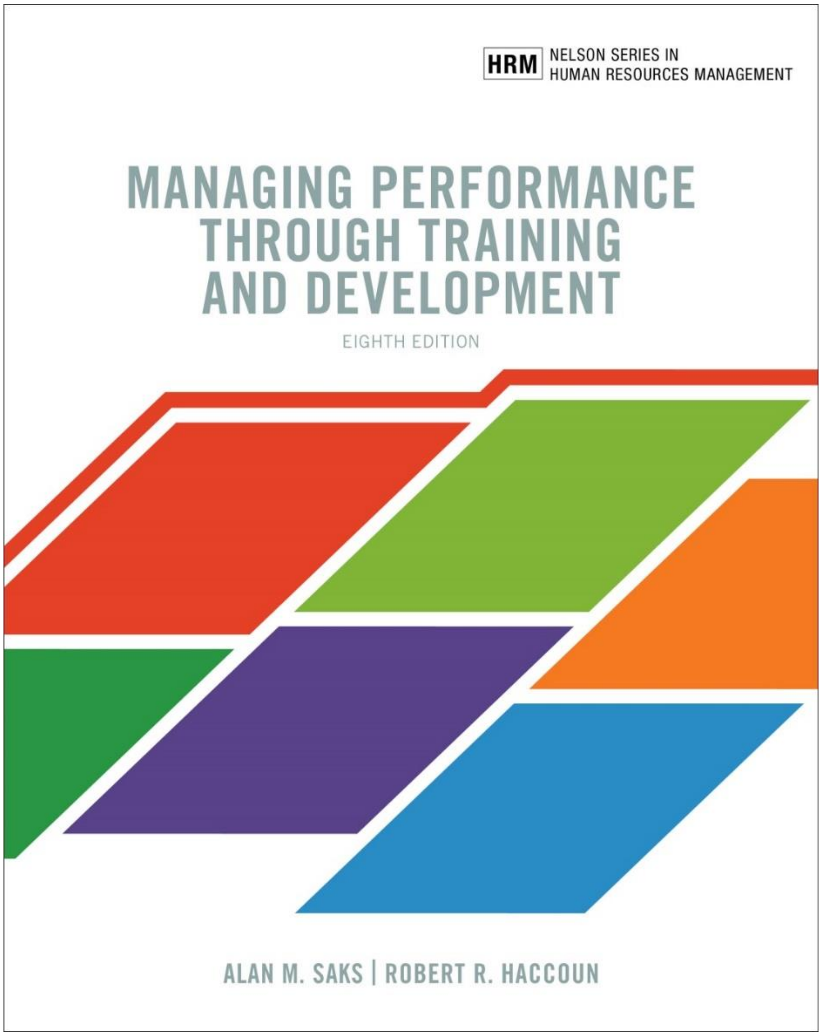
4. Trainees should have a healthy balance of intrinsic as well as extrinsic motivation. They can set their own learning goals and mesh them with the

overarching goal of successfully completing the mandatory aspects of the training along with the consequences they entail (e.g., keeping your job!).

5. While formal learning can be a valuable way for pool operators and employees to acquire technical skills and competencies, informal learning is a great way for them to transfer those skills and competencies to their day-to-day duties. Both should be used in conjunction to increase the effectiveness of the training program.

CASE NOTES

to accompany



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CHAPTER 1
The Training and Development Process

Case Study: Flotation Ltd.

Suggested Answers to Case Study Questions:

1. Sam relies on his “likability,” but is probably not as effective as the organization needs him to be in leading training. He is out of date and out of touch with the changes taking place in his industry and his company.

2. At present, it would be difficult to say that the training offered is strategic. Other than knowing that there is a general goal of increasing productivity by 50 percent, more information on the specific organization goals is necessary in order to develop training goals that are aligned with those of the organization.

3. Sam does not apply the ISD model. He does not conduct any sort of training needs analysis, and instead just keeps recycling the same courses over and over and has done so for years. While his courses are popular, they have not been adequately assessed to determine if they are effectively designed and delivered. The courses are not formally evaluated, no evidence of transfer of training is solicited or collected, and no return-on-investment calculations are made.

