



LEONARDO DA VINCI - TRANSFER OF INNOVATION

HUMAN RESOURCE MANAGEMENT



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This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any

Document data

Author:	Zsolt Tóth (ed.) – Darragh Coakley
Version:	final
Theme:	Human Resource Management
WP:	WP4
Date:	31/05/201
Document Type:	product
File:	R10_sme2_module_hr_EN_rev_f.doc
Lector:	Zsuzsanna Bódi
Product ID:	R10
Target group:	Employees, managers of SMEs

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HUMAN RESOURCE MANAGEMENT

1 Human Resource Management Basics

Human resource management (HRM) is the process of employing people, training them, compensating them, developing policies relating to them, and developing strategies to retain them.

Many functions of HRM are also tasks other department managers perform, which is what makes this information important, despite the career path taken.

Most experts agree on the main roles that HRM plays in organizations. This section is designed to give a brief overview of the basics of HRM, involving staffing, retaining and motivating workers and the necessity of having procedures and processes for redundancies, worker protection, compensation, etc.

1.1 Staffing and development of Workplace Policies

1.1.1 Staffing:

You need people to perform tasks and get work done in the SME. Even with the most sophisticated machines, humans are still needed. Because of this, one of the major tasks in HRM is staffing. Staffing involves the entire hiring process from posting a job to negotiating a salary package. Within the staffing function, there are four main steps:

- **Development of a staffing plan.** This plan allows HRM to see how many people they should hire based on revenue expectations.
- **Recruitment.** This involves finding people to fill the open positions.
- **Interviewing:** This involves gathering information from the individuals looking to fill the open position.
- **Selection.** In this stage, people will be selected, and a proper compensation package will be negotiated. This step is followed by training, retention, and motivation.

1.1.2 Workplace Policies

Every organization has policies to ensure fairness and continuity within the organization. One of the jobs of HRM is to develop the verbiage surrounding these policies. In the development of policies, HRM, management, and executives should all be involved in the process. It is key to note here that HR departments do not and cannot work alone. Everything they do needs to involve all other departments in the organization. It is therefore imperative that every workplace policy be discussed with any additional relevant departments such as management, IT, etc. Elements such as these are further discussed under "Worker Protection and laws affecting employment".

Each policy can be unique to the organization, but must follow national and international law. Some typical examples of workplace policies might be the following:

- Punctuality policy
- Discipline process policy
- Vacation time policy
- Internet usage policy

Typical steps in developing a workplace policy should include:

1) Planning and consultation

This step should involve relevant (if not all) staff members in developing and implementing workplace policies to promote awareness, understanding, compliance, etc. Involvement of the staff at this stage helps gain an insight into how the policies might apply in practice, including possible scenarios where the policy might apply.

2) Research and define policy terms

This step is important in ensuring that the policy will be legible and will contain the correct wording. A number of elements should be taken into consideration at this stage:

- Ensure that the policy will be consistent with and informed by the organisation values/ ethics and existing employment legislation.
- Be clear in the policy about who the policy applies to. For example, does the policy apply strictly to employees, or does it extend to sub-contractors, contractors, etc.?
- The policy should contain specific instructions/ information about what will happen to employees who do not appropriately follow the policy. This should ensure that there is a clear procedure in place.
- Equally, the policy should outline exceptions to the policy – situations where it is not possible to follow the policy. In this case, it should be very specific information outlining what constitutes a situation where the policy cannot be followed.
- The policy should have (and where necessary, define) key terms contained in the policy so that very specific keywords are used and can be understood by employees.
- The language used should be as clear as possible, without relying on complex terms or administrative language. It should be as easy to read if possible.

A good step in this is to, if possible, examine what a good policy looks like – for example what other organizations have done – and identify a policy similar to what you want to implement.

3) Draft policy

Policies should be as legible as possible – written in plain English and understandable by all employees. If possible, it should be possible to sum up the policy in a series of key statements that can be listed (e.g.: workplace internet usage policy: 1...,2...,3..., etc.). If necessary, the policy should be translated into additional languages, if there is a need for it.

Once drafted, the creator of the policy should seek comments and feedback from all sectors of the organization – such as the employees whom it will affect, the department who will enforce it (e.g.: the IT dept who will enforce the internet usage policy), management who may be responsible for penalizing employees who do not follow the policy, etc.

The drafted policy should be reviewed, revised and re-circulated on a regular basis to ensure that it all departments are familiar and that it is acceptable to all major departments.

4) Implementation

When implementing policies, it is important to make information available to all existing and (especially) new employees. The policies need to be available publically and easily available at all times – both in document form and online. Employees should be encouraged to review these when they begin work and any time which they are changed. Policies may also be explained through information and training sessions, meetings, etc. Ideally, policies should be reviewed frequently to ensure that they are relevant.

5) Compliance

Policies are there to ensure uniformity and consistency in decision-making and operational procedures. Therefore, when ensuring compliance with policies, it is important to ensure that they apply throughout all areas of the organisation. Policies should be made available to all employees and adherence to these should be encouraged.

Once these actions have been established, it is important, as mentioned earlier, to identify the consequences of breaching the policy – this should include the reasons (if necessary) why breaches to policy are to be avoided and the consequences for the employee who has breached the policy. The consequences for the employee should reflect the severity of breaching the policy – via either a verbal warning, formal warning to a disciplinary action or dismissal.

In addition, a breach of a policy should be dealt with promptly and according to the procedures set out in the policy without delay or procrastination.

1.2 Retention of Workers

Retention involves keeping and motivating employees to stay with the organization. Compensation is a major factor in employee retention, but there are other factors as well. Ninety percent of employees leave a company for the following reasons:

- Issues around the job they are performing
- Challenges with their manager
- Poor fit with organizational culture
- Poor workplace environment
- Etc.

Retention and reduction of turnover is paramount to a healthy organization. Performing research, such as doing exit interviews, and surveying employees' satisfaction, are the first steps in this. Following this, one should examine policies regarding succession planning and salaries and benefits. Finally, one should examine compensation and benefits.

1.2.1 Employee Satisfaction

Employee satisfaction refers to whether employees are satisfied and fulfilled in their role in the organisation, how the organisation is run, what they desire from the organisation, etc. Employee satisfaction is a very wide field, with many many variables, but gathering information regarding employee satisfaction in your organisation will certainly help to improve the organisation and employee's relationship to the organisation.

The following 2 tools which are very useful in gathering employee satisfaction information:

1) Employee survey

An employee survey is a series of questions that seek to gather information from employees related to their day-to-day experiences and processes and their attitude towards their conditions, co-workers, employers, etc.

The employee survey can examine satisfaction on a wide range of issues, including:

- Role & responsibilities
- Everyday actions
- Employee pay and recognition
- Management
- Communication
- Leadership
- Support
- Etc.

A good employee questionnaire should seek feedback for specific items by asking closed-ended questions (e.g.: yes/no questions, Linkert scale (strong, okay, weak) questions) that ask employees to rate a particular aspect of the work environment and open text-based questions that allow them to express their opinions.

There are 3 very important elements to be aware of when putting together questions:

- The type of information you need – This will determine the form the question will take (e.g.: yes/no, rate 1-5, open-text “comment”)
- The question structure – Be sure to use clear language (& references to specific company tasks/terms etc. where necessary) so that employees understand what is being asked

WEB LINK: A guide to putting together an Employee Attitude Survey is available here:

<http://bit.ly/TymcNn>

2) Exit Interviews

Exit interviews are interviews conducted with an individual who is separating from the organization.

