HUMAN RESOURCE MANAGEMENT

MODULE 2: Lecture 3

Learning and Development & Performance Management

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Learning Outcomes

- The fundamentals of learning and development.
- The key steps of learning and development.
- Practices adopted in learning and development.
- How people learn.
- How to carry out a Training Needs Analysis.
- Development of a training plan.
- Leadership and management development.
- The need and benefits of performance management.
- Different systems (models) in managing performance.
- Setting SMART objectives
- Assessing and rating performance at work.
- Conducting performance appraisals.

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Why do we need to learn & develop at work

Learning & development – a definition

- It is concerned with ensuring that organisations have the knowledgeable, skilled and engaged people they need.

- It means enabling individuals to acquire knowledge and skills through experience, social contacts, coaching, mentoring and guidance provided by line managers and others, self managed learning, and learning events and programmes provided by the organisation

How people learn

70 / 20 / 10 Model

(Lombardo & Eichinger, 1996)

70% from work experience

20% from social learning

10% from formal training

Clardy 2018

Learning does not necessarily fit neatly within these "boxes" – experiential and social learning are important but formal training should not be underestimated

Blended learning concept

Components of L&D

Learning

(process by which a person acquires and develops knowledge, skills, capabilities, behaviours and attitudes)

Development

(the growth of a person's ability and potential through provision of learning and educational experiences)