4. As per the previous question, there is no formal evaluation of Sam’s training programs—he simply relies on anecdotal evidence such as hearing that staff viewed his training as a “reward.” In order for Sam to evaluate his training programs based on the president’s objectives, he would first need to gain more detail and clarity on the objectives themselves (and push for metrics, if not readily offered), then conduct a thorough training needs analysis to determine where training might be a strategic solution to problems standing in the way of the president’s objectives being achieved.

5. Jenny would first want to conduct a complete audit of the current training programs and compare them to the new company objectives, looking for obvious gaps that need to be filled. She would want to prepare a proposal for the president that included using the ISD approach to assess, design, deliver, and evaluate training focused on helping the company achieve its strategic objectives.

CHAPTER 2
Learning and Motivation

Case Study: The Performance Appraisal Training Program

Suggested Answers to Case Study Questions:

1. Students should be able to answer that the expected learning outcomes involve verbal information, intellectual skills, cognitive strategies, and, perhaps most importantly, attitudes (internal states)—which seems to be the aspect of the training most needed but most lacking.

2. Conditioning theory explains that learning is a relatively permanent change in behaviour in response to a particular stimulus. The conditioning process emphasizes the importance of consequences of behaviour—in this case, there did not seem to be any consequence (positive or negative) to the supervisors learning or applying what they were supposed to learn in their training, so it should come as little surprise that there was no real change in behaviour as a result of the training. Social cognitive theory might explain the power of peer pressure (in this case negative), which led the supervisors to not take the training seriously (for example, the role-play exercise). Having consequences for applying the skills acquired (positive or negative reinforcement) as well as some positive role modelling (either through supervisors who were committed to the performance management process leading by example, or by having senior leaders in the training modelling the training behaviours) might have improved the training outcomes significantly.

3. Students should be able to list and describe the adult learning principles listed in Table 2.6 on page 59. In their answers they might note the ingrained habits and attitudes (lack of openness to change) as the greatest single challenge in terms of the effectiveness of this training initiative. They should refer to the list of implications for training (The Trainer's Notebook 2.3 on page 60) and might comment that perhaps there was not enough emphasis on conveying the importance of the training, and that the role play may not have provided safe practice opportunities.

4. Students should likely be able to conclude that the training likely suited CE types (Kolb model) and Auditory Learners (VARK) the most; however, it is possible the training provided opportunities for all four learning styles to be used at some point during the training to varying degrees. To improve the program, they may suggest things like more practice opportunities, more use of visual material (e.g., infographics, videos, etc.), more time for reflection on what was learned (including modelling professionalism while participating in workplace training), or more time for group discussion.

5. Students should be able to identify that learner motivation was a significant problem, and that both intrinsic and extrinsic motivation was lacking (intrinsic because the supervisors did not see value in the training, and extrinsic because there did not seem to be any consequence tied to applying the skills that were to be acquired through the training). The consultant could have worked with administration to increase training motivation through the setting of training goals, establishing expectations for application, and establishing some consequences for behaviours exhibited by the trainees both during and after the training session.

CHAPTER 3
The Needs Analysis Process

Case Study: The Incident and Apology

Suggested Answers to Case Study Questions:

1. Consider asking this question in the form of a poll (approve vs disapprove). Probe students to justify their position, looking for various perspectives including those of the club members; non-member guests; the general public; and, of course, the mother.

2. Students should be able to infer that the club's CEO and board president acted out of desire to protect the reputation of the club and therefore were not willing to wait for a needs analysis as they wanted to be seen as acting quickly and decisively, and in a manner seen as being supportive of the mother. A needs analysis may or may not have validated the decision to provide sensitivity training to staff, but it would have almost certainly helped in determining whether or not staff were conversant with the province's human rights code.

