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# Task1

## AC2.1 Evaluate methods for identifying organizational learning needs and key principles.

Building organizational effectiveness and achieving its objectives depend on the right people with the right skills at the right time. To achieve the individual, team, and organizational desired, performance, it is essential to perform a health check on current and future needed talents and skill i.e., LNA (CIPD, 2022). For example, to achieve online communications using office 365 objective, LNA should be performed to analyze the needs based on which training intervention happens. There are several methods to collect data to conduct LNA:

* Questionnaires:

Questionnaires are a fast and cost-effective data collection method that provides ease of consuming and analyzing the data (Lindemann, 2023). It provides a picture about where we are now and where we want to be. However, in a busy work schedule, response rate might not be acceptable. When collecting data about LNA, questionnaires should not be relied on solely.

* Interviews:

Although interviews are time-consuming activity and can pose more problems than solutions, it is a very effective way of gathering information about learning needs. It offers a comprehensive idea about the status quo and the future goals. To be utilized effectively, it should be structed to get the most out of it.

* Performance Metrics:

PMs give an indication about the current skill of individual and the organization. It looks at the past and the present, but it does not point to the future needs. However, it is a very robust tool to measure performance health check.

The best approach to combine different data collection methods. For example, it would be implausible to interview 12000 employees in the organization. It is beneficial to consolidate data from more than one source.

## AC2.2 Conduct key stakeholder analysis to identify areas of need in relation to learning and development activity.

Stakeholders, in L&D activities, are those who are affected by or have an effect on the activity. To formulate the strategy for managing communications, involvement, and engagement levels, a stakeholder analysis is a fundamental step. It is the process of identifying L&D activities’ stakeholders and assessing their interest and influence over L&D activities (CMI, n.d.).

Mendelow stakeholder matrix is a well-known tool to analyze stakeholders based on their interests in the activity and their power over it (Mind tools, n.d.). It categorizes the stakeholders into four categories according to their power over L&D project and their interest in its success.

* Quadrant A:

Stakeholders in this area have high power over the project and high interest in its success (players). Senior leaders like Global people director, Regional Managers, Head of information technology and other senior leaders have the power to control the project and have high interest in its success to achieve organizational objectives of cutting costs. Stakeholders should be involved and communicated closely.

* Quadrant B:

Stakeholders have high power, low interest (context setter). Project & Program Management Office Lead – Germany is an example. They are responsible for managing the program but have little interest. They should be satisfied throughout the project.

* Quadrant C:

Stakeholders have high interest, low power (subjects). Trainees are examples of those stakeholders. They must be informed throughout the project. Collecting feedback from them and acting upon it is essential to get their buy-in.

* Quadrant D:

Stakeholders with low interest and low power over the project (crowd). Translators, digital design team are examples in the scenario. They must be monitored closely in case for their interest change in the future.

## 

## AC2.3 Convert and relevant information from the stakeholder analysis into clearly stated learning and development objectives.

In a learning and development initiatives, trainees are the primary stakeholders around whom the learning process evolves. In the scenario, employees are key stakeholders whom success will prove the success of the L&D initiative.

The organizational objective is to reduce costs of travel due to meetings by 66% over a nine-month period. The notion of golden thread would be helpful here. Golden thread is a performance model that links the organizations’ strategy with its operations (Evans. 2013). Therefore, that big picture goal is cascaded down for smaller units of the organization.

L&D function, in turn, has its own SMART objectives that aligns with the larger organization’s objectives. SMART objectives are acronym for Specific, Measurable, Achievable, Realistic, and Timely objectives (CIPD, 2022). Objectives of L&D functions must be SMART to serve the bigger objectives.

The objective is to train employees on Microsoft packages so that two meetings out of three are held online across the four territories, in addition to using Yammer as the social network of the organization instead of other platforms. To achieve that, all employees would have a training in those packages over nine months.

Specific: The goal is clear: training all employees on Microsoft packages so that 66% of meetings are online using teams and information sharing using yammer.

Measurable: the measure is reducing hotel stay and travel by 66% as a result of reducing physical meetings and events by 66%.

Achievable: it is a challenging enough to train 12000 employees across four regions; it is an achievable objective, though.