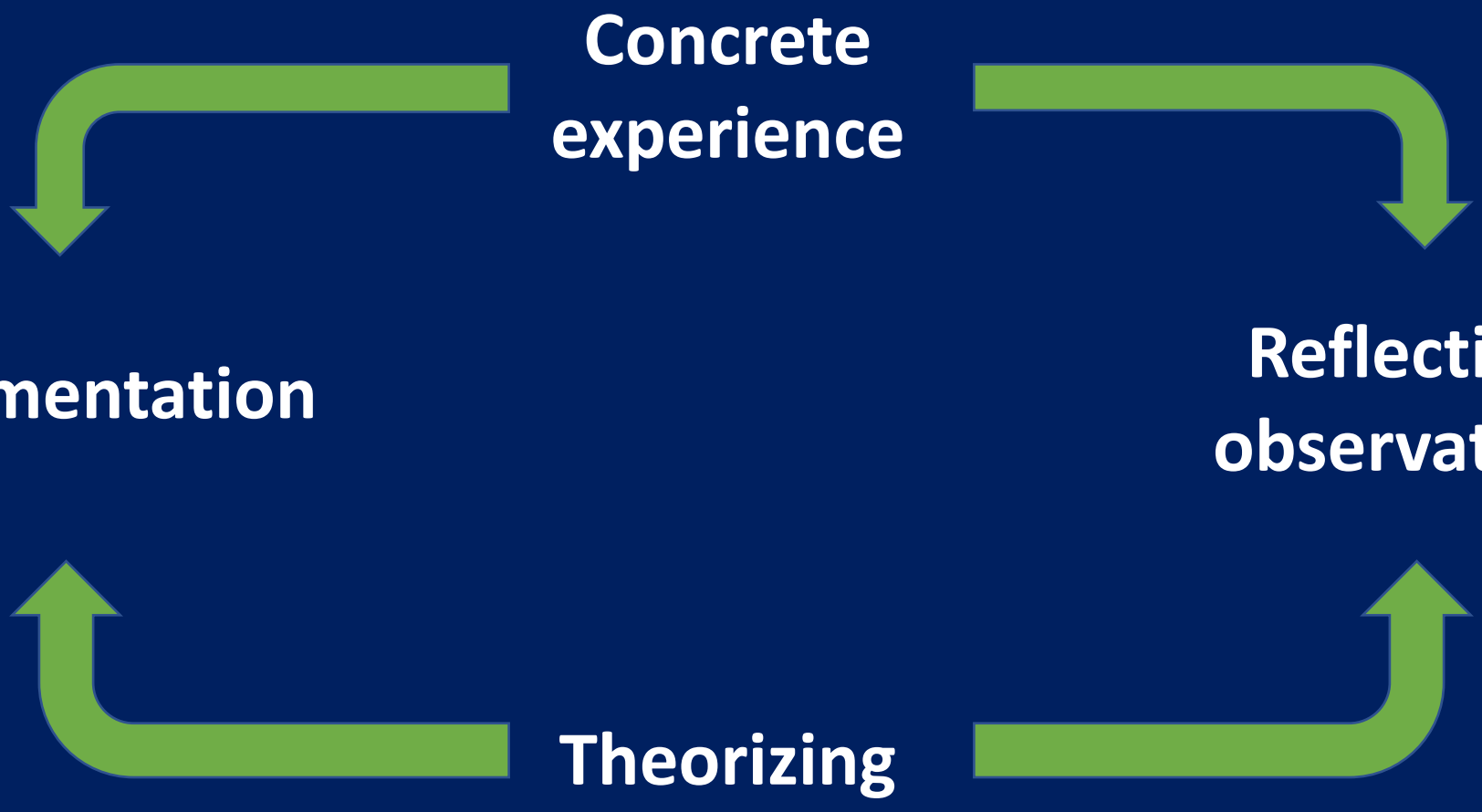
Training

(formal process, such as attending a training course, to help people acquire knowledge / skills to do their job better)

Education

(development of the knowledge, values and understanding required in al aspects of life, and not just related to particular areas of work)

Learning styles – Kolb's learning cycle



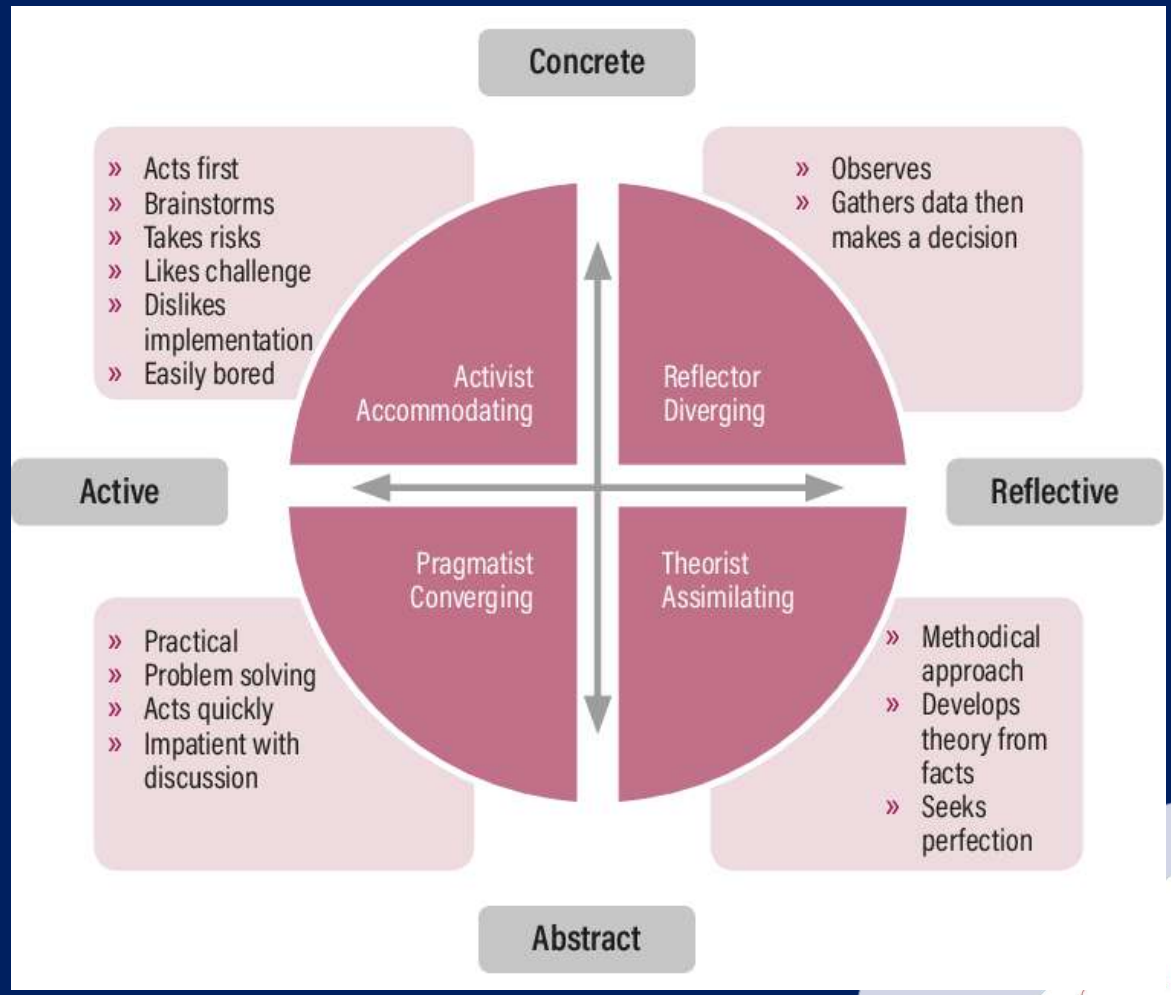
Learning styles – Honey & Mumford

ACTIVISTS – involve in new experiences

REFLECTORS – observe

THEORISTS – apply observations in form of logical theories

PRAGMATISTS – experiment



What is your learning style?