These tend to gather very honest feedback from employees as they no longer have a vested interest in the organisation and their role in the organisation. The difficulty with exit interviews is that, as with any use of the interview tool, it takes time to develop, hold and analyze information from the interview.

Exit interview questions can be quite broad as they are usually more relevant for the wider organization.

Typical exit interview questions include why you are leaving, why you decided to accept a new position, whether there is anything you would change about the company, and what suggestions you might have for improvement. For example, some useful questions may be:

- What did you like best about your job?
- What did you like least about your job?
- How could the organisation better facilitated your role & responsibilities?

WEB LINK: A guide to putting together an Employee Attitude Survey is available here:

<http://slidesha.re/i8QEJH>

NOTE: The specifics of how to use these tools is covered in chapter 4 of this module, which details tools to use to make surveys and other information gathering tools available.

1.2.2 Succession Planning

Succession planning is a process of identifying and developing internal people who have the potential for filling positions. As we know, many people leave organizations because they do not see career growth or potential. One way we can combat this in our retention plan is to make sure we have a clear succession planning process that is communicated to employees. Succession planning is sometimes called the talent bench, because successful companies always have talented people “on the bench” or ready to do the job should a key position become vacant. The goals of most succession plans include the following:

- Identify high-potential employees capable of advancing to positions of higher responsibility.
- Ensure the development of these individuals to help them be “ready” to earn a promotion into a new position.
- Ensure diversity in the talent bench by creating a formal succession planning process.

Succession planning must be just that: planned. This allows clear communication to the employees on how they can further develop within the organization, and it helps them see what skills they should master before that time comes.

1.2.3 Salaries and Benefits

A comprehensive compensation plan that includes not only pay but things such as health benefits and paid time off (PTO) is the first retention strategy that should be addressed. The compensation plan should not only help in recruitment of the right people but also help retain employees. Utilizing a pay banding system, in which the levels of compensation for jobs are clearly defined, is one way to ensure fairness exists within internal pay structures.

As we know from this chapter, compensation is not everything. An employee can be well paid and have great benefits but still not be satisfied with the organization. Some of the considerations surrounding pay as a way to retain employees include the following:

- **Instituting a standard process.** Many organizations do not have set pay plans, which can result in unfairness when onboarding (the process of bringing someone “on board” with the company, including discussion and negotiation of compensation) or offering pay increases. Make sure the process for receiving pay raises is fair and defensible, so as not to appear to be discriminatory. This can be addressed in both your compensation planning process as well as your retention plan.
- **A pay communication strategy.** Employees deserve to know how their pay rates are being determined. Transparency in the process of how raises are given and then communicating the process can help in your retention planning process.
- **Paid time off.** Is your organization offering competitive PTO? Consider implementing a PTO system that is based on the amount of hours an employee works. For example, rather than developing a policy based on hours worked for the company, consider revising the policy so that for every X number of hours worked, PTO is earned. This can create fairness for the salaried employee, especially for those employees who may work more than the required forty hours.

1.2.4 Compensation and Benefits

When we think of compensation, often we think of only our paycheck, but compensation in terms of HRM is much broader. A compensation package can include pay, health-care benefits, and other benefits. Before beginning work on your compensation packages, some analysis should be done to determine your organization's philosophy in regard to compensation. Before development of your compensation philosophies, there are some basic questions to address on your current compensation packages.

- From the employee's perspective, what is a fair wage?
- Are wages too high to achieve financial health in your organization?
- Do managers and employees know and buy-into your compensation philosophy?
- Does the pay scale reflect the importance of various job titles within the organization?
- Is your compensation good enough to retain employees?
- Are laws being met with your compensation package?
- Is your compensation philosophy keeping in line with labor market changes, industry changes, and organizational changes?

1.2.4.1 Job Evaluation Systems

Job evaluation is defined as the process of determining the relative worth of jobs to determine pay structure. Job evaluation can help us determine if pay is equitable and fair among our employees. There are several ways to perform a job evaluation. One of the simplest methods, used by smaller companies or within individual departments, is a **job ranking system**. In this type of evaluation, job titles are listed and ranked in order of importance to the organization.

A **paired comparison** can also occur, in which individual jobs are compared with every other job, based on a ranking system, and an overall score is given for each job, determining the highest-valued job to the lowest-valued job.

In a **job classification system**, every job is classified and grouped based on the knowledge and skills required for the job, years of experience, and amount of authority for that job.

Another type of job evaluation system is the **point-factor system**, which determines the value of a job by calculating the total points assigned to it. The points given to a specific job are called compensable factors. These can range from leadership ability to specific responsibilities and skills required for the job. Once the compensable factors are determined, each is given a weight compared to the importance of this skill or ability to the organization. When this system is applied to every job in the organization, expected compensable factors for each job are listed, along with corresponding points to determine which jobs have the most relative importance within the organization.

Another option for job evaluation is called the **Hay profile method**. This proprietary job evaluation method focuses on three factors called know-how, problem solving, and accountability. Within these factors are specific statements such as "procedural proficiency." Each of these statements is given a point value in each category of know-how, problem solving, and accountability. Then job descriptions are reviewed and assigned a set of statements that most accurately reflect the job. The point values for each of the statements are added for each job description, providing a quantitative basis for job evaluation and

eventually, compensation. An advantage of this method is its quantitative nature, but a disadvantage is the expense of performing an elaborate job evaluation.

1.2.4.2 Pay Systems

Once you have performed a job evaluation, you can move to the next step, which we call pay grading. This is the process of setting the pay scale for specific jobs or types of jobs.

The first method to pay grade is to develop a variety of **pay grade levels**. Then once the levels are developed, each job is assigned a pay grade. When employees receive raises, their raises stay within the range of their individual pay grade, until they receive a promotion that may result in a higher pay grade. The advantage of this type of system is fairness. Everyone performing the same job is within a given range and there is little room for pay discrimination to occur. However, since the system is rigid, it may not be appropriate for some organizations in hiring the best people.

One of the downsides to pay grading is the possible lack of motivation for employees to work harder. They know even if they perform tasks outside their job description, their pay level or pay grade will be the same. This can incubate a stagnant environment. Sometimes this system can also create too many levels of hierarchy. For large companies, this may work fine, but smaller, more agile organizations may use other methods to determine pay structure. For example, some organizations have moved to a **delayering and banding** process, which cuts down the number of pay levels within the organization. Rather than use a pay grade scale, some organizations use a **going rate model**. In this model, analysis of the going rate for a particular job at a particular time is considered when creating the compensation package. This model can work well if market pressures or labor supply-and-demand pressures greatly impact your particular business.

Another pay model is the management fit model. In this model, each manager makes a decision about who should be paid what when that person is hired. The downside to this model may be potential discrimination, halo effects, and resentment within the organization. Of course, these factors can create morale issues, the exact thing we want to avoid when compensating employees.

In addition to the pay level models we just looked at, other considerations might include the following:

- **Skill-based pay.** With a skill-based pay system, salary levels are based on an employee's skills, as opposed to job title. This method is implemented similarly to the pay grade model, but rather than job title, a set of skills is assigned a particular pay grade.
- **Competency-based pay.** Rather than looking at specific skills, the competency-based approach looks at the employee's traits or characteristics as opposed to a specific skills set. This model focuses more on what the employee can become as opposed to the skills he or she already has.
- **Broadbanding.** Broad banding is similar to a pay grade system, except all jobs in a particular category are assigned a specific pay category. For example, everyone working in customer service, or all administrative assistants (regardless of department), are paid within the same general band.
- **Variable pay system.** This type of system provides employees with a pay basis but then links the attainment of certain goals or achievements directly to their pay. For example, a salesperson may receive a certain base pay but earn more if he or she meets the sales quota.