Realistic: Each L&D function across each region will be accountable for training their respective employees.

Timely: nine-month period is allowed so that there the objective is achieved.

## AC2.4 Assess how individual and team learning, and development objectives align to organisational or departmental strategy.

The organizational strategy and the aim of the training is to decrease physical meetings and shift towards online events and sharing information digitally and support corporate social responsibility of the organization to reduce the impact of the travel on the environment. The L&D intervention is targeting at training employees on using teams for online meetings and events and yammer for sharing information.

The learning objectives of the L&D is to enable every employee with the necessary technical skills so that all team communication and information sharing would be through teams and yammer. Success of the learning and development initiative means that employees can use the technology and enthusiastic about using. Therefore, each two out of three meetings and events would be using teams. That would translate reduction in costs associated with physical meetings and events.

The team is dispersed across different territories which make it a challenge in terms of logistics and culture norms. There are also many employees who need to complete the training in a short time frame. The intervention uses decentralized approach to learning where each territory has its own learning that fit its culture.

# Task 2

## AC1.1 **Explore** key factors to be considered when designing learning and development activities.

When designing L&D activities, taking a learner-centered approach is a precursor to successful results. This approach puts learners at the driving seat, they would actively participate in the learning process. The more they are engaged in the learning process, the more knowledge and skills they get back to work with (Lawless, n.d.).

When learners participate in their learning process, they build on their previous knowledge and experience and use that to perceive the current learning, a term called constructivism. Learners build knowledge upon the foundation they have rather than passively receive it (McLeod, 2023).

According to Jonassen et al (1995) effective leaning systems, based on learner-centered approach and constructivism, are built on four attributes:

Context: learner connect their real life with what they are learning.

Construction: construct their own knowledge and experience with learning

Collaboration: the ability to test the new ideas with colleagues

Conversation: communication between learners makes them make sense of the learning process.

Employees in marketing and IT departments, in the case study, would build on their previous knowledge of technology together with the new learning. Jonassen theory applies as follows:

Context: employees would use these packages in their actual work, so it is in the same context.

Construction: they will build on previous knowledge.

Collaboration: they will be in contact with other colleagues during learning.

Conversation: the main purpose of that training is communication.

However, those who do not have knowledge with those packages would apply Vygotsky and Bruner Theory by which they have a mentor to help the, then they will scaffold learning (Wheeler, 2014).

In addition to constructivism and learner-centered approaches to designing L&D activities, there are several organizational factors that should be considered when designing learning and development activities, for instance:

**Legal:**

When the organization arrange L&D activities, it needs to consider the relevant regional law in each region. For example, European branches should consider the General Data Protection Regulation (GDPR) (europa.eu, 2022) and USA branch should focus on the Privacy Act 1974 (Murray, 2023) and other branches would ensure compliance with regional relevant laws when it comes to interaction with learners’ private data. In addition, the organization should also care for “Original Equipment Manufacturer” industry guidelines in each territory it operates in.

**Cultural**

Since the organization is spread across North America, Western Europe, China and Australia, there would be many cultural differences and expectations between learners that should be considered. Different backgrounds must be considered. For example, the Chinese translators would be a great help in understanding the Chinese trainers’ culture.

**Financial**

The goal of the organization is to cut travel costs by 66% in the next 9 months. L&D activities must be within the budgetary guidelines of the organization. The hidden costs, like taken employees out of work, should also be considered. For example, training the employees on office 365 package in the time of actual meeting would be cost effective.

## AC1.2 **Assess** factors to consider when designing learning and development programmes for dispersed workforces.

Multinational organizations that have workforces across the globe have a challenge of delivering L&D activities to all learners in every region. With the increase of geographical barriers, L&D activities become more challenging. For instance, a survey by KPMG (2020) showed that 46% of surveyed employees had spent less time on L&D activities. Therefore, it is essential to consider the following factors when designing L&D programs for multinational organizations.

**Learning**

The goal of the L&D initiative is to let employees use technology such as Microsoft teams and yammer in communications to reduce the travel expenses. Therefore, what we need to deliver to employees is a hands-on experience of using these technologies in communication.