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Implications of learning concepts

Process of learning	Learning is achieved in different ways – context is important	Different learning needs require different learning methods
Learning styles	Every person learns differently	Programmes need to be adjusted to cope with different learning styles
Learning curve	Time to learn varies between people	Progress in learning varies
Motivation to learn	People need to have a motivation to learn	Learners should be helped to develop learning goals and understand its benefits
Cognitive learning theory	People learn by being exposed and solving problems	Provide learning opportunities to people to learn by doing

Workplace learning

- Learning happens mainly ***in the workplace***
- Much of it is ***informal*** though managers have a role to play through their coaching intervention
- Workplace learning is largely ***experiential*** – learning by doing
- It also involves learning by ***observing others*** (cooperative learning)
- Induction training

Characteristics of workplace learning

Workplace is a site for learning – “training island” close to where work is actually carried out (similar to a lab)

The workplace itself as a learning environment (e.g. through job rotation, job shadowing, cross-site project work)

Learning through work itself (informal learning) to develop skills (continuous learning)

Enhancing workplace learning

- Induction training for new employees
- Planned experience to obtain knowledge and skills over time
- Coaching (one-to-one training)
- Mentoring (experienced people to provide advice and guidance)
- Buddy System (work with someone else in same job)
- Shadowing (learning through observation)
- Performance management (identify areas for improvement)
- Personal development planning (structured approach)

Training Needs Analysis (TNA)

- What people should know
- Expected performance

Learning Gap

- What they actually know
- Actual level of performance

TNA process & method

- **Surveys** or **interviews** – about requirements of position
- **Role analysis** – specifying the requirements of the position
- **Skills analysis** – level of skill required to achieve a standard of performance
- **Performance management** – knowledge, skills and behaviour
- **Learning evaluations** – measuring the level of knowledge gained after a training intervention and implementation of knowledge

Learning & development practices

Workplace Learning

(mostly informal supported by Line Managers, including coaching and mentoring) – NEEDS TO BE ORGANISED

Social & collaborative Learning

(people connecting, conversing, collaborating and learning from each other) – PROVIDE THE EXPERIENCE

Digital Learning

(E-learning, virtual learning environments, social networks, "Googling", game based learning)

Artificial Learning (AI) Learning

(Automated learning systems, tailor made training interventions, adaptation of training based on feedback)

Development of a training plan

1 - ANALYSIS	2 - DESIGN	3 - DEVELOPMENT
• Current level of knowledge / experience • What participants will learn (knowledge, skills, behaviour) • Set learning goals & objectives	How training will be delivered taking into consideration the learning styles of participants i.e. instruction, presentations, discussions, case studies, games, coaching, mentoring etc	Detailed development of programme including content, outcome from each session, who will deliver training, training material, handouts etc

Group activity

Discuss an appropriate method of learning and development programme for the following jobs:

1. An entry-level chef at a 5 star restaurant
2. A new manager in a fast food restaurant
3. A car mechanic on hybrid / electric cars
4. A receptionist in a hotel
5. A machine operator in a manufacturing company producing flavoured drinks

1. Entry-Level Chef (5-Star Restaurant)

Best Method: Apprenticeship / "Staging" (Job Rotation).

Learning Style Focus: Reflector & Activist.

The Programme: High-end culinary work requires watching a master (Reflecting) and then repetitive, high-pressure practice (Activist). The program should involve "shadowing" different stations (sauces, pastry, larder) to understand the kitchen's flow before taking over a station.

2. New Manager (Fast Food Restaurant)

Best Method: Scenario-Based Training / Role-Playing.

Learning Style Focus: Pragmatist & Activist.

The Programme: Fast food is about speed and standardized systems. Training should focus on "What do you do when the grill breaks?" or "How do you handle a rush?" Real-time feedback on the floor and simulation exercises are more effective here than long lectures.

3. Car Mechanic (Hybrid / Electric Cars)

Best Method: Technical Certification / Blended Learning.

Learning Style Focus: Theorist & Pragmatist.

The Programme: Unlike traditional combustion engines, EV systems are highly logical and dangerous if misunderstood. Mechanics need deep **Theorist** work (understanding battery chemistry and circuitry) via manuals/e-learning, followed by **Pragmatist** labs where they apply that theory to diagnostic software.