There is more to a compensation package than just pay but mainly in larger companies than an SME. There are many other aspects to the creation of a good compensation package, including not only pay but incentive pay and other types of compensation.

1.3 Grievances and dealing with them

Grievance procedures are important in an organization as they put in place a clear and transparent structure for dealing with difficulties which may arise as a result of conflict and complications with other employees and with management.

Specifically, grievance procedures are important to:

- Provide an established course of action if a complaint arises
- Provide an established course of action if individuals are unable to resolve through regular communication or communication with their line manager
- Provide a point of contact (and potentially timescales) for resolving grievances
- Resolve matters without recourse to an employment tribunal.

As with other procedures within an organisation, grievance policies should:

- Be consistent with and informed by the organisation values/ ethics and existing employment legislation.
- Be very clear about what constitutes a valid grievance (and any potential exceptions).
- Contain specific instructions/ information about what will happen to the individuals against whom the accusation is made.

Disciplinary procedures are different from grievance procedures in that a disciplinary procedure should be preventative rather than dealing with the aftermath of an incident. The aim of a disciplinary policy is to ensure that employees:

- Know the standards that must be adhered to in terms of behaviour/ conduct – particularly with regard to interactions with their co-workers.
- Can identify situations which would constitute a breach of the organisation's policies.
- Are aware of the consequences of breaching the policy and are aware of the step-by-step procedures which are part of this.

The following are important factors which should be part of your disciplinary policy and procedures:

- **Fast acting:** The grievance should be dealt with as soon as possible, without procrastination, to avoid further complications. Time must be given to managers to effectively manage a grievance in time.
- **Acknowledgement:** The grievance must be acknowledged as soon as it is put forward by the individual – acknowledgement indicates that the complaint is being dealt with and without bias.
- **Based in fact:** The first step in dealing with a grievance should be to gather the appropriate and sufficient facts surrounding the grievance.
- **Aiming at the root cause:** The cause of the grievance should be identified as well – in order to avoid repetitions of the grievance.
- **Multiple options:** A number of courses of action should be identified – so that a number of options are available to the manager.

- **Reviewing:** After implementing the decision, a follow-up should be implemented to ensure that the grievance has been dealt with and that complainant is satisfied.

WEB LINK: Sample Grievance Handling Procedure: <http://en.allexperts.com/q/Human-Resources-2866/2008/4/HRM-26.htm>

NOTE: A very important point with grievance and discipline procedures and policies is ensuring that these comply with up-to-date employment legislation.

1.4 Redundancies

Redundancies are a necessary, if unfortunate, part of any business. If an organisation faces financial difficulties, then it will be required to let people go.

1.4.1 Important Initial Steps:

There are some very important steps before implementing redundancies:

- The first step in dealing with redundancies is to ensure that you have access to existing legislation on Worker Protection and laws affecting employment. Redundancy policies in your organisation can be unique to your organization, but must follow national and international redundancy law.
- If a workforce reduction is necessary, the justifications for this should be documented at an early age so that evidence that alternatives to redundancies were not applicable.
- Ensure that any redundancies which take place are non-discriminatory and can be shown to be non-discriminatory.

1.4.2 Alternative Actions

Before progressing with redundancies, one should consider some alternatives. If a court case arises as a result of a redundancy, it can be useful to show that alternative courses of action were tried and that the reasons for a redundancy was strictly due to business reasons. Potential alternatives to (or actions prior to) redundancies can include:

- **Freezing salary and benefit increases:** This is a standard and sensible action for an organization facing difficulties. Agree to revise and update this policy accordingly over time.
- **Implementing a hiring freeze:** Similar to freezing salaries, an obvious step in reducing costs is to stop hiring for all non-essential roles.
- **Let Contract and Temporary Employees Go:** Contract and temporary employees tend to be let go before any full-time employees, due to the nature of their relationship to the business.
- **Early Retirement, voluntary redundancies:** Asking employees to undertake early retirement and voluntary redundancy is a way of letting employees go which will be viewed less negatively by employees than making people redundant, but will also be expensive in the short term (severance packages, etc will be expected).

- **Reduce Pay Rates and/ or Work Hours:** As a final step before redundancies, pay rates and working hours can be reduced to cut costs. It is commonly held that this is a step that often precedes redundancies.

1.4.3 Prior to Redundancies

If efforts to avoid redundancies are unsuccessful, then the following steps should be taken to make sure that the damage done by redundancies are limited:

- **Keep your employees informed:** Ensure that your employees are aware about the problems that the organisation is facing. This should be done to ensure that redundancies do not come as a surprise and will generate trust from the existing employees and may induce some to take voluntary redundancies.
- **Look for alternatives:** Consider the alternative actions listed previously.
- **Keep communicating:** Ensure that you keep communicating with employees on what you are considering and implementing. Otherwise employees will not be aware that you pursued other options before making people redundant.
- **Consult with an attorney:** Before undertaking any redundancy procedures, make sure that you speak to a qualified employment law attorney with experience in layoffs to ensure that your procedures conforms to existing legislation.
- **Be aware of discriminatory redundancies:** Ensure that your processes are non-discriminatory as these can be contentious issues. Apply the criteria for layoff selection equally across all employees & document the process.
- **Be prepared:** Have a clear procedure for redundancies in place, so that as little time as possible is wasted. Have a severance package prepared and have a legal document releasing the employer from liability for the employee (created or double-checked by a qualified employment law attorney) for the employee to sign.
- **Maintain professionalism:** Remember to treat employees being made redundant with respect – this is what they will remember from the experience – how they were treated. Ensure that people are met face-to-face and communication is maintained.

1.4.4 Considerations

The following are elements which should be considered in redundancies:

Severance Pay: Severance pay varies – it can range from two weeks to as much as six months or

The following are elements which should be considered in redundancies:

- **Severance Pay:** Severance pay varies – it can range from two weeks to as much as six months or more at an employee's current salary (in addition to vacation time). This can generally be determined by the organization, as opposed to necessitating discussion, but any policy on severance pay should be discussed with an employment law attorney.
- **Separation Agreement:** This contract can sometimes be implemented & outlines the terms of the layoff and should determine that the employee being made redundant should not disclose information specific to your organization or hold the organization liable for termination.

WEB LINK: Sample termination letter By Susan M. Heathfield:

<http://humanresources.about.com/od/layoffs-downsizing-strategies/qt/Sample-Layoff-Termination-Letter.htm>

1.5 Worker Protection and laws affecting employment

1.5.1 Worker Protection

Safety is a major consideration in all organizations. Oftentimes new laws are created with the goal of setting federal or state standards to ensure worker safety. Unions and union contracts can also impact the requirements for worker safety in a workplace. It is up to the human resource manager to be aware of worker protection requirements and ensure the workplace is meeting both federal and union standards. Worker protection issues might include the following:

- Chemical hazards
- Heating and ventilation requirements
- Use of “no fragrance” zones
- Protection of private employee information

It’s impossible to present all the aspects listed above therefore we concentrate mainly on the most important issues for an SME.

1.5.2 Dealing with Laws Affecting Employment

Human resource people must be aware of all the laws that affect the workplace. An HRM professional might work with some of these laws:

- Discrimination laws
- Health-care requirements
- Compensation requirements such as the minimum wage
- Worker safety laws
- Labor laws

The legal environment of HRM is always changing, so HRM must always be aware of changes taking place and then communicate those changes to the entire management organization.