3. Students should be able to work through each step of the process model. It should be obvious that the concern was important, so therefore the next step would be to consult stakeholders (in this case, the board of governors and the club membership). They should then be able to describe examples of information collection from the three categories of analysis (e.g., the club's strategic plan as an example of organizational analysis, staff job descriptions as part of the task analysis, and individual or team interviews or staff surveys as part of the person analysis). For outcomes, they might infer that club employees are unaware of the human rights code or that some staff have personal biases that may cause them to act in a discriminatory fashion.

4. Students might cite the examples as listed above or suggest other methods and sources from Table 3.4, such as observation of staff while interacting with patrons, or key consultation with club members.

5. Students might identify non-training solutions such as clarifying expectations

and/or providing feedback. Ultimately, they will likely conclude that training does need to be part of the solution and point to the sensitivity training promised as part of the apology, along with training on the Ontario Human Rights Code. Some students might suggest that the training is necessary only for staff who interact directly with members and guests, while other students may make the case that the club needs to make a cultural shift; therefore, the training should be mandatory for all employees (and perhaps even for the board members).

6. Students might suggest things such as including this training in new employee orientation training, providing booster sessions to help ensure the training "sticks" (this is an opportunity to preview Chapter 9, Transfer of Training), and ensuring there are serious consequences for employee non-compliance with the Code.

CHAPTER 4
Training Design

Case Study: Training the Sales Force

Suggested Answers to Case Study Questions:

1. The objectives of the training program had to do with increasing sales, and one can surmise that they mostly had to do with training in basic sales techniques (which many of the trainees indicated they already knew). In writing a sample objective to answer the next part of the question, students should be sure to include the requisite elements and components and should be able to speak to how a well-written training objective can help focus training and provide both trainees and their managers with a better idea of what the focus of the training will be.

2. The decision to purchase was one of convenience and time savings and suited the decision makers because they wanted to be seen as taking quick action to solve the problem of declining sales. The advantage of quick implementation was overshadowed by the disadvantage of not having any customization in order to address the specific needs of the company. While a training program developed in-house would have offered that customization, it still would have been ineffective if it did not focus on solving the real problem—something that was not identified because a proper needs analysis was never conducted.

3. An RFP likely would not have made too much of a difference in the absence of a proper needs analysis, because the decision makers would likely still have been fixated on training in sales techniques and would have emphasized this in the RFP.

4. The effect of not conducting a new needs analysis was huge. It led to the assumption that poor sales techniques were the problem, when really the problem seemed to have more to do with a lack of product knowledge by the sales force, who stated

they were overwhelmed with trying to keep up with all of the new products that were being quickly introduced. If a proper needs analysis had been done, the focus of the training would have been on helping the sales force acquire the requisite product knowledge rather than on sales techniques. As the product knowledge needed by the sales force was housed internally (by the design engineers), this would have led to the decision to design and deliver the product knowledge training in-house.

5. The reliance on Web-based training was not likely the best choice in this instance, because it created the feeling among the trainees that they were just “going through the motions,” slogging through slow and boring training material that did not teach them anything new. If the focus of the training had been on product knowledge, it is possible that at least some of it could have been delivered effectively via the Web; students should appreciate that the focus of the training, not the delivery modality, was the real problem.

6. In answering this question, students should be able to pull together the ideas discussed in the preceding questions. They should appreciate the importance of the needs analysis process in determining the real training need to solve the cause of the poor performance and suggest training objectives and content related to product knowledge rather than sales techniques. They could suggest a range of training methods that could be used to accomplish such objectives.

CHAPTER 5
Off-the-Job Training Methods

Case Study: The Customer-Service Training Program

Suggested Answers to Case Study Questions:

1. Students should be able to state that while the training program was successful based upon the test scores and trainee reaction, it failed in that it did not result in the desired behaviours the training was intended to produce. Students should note that while trainees may have been trained cognitively and may have been provided with helpful knowledge, the training did not provide opportunity for practice and application of the new knowledge.

2. Students should identify lecture, discussion, and possibly case study/case incident through the use of the video examples. They could also suggest that the video segments showing ineffective and effective customer service served as a sort of behaviour modelling training. Students might suggest that these methods were appropriate but not adequate as they did not provide opportunities for practice.