4. Receptionist (Hotel)

Best Method: Soft Skills Coaching / Shadowing.

Learning Style Focus: Reflector & Pragmatist.

The Programme: A receptionist needs to observe how senior staff handle "difficult" guests (Reflecting). The L&D should include a clear handbook on software systems (Pragmatist) and "debriefing" sessions after shifts to discuss social interactions and guest satisfaction.

5. Machine Operator (Manufacturing - Drinks)

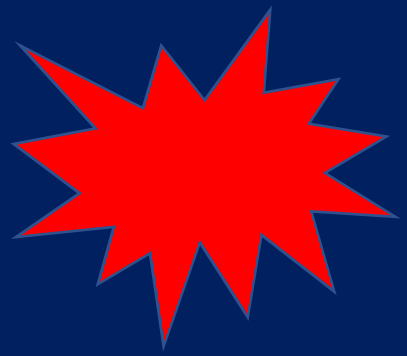
Best Method: Standard Operating Procedures (SOPs) & TWI (Training Within Industry).

Learning Style Focus: Pragmatist.

The Programme: This role is about consistency and safety. The best program uses the "Show, Tell, Do, Check" method. It’s highly pragmatic - if the operator follows the 10-step checklist, the machine runs. Training should be conducted right at the machine, not in a classroom.

Summary – what is L&D?

- Video - https://www.youtube.com/watch?v=hK5zWdvD9Zw&t=107s



Leadership & management development

60 to 75% of employees in any organisation, no matter where survey was completed , report that the worst or most stressful aspect of their job is their immediate supervisor

Pfeffer & Sutton (2006)

IMPACT ON THE ORGANISATON?

Leadership & management development – defined

- It aims to provide managers with the leadership and managerial qualities required to achieve success.
- It is concerned with unlocking potential and form a vital ingredient in talent management.
- A blended approach is used combining analysis of learning needs and activities used to achieve the learning objectives.

Management vs Leadership

Making the distinction

Leadership involves management and management involves leadership – hence may be difficult to separate the two

Leadership = inspiring people to do their best to achieve results (based on motivation, vision, persuasion, influence and engagement)

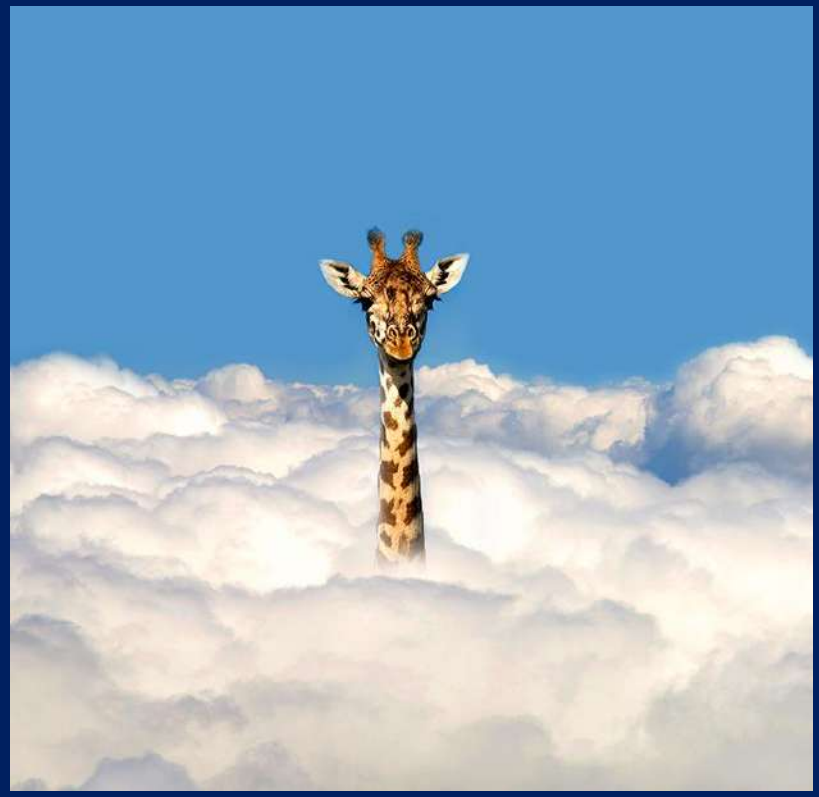
Management = process of achieving results by "getting things done through people".