1.5.3 Compensation and Benefits Administration

HRM professionals need to determine that compensation is fair, meets industry standards, and is high enough to entice people to work for the organization. Compensation includes anything the employee receives for his or her work. In addition, HRM professionals need to make sure the pay is comparable to what other people performing similar jobs are being paid. This involves setting up pay systems that take into consideration the number of years with the organization, years of experience, education, and similar aspects. Examples of employee compensation include the following:

- Pay
- Health benefits
- Retirement plans

- Stock purchase plans
- Vacation time
- Sick leave
- Bonuses
- Tuition reimbursement

1.6 Skill/ Competency Mapping

“A competency is a set of skills, related knowledge and attributes that allow an individual to successfully perform a task or an activity within a specific function or job.” (United Nations Industrial Development Organisation, 2002).

WEB LINK: Sample Audit Competency Mapping Tool with competencies and “Tasks” (Behaviours)
<http://www.catrainingoffice.ca/archive-downloads/item47206.pdf>

1.6.1 Competency Mapping and Competency based recruitment

Competencies may take the following forms:

- Knowledge
- Attitude
- Skill

Within an organization, competencies form an important indicator – whether someone has the necessary knowledge and skills to perform successfully in a given job role or for a given task.

Competency mapping consists of identifying the competencies required for a job role by identifying the tasks that form the responsibilities of this role. From these tasks it is possible to identify the competencies (knowledge, attitude, skills, etc.) needed to perform these tasks and therefore this job role, successfully.

The following are important elements which you should be familiar with for competency mapping:

- Competency Mapping: A process used to identify and describe competencies critical to a job role.
- Competency Map: A list of competencies representing the factors critical to success in a job role.
- Competency Profiling: A process for identifying the knowledge, attitude and skill relevant for a job role.
- Primary Competencies: Primary competencies (or “top competencies”) are the vital/ essential competencies that are the most important to an individual in a job role.

In addition to being useful for recruitment, competency mapping can also be relevant for other evaluation functions such as:

- Succession Planning
- Restructuring

- Gap Analysis
- Growth Plans
- Training and Development
- Career Planning
- Performance Appraisal

Competency-based recruitment is a process of recruitment based on identification of the key competencies for specific job roles and hiring people accordingly based on their professional experience which can then be used as evidence that the candidate has a given competency. The advantages of competency-based recruitment is that it can help to ensure that:

- Selection processes tie the right individuals (i.e: those who have the appropriate competencies) to the right jobs
- Individual skills and abilities are matched to the requirements of the job
- The organisation is clear regarding the appropriate competencies and skill sets required by the job.
- The evaluation for staffing and job roles are more accurate

1.6.2 Competency Mapping in an SME

Competency mapping can be performed in an SME by completing a series of logical steps:

1. Locate competency resources
2. Identify an individual's primary competencies in a specific job role
3. Break down the primary competences with a list of behaviours which the individual has demonstrated in their job role
4. Identify performance examples for these behaviours
5. Edit and finalize the primary competencies and behavioural examples to complete the competency map.

The above steps are elaborated below:

1) Locate competency resources

The first step in the competency mapping process will be to identify the competencies (and type of competencies) to focus on. The resources for developing this can be drawn from a number of sources:

- Literature Review: A preliminary approach for identifying required competencies is to conduct a review of the literature to learn about previous studies of the job or similar jobs.
- Competency card sorts: these are groupings which categorize particular competencies – these are useful for generating a broad overview of the competencies to consider – and can include competencies as broad as “communication”, “team leadership”, “decision making”, etc. These card sorts can also aid individuals during the sorting process by identifying the competencies that are part of their map.

WEB LINK: Competency Overview Presentation – Josie Fernandez, Michelle Ezray, 2008:
<http://www.slideshare.net/jdevors/competency-overview-presentation-presentation>

- Career coaches: Individuals who have experience in identifying competencies can also be valuable sources for developing competencies for a specific job role or function.

2) Identify one's competencies and determine their top competencies

Following the development of the competency resources, a validation of the list of competencies developed should be performed as a type of "reality check". Please note that this does not need to be a scientific validation of the competencies, but an overview to make sure that they are relevant.

The next step, once the competencies have been verified, is to identify the "Primary competencies" which are considered to be most essential to the job role. When defining top competencies, a structure or set of points should be put in place which these Primary Competencies should conform to. For instance:

- There should be a limited number of primary competencies – choose the most important 3-5 competencies.
- The primary competencies should be closest to the real-life activities for the given job role.
- The primary competencies should be elements which will not change over time.

Validation of the developed competencies and primary competencies can be performed a number of ways – however, some standard methods of validating these competencies include:

- A review of the competencies by an experienced career coach.
- A review of the competencies by an individual currently inhabiting that job role or who has managed someone in that role.
- A comparison of the competencies with existing descriptions for the job role.

For a more detailed review of the competencies – which can be useful for identifying primary competencies – evaluation of the competencies can take place through:

- Focus Groups: A small group of individuals who have worked in this role, people who have managed/ supervised people in this role, customers/ clients who have dealt with people in this role can be asked to identify competencies they feel essential to performance in this job role.
- Structured Interviews: In a one-to-one basis, detailed questions can be put to individuals who have worked in this role, people who have managed/ supervised people in this role, customers/ clients who have dealt with people in this role to see how important these competencies are considered to be.

3) Break down the primary competences with a list of behaviours which the individual has demonstrated in their job role

Once the "Primary Competencies" for a job role have been defined, then an associated list of behaviours should be developed in order to reflect the actions to be taken by someone in the job role. These behaviours can be identified from these primary competencies through:

- Behavioural Interviews: In behavioural interviews, individuals who were involved in a job role are asked about what the typical behaviours which they would undertake day-to-day. In addition,

they may provide their experience of certain situations in the job role which they found challenging or difficult and what they did in these situations.

- **Structured Interviews:** In a one-to-one basis, detailed questions can be put to individuals who have worked in this role, people who have managed/ supervised people in this role, customers/ clients who have dealt with people in this role to see how important these competencies are considered to be.
- **Observations:** In an observation, an individual in the given job role is observed at work and the behaviours that they undertake day-to-day are noted. The more complex the job, the more time is needed for observation.

Behaviours should include specific concrete actions. In addition, you should limit the number of behaviours to the main 5-7 behaviours.

4) List performance examples of each key behaviour

In this part of the process, it should ideally be the existing individual in the job role to undertake the process of listing previous tasks, projects, etc. which they worked on in their job role and then, under each of these, to consider some behaviours which they undertook which had a positive result. This has the benefit of identifying examples of successful behaviours which can then be applied according to the behaviours identified.

This is a task whose responsibilities lie aligned to the individual in the job role as they are the only individuals who possess the information on their own prior experiences.

5) Edit and finalize the primary competencies and behavioural examples to complete the competency map.

Once all of the primary competencies have been developed, the behaviours analysed and performance examples extrapolated from these, then these should be classified under the job role and a final evaluation should take place by the individuals involved in the job role, and if possible, by the job role manager(s) and customers/ clients.

A useful action following the development of a competency map for a job role is to create a resume based around, or an advertisement for, the job role. The competencies should be integrated into the personal descriptions or list of skills required for the job and the behavioural actions should be integrated into the descriptions of the job tasks.

The functional accomplishments in a job resume or a job description should tie very directly into the primary competencies for the job role. In general, accomplishment statements should form a very large part of any job role resume/ advertisement.

Challenges to competency mapping

The following are some difficulties which might be encountered when performing competency mapping:

- Competency mapping requires very close scrutiny of an individual's day-to-day activities and positions of interest. This may be uncomfortable for some employees who would have to accept intrusion into their working day(s).