3. To provide opportunities for practice, students should identify role play and possibly action learning as good choices to supplement the other training methods and provide the practice opportunities that were lacking.

4. Students will likely have answered this question in their responses to Question 3 (with emphasis on role play as the preferred training method).

5. Students should appreciate the significant impact that training methods can have on training outcomes and training effectiveness. This is a good opportunity to reinforce how having thoughtful and well-written training objectives can help with the selection of the appropriate training methods.

CHAPTER 6
On-the-Job Training Methods

Case Study: TPK Appliances

Suggested Answers to Case Study Questions:

1. Students should be able to explain through the four steps of job instruction training that while in essence Jacob received some job instruction training, the preparation was inadequate and not well thought out; the instruction was rushed and too basic as evidently the supervisor had no training in proper delivery of on- the-job training and was too busy to give it much thought; the performance stage did not include a variety of conditions that reflected the actual conditions of the job (for example, what to do when the machine malfunctions); and there was inadequate follow-up to check for problems and to ensure performance.

2. Students should note that this case illustrates many of the problems with on-the-job training in that it is often not treated seriously or given enough attention, and is often unevenly executed depending on variables including the skills and attitudes of the person delivering the training (often a supervisor or co-worker who may not have any training on how to train on-the-job). They should appreciate that this case illustrates that even seemingly simple tasks require an adequate amount of thoughtful training in order to ensure desired performance.

3. It should be apparent that the supervisor should have followed the four steps of job instruction training more thoroughly. Specifically, he should have spent more time on the preparation, making Jacob feel more comfortable and confident. The instruction should not have been so rushed and should have included instruction on how to solve common problems that may be encountered when performing the job, which could have been included in the performance stage by simulating those problems and guiding the trainee through the process of dealing with them safely and effectively. Finally, students should note the importance of follow-up as a proactive aspect of training rather than a reactive one after a problem occurs or performance is seen to be inadequate.

4. This question could be combined with the previous one, with students identifying elements of the four steps of job instruction training as suggested above.

5. Students should reference Table 6.1 on page 180**;** they may suggest a performance aid that illustrates steps to take when adjusting equipment, or that Jacob could have been assigned a coach to work with him until he was comfortable and proficient with the operation of the machine he was operating.

CHAPTER 7
Technology-Based Training Methods

Case Study: E-Learning at Flotation Ltd.

Suggested Answers to Case Study Questions:

1. Students may have (and should be encouraged to have) varying opinions as to whether e-learning was or wasn't a good idea. Some might argue that this sort of updating of training was necessary, while others might take a "if it's not broken" stance. Clearly there was an expectation of change related to training from the company president, but the conversation opportunity centres around whether the approach taken was the best one, and whether it was designed, introduced, and implemented effectively.

2. Students should pick up on the fact that part of the problem may have been that a training program designed for classroom delivery had been "tweaked" for online delivery, the result being an e-learning course that was not seen as very interesting, engaging, or effective. Low participation and completion rates are the primary indicators of the program's lack of success.

3. Students should point to the need for some detailed evaluation of the training program as well as the messaging around it. Additional promotion to increase participation might be worthwhile in order to generate a larger sample size to evaluate six months down the road. As e-learning is new to both Jenny and the organization, this less-than-perfect introduction should serve as a learning opportunity rather than a failure that results in abandoning e-learning altogether.

4. Students might point to the fact that employees liked the classroom-based training they were accustomed to (recall from the case that some employees viewed training as a reward). Others might comment on the natural tendency people have to resist change. Still others may point to some of the design and implementation flaws that were responsible for trainees not embracing the new delivery platform or feeling that the program lacked interest and value. Suggestions for changes/improvements might include more communication on the reason for switching from traditional to e-learning and the expected benefits to both the company and to employees; enhancing the course with games, quizzes, or other engaging activities; or even tying completion of the course to employees' performance goals as a way of increasing participation and completion rates.