Leadership development

It is sometimes said that leaders are born, not made

Conditions for successful leadership development – Yukl (2006)

- Clear learning objectives
- Clear, meaningful content
- Appropriate sequencing of content
- Appropriate mix of training methods
- Opportunity for active practice
- Feedback
- High trainee confidence
- Appropriate follow-up



Management development – formal approaches

- Planned experience – rotation project teams, secondment
- Coaching - one-to-one approach
- Mentoring – specialists / experts in the field
- Action learning – exposed to real life problems / situations
- Outdoor learning – to learn how to handle pressure
- Performance management feedback
- Self-developed learning
- Specialised courses and programmes

Performance Management

Learning Outcomes…..reminder

- The need and benefits of performance management
- Different systems (models) in managing performance
- Setting SMART objectives
- Assessing and rating performance at work
- Conducting performance appraisals

The need and benefits of performance management

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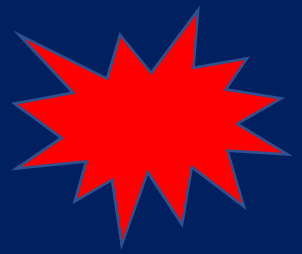
Performance management – defined

It is the continuous process of improving performance by:

(1) setting individual and team goals that are aligned to the strategic goals of the organisation
(2) planning performance to achieve the goals
(3) reviewing and assessing progress and
(4) developing the knowledge, skills and abilities of people.



Video – Performance Management

Bill Shannon (Auburn University)

https://www.youtube.com/watch?v=sYyTxu3Mzhw&t=42s

5 benefits of performance management

It helps to:

1. Work towards common organisational and departmental goals
2. Builds accountability
3. Provide clear understanding of expectations
4. Provide feedback t employees
5. Prepare for and develop career goals

Four major influences affecting performance

Harrison (1997)