- Depending on the job role, it may take a lot of time (and effort) to identify competencies. Particularly in the case where a job role does not have a lot of existing information surrounding it – e.g.: lacking a list of primary competencies, lacking good behavioural examples, etc.
- Many employees may not be used to describing the competencies involved in their position, or the behavioural aspects of their jobs – the performance examples for behaviours may also take a long time to develop as these would require close scrutiny of work done.
- “Blind spots” may occur for employees when describing or thinking about their competencies, behaviours and performance examples. For example, an employee may consider or remember an event or result of behaviour as very successful, but in reality, the results may have been less than ideal.
- Some competencies may not be trainable, no matter how much time and effort are available. This should be something to be considered when reviewing the primary competencies generated, and perhaps put aside as a “checklist” to be examined against candidates.

WEB LINK: Handbook of Competency Mapping - Sanghi, S. (2007).The Handbook of Competency Mapping. Sage Publications, London.

<http://www.slideshare.net/n.rashmisomashekhar/hb-of-competency-mapping>

2 Recruitment & Interviewing Processes

2.1 Recruitment Processes

The recruitment process is an important part of human resource management (HRM). It isn't done without proper strategic planning. Recruitment is defined as a process that provides the organization with a pool of qualified job candidates from which to choose. Before companies recruit, they must implement proper staffing plans and forecasting to determine how many people they will need. The basis of the forecast will be the annual budget of the organization and the short- to long-term plans of the organization—for example, the possibility of expansion. In addition to this, the organizational life cycle will be a factor.

Forecasting is based on both internal and external factors. Internal factors include the following:

- Budget constraints
- Expected or trend of employee separations
- Production levels
- Sales increases or decreases
- Global expansion plans

External factors might include the following:

- Changes in technology
- Changes in laws
- Unemployment rates
- Shifts in population
- Shifts in urban, suburban, and rural areas
- Competition

Once the forecasting data are gathered and analyzed, the HR professional can see where gaps exist and then begin to recruit individuals with the right skills, education, and backgrounds. This section will discuss this step in HR planning.

2.1.1 Recruitment Strategy

Although it might seem easy, recruitment of the right talent, at the right place and at the right time, takes skill and practice, but more importantly, it takes strategic planning. An understanding of the labor market and the factors determining the relevant aspects of the labor market is key to being strategic about your recruiting processes.

Based on this information, when a job opening occurs, the HRM professional should be ready to fill that position. Here are the aspects of developing a recruitment strategy:

- Refer to a staffing plan.
- Confirm the job analysis is correct through questionnaires.
- Write the job description and job specifications.

- Have a bidding system to recruit and review internal candidate qualifications for possible promotions.
- Determine the best recruitment strategies for the position.
- Implement a recruiting strategy.

The first step in the recruitment process is acknowledgment of a job opening. At this time, the manager and/or the HRM look at the job description for the job opening (assuming it isn't a new job).

Assuming the job analysis and job description are ready, an organization may decide to look at internal candidates' qualifications first. Internal candidates are people who are already working for the company. If an internal candidate meets the qualifications, this person might be encouraged to apply for the job, and the job opening may not be published. Many organizations have formal job posting procedures and bidding systems in place for internal candidates. For example, job postings may be sent to a listserv or other avenue so all employees have access to them. However, the advantage of publishing open positions to everyone in and outside the company is to ensure the organization is diverse.

Then the best recruiting strategies for the type of position are determined. For example, for a high-level executive position, it may be decided to hire an outside head-hunting firm. For an entry-level position, advertising on social networking websites might be the best strategy. Most organizations will use a variety of methods to obtain the best results.

Another consideration is how the recruiting process will be managed under constraining circumstances such as a short deadline or a low number of applications. In addition, establishing a protocol for how applications and résumés will be processed will save time later. For example, some HRM professionals may use software such as Microsoft Excel to communicate the time line of the hiring process to key managers.

Once these tasks are accomplished, the hope is that you will have a diverse group of people to interview (called the selection process). Before this is done, though, it is important to have information to ensure the right people are recruited. This is where the job analysis and job description come in.

2.1.2 Job Analysis and Job Descriptions

The job analysis is a formal system developed to determine what tasks people actually perform in their jobs. The purpose of a job analysis is to ensure creation of the right fit between the job and the employee and to determine how employee performance will be assessed. A major part of the job analysis includes research, which may mean reviewing job responsibilities of current employees, researching job descriptions for similar jobs with competitors, and analyzing any new responsibilities that need to be accomplished by the person with the position. A job diagnostic survey should be used to diagnose job characteristics prior to any redesign of a job.

To start writing a job analysis, data need to be gathered and analysed. Please note, though, that a job analysis is different from a job design. Job design refers to how a job can be modified or changed to be more effective—for example, changing tasks as new technology becomes available.

The information gathered from the job analysis is used to develop both the job description and the job specifications. A job description is a list of tasks, duties, and responsibilities of a job. Job specifications, on the other hand, discuss the skills and abilities the person must have to perform the job. The two are tied together, as job descriptions are usually written to include job specifications. A job analysis must be performed first, and then based on that data, we can successfully write the job description and job specifications. Think of the analysis as “everything an employee is required and expected to do.”

Two types of job analyses can be performed: a task-based analysis and a competency- or skills-based analysis. A task-based analysis focuses on the duties of the job, as opposed to a competency-based analysis, which focuses on the specific knowledge and abilities an employee must have to perform the job. An example of a task-based analysis might include information on the following:

- Write performance evaluations for employees.
- Prepare reports.
- Answer incoming phone calls.
- Assist customers with product questions.
- Cold-call three customers a day.

With task job analysis, the specific tasks are listed and it is clear. With competency based, it is less clear and more objective. However, competency-based analysis might be more appropriate for specific, high-level positions. For example, a competency-based analysis might include the following:

- Able to utilize data analysis tools
- Able to work within teams
- Adaptable
- Innovative

You can clearly see the difference between the two. The focus of task-based analyses is the job duties required, while the focus of competency-based analyses is on how a person can apply their skills to perform the job. One is not better than the other but is simply used for different purposes and different types of jobs. For example, a task-based analysis might be used for a receptionist, while a competency-based analysis might be used for a vice president of sales position. Consider the legal implications, however, of which job analysis is used. Because a competency-based job analysis is more subjective, it might be more difficult to tell whether someone has met the criteria.

Once you have decided if a competency-based or task-based analysis is more appropriate for the job, you can prepare to write the job analysis. Of course, this isn't something that should be done alone. Feedback from managers should be taken into consideration to make this task useful in all levels of the organization. Organization is a key component to preparing for your job analysis. For example, will you perform an analysis on all jobs in the organization or just focus on one department? Once you have determined how you will conduct the analysis, a tool to conduct the analysis should be chosen. Most organizations use questionnaires (online or hard copy) to determine the duties of each job title. Some organizations will use face-to-face interviews to perform this task, depending on time constraints and the size of the organization. A job analysis questionnaire usually includes the following types of questions, obviously depending on the type of industry:

- Employee information such as job title, how long in position, education level, how many years of experience in the industry
- Key tasks and responsibilities
- Decision making and problem solving: this section asks employees to list situations in which problems needed to be solved and the types of decisions made or solutions provided.
- Level of contact with colleagues, managers, outside vendors, and customers
- Physical demands of the job, such as the amount of heavy lifting or ability to see, hear, or walk
- Personal abilities required to do the job—that is, personal characteristics needed to perform well in this position
- Specific skills required to do the job—for example, the ability to run a particular computer program
- Certifications to perform the job

Once all employees (or the ones you have identified) have completed the questionnaire, you can organize the data, which is helpful in creating job descriptions. If there is more than one person completing a questionnaire for one job title, the data should be combined to create one job analysis for one job title. There are a number of software packages available to help human resources perform this task.