5. Students should reference the section on Web 2.0 on pages 220–221. In particular, they should cite the need for learner initiation and control (generative learning), the use of variety of media, and opportunities for learners to engage with one another through social media as they work through the content (communities of practice).

Case Study: The Korea Ginseng Corporation

Suggested Answers to Case Study Questions:

Part 1:

1. Students should refer back to Figure 1.3, A Strategic Model of Training and Development, in Chapter 1 (page 21) and conclude that the training objectives of enhancing employees' core product and market knowledge across the organization is directly connected to the Korea Ginseng Corporation's business strategy.
2. Students should refer to Figure 3.1, The Needs Analysis Process, in Chapter 3 (page 83) and identify aspects of organizational analysis, task analysis, and person analysis as part of the process followed by the Korea Ginseng Corporation HRD department as they went about identifying core organizational knowledge key words across the company's seven business units. Students should identify the consultation with department heads and SMEs across the business units as a strength, but the lack of any consultation at the worker/trainee level as a weakness.
3. Students might point out that employees were not taking advantage because the importance of the training was not adequately communicated to them, and may also reference the lack of consultation at the needs analysis stage as a potential contributor to the lack of interest in the training program.
4. Students may point to the principles listed in The Trainer's Notebook 7.2, Design Principles for Computer-Based Training (page 227) for inspiration to answer this question in addition to suggesting design element features such as described in the preceding section Designing Effective Technology-Based Training Programs (pages 223–227).

Part 2:

1. Students should refer back to the resources they used to answer the previous question. They may or may not feel that the decision to incorporate gamification was a good idea but the important thing is that they justify their opinion ("yes" because it will help generate interest, "no" because the potential benefit does not justify the expense, etc.). They may point to the research cited on page 225 that found gamification increased self-efficacy, declarative knowledge, procedural knowledge, and retention, all of which are relevant to the training in question. On the negative side, students might note that other studies have shown that other less expensive training options have proven to be just as effective.
2. It is very likely that most students will anticipate a positive reaction to the new training format based on their own experiences with computer games.

Part 3:

1. If students define effectiveness based on trainee participation and feedback, then invariably they will state that the new format was more successful than the original.
2. The positive changes speak well for the decision to "gamify" the training program and to the use of games and gamification as a means to increase trainee involvement and engagement.
3. The lessons to organizations emphasize the need to move beyond the status quo and to ensure training design and delivery is incorporating and leveraging the opportunities that computer-based training presents. It also may speak to the changing desires and expectations of employees, which may be significantly impacted by generational changes within the workforce.

Part 4:

1. There are many lessons contained within this case. A few that may be identified by students include the following: one-size does not fit all—not all employees will want to or enjoy playing computer-based training games; keeping the game fresh and current is important but so is making sure the game is fun and engaging; the commitment to finding and continually adding substantial amount of content may be problematic; and overall, the decision to use gamification for training requires substantial resources and expertise.
2. Most students will likely concur that the use of gamification was a good idea. In addition to achieving the objective of increasing core business and product knowledge across the organization, the training helped break down organizational silos and helped foster new relationships among employees and management alike.
3. Students should flip ahead to Chapter 10, Training Evaluation, to help answer this question. Without going too deep into this chapter, encourage students to review and attempt to apply Kirkpatrick's Hierarchical Model: The Four Levels of Training Evaluation (pages 325–327) as they answer. They should be able to conclude that ideally the company would want to conduct at minimum a Level 3 evaluation, and ideally a Level 4 evaluation in order to meaningfully determine the effectiveness of the gamification training program.
4. Students might advise that organizations should conduct a proper needs analysis to determine that the problem they are trying solve is important enough to allocate the considerable resources required to develop an effective gamification training program, and that the training will have a high probability of addressing the problem effectively. While organizations should not shy away from trying something similar to what KGC did, they need to do so cautiously and deliberately and be prepared to invest the necessary resources.