The learner

Needs right level of competence, motivation, support and incentive

The learner's work group

Influencing positively or negatively

The learner's manager

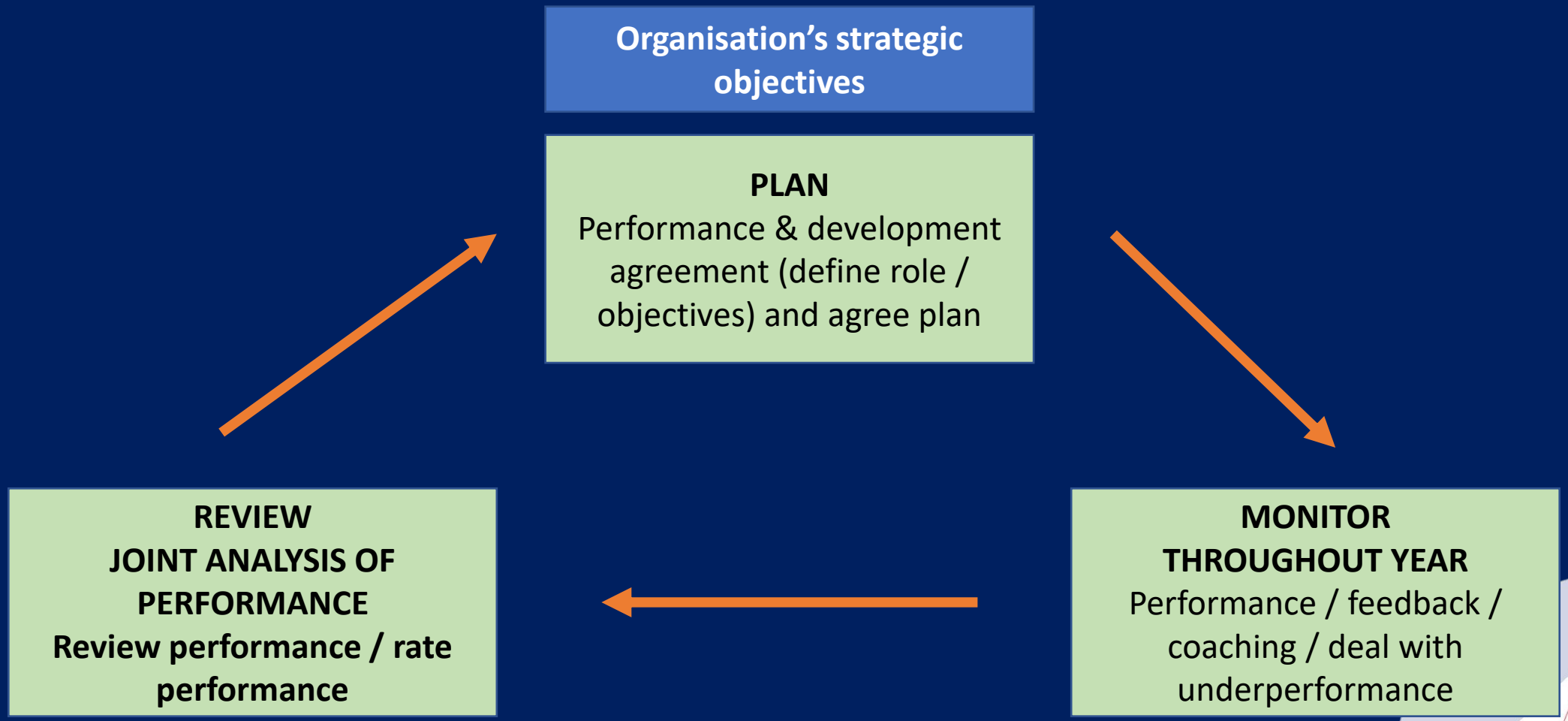
Needs to provide continuing support

The organisation

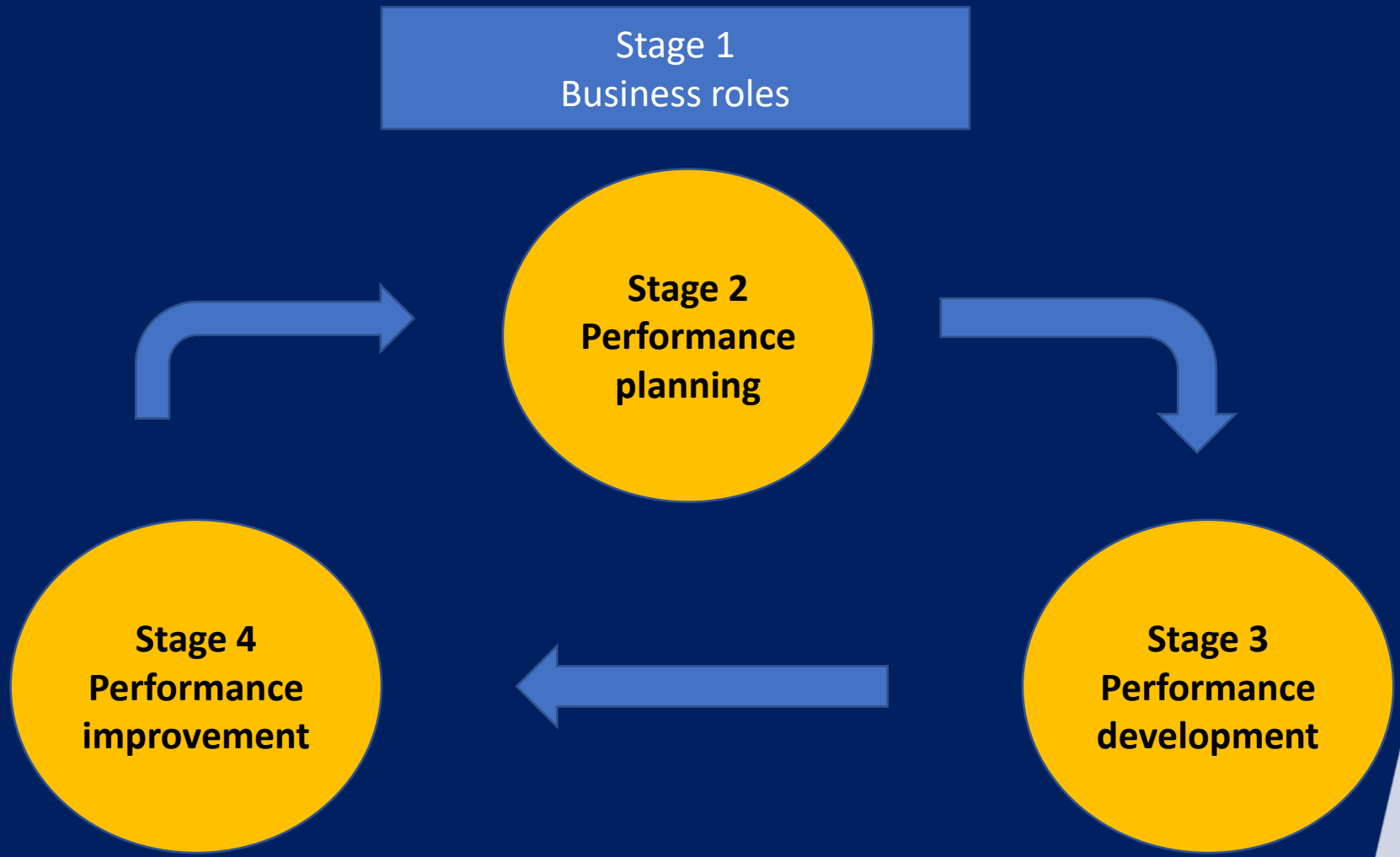
Fosters performance (positively or negatively)

