Organizational Systems’ Effect on Training Success, Covering the content is not enough.
Current forms of education focus on how to “cover the content” in an efficient way. Indeed, advancements in engagement, motivation, and design of scaffolds often focus on how to better engender knowledge attainment. While these approaches are an important aspect of learning, they fail to consider broader, more holistic contextual perspectives and elucidate institutional barriers that play a role in learning.

This design case details how a mid-sized, nonprofit organization managed training for its employees to support the implementation of a new employee talent management system software, specifically the performance appraisal system. Our findings suggest organizational systems, such as readiness for change and availability of practice environments are important factors if synthesis-level learning or the ability to solve problems is expected. Our observations indicate even manager and employee scope of responsibilities and frustrations associated with learning new work tools has influence over the successful implementation of learning systems.

The training strategy for this system implementation appeared to be complete and thorough, but it proved ineffective. Why didn’t it work? This design case is an in depth exploration of the reasons for its failure and the accompanying frustrations. Namely, the reason may have had less to do with training design using traditional instructional systems and more to do with managing workplace systems that encase the population of learners. This case supports the supposition that learning is not complete when information is conveyed and considered known among the stakeholders. Our findings further suggest that training effectiveness and motivation for learning is especially hindered when organizational systems are not taken into consideration. Specifically, emergent concepts related to change management, business decisions related to project management, and scope of employee responsibilities were of particular importance.

Introduction
Educational technology is considered to be the “the study and ethical practice of facilitating learning and improving performance by creating, using, and managing appropriate technological processes and resources” (Robinson, Molenda, Rezabek, Landra, 2016). In school settings, individual tests and assignments are used assessments that determine if learning was successful. However, assurances of how learning occurs in the workplace is often overlooked when compared with classroom contexts. One confound is that learning is contextual within organizations. Communities of practice that provide social learning and peer mentoring are valuable learning aids. A community of practice is defined as “groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly” (Wenger, 1998). Lave and Wenger (1991) have argued that communities of practice
can legitimize new knowledge acquired by the learner. As such, the knowledge embedded within an organization is socially negotiated and reinforced among members of a community of practice.

Another distinction between schools and organizations is that learning in domain-practice is often skills based. For employee training to be effective, Bass and Vaughn (1966) argue training methods should be selected on the basis of the degree to which they do the following:

1. Allow active participation of the learners.
2. Help the learners transfer learning experiences from training to the job situation.
3. Provide the learners with knowledge of results about their attempts to improve.
4. Provide some means for the learners to be reinforced for the appropriate behavior.
5. Provide the learners with an opportunity to practice and to repeat when needed.
6. Motivate the learners to improve their own performance.
7. Help learners increase their willingness to change.

In organizational settings, assessments are often embedded in performance and thus are not as clear or straightforward as a traditional assessment of content recall. To address this challenge, workplace technologies are increasingly exploring learning technologies to better support on-the-job learning transfer (OECD, 2016).

The Setting
The organization in this design case is a mid-sized non-profit with about 1,500 geographically-dispersed employees. It is a corporate-style organization with a manager-to-employee ratio of 1:4 (variable). The HR division manages the full range of services in the employee lifecycle including Recruitment and Selection, Benefits, Payroll, Talent Development, and Employee Relations. The Talent Development’s HR training team is responsible for new hire orientation and on-boarding, professional and leadership development programs, employee opinion surveys, employee recognition programs, and employee performance management which includes the annual employee performance appraisal tool. The HR training team is comprised of six employees - two instructional designers/trainers, one facilitator, a coordinator, two advisors – one of whom is a performance management expert, and a group manager. This group focused on HR-related topics and not technical skills training for the functional lines of business.

