Module Four: Learning and Development

Module overview

This module discusses the purpose of employee orientation, onboarding, training, and development. It provides a perspective on how adults learn while considering several methods of training. Finally, it gives insight into determining whether training is successful.

The module covers three topics:
- 4.1: Training Program Design
- 4.2: Orientation, Onboarding, and Professional Development
- 4.3: Training Evaluation

Module objectives

At the completion of this module, you will be able to:
- Define training.
- Define development.
- Understand the importance of learning styles and adult learning principles in developing training.
- Explain the purposes of orientation, onboarding, training, and development.
- Identify on- and off-the-job training strategies.
- Identify key professional development tools.
- Understand the four levels of training evaluation.

4.1 Training Program Design

Learning and development refers to a variety of formal and informal activities that impart knowledge to employees, provide them with job competencies, and help to improve their job performance. **Training** is the process of formally providing knowledge, skills, and abilities (KSAs) specific to a task or job; **development** refers to activities focusing on building employees' current job competencies while preparing them for future responsibilities.

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Training teaches employees the basic skills they need to do their jobs. Learning, of course, occurs on an ongoing basis, with or without formal training. Training, however, accelerates the learning that is specific to the needs of the organization. It is intended to close the gaps between an employee's current performance and the desired performance. Training is appropriate to support learning; it may also be a tool to correct some performance issues.

Training seeks to create a learning climate by adhering to the following:
- Learning is performance-based and tied to business objectives.
- The intent is to improve the employee's KSAs.
- Importance is placed on how to learn, not just what to learn.
- Facilitators help employees develop critical thinking skills.
- Employees take responsibility for their own learning.

The primary goal of a training program is to support the goals of the organization and to ensure that employees are effective and efficient in their jobs. It is not enough that employees gain new KSAs; they must be able to apply what they learn to improve and sustain good job performance. Work-related training can be regarded as successful only if the learning transfers to the job.

Adult Learning Principles and Learning Styles

When designing or selecting learning activities, it is important to consider adult learning principles and learning styles. Both elements contribute to the quality of the learning experience.

Adult learning principles
The table below lists some basic principles of adult learning.

These principles provide insight as to how adults learn best and should be the starting point for the design of training programs.

Adult Learning Principles	Training Applications
☑ Adults want a focus on "real world" issues.	☑ Show how participants can immediately transfer the learning back to the job.
☑ Emphasis on how the learning can be applied is desired.	☑ Apply training to current and future needs.
☑ Adult learners will come with goals and expectations.	☑ Discover the participants' expectations at the onset of the program and address those that will not be covered.
☑ Allow debate and challenge of ideas, but adults must be motivated to keep disagreements unheated.	☑ For some participants, this interaction enhances the learning. ☑ Create a safe learning environment.
☑ Listening to and respecting their opinions is what adults expect.	☑ Promote a learning environment that is collaborative between the instructor and the participants. ☑ Allow participants to receive feedback from the instructor and each other.
☑ Adults will wish to be resources to you and to each other.	☑ Allow for planning between the instructor and the group. ☑ Take the knowledge and experience of participants into account.

Learning styles

Learning styles describe the ways individuals learn and how they process ideas. There are three distinct styles—visual, auditory, and kinesthetic (tactile).

- **Visual learners learn best through seeing.** These learners need to see body language and facial expression to fully understand content. They may think in pictures and learn best from visual displays, including diagrams, slide presentations, and computer-based training.

- **Auditory learners learn best through hearing.** Verbal lectures, discussions, and listening are auditory learners' preferred methods of learning. These learners often benefit from reading text aloud or using a recording device.

- **Kinesthetic (tactile) learners learn best through an activity-based (hands-on) approach.** They prefer to actively explore the physical world around them. They may find it hard to sit still for long periods and may become distracted by their need for activity and exploration.

Most adult learners have a preferred learning style but are able to adapt to use the other, non-preferred styles. Trainers and instructional designers should try to incorporate all three styles into their courses. Understanding learning styles and modifying instruction to address all styles helps to increase the retention rate of adult learners.

Competency Connection

Communication: Listening is a key element of the Communication competency. When designing training programs, HR professionals must use active listening to understand the perspectives and needs of employees. They may also use surveys or other tools to gather feedback from employees.