Different systems (models) in performance management

Traditional Method



Method at Astra-Zeneca



Method at Pfizer Inc

Setting SMART objectives

SMART OBJECTIVES

S	SPECIFIC	• Who is involved? • What do I want to achieve? • When do I need to achieve this? • Why is the goal important?
M	MEASURABLE	• How will I measure my progress? • How will I know if my goal is achieved?
A	AGREED / ACHIEVEABLE	• Will it be clear when the goal is complete? • Is it reasonable to complete the goal in the time allotted?
R	REALISTIC / RELEVANT	• Is this goal related to my overall success (or the success of my business/organization)
T	TIME BOUND	• How long should it take to accomplish this goal? • When will I check in on whether or not the goal has been completed? • Am I ready to start work on the goal?

Exercise on SMART – 20 mins

Set **SMART** objectives for the following positions (or others you may be better familiar with):

1. An entry-level chef at a 5-star restaurant
2. A new manager in a fast-food restaurant
3. A car mechanic on hybrid / electric cars
4. A receptionist in a hotel
5. A machine operator in a manufacturing company producing flavoured drink

CHEF OBJECTIVE

Objective:

By the end of the next quarter (3 months), successfully master and demonstrate the preparation of 10 signature dishes from the restaurant's menu to the head chef's standards, achieving at least an 85% approval rate during weekly evaluations.

Breakdown of the SMART Criteria:

1. **Specific**: The focus is on mastering 10 signature dishes to the head chef's standards.
2. **Measurable**: Progress is measured through weekly evaluations and an 85% approval rate.
3. **Achievable**: The objective is realistic for a junior chef to achieve within the given timeframe, assuming they already have basic skills.
4. **Relevant**: Developing proficiency in the restaurant’s menu supports the junior chef’s role and contributes to maintaining the restaurant's five-star standards.
5. **Time-Bound**: The goal must be achieved within three months.

NEW MANAGER OBJECTIVE

Objective:

Within the next three months, reduce customer wait times during peak hours by 15% by optimizing staff scheduling and implementing a new order preparation workflow, while maintaining a customer satisfaction score of at least 90% based on weekly feedback surveys.

Breakdown of the SMART Criteria:

1. **Specific**: Focuses on reducing wait times, improving workflow, and maintaining customer satisfaction.
2. **Measurable**: Success is tracked through a 15% reduction in wait times and maintaining a 90% satisfaction score.
3. **Achievable**: The timeframe and targets are realistic with proper training, effort, and resource allocation.
4. **Relevant**: The objective supports the restaurant's goals of improving efficiency and enhancing customer experience.
5. **Time-Bound**: The goal must be achieved within three months.

CAR MECHANIC OBJECTIVE

Objective:

Within the next six months, complete a certified training program on hybrid car maintenance and repair, and independently perform at least 10 hybrid vehicle diagnostics and repairs with a 90% customer satisfaction rate as assessed through post-service feedback.

Breakdown of the SMART Criteria:

1. **Specific**: Focuses on completing certification and applying skills to hybrid vehicle diagnostics and repairs.
2. **Measurable**: Progress is tracked through certification completion, performing 10 repairs, and achieving a 90% customer satisfaction rate.
3. **Achievable**: Six months provides sufficient time for training and practical application, assuming access to training and tools.
4. **Relevant**: The objective aligns with the growing need for hybrid vehicle expertise in the automotive indust
5. **Time-Bound**: The goal must be completed within six months.

RECEPTIONIST OBJECTIVE

Objective: Improve customer satisfaction scores by 15% within 3 months by enhancing communication and service delivery skills through focused training and feedback.

Breakdown of the SMART Criteria:

1. **Specific**: Focuses on improving customer satisfaction by enhancing communication and service delivery.
2. **Measurable**: The target is a 15% increase in customer satisfaction scores.
3. **Achievable**: The goal is realistic with targeted training and regular feedback.
4. **Relevant**: Aligns with the receptionist's role in providing excellent guest service.
5. **Time-bound**: The objective is to be achieved within 3 months.

MACHINE OPERATOR OBJECTIVE

Objective:

Within the next two months, achieve a 98% operational efficiency rate by reducing machine downtime through proper maintenance practices and completing a safety and troubleshooting training program, ensuring zero safety violations during the period.