The organization’s business leaders determined the time was right to implement a new software system for HR Core processes for Payroll, Benefits, and Timekeeping. The same software vendor also offered a performance management system that could link appraisals with other talent management features such as skills inventories, individual development plans and performance appraisals including performance improvement plans. This additional software was very attractive to the organization because the previous system was paper-based, which was problematic because it lacked the ability to report performance metrics or connect to broader talent management tools. Additionally, the previous system was unable to support the organization’s planned growth and strategic initiatives centered on the workforce of the
future. This led to questions about how to track performance and improvement initiatives at the individual level throughout the organization. Issues with the old system and the advantages of the new one led senior business leaders to approve HR’s request to purchase the new system. There was great anticipation and high expectations that the new system would be easy to learn and use, and lay the systems foundation for additional HR infrastructure improvements down the line.

The project to implement the Payroll, Benefits, Timekeeping, and Performance Management segments of the software was led by the head of HR as the executive sponsor, a senior-level HR leader serving as the project’s champion and system expert, and a project manager from the IT group. The role of these individuals was to ensure the initiative remained aligned with organizational culture and values and to ensure the project implemented on time and under budget. The project plan also included a change management component to address individual and organizational acceptance of the new system and time for training development and delivery to its employees. Because the HR training team’s small number, the training strategy identified training partners from each functional area to assist in the content delivery and to act as first-line troubleshooters after system implementation. For example, an employee from Marketing assisted in the initial training sessions for all employees on general system navigation. Afterward, the Marketing Training Partner served as the first point of contact and problem resolution for Marketing department employees, thereby reducing the number of help requests made directly to HR. The training partners were equipped with training aids and a facilitator guide with full narratives and examples. The training materials utilized a Rule-Example-Practice design and focused on general system orientation and navigation. No other instructional design was considered because this design had been found to be successful with this organization for more than five years.

The project manager scheduled the Payroll, Benefits, and Timekeeping segments of the system to implement on a single project plan and timeline called Phase 1. The Performance Appraisal and Review segment of the system was added to the same project plan as Phase 1a with implementation scheduled for one-month later to coincide with the annual performance appraisal activities. While this was done to relieve the immediacy of the implementation, it meant employees would receive training on a system they would not interact with for a month or longer.

**Individual and Organizational Readiness**

Parankimalil (2015) describes the advantages and disadvantages of educational systems. For advantages, Parankimalil indicates that a systems approach helps to identify the suitability of resource materials to achieve specific goals, the value and utility of technology for attaining a defined goal, and to assess peripheral resource needs including time and other factors. In the current design, this was done via the Training Partners, training materials, and scheduled training sessions open to all employees, including distance learning tools to reach employees who could not attend in person. Disadvantages include resistance to change, a need for continuous monitoring of new or additional systems, and lack of understanding about how systems influence learning. These were prevalent in this design case in that the organization
may not have clearly understood or acknowledged resistance to learning and the effect of a lapse in time between the training and the actual system launch.

In this design case, the 60-year old organization has a strong culture of continuous learning. 70% of its members are under 40 years of age with five or less years of tenure. Self-guided learning using digital tools was used because of its flexibility and because it was an accepted form of content transfer. The remaining 30% of the learning population is mostly over 40 years of age with five to 25 years of service, most of whom are managers.

In addition to the use of training partners, the training strategy included job aids, instructor-led training, web-based and training on video, expert-led system demonstrations and executive information sessions. This strategy aimed to leverage the organization’s affinity for “leaders as teachers” and to amplify the training group’s small number. All materials were written as step-by-step aids supported by screen captures in an attempt to give the learner confidence navigating the new software. Train-the-trainer sessions involved sample delivery and practice, and included a leader guide with a conversational-style suggested narration.

The HR trainers, aided by the training partners, delivered 10 live in-person sessions in one week at one hour per session for audiences of up to 100 employees. One of these was recorded and made available on the company’s intranet so that employees could access and review the content at their convenience. Small group sessions were held for managers in order to answer specific questions about managing payroll, benefits, and timekeeping for their employees especially where deadlines and cut-offs were concerned. This strategy ensured all employees had the opportunity to learn about the new system.