Introducing a new technology might face resistance (challenge) at the beginning. Managing the change and preparing to it is an essential factor to be considered when designing a program. Kurt Lewin is a renowned change management model that could be used (Connelly, 2023).

At the end of the program (freezing stage), assessing the employees’ performance against what they had learnt is essential. Conducting actual meetings using teams and sharing information using yammer is a KPI for the program. In addition, preparing additional information for learners to help them learn like a how-to guide would be considered.

**Learners**

Not all people are equal, some of them may be tech-savvy; others might not be so. When designing L&D program to teach them Teams and Yammer, these differences should be considered. A survey is a helpful tool to draw a picture of the current skills of the employees in terms of using teams and yammer.

Employees who have previous experience or had worked with that kind of technology can guide employees who have never touched that technology. In other words, a buddy system could be utilized, especially in a short time frame for a large number of learners.

Some learners might be demotivated to change, i.e., resistant to change and learn some new technology. Those folks must be motivated to pursue the learning program. Making the learning journey a fun process would help them to be motivated. According to Willis (2009), learners learn in a fun context, not in a dull environment. Therefore, fun learning program that includes activities and games must be considered.

**Logistics**

Since the learners are a huge team and dispersed across four different territories, and that includes language barriers, time-zone differences, designing a program is a challenging job. However, several alternatives could be used to overcome that. For example, a buddy system for antitechnology employees, using online platforms like coursera, udemy, linkedin, …etc., for tech-savvy employees. Since all employees have teams and yammer installed on their devices, that would make it handy to design such a program. They can access the learning material any time at their own pace. For those who are antitechnology employees, an in-house training program would be designed to help them step by step from the ground up until they are able to use these technologies effectively.

## AC1.3 Explain how inclusivity and accessibility can be built into learning and development at design stage.

Inclusive learning and development program is a program that include a wide range of human diversity and perspectives: age, ethnicity, gender, …etc. (Taherian, 2020). In other words, all employees should be considered in the L&D program for teams and yammer even if they are considered antitechnology people, baby boomers for instance.

Accessibility means that L&D program is easy to use by even those who have impairment: physical or digital impairment (Taherian, 2020a). In other words, L&D program includes diverse ways to include diverse people in an engaged ways irrespective of their nature or abilities.

**Elements of inclusivity:**

Designing a successful learning and development program needs considering all stakeholders through mapping them out (Anderson, 2020). Mapping and categorizing learners help designing and inclusive and accessible program.

*Stakeholder mapping*

Careful stakeholder mapping helps L&D program designers to have a bird-eye view of all stakeholders and categories them to be able to come up with different approaches for different people on the one hand, and to avoid discrimination on the other hand. For example, categorizing the stakeholders in the four branches of the case study organization reveals that a country has diverse workforce the consists of immigrants from across the globe in Western Europe branch in addition to the Chinese branch which, in turn, has serval ethnicities.

*Learning journey mapping*

Not all people are equal in terms of using technology. Some might be tech-savvy and have quick comprehension of digital content while other have difficulties performing the simplest tasks on a computer. Therefore, program designers must be careful about these differences. The program should have materials tailored for each group of stakeholders so that each group can use teams and yammer effectively.

**Elements of accessibility:**

Accessibility means learners have easy access to the learning content irrespective of their abilities. It can be in terms of language or consuming the content.

*Language barriers:*

Since the organization spans across different regions across the world, language might be a hinder for learning. Therefore, designing an L&D program must account for the language barriers. For instance, when offering a video in English, non-native English speakers may have difficulties with the content. It is essential for the program to be designed to be accessible for everybody even for the non-English speakers. For example, putting the subtitles on the video can help non-native English speakers as well as other dialects.

*Content accessibility:*

There are one in four persons across the globe has a disability of some kind (Taherian, 2020b). For example, some learners have visual constraints. When designing an L&D program for them, some consideration should be in place like including text alternatives for visual content, retaining text hierarchy, choosing the right level of color contrast, and avoiding content that may cause seizures (Taherian, 2020b). Using material that have a feature of converting the text to audio feature would be also helpful here.

## AC3.1 Assess how aspects of learning-related theory, psychology, and neuroscience influence approaches to the design of learning and development.