Once the job analysis has been completed, it is time to write the job description and specifications, using the data you collected. Job descriptions should always include the following components:

- Job functions (the tasks the employee performs)
- Knowledge, skills, and abilities (what an employee is expected to know and be able to do, as well as personal attributes)
- Education and experience required
- Physical requirements of the job (ability to lift, see, or hear, for example)

Once the job description has been written, obtaining approval from the hiring manager is the next step. Then the HR professional can begin to recruit for the position. Before we discuss specific recruitment strategies, we should address the law and how it relates to hiring.

NOTE: One of the most important parts of HRM is to know and apply the law in all activities the HR department handles. Specifically with hiring processes, the law is very clear on a fair hiring that is inclusive to all individuals applying for a job. The laws discussed here are applied specifically to the recruiting of new employees.

2.1.3 Recruitment Strategies

2.1.3.1 Recruiters

Some organizations choose to have specific individuals working for them who focus solely on the recruiting function of HR. Recruiters use similar sources to recruit individuals, such as professional organizations, websites, and other methods discussed in this chapter. Recruiters are excellent at networking and usually attend many events where possible candidates will be present. Recruiters keep a constant pipeline of possible candidates in case a position should arise that would be a good match.

There are three main types of recruiters:

- **Executive search firm.** These companies are focused on high-level positions, such as management and CEO roles. They typically charge 10–20 percent of the first year salary, so they can be quite expensive. However, they do much of the upfront work, sending candidates who meet the qualifications.
- **Temporary recruitment or staffing firm.** Suppose your receptionist is going on medical leave and you need to hire somebody to replace him, but you don't want a long-term hire. You can utilize the services of a temporary recruitment firm to send you qualified candidates who are willing to work shorter contracts. Usually, the firm pays the salary of the employee and the company pays the recruitment firm, so you don't have to add this person to your payroll. If the person does a good job, there may be opportunities for you to offer him or her a full-time, permanent position. Kelly Services, Manpower, and Snelling Staffing Services are examples of staffing firms.
- **Corporate recruiter.** A corporate recruiter is an employee within a company who focuses entirely on recruiting for his or her company. Corporate recruiters are employed by the company for which they are recruiting. This type of recruiter may be focused on a specific area, such as technical recruiting.

A contingent recruiter is paid only when the recruiter starts working, which is often the case with temporary recruitment or staffing firms. A retained recruiter gets paid up front (in full or a portion of the fee) to perform a specific search for a company.

While the HR professional, when using recruiters, may not be responsible for the details of managing the search process, he or she is still responsible for managing the process and the recruiters. The job analysis, job description, and job specifications still need to be developed and candidates will still need to be interviewed.

2.1.3.2 Campus Recruiting

Colleges and universities can be excellent sources of new candidates, usually at entry-level positions. Consider technical colleges that teach cooking, automotive technology, or cosmetology. These can be great sources of people with specialized training in a specific area. Universities can provide people that may lack actual experience but have formal training in a specific field. Many organizations use their campus recruiting programs to develop new talent, who will eventually develop into managers.

For this type of program to work, it requires the establishment of relationships with campus communities, such as campus career services departments. It can also require time to attend campus events, such as job fairs. Setting up a formal internship program might also be a way to utilize college and university contacts.

2.1.3.3 Professional Associations

Professional associations are usually nonprofit organizations whose goal is to further a particular profession. Almost every profession has its own professional organization.

2.1.3.4 Websites

If you have ever had to look for a job, you know there are numerous websites to help you do that. From the HR perspective, there are many options to place an ad, most of which are inexpensive. The downside to this method is the immense number of résumés you may receive from these websites, all of which may or may not be qualified. Many organizations, to combat this, implement software that searches for keywords in résumés, which can help combat this problem.

2.1.3.5 Social Media

Facebook, Twitter, LinkedIn, YouTube, and MySpace are excellent places to obtain a media presence to attract a variety of workers. The goal of using social media as a recruiting tool is to create a buzz about your organization, share stories of successful employees, and tout an interesting culture. Even smaller companies can utilize this technology by posting job openings as their status updates. This technique is relatively inexpensive, but there are some things to consider. For example, tweeting about a job opening might spark interest in some candidates, but the trick is to show your personality as an employer early on.

Creativity with a social media campaign also counts. Facebook allows free job postings in Facebook Marketplace, and the company Facebook page can also be used as a recruiting tool. Some organizations decide to use Facebook ads, which are paid on a “per click” or per impression (how many people potentially see the ad) basis. Facebook ad technology allows specific regions and Facebook keywords to be targeted. Some individuals even use their personal Facebook page to post status updates listing job opportunities and asking people to respond privately if they are interested.

2.1.3.6 Events

Many organizations hold events annually to allow people to network and learn about new technologies. Some organizations host job fairs all over the country; participating in this type of job fair may be an excellent way to meet a large variety of candidates. Other events may not be specifically for recruiting, but attending these events may allow you to meet people who could possibly fill a position or future position.

2.1.3.7 Special/Specific Interest Groups (SIGs)

Special/specific interest groups (SIGs), which may require membership of individuals, focus on specific topics for members. Often SIGs will have areas for job posting, or a variety of discussion boards where jobs can be posted. Recruiting using SIGs can be a great way to target a specific group of people who are trained in a specific area or who have a certain specialty.

2.1.3.8 Referrals

Most recruiting plans include asking current employees, “Who do you know?” The quality of referred applicants is usually high, since most people would not recommend someone they thought incapable of doing the job. E-mailing a job opening to current employees and offering incentives to refer a friend can be a quick way of recruiting individuals. Due to the success of most formalized referral programs, it is suggested that a program be part of the overall HRM strategic plan and recruitment strategy. However, be wary of using referrals as the only method for recruitment, as this can lead to lack of diversity in a workplace. Nepotism means a preference for hiring relatives of current employees, which can also lead to lack of diversity and management issues in the workplace.

Usually, most incentives require the new employee to be hired and stay a specified period of time. Some examples of incentives that can be used to refer a friend might include the following:

- A gift card to the employee
- A financial incentive
- Raffles for most referrals

These types of programs are called employee referral programs (ERPs) and tend to generate one of the highest returns on investment per hire. To make an ERP program effective, some key components should be put into place:

- Communicate the program to existing employees.
- Track the success of the program using metrics of successful hires.
- Be aware of the administrative aspect and the time it takes to implement the program effectively.
- Set measureable goals up front for a specialized program.

2.2 Interviewing

Interviewing people costs money. As a result, after candidates are selected, good use of time is critical to making sure the interview process allows for selection of the right candidate. In an unstructured interview, questions are changed to match the specific applicant; for example, questions about the candidate’s background in relation to their résumé might be used. In a structured interview, there is a set of standardized questions based on the job analysis, not on individual candidates’ résumés. While a structured interview might seem the best option to find out about a particular candidate, the bigger concern is that the interview revolves around the specific job for which the candidate is interviewing. In a structured interview, the expected or desired answers are determined ahead of time, which allows the interviewer to rate responses as the candidate provides answers. For purposes of this section, we will assume that all interviews you perform will be structured, unless otherwise noted.

2.2.1 Types of Interviews

Interview processes can be time-consuming, so it makes sense to choose the right type of interview(s) for the individual job. Some jobs, for example, may necessitate only one interview, while another may necessitate a telephone interview and at least one or two traditional interviews. Keep in mind, though, that there will likely be other methods with which to evaluate a candidate’s potential, such as testing.