Learning activities

The following are types of learning activities that are frequently incorporated into training programs. Using a well-balanced mix of learning activities that incorporate various levels of participation is a good way to accommodate all learning styles. There are no right or wrong learning activities; they depend on the audience, the trainer, and the content to be covered.

Type	Description	Useful When . . .
Icebreaker activities	Activities used at the beginning of training to allow a group to get acquainted and to encourage involvement and participation. This type of activity allows for early engagement of the learners and helps set the tone for the course.	The success of the seminar depends on the trainees' ability to work together throughout the event.
Lecture	The primary purpose of lecture is to provide information. For the most part, the trainer presents information via slides or handouts and communication is primarily one-way.	There is a great deal of information to be disseminated and the learner is not expected to retain the information for the long term.
Group discussions	Trainees take part in small-group discussions designed to elicit a variety of ideas and viewpoints. In many cases, groups are given a problem and asked to provide an answer.	The size of the group allows time for discussion and trainees are comfortable working together.

Type	Description	Useful When . . .
Demonstration	Trainees are shown how to perform a task correctly. They are given feedback at appropriate steps throughout the process.	Trainees will benefit from practicing in a nonthreatening environment, the training environment supports such practice, and the trainer is skilled in the task.
Role plays	Trainees assume roles and act out situations related to the job.	The training environment allows trainees to take risks and make mistakes. Trainers are skilled at providing feedback and identifying teaching points.
Case studies	Case studies are descriptions of real or hypothetical job situations that contain information that trainees will analyze to understand what has occurred and why. Based on the information provided, trainees will formulate responses to the situations.	Trainees are preparing for a role that is new to them—for example, a management or executive role—and the cases are relevant to their jobs; also useful when there is a skilled trainer and adequate time to discuss and debrief the complexities of the cases.
Scenarios	Scenarios are similar to case studies but are usually fictional and limited in length and learning objectives.	Trainees have sufficient knowledge of the concepts behind scenarios to describe appropriate responses to questions. Trainers are skilled at providing feedback.
Simulations	Simulations are similar to case studies but are generally more complex and are highly interactive. The path of the simulation is often directly tied to the trainee's decisions.	Trainees have adequate time to participate in the simulation and when it is important for trainees to see the link between their decisions and the results.

Developing Training Programs

A five-step instructional design process commonly referred to as the ADDIE model serves as a guide for training program development and implementation. The steps, followed in order, lead to the development of training programs that enable the organization to meet its mission, goals, and objectives.

The diagram on the next page visualizes the ADDIE process and provides an example for each step of the process. The example is based on the development of a training program for employees who sell replacement cartridges for printers.

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ADDIE Model

A	**1. Analysis of needs**	Example:
	Analyze the goals, resources, and environment (including constraints) of the organization as they relate to training. Analyze job tasks and assess the gaps (KSAs) that exist between current performance and desired performance. Such gaps may relate to: • Below-standard performance. • A change in the organization that requires changes in employees. • New job-related technology or equipment that requires training to operate.	The instructional designer conducts a needs assessment to determine the skills needed to sell printer cartridges. She determines that errors are frequently made in identifying the customer's printer and locating the appropriate cartridge. The trainer begins tracking the number of errors/returns of incorrect cartridges.

D	**2. Design**	
	Based on the organization's goals/resources/environment and the employees' performance gaps, identify: • Training objectives and content. • How training will be delivered (self-study, workshop, computer, centralized/decentralized, etc.). • What strategies will be used (drill and practice, role play, group exercises, case studies, etc.).	Based on the research, the designer decides that a two-hour training session will be sufficient. The designer outlines the training session, creates the learning objectives, and describes the case-study and role-play activities that will support the learning.

D	**3. Development**	
	Acquire the course materials needed to fit the design. Three options exist: • Purchase an existing course (if it meets the need). • Modify an existing course (customize it to meet the need). • Create the course "from scratch."	The manufacturer provides sales tools to help salespeople select the appropriate cartridge. These tools will be used in the development of the training session.

I	**4. Implementation**	
	Deliver the training to the intended employees. This phase involves: • Scheduling participants and training facilities/equipment/personnel. • Monitoring and keeping records of performance. • Reporting performance to management.	The first session will be a pilot, and revisions will be made as required. After the pilot, regular training sessions will be scheduled and attendance will be tracked. Training will be completed in one week.