CHAPTER 8
Training Delivery

Case Study: The Houghton Refrigeration Company

Suggested Answers to Case Study Questions:

1. Students should refer back to the section on the trainer on pages 254–256 when answering this question. They should look at desirable trainer characteristics including being expressive and engaging, and conclude that the trainer selected by the president did not exhibit these characteristics. They might conclude that the president should have made a point of selecting a trainer who was more outgoing and engaging, but some might suggest that with some proper train-the- trainer support (and perhaps some coaching) that Bill could learn to deliver the training in a more engaging way.

2. Students should expand upon their answers to the previous question and note that, while Bill had some subject-matter expertise (likely from his previous course experience and involvement with the Red Cross), he lacked effective delivery skills. They might suggest that he include aspects of social-cognitive theory such as role modelling, build in a role play demonstrating effective and ineffective lifting techniques, and provide opportunities for active practice followed by feedback.

3. It seems that the training was delivered on a department-wide basis, with little or no consideration for the need for the training. Students should be able to pick up on this and suggest that the training be targeted to employees who actually are required to lift heavy objects as a part of their job duties.

4. It is likely that little or no thought was given to the learning climate, something that Bill might have been more cognizant of had he received some train-the-trainer support. Students should review the recommendations on pages 264–265 and suggest that these ideas be incorporated into the training.

5. Students should refer to Table 8.5 on pages 265–266 in their answer to this question. They should be able to note that most of the nine events were either minimally present or altogether absent from Bill's training, which focused almost entirely on event 4 (present the material to be learned), and this was rushed and scant in terms of content. This is an excellent opportunity to reinforce the importance of all nine events and press the point that effective training is much more than just delivering content material.

6. The problems all relate back to the absence of Gagné's Nine Events of Instruction, and the suggestion students should make is for Bill to acquire skill in this area through a train-the-trainer program.

CHAPTER 9
Transfer of Training

Case Study: The School Board

Suggested Answers to Case Study Questions:

1. In answering this question students should refer to Table 9.3, Barriers to the Transfer of Training, found on page 285. Students might identify lack of management support, the dysfunctional work culture, systems that were not supportive of using the skills acquired during training, difficulties in changing old habits, and even the apparent lack of a reward system, among other possibilities.

2. Students can build on their answers to the previous question and will likely assign most of the responsibility to supervisors who appear to favour top-down communication and evidently did not participate in the training program. They also might point to senior management as part of the problem for their tacit approval of the current culture, and even to the trainees who, at least based on the post-training comments solicited by the trainer, had little expectation of actually transferring the skills acquired in training to the workplace.

3. Again, this is a good time to have students revisit Chapter 3 and work through the Mager and Pipe flowchart for training needs analysis to try to determine if training is in fact the solution (or part of the solution), suggesting that other interventions are necessary such as changing management behaviours around top-down and one-way communication practices. Students might also suggest that while the training seemed to include many positive activities and features, more could have been done to promote transfer; they might cite some of the transfer strategies listed in Table 9.4 (pages 290–291), with particular emphasis on the "during training" strategies that the trainer had the most control over.

4. Students should be able to identify and appreciate that the training transfer climate was poor, as evidenced by the lack of management participation and the low expectations of transfer on the part of the trainees, both of which are significant factors contributing to the lack of transfer.

5. Students may suggest that Carlos needs to be assertive with the superintendent in order to address the underlying problems inhibiting the desired transfer. He could use the Mager and Pipe needs analysis tool to guide the conversation with the superintendent, which might lead to changes including the insistence that supervisors participate in the training, the setting of clear expectations and consequences related to post-training behaviours, etc. They might also suggest some changes or enhancement to the training design, including the use of relapse prevention strategies.

CHAPTER 10
Training Evaluation

Case Study: The Alcohol/Drug Abuse Prevention Program (ADAPP)

Suggested Answers to Case Study Questions:

1. These questions are best delivered as either a homework assignment or as an in-class team-based exercise. Students will address the subsequent three questions as components of this question. Encourage them to model their evaluation form on the samples included in this chapter (Table 10.2–Table 10.4), or provide them with samples of your own choosing.