Here are different types of interviews:

- **Traditional interview.** This type of interview normally takes place in the office. It consists of the interviewer and the candidate, and a series of questions are asked and answered.
- **Telephone interview.** A telephone interview is often used to narrow the list of people receiving a traditional interview. It can be used to determine salary requirements or other data that might automatically rule out giving someone a traditional interview. For example, if you receive two hundred résumés and narrow these down to twenty-five, it is still unrealistic to interview twenty-five people in person. At this point, you may decide to conduct phone interviews of those twenty-five, which could narrow the in-person interviews to a more manageable ten or so people.
- **Panel interview.** A panel interview occurs when several people are interviewing one candidate at the same time. While this type of interview can be nerve racking for the candidate, it can also be a more effective use of time. Consider some companies who require three to four people to interview candidates for a job. It would be unrealistic to ask the candidate to come in for three or four interviews, so it makes sense for them to be interviewed by everyone at once.
- **Information interview.** Informational interviews are usually used when there is no specific job opening, but the candidate is exploring possibilities in a given career field. The advantage to conducting these types of interviews is the ability to find great people ahead of a job opening.
- **Meal interviews.** Many organizations offer to take the candidate to lunch or dinner for the interview. This can allow for a more casual meeting where, as the interviewer, you might be able to gather more information about the person, such as their manners and treatment of waitstaff. This type of interview might be considered an unstructured interview, since it would tend to be more of a conversation as opposed to a session consisting of specific questions and answers.
- **Group interview.** In a group interview, two or more candidates interview at the same time. This type of interview can be an excellent source of information if you need to know how they may relate to other people in their job.
- **Video interviews.** Video interviews are the same as traditional interviews, except that video technology is used. This can be cost saving if one or more of your candidates are from out of town. Skype, for example, allows free video calls. An interview may not feel the same as a traditional interview, but the same information can be gathered about the candidate.
- **Nondirective interview (sometimes called an unstructured interview).** In a nondirective interview, the candidate essentially leads the discussion. Some very general questions that are planned ahead of time may be asked, but the candidate spends more time talking than the interviewer. The questions may be more open ended; for example, instead of asking, "Do you like working with customers?" you may ask, "What did you like best about your last job?" The advantage of this type of interview is that it can give candidates a good chance to show their abilities; however, the downside is that it may be hard to compare potential candidates, since questions are not set in advance. It relies on more of a "gut feeling" approach.

It is likely you may use one or more of these types of interviews. For example, you may conduct phone interviews, then do a meal interview, and follow up with a traditional interview, depending on the type of job.

2.2.2 Interview Questions

Most interviews consist of many types of questions, but they usually lean toward situational interviews or behavior description interviews. A **situational interview** is one in which the candidate is given a sample situation and is asked how he or she might deal with the situation. In a **behavior description interview**, the candidate is asked questions about what he or she actually did in a variety of given situations. The assumption in this type of interview is that someone's past experience or actions are an indicator of future behavior. These types of questions, as opposed to the old "tell me about yourself" questions, tend to assist the interviewer in knowing how a person would handle or has handled situations. These interview styles also use a structured method and provide a better basis for decision making.

Examples of situational interview questions might include the following:

- If you saw someone stealing from the company, what would you do?
- One of your employees is performing poorly, but you know he has some personal home issues he is dealing with. How would you handle complaints from his colleagues about lack of performance?
- A coworker has told you she called in sick three days last week because she actually decided to take a vacation. What would you do?
- You are rolling out a new sales plan on Tuesday, which is really important to ensure success in your organization. When you present it, the team is lukewarm on the plan. What would you do?
- You disagree with your supervisor on her handling of a situation. What would you do?

Examples of behavior description interview questions might include the following:

- Tell me about a time you had to make a hard decision. How did you handle this process?
- Give an example of how you handled an angry customer.
- Do you show leadership in your current or past job? What would be an example of a situation in which you did this?
- What accomplishments have given you the most pride and why?
- What plans have you made to achieve your career goals?

There are many types of interview questions that would be considered illegal or impolite. Here are some examples:

- **National and ethnic minority origin.**
- **Marital status.** You can't ask direct questions about marital status or ages of children. An alternative may be to ask, "Do you have any restrictions on your ability to travel, since this job requires 50 percent travel?"
- **Religion and politics.** It's illegal to ask candidates about their religious or political affiliation in EU-countries.
- **Disabilities.** You may not directly ask if the person has disabilities or recent illnesses. You can ask if the candidate is able to perform the functions of the job with or without reasonable accommodations.
- **Personal questions.** Avoid asking personal questions, such as questions about social organizations or clubs, unless they relate to the job.

Also, be aware of a **halo effect or reverse halo effect**. This occurs when an interviewer becomes biased because of one positive or negative trait a candidate possesses. Interview bias can occur in almost any interview situation. **Interview bias** is when an interviewer makes assumptions about the candidate that may not be accurate. These assumptions can be detrimental to an interview process. **Contrast bias** is a type of bias that occurs when comparing one candidate to others. It can result in one person looking particularly strong in an area, when in fact they look strong compared to the other candidates. A gut feeling bias is when an interviewer relies on an intuitive feeling about a candidate. **Generalization bias** can occur when an interviewer assumes that how someone behaves in an interview is how they always behave. For example, if a candidate is very nervous and stutters while talking, an assumption may be made that he or she always stutters. Another important bias called **cultural noise bias** occurs when a candidate thinks he or she knows what the interviewer wants to hear and answers the questions based on that assumption. **Nonverbal behavior bias** occurs when an interviewer likes an answer and smiles and nods, sending the wrong signal to the candidate. A **similar to me bias** results when an interviewer has a preference for a candidate because he or she views that person as having similar attributes as themselves. Finally, **recency bias** occurs when the interviewer remembers candidates interviewed most recently more so than the other candidates.

2.2.3 Interview Process

Once the criteria have been selected and interview questions developed, it is time to start interviewing people. Your interviewing plan can determine the direction and process that should be followed:

1. Recruit new candidates.
2. Establish criteria for which candidates will be rated.
3. Develop interview questions based on the analysis.
4. Set a time line for interviewing and decision making.
5. Connect schedules with others involved in the interview process.
6. Set up the interviews with candidates and set up any testing procedures.
7. Interview the candidates and perform any necessary testing.
8. Once all results are back, meet with the hiring team to discuss each candidate and make a decision based on the established criteria.
9. Put together an offer for the candidate.

As you can see, a large part of the interviewing process is planning. For example, consider the hiring manager who doesn't know exactly the type of person and skills she is looking to hire but sets up interviews anyway. It is difficult, if not impossible, to determine who should be hired if you don't know what you are looking for in the first place. In addition, utilizing time lines for interviewing can help keep everyone involved on track and ensure the chosen candidate starts work in a timely manner. Here are some tips to consider when working with the interview process:

- Make sure everyone is trained on the interviewing process. Allowing someone who has poor interviewing skills to conduct the interview will likely not result in the best candidate.
- Listen to the candidate and try to develop a rapport with them. Understand how nervous they must be and try to put them at ease.

- Be realistic about the job. Do not try to paint a “rosy” picture of all aspects of the job. Being honest up front helps a candidate know exactly what they will be in for when they begin their job.
- Be aware of your own stereotypes and do not let them affect how you view a potential candidate.
- Watch your own body language during the interview and that of the candidate. Body language is a powerful tool in seeing if someone is the right fit for a job.
- Stick to your criteria for hiring. Do not ask questions that have not been predetermined in your criteria.
- Learn to manage disagreement and determine a fair process if not everyone on the interviewing team agrees on who should be hired. Handling these types of disagreements is discussed further in Chapter 9 “Successful Employee Communication”.