The HR trainers, training partners, and the project team were satisfied learning objectives were met once the content was delivered for the Payroll, Benefits, and Timekeeping segments of the system implemented in Phase 1. This is because employees were able to interact with these segments immediately following the training. This was not true for the performance management system in Phase 1a. Training on this segment of the system was conducted with Phase 1 even though actual implementation of the performance management system was not planned for another month. The software vendor offered a generic practice environment at an additional cost. However, the business leaders decided to forego this feature. The project team determined the features of the generic practice environment were too different from the system being configured for this organization. As such, the cost outweighed the benefit.

**Frustrations for Many**
The new performance management system implemented as scheduled one month after training when performance appraisals were set to begin. Now there was pressure to complete performance appraisals within a 30-day period using a new and unfamiliar system. Employees and managers became frustrated and began calling HR for assistance. To meet this sudden influx of calls, the HR group formed a panel of system navigation experts to serve as a temporary Help Desk. The lapse in time between the training event and interaction with the system left employees and managers minimally able to interact with the system. Without the
aid of a practice environment or a community of practice to reinforce learning, the content did not transfer. It failed to transform into useful learning because there was no effort to integrate it with prior knowledge (Giulioni, 2013).

**Reflections on Organizational Systems and Training Success**

This experience shows how instructional design strategy must account for the organizational “system” in which it is expected to play if it is to be successful. In the current case, we saw that educational systems involving individual readiness, practice environments, project timelines and business decisions contributed to the failure of training to deliver on its objective to prepare employees to interact with a new performance management system. It illustrates the theory that learning is not complete when information is known. Conveying the content is not enough. Employee resistance and communication breakdown are common obstacles (SHRM 2018). As it relates to this design case, we found that because change is often a complex and difficult process, managing change on the personal and organizational level requires new thinking, new models for change and new frameworks and tools to enable the smooth implementation of the desired change. (Hiatt, 2006).

In terms of this design case, we found that failure to provide a practice environment for the new performance appraisal system revealed employees and managers had forgotten what they had heard about the performance appraisal system in the training sessions a month prior. Employees felt the training effort had failed and further, expressed a negative impression of the system itself.

Performance appraisals are sometimes regarded as problematic because of the amount of administrative effort required to complete one. Most business managers have more than one employee, some as many as 30 depending on the organization and nature of the work. This organization was converting from a paper-based appraisal to an online paper-less system that is part of a network of talent management instruments. Upon reflection, this new system appeared to be a welcomed improvement until it was time to use it complete the first appraisal. It was then that the absence of an immediate application for learning a new skill on an unfamiliar tool for an undesirable administrative duty turned excitement for the new tool into disappointment. Curiosity that peaked early disappeared and turned into frustration by the time appraisals were initiated.

What education practices might be derived from this case study? Consider the following:

1. Use change management tools to prepare the organization for changes and spend more time on subjects that might encounter heavier individual resistance.
2. Deliver training using a test system that mirrors the actual system to give the learner a realistic experience and a safe setting in which to practice new skills.
3. Plan to offer communities of practice and other socially facilitated reinforcement efforts to manage learner insecurity.

**Lessons Learned**
The size and scope of the new Performance Management system may have called for a project plan of its own. The implementation timeline of that plan could have aligned with the annual performance evaluation period giving employees a chance to immediately and apply the new skills. However, the HR Management Team felt it was worth the risk to offer training on the system ahead of its implementation and close gaps with the training partners and detailed job aids available on the corporate intranet. This decision showed confidence in the training strategy, its components, its developers, and the employees receiving the training, but it failed to account for individual and organizational readiness for acceptance of the new performance appraisal system. With no time allotted to prepare employees for the new system, the training was “pushed out” to meet the project timeline and as such, fell into the assumption that learning was complete because the information was conveyed and considered or assumed to be known.

References