2. Students can select any of the three models described in this chapter, but should be required to explain and justify their selection. Some might feel more at ease with the Kirkpatrick model; however, others may see the value in the other two models in that they provide the opportunity to delve more deeply into specific issues or concerns as aspects of the evaluation (formative and summative).

3. Students should use Table 10.1 (page 330) as a resource when answering this question. They may make a valid case for any of the variables listed, but should be able to justify their recommendations along with the mechanisms (e.g., questionnaires, observations, organizational records, etc.).

4. Students should be able to explain the benefits of pre-post and time series designs, but also appreciate the difficulties (including time and costs) of choosing these designs over the more common post-only approach. As it is somewhat reasonable to conclude that the training is the primary factor influencing post-training behaviour and results, it would not be unreasonable for students to conclude that a post-only evaluation would suffice; however, as the stakes are high in terms of the desired outcome (effective implementation of the ADAPP policy), a strong case can also be made that at least a pre-post design should be used.

CHAPTER 11
Training Costs and Benefits

Case Study: DATAIN

Suggested Answers to Case Study Questions:

1. In answering this question students should be sure to use the costing categories listed in Table 11.1 on page 363.

   - Direct costs include the trainer's cost ($1,600), lunch for the trainees ($250), and refreshments ($50).
   - Indirect costs include administrative costs ($240).
   - Developmental costs include need analysis ($2,000), the program development fee ($5,000), and evaluation costs ($2,000).
   - Overhead costs include portion of heat, electricity, etc. ($100).
   - Trainee compensation costs include trainee's wages ($3,000).

   Total program costs = $14,240

2. Students should calculate benefit, net benefit, benefit–cost ratio, and ROI in a similar fashion to Case Incident 2.

   Students' recommendations should be based on their calculations, with a particular focus on net benefit and ROI. These are, however, difficult to calculate without knowing the standard deviation of performance. One could conclude that although the claimed reduction in errors and mistakes as a result of the training is relatively similar in both proposals, the anticipated rate of turnover is much lower in the training consultant's proposal (a 90% reduction vs. a 60% reduction for the e- learning program), and as the cost of turnover is a major cost consideration (estimated to be $5,000 per employee), that alone would suggest the consultant's proposal stands to have a greater overall benefit and should therefore be the recommended option.

3. Other factors the company should consider when deciding which program to go with include trainee preferences and the company culture for degree of "fit," as well as the track record (based on referrals and recommendations) of each of the training vendors.

4. To conduct a utility analysis, the owners would need to attempt to determine the length of the training effect and the effect size, along with a standard deviation of job performance. Assistance in determining these numbers could be solicited from the training vendors.

CHAPTER 12
Training Programs

Case Study: The Foreign Assignment

Suggested Answers to Case Study Questions:

1. Students should be able to identify that the primary reason behind Fred's pending decision to leave is culture shock, which is affecting both him and his wife, but in different ways. (Many of your students will likely be able to relate to this on a very personal level, especially if they are international students or newer Canadians.)

2. Students will have varying opinions on whether the decision was a good one. Some will point to the value of new experiences (both for Fred and his family) and others will suggest that this was not a good idea because of the ages of his children (interestingly, they seem to be least affected by the move to Tokyo based on the information available in this case). Others will point out the financial and career gains, while some will question whether the risks in these areas outweigh the potential rewards.

3. Students should clearly see that the preparation for this overseas assignment was seriously lacking. Answering this question provides an excellent opportunity to discuss how much responsibility Fred (and by extension, his family) should have taken for this, and how much rests with the company. The discussion should focus around how Fred and his family could have better informed themselves both pre- departure and post-arrival (in spite of the time demands described), and the need for a much more proactive role by Fred's company.

4. Students should be able to identify some of the more basic problems like difficulties getting around, buying things, meeting people, entertainment options, etc.) (which often seem minor at first, but can become significant as the "honeymoon" phase wears off), as well as the cultural faux pas that Fred made at work as a result of not understanding Japanese culture and communication styles (such as subordinates and clients not providing clear direct answers to questions). Students should be able to suggest how cross-cultural training along with a robust orientation to the new surroundings (Tokyo) both pre-departure and while settling in would have helped immensely. Students should refer to Table 12.3 on page 395 and The Trainer's Notebook 12.1, How to Design an Effective Cross-Cultural Training Program, on page 396 to help them answer this part of the question.