E	**5. Evaluation**	
	Determine whether the training produced the intended results. This phase involves measuring whether the intended levels of learning were achieved according to the four levels of evaluation: reaction, learning, behavior, results.	The trainer will ask each student to complete a course evaluation and will also monitor the number of returns after the training to determine if there is a reduction in errors.

While the ADDIE model is preferred by SHRM, HR professionals should be aware that other instructional design models may be used. Unlike ADDIE, which is a linear process, the Successive Approximation Model (SAM) develops training in multiple design and development phases that are broken down into small steps. Agile is a version of SAM that emphasizes collaboration and feedback. In the agile method, design, development, implementation, and evaluation occur iteratively so that changes can be made quickly.

Types of Training

On-the-job training

On-the-job training (OJT) is training provided to employees at the work site utilizing demonstration and performance of job tasks. OJT can be highly structured or informal. Either the employee's manager or an experienced coworker assumes the role of trainer. The ultimate effectiveness of the training effort depends on the trainer's expertise and the time and personal commitment he or she gives to the effort. When done well, OJT can be highly effective and can bring a trainee's performance up to standards quickly. OJT is the preferred training method of many organizations because:

- The transfer of learning to the job is enhanced. Training occurs in the job setting.
- Training is relatively inexpensive. It involves no separate facility and no professional trainer.
- Trainees are motivated to learn. The relevance of the training is typically linked to outcomes that will benefit the employee.

A possible disadvantage of OJT is its dependence on the skills and commitment of the "trainer." Managers or experienced coworkers who do not take their role seriously or who have limited time to train the employee often leave the trainee in a "sink or swim" predicament. If the trainer is ineffective or if there are too many competing demands on the trainer's time, the trainee suffers the consequences.

The following table reviews some of the more common forms of on-the-job training.

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OJT Method	Description
Formal training	Usually provided in a classroom or meeting room at the work location and led by an instructor, manager, or experienced colleague.
Learner-controlled instruction	Usually provided in the form of computer-based instruction, trainees are able to progress through this type of training at their own pace.
Apprentice training	Trainees work with an accomplished, skilled, and certified worker to learn their craft. This is most common in union environments and skilled crafts (e.g., plumbing, carpentry, welding).
Shadowing	Trainees spend a period of time observing an experienced employee who performs the work tasks associated with the requirements of the job.

Off-the-job training

Off-the-job training occurs away from the actual work site, often in an organization's training facility or a hotel conference room. Depending on the training content and the materials involved, it can be the most economical way to deliver training to a group of employees.

Advantages include the following:

- The controlled environment ensures that all attending trainees will receive the same information.
- When they are removed from the daily demands of their jobs, trainees can focus more fully on the training task.
- Organizations may use professional trainers from outside the organization who can often enhance the effectiveness of training while introducing trainees to novel points of view (helping them to think "out of the organization's box").

The main challenge of off-the-job training is to ensure that the design of the training incorporates methods that will help trainees transfer to the job what they learn in the classroom.

Common off-the-job training methods include:

- Workshops.
- Conferences/seminars.
- Simulations.
- Multimedia.
- Case studies and scenarios.
- Role plays and management games.
- Computer- or web-based learning.

Consider . . .

Business Acumen: Your manager has asked you to put together a budget for the upcoming performance evaluation training sessions that all employees will attend. This requires you to determine if you will use an internal or outside trainer. After a thorough needs analysis, you determine that hiring an outside consultant is the best option. You contact three possible training companies and request a proposal from each.

4.2 Orientation, Onboarding, and Professional Development

An organization relies on its employees to help meet its goals and objectives. Through employee orientation, onboarding, and professional development, an organization ensures that its employees understand the business of the organization and have the critical skills necessary to work safely and effectively.

Orientation

Orientation is the first step in the formal process of training employees. Through orientation, employees become familiar with the organization, their department, their coworkers, and their job. The purpose is to help them become productive members of the organization as quickly as possible.

The orientation process is often divided into two parts—general orientation and department orientation. While HR serves as a valued coach/counsel to each manager, it is ultimately the manager's responsibility to ensure that employees understand how they fit into the organizational structure and how they contribute to the overall success of their department. The illustration below

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