Breakdown of the SMART Criteria:

1. **Specific**: Focuses on improving operational efficiency, reducing downtime, and adhering to safety practices.
2. **Measurable**: Success is tracked with a 98% efficiency rate and zero safety violations.
3. **Achievable**: The targets are realistic with the training program and adherence to maintenance protocols.
4. **Relevant**: The objective directly contributes to production efficiency and safety standards in the factory.
5. **Time-Bound**: The goal is to be completed within two months.

Assessing and rating performance at work

Assessment (appraisal) 3 approaches

OVERALL ASSESSMENT

- General analysis (based on performance agreement)
- Based on future action (rather than judgement)
- Understanding of what is going well and what is not
- Distinguish between high / average and non performers
- Written record

Cons:

- **Assessment can be generic**
- **“halo” / “horn” effect.**

RATING

- Assessment is based on a score on performance (numerical or descriptive based on definitions) – usually 5 levels i.e. Beyond Expectations / Meets expectations most of the times / meets expectations sometimes / Below expectations / Requires drastic improvement

Cons:

- **Managers rate differently**
- **may lead to confrontation**

VISUAL ASSESSMENT

Performance Grid
(see next slide)

Visual assessment

BEHAVIOURAL STYLE

HIGH

LOW

GOOD APPROACH AND ATTITUDE BUT NOT DELIVERING ON RESULTS

Feedback
Medium reward
Coach / train
Set milestones (targets)

TOP PERFORMERS

Reward
Promotion

BEHAVIOURAL AND PERFORMANCE PROBLEMS

Feedback
Coaching
Training
If sustained – to change?

GOOD BUSINESS RESULTS BUT NEED TO FOCUS ON HOW RESULTS ARE OBTAINED

Medium reward
Provide feedback for improvement
Coaching

LOW **BUSINESS PERFORMANCE** HIGH

Conducting performance appraisals

Steps when conducting appraisal

- **Step 1:** Which model will you use – Traditional? Cyclical? Linked to pay?

- **Step 2:** Plan for the appraisal meeting

  - ✓ Advise employee about date and explain what will be done (it is no a test but a discussion)
  - ✓ Review all aspects of performance during a period (not the last week!) and be objective

- **Step 3:** Conduct appraisal meeting. During appraisal meeting….

  - ✓ Talk in terms of objectives not (not feelings) and data (or observations)
  - ✓ Be positive throughout
  - ✓ Don’t get personal or criticise destructively
  - ✓ Encourage 2 way communication / listen
  - ✓ Get agreement about way forward

Checklist – Appraisal Interview

- ❑ Review job description, previous appraisals, goals and current job standards
- ❑ Provide adequate time and a private, quiet environment
- ❑ Focus discussion and comments on evident information
- ❑ Allow appraisee to give his / her point of view without judgement
- ❑ Avoid attacking appraisee's comments
- ❑ Criticise with respect and dignity
- ❑ Discuss each of the appraisee's duties and goals
- ❑ Reach agreement on training /development required
- ❑ Discuss steps to take if performance does not improve
- ❑ Discuss performance in light of career aspirations

Performance Appraisal Meeting

- Video clip: https://www.youtube.com/watch?v=cEvOGhVStZE&t=5s

Group activity

On what factors would you appraise the following positions (or others you may wish to choose)

1. An entry-level chef at a 5-star restaurant
2. A new manager in a fast-food restaurant
3. A car mechanic on hybrid / electric cars
4. A receptionist in a hotel
5. A machine operator in a manufacturing company producing flavoured drinks

Role Play

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Objective:

The purpose of this role play is to simulate a performance appraisal meeting for a hotel receptionist. The goal is to assess the receptionist's performance over the past year, discuss achievements, identify areas for improvement, and set goals for the upcoming year.

Participants:

- **Manager (M)**: You are the hotel manager responsible for conducting the performance appraisal. Your role is to provide constructive feedback, acknowledge achievements, discuss areas for improvement, and collaboratively set goals for the receptionist.
- **Receptionist (R)**: You are the hotel receptionist undergoing the performance appraisal. Your role is to reflect on your performance, discuss your achievements, acknowledge areas for improvement, and actively participate in setting goals for the next year.

Scenario:

- **Background:** The hotel receptionist, Sarah, has been working for the hotel for the past year. She has made efforts to improve communication skills and has successfully implemented a digital check-in system. However, there are still opportunities for growth, particularly in managing multiple tasks during peak hours.
- **Setting:** The meeting is taking place in the manager's office. Both the manager and receptionist are expected to maintain a professional and constructive tone throughout the discussion.

Aim for ongoing reviews

Ongoing reviews throughout the year are preferable and more effective

21 ACADEMY

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