5. Students should carefully re-read the paragraphs on pages 395–396 dealing with cultural toughness, communication toughness, and job toughness. Significant cultural distance exists between Japanese culture and American culture, so for Fred the

cultural toughness would score high (at the same time, students should consider how it could be even harder if Fred were relocated to a country much less developed than Japan). Similarly, communication toughness would be rated high as a result of differences in communication styles, and also because of a lack of language fluency, which creates a reliance on translation (you may even consider showing a clip from the movie *Lost in Translation* if you have time). In terms of job toughness, students should be able to appreciate that while Fred evidently was very competent and capable at what he does, he was used to working in a very different context—so under the new circumstances, his job toughness situation would also be rated as fairly high.

6. Referring again to Table 12.3, students should be able to make recommendations from the list. A valid case can be readily made for each of the six training methods described, so the important thing is for students to be able to explain and justify their selections.
7. Drawing on The Trainer's Notebook 12.1 on page 396, students should be able to conclude that a mandatory training program specifically tailored to preparing Fred and his family for their assignment in Japan should have included in-depth training on Japanese culture along with an appropriate amount of language training support both pre-departure and while in-country. The training should also have included a significant amount of orientation content geared specifically toward feeling comfortable in Tokyo (including how to use the subway, how and where to shop, eating out, making friends, etc.). This training could have been delivered before they left (if the posting were not so rushed and more time had been available) and supported in-country through the use of a guide (Japanese or ex-pat) who was very familiar and comfortable with Japan (and Tokyo specifically), but also empathetic toward the feelings experienced by someone brand-new to the culture and the country.

8. Students may have varied responses to this question, but most would probably feel that they should stick it out (some will be aware from their own experience that their feelings of discouragement will diminish over time), and that it is also not too late for them to receive the training supports they should have received in the first place. Training transfer would be more positive if they had more support from the company, had "safe" practice opportunities, and had received some error-management training that would help build their resilience and preserve their self-efficacy as they work through the many challenges of their new experiences.

CHAPTER 13
Management and Leadership Development

Case Study: Market Research Inc.

Suggested Answers to Case Study Questions:

1. To identify the main skills in need of development, students should once again refer to Figure 13.1 on page 417, and identify that Mary will require technical, conceptual, and interpersonal skills in order to effectively perform the planning, controlling, organizing, and leading functions of her new managerial role. Students may focus in on apparent gaps or weaknesses, as well as existing strengths that can be leveraged. For example, Mary already has strong interpersonal skills but may require development in some of the other areas identified.

2. Students may recommend that Mary would benefit from either a management education program (as a longer-term solution) or a more intensive and immediate management training program to help her get "up and running" as a new manager more quickly. They may also point out the benefits of supporting Mary on the job with a coach to help her develop and hone her management skills, and with a mentor to help support her career development long term.

3. As Tom has a significant amount of experience and expertise in the role that Mary is stepping into and since he should not in any way feel threatened by her (since he is retiring soon), students will likely conclude that it would make sense to involve Tom in her development, either as a coach/mentor (depending upon their relationship and their personalities), or at least as a contributor to her on- the-job training.

4. For each of the programs listed, students should draw their own conclusions as to their effectiveness and be able to justify their answers. For example, they may conclude that while a management education program such as an MBA would benefit Mary long term, it may not provide her with the skills she needs to develop before assuming the role (in the next year), and therefore a management training program may be more suitable in order to address these more immediate concerns. Students should also be able to point to the value of the two on-the-job approaches described (coaching and mentoring), but conclude that in this instance job rotation would not be as appropriate. Astute students may go further to suggest that Mary should assume at least a part of the role before Tom retires, allowing for a more seamless transition during which time she could benefit from Tom's coaching and mentoring as she transitions into the role.