Understanding how learners interact with the learning process and how they perceive it help L&D professionals design an effective learning and development program. The following theories and models help better design an L&D program.

Learning-related theory:

Two of the main assumptions of adult learning theory is self-concept and readiness to learn (O'Neill, 2020). In other words, leaners, especially in the workplace, are motivated to learn what they are going to learn if it is related to their lives and will solve a problem. Moreover, they will be less dependent on the instructor. Hence, involving learners at early stages of the learning process helps with their motivation to learn and participate and share ideas with colleagues. For example, learners could share their previous experience with similar packages like zoom or google meet if they used it before. Hence the design is based on collaboration and sharing experiences from the learners and letting them share information about the topic.

Otherwise, learners would lose focus and motivation to learn, as they would be fed with the information which contradicts adult learning theory.

Psychology:

Humans have a limited capacity to receive and analysis new information coming into them, even with the most intellectual and smartest people. If they are bombarded with lots of information at a single point of time, they would be overwhelmed and lose concentration and engagement. Cognitive overload is the stage at which working memory is overwhelmed by information (Marousis, 2023). Cognitive overload is caused by giving learners too much information in a short amount of time which is more than their attention span. It must be considered during designing learning and development activities.

Therefore, thermotical models like AGES which stands for Attention, Generation, Emotion, and Spacing (Herrholtz, 2020) should be considered when designing L&D activities. Taking care of learners’ attention throughout the program is an essential task by asking questions and getting regular feedback about understanding. Moreover, sequencing and spacing the content into digestible portions helps avoid cognitive load and approach learning effectively.

Therefore, these concepts have been taken into consideration when designing the intervention; otherwise, learner would lose concertation and engagement for learning due to their short attention span.

Neuroscience

Neuroscience is the study of the brain (Sussman, 2023) and how it works. Models like RAD and SCARF help in understanding how the brain is working and motivated towards learning which enables professionals remove blockers.

Willis (2009) discusses that the learning to take place should be in a fun environment rather than an intimidating environment. Therefore, the learning environment must be fun for learning and posing any threats to them. For example, making a learner embarrassed might trigger fight or flight response which would disengage them.

SCARF model explains how the brain respond (engagement or threat) in social situations (mind tools, n.d.). Factors like Status, Certainty, Autonomy, Relatedness, and Fairness taken into consideration when designing the initiative. For example, learners were involved from the beginning, have their own say about the learning methodology (autonomy), there are lots of teamwork activities (relatedness) and so forth.

Otherwise, neglecting those factors lead to fight or flight response and would disengage learner causing learning experience falls apart.

## AC3.2 Discuss a range of learning and development delivery methods, and how they can be blended together to form an engaging and effective learning and development solution.

For a learning and development solution to be effective, it needs to utilize different delivery methods to match different learning styles and preferences. In other words, we need to put several delivery methods together in a blended learning approach. Blended learning is an approach to learning that uses multiple delivery methods both traditional (face-to-face) or digital (synchronous or asynchronous) (Gaquin, 2021). Learning, therefore, would be tailored to individual’s learners needs.

**Traditional Learning:**

Traditional learning is a face-to-face, instructor-based approach of learning. In this approach, a well-experienced, informative instructor provides a group of learners with knowledge and skills they would work with. This approach to learning is known as synchronous learning in which all learners have the same information at the same time (Stanford, n.d.). It can be on-the-job or off-the-job delivery. Off-the-job learning involves halting work and attending formal learning in a classroom. While on-the-job training or learning in the flow of work is accessing learning in the flow of work from more experienced co­­lleagues (CIPD, 2022). Employees have barely 1% of their time to learn something new (Lahey, 2016). Due to the scarcity of time available for learning and the potential short attention span, learning in the flow of work would be a supporting option to the more costly off-the-job training. It is a bite-sized learning solution that is directly targeted at solving a problem without taking employees out of their job.

**Virtual Learning:**

Virtual learning involves attending classes using technologies like e-learning courses, webinars, videos, …etc. It is the favorable approach for remote workers who have difficulties to relocate for a training course. In addition, it can be mixed with traditional learning to avail both benefits. For example, a lecture in traditional learning could be recorded for later consumption when the time is available for the learner. Virtual learning can be asynchronous where learners access and consume that material at their own pace and time (Stanford, n.d.). For example, students might enroll in a virtual course on coursera, linkedin leaning or other platforms on their own pace (asynchronous). Alternatively, it can be synchronous when all learners attend the same class virtually – a traditional like classroom but online. This is especially useful for remote work.

**Flipped Learning:**

Flipped approach to learning turns the learning process upside down: classwork comes after the homework (School of education, 2020). In other words, flipped learning uses a mixture between synchronous and asynchronous learning. Learners study the material on their own pace, and based on their study, there will be a discussion in the classroom (physical or virtual) about the content they consumed. As such, classroom is more about coaching session rather than a classroom.

It blends lots of learning approaches together to benefit from them all; learning approaches can include off-the-job, in the flow of work, virtual, physical or e-learning.

Learning and development activities should utilize several delivery methods in a blended approach to delivery. There is no clear cut to differentiate between different delivery methods; they should be blended for the best learning experience.

## AC3.3 Design a learning and development solution that addresses and combines identified learning and development objectives: Learning methods, Engagement techniques, Impact measurement activities

Based on “straw man” proposal in the appendix for an L&D intervention to train 12000 on using Microsoft teams and Yammer, the learning solution would be as follows:

Learning Methods:

The blended approach to learning ensures maximum benefit of learning as well as accommodating different learning styles. Traditional learning would be in the form of instructor-based learning and in-the-flow of work learning (CIPD, 2022). Moreover, flipped learning approach would be adopted where learners would be given assignments about some features of teams and yammer to prepare at home and demonstrate it to their colleagues i.e., flipped learning (School of education, 2020). For example, instructor demonstrate certain features of the technology, and as a homework, learners would prepare for the next session to demonstrate the feature to their colleagues.

Engagement techniques

Several theories emphasized the link between motivation and autonomy, Pink’s motivation theory (Pink, 2009), SCARF model (Davey, 2001), and self-determination theory (Ackerman, 2018) to list some. Autonomy and feeling control over the learning process help learners to be engaged and enthusiastic.

Learner inclusion over the learning design is an important aspect of their control over the process. Before the start of the process, learners are surveyed about their preferred way of learning so that it is implemented, group learning, for example. As such, learners would feel more autonomous and have control over learning and would be more engaged.

In addition, using multimedia and games would be a great tool for engagement. Games and multimedia are used as visual arousal tools that grip attention and refreshes the mind especially for short attention spans. That is also coupled with spacing and sequencing technique where the material is given in chunks and separated apart to ensure proper comprehension.

Another example to engage learners is to make them instructors for a portion of the course. That would boost the engagement score of the learners as well as provides them with solid understanding of the material as well.

Impact measurement

Kirkpatrick’s model of training evaluation (Andreev, 2023) is a renowned model which could be used here. It evaluates 4 hierarchical levels of training aspects:

* Reaction: learner’s feedback about the learning (formative and summative).
* Learning: what is the actual added value to the learners.
* Behavior: did learning intervention changed learner’s behavior. (Do they really use teams and yammer in their daily communication?)
* Results: Does the learning objectives main goal has been achieved?

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# Appendix

**AC 3.3 - Design a learning and development solution that addresses and combines identified learning and development objectives:**

* Learning methods
* Engagement techniques
* Impact measurement activities

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| **A “Straw Man” design of an L&D intervention will meet the needs of the identified learning and development objective.** | | |
| This **Straw Man L&D Design** meets the L&D objective (taken from AC 2.3) |  | |
| **Preparation** of the learners | Communication (channels and methods) | Learners must be informed about the roadmap of the learning and development intervention. All the communications would be written communications through emails. |
| Engagement techniques | For learners to be engaged right before the commencement of the intervention, they need to feel sense of ownership and autonomy; they need to feel valued and involved. Therefore, an MCQ survey is sent to learners about their preferred of learning to be implemented during the intervention. In addition, the survey should have a section about the expectation about the learning and its outcomes. |
| Resources required (technology, time, people, finance) | The resources required for the training is mobile devices that have teams and yammer already installed on them. 98% of learners have already devices or have their own personal devices have these packages installed.  A roadmap to the training is rolled out; it explains what they should expect from the training and relevant links to material so that they can be prepared.  The time for reading the roadmap would be 5 minutes and an additional 30 minutes exploring the material. |
| Pre-learning activity | Learners need to explore the training roadmap and the associated links to the material. That would be a great warm up for them before the training, |
| **Input** provided to the learners | Learning methods | There would be a blended learning approach in which several learning methods utilized. Traditional learning in which instructors explains and demonstrates the material to the learners.  As a practice, the trainer would task learners with homework. They would search for some features online for teams and yammer and in the next session, these features would be discussed in class.  In addition, volunteers would be the instructor for their colleagues and give a demo about certain feature they have studies as a homework.  As social learning implementation, learners would be divided into groups to discuss one feature and a representative of each group makes a demo about it. |
| Engagement techniques | The roleplay of the learners as the tutors showing demos to their colleagues in addition to some games to make sure that the information is thoroughly understood. |
| Resources required (technology, time, people, finance) | The resources are learners’ devices with the installed software in addition to one hour of their work week for class. Moreover, two hours needed at the learners’ pace to excise what they have already learnt and make some research for the next session. |
| Psychology and neuroscience used | RAD: the learning process would be fun avoiding any stress in class. For example, embarrassing situations for learners in the class are not forbidden. Everybody respects one another and learn from one another in a fun session.  Cognitive Load: To avoid cognitive load, the training sessions are spaced apart: once a week (spacing). In addition, every session has a definite scope which is light weight material for learners to easily digest the material. |
| **Application** of learning for the learners | How learners will be able to apply / practice what they have learnt in the real world | The training material would not be given at once by traditional approach to learning. Alternatively, there will be some sessions that would be given online using teams. Therefore, learners have the opportunities to practice what they have learnt. In addition, sharing information and communication would be using yammer exclusively. |
| Engagement techniques | Using flipped learning techniques in which learners do their homework before classwork. They should prepare a demo about one feature of teams and one feature of yammer and then make a demo to their colleagues virtually. |
| Resources required (technology, time, people, finance) | There would be two sessions remotely to discuss advanced features of teams and yammer which will cost one hour per each. |
| Post-learning activity | Applying on-the-job training principle, learners would attended their next actual meeting using teams and share their thoughts about the meeting on yammer. |
| **Follow up** to support the learners transfer learning into the real world | How learners will be supported to embed what they have learnt | Team will make sure that two out of three meetings or events are held on teams. In addition, the information sharing, and communication would be through yammer exclusively. |
| Engagement techniques | Incorporating using the technology stack in the performance appraisal KPIs. |
| Resources required (technology,  time, people, finance) | Communication officers should monitor the communication flow between employees. They need to allocate sometime to check the KPIs for monitoring the communications to minimize the physical meetings and events. |
| How learners are assessed as being competent | Successful online meetings and communications without problems mean that learners had grasped the new technology and using it effectively. |
| **Evaluation** **methodology** used to determine the success of the intervention | Evaluation method, process or model adopted | Kirkpatrick’s model of training evaluation is a great model to evaluate the learning process. |
| Data to be collected (using quantitative and qualitative data) | Qualitative data that could be collected during and after the intervention would be learners’ feedback. How far the intervention reached their expectation? What did they like about the intervention? What did they do not like about the intervention? Would it be likely for them to nominate such an intervention to a friend?  As for quantitative data, it could include number of students who participated as tutors, learners’ satisfaction rate, the main KPI of having two of three meetings on teams. |
| How learner feedback will be collected (method) | As Microsoft forms is one of the packages available in the office bundle, it can be used as a tool to collect feedback from learners. |
| Formative evaluation (during learning) or summative evaluation (after learning) Assessment utilised | Both formative and summative approaches to assessment could be utilized. Formative assessment enables facilitators make sure that learners have acquired the skill of using the new technology and recognize if there are any difficulties that could be addressed.  Summative approach can be utilized as well. It is a helpful approach for the next groups. The target of the training is to train 12000 employees who will be divided into groups per territory. The feedback given form early groups can be utilized and implemented into the next groups. |

This is a template designed to support learners in providing a framework for their “Straw Man” design for AC 3.3 in Unit 5LD02 – this is an optional template.