Once you have successfully managed the interview process, it is time to make the decision.

2.3 The Selection Process

Once you have developed your recruitment plan, recruited people, and now have plenty of people to choose from, you can begin the selection process. The selection process refers to the steps involved in choosing people who have the right qualifications to fill a current or future job opening. Usually, managers and supervisors will be ultimately responsible for the hiring of individuals, but the role of human resource management (HRM) is to define and guide managers in this process.

Because of the high cost, it is important to hire the right person from the beginning and ensure a fair selection process.

The selection process consists of five distinct aspects:

- **Criteria development.** All individuals involved in the hiring process should be properly trained on the steps for interviewing, including developing criteria, reviewing résumés, developing interview questions, and weighting the candidates. The first aspect to selection is planning the interview process, which includes criteria development. Criteria development means determining which sources of information will be used and how those sources will be scored during the interview. The criteria should be related directly to the job analysis and the job specifications. In fact, some aspects of the job analysis and job specifications may be the actual criteria. In addition to this, include things like personality or cultural fit, which would also be part of criteria development. This process usually involves discussing which skills, abilities, and personal characteristics are required to be successful at any given job. By developing the criteria before reviewing any résumés, the HR manager or manager can be sure he or she is being fair in selecting people to interview. Some organizations may need to develop an application or a biographical information sheet. Most of these are completed online and should include information about the candidate, education, and previous job experience.
- **Application and résumé review.** Once the criteria have been developed (step one), applications can be reviewed. People have different methods of going through this process, but there are also computer programs that can search for keywords in résumés and narrow down the number of résumés that must be looked at and reviewed.

- **Interviewing.** After the HR manager and/or manager have determined which applications meet the minimum criteria, he or she must select those people to be interviewed. Most people do not have time to review twenty or thirty candidates, so the field is sometimes narrowed even further with a phone interview. This is discussed in Section 5.3.1 "Types of Interviews".
- **Test administration.** Any number of tests may be administered before a hiring decision is made. These include drug tests, physical tests, personality tests, and cognitive tests. Some organizations also perform reference checks, credit report checks, and background checks. Types of tests are discussed in Section 5.4.1 "Testing". Once the field of candidates has been narrowed down, tests can be administered.
- **Making the offer.** The last step in the selection process is to offer a position to the chosen candidate. Development of an offer via e-mail or letter is sometimes a more formal part of this process. Compensation and benefits will be defined in an offer. We discuss this in Chapter 6 "Compensation and Benefits".

2.3.1 Criteria Development and Résumé Review

2.3.1.1 Criteria Development Considerations

Many HR professionals and managers develop the criteria for hiring, as well as the interview questions, before reviewing any résumés. This allows for a streamlined process with specific guidelines already set before reviewing a résumé. For example, criteria for a project management job might include the following:

- Two years of experience managing a ... HUF/EUR or more project budget
- A bachelor's degree in business or closely related field
- Ability to work on multiple projects at once
- Problem-solving ability
- Conflict-management ability
- Ability to manage a team of five to six diverse workers
- Score of excellent from most recent employer

By setting criteria ahead of time, the hiring team has a clear picture of exactly what qualifications they are looking for. As a result, it is easier to determine who should move forward in the selection process. For example, if someone does not have a bachelor's degree, given this is a criterion, their application materials can be filed away, perhaps for another job opening. Likewise, the HR manager can include those résumés with two or more years of experience and bachelor's degree in the interview pile and then develop interview questions that show the candidates' problem-solving, multitasking, and conflict-management abilities. Résumé parsing or résumé scanning software is readily available and can make the initial screening easier.

2.3.1.2 Validity and Reliability

The **validity** refers to how useful the tool is to measure a person's attributes for a specific job opening. A tool may include any and all of the following:

- Résumé-scanning software

- Reference checks
- Cognitive ability tests
- Work samples
- Credit reports
- Biographical information blanks
- Weighted application forms
- Personality tests
- Interview questions

Biographical information blanks (BIBs) are a useful part of the application process. A BIB is a series of questions about a person's history that may have shaped his or her behavior. The BIB can be scored in the same way as an interview or a résumé, assuming the organization knows which types of answers are predictable for success in a given job. Similarly, a weighted application form involves selecting an employee characteristic to be measured and then identifying which questions on the application predict the desired behavior. Then scores are assigned to each predictor. Of course, the development of the scoring should be determined before any résumés and application forms have been reviewed. In other words, any tool you use to determine someone's qualifications for a job should have validity to determine they are the right fit for the job.

Reliability refers to the degree in which other selection techniques yield similar data over time. For example, if you ask the same interview question of every applicant for the project management position, and the "right" answer always yields similar, positive results, such as the hiring of a successful employee every time, the question would be considered reliable. An example of an unreliable test might occur with reference checks. Most candidates would not include a reference on their résumé who might give them a poor review, making this a less reliable method for determining skills and abilities of applicants.

2.3.1.3 Fit Issues

Fit includes not only the right technical expertise, education, and experience but also fit in company culture and team culture. If a potential candidate is not interested in long-term career growth, he or she might not be deemed an appropriate strategic fit with the organization. In today's organizations, most people are required to work within teams. As a result, fit within a team is as important as company culture fit.

2.3.2 Reviewing Résumés

Once we have developed our criteria for a specific job, we can begin the review process. Everyone prefers to perform this differently. For example, all the hiring decision makers may review all résumés, list the people they would like to meet in person, and then compare the lists. Another method might be to rate each candidate and interview only those above a certain score. Obviously, much of the process will depend on the organization's size and the type of job. None of this process can be done fairly without first setting criteria for the job.

When looking at résumés to determine whom to interview, a manager should be concerned with the concepts of disparate impact and disparate treatment. Disparate impact is unintended discrimination against a protected group as a whole through the use of a particular requirement. Disparate impact may be present in the interviewing process, as well as other employment-related processes such as pay raises and promotions. Every criteria developed should be closely considered to see if it might have disparate impact on a protected group of individuals. For example, the requirement of a certain credit score might have a negative impact on some groups, who may not have a well-developed credit rating. However, if being able to manage money is an important requirement of the job, this requirement might not be discriminatory.

Disparate treatment in hiring might include not interviewing a candidate because of one's perception about the candidate's age, race, or gender. The last consideration is the hiring of internal versus external candidates. A bidding process may occur to notify internal candidates of open positions. Generally speaking, it is best to go through a formal interview process with all candidates, even if they work within the organization. This way, an HR professional can be assured that disparate treatment does not occur because of favoritism. For example, a senior colleague of your organization just left, and you believe a younger colleague in that department is qualified to take over the position. Suppose, though, that the colleague has been lobbying you for the job for some time and has even taken you out to lunch to talk about the job. While this person has maintained high visibility and lobbied for the promotion, there may be equally qualified internal candidates who did not use the same lobbying techniques. Automatically offering the position to this internal candidate might undermine others who are equally qualified. So while hiring internally can be a motivator, making assumptions about a particular person may not be a motivator to others. This is why it is best, even if you hire internally, to post a formal job announcement listing the job description and job qualifications, so everyone in the organization can have an equal opportunity to apply for the job. Once you have completed the criteria for the particular job and narrowed down the field, you can begin the interview process.

2.3.3 Testing

A variety of tests may be given upon successful completion of an interview. The major categories of tests include the following:

- Cognitive ability tests
- Personality tests
- Physical ability tests
- Job knowledge tests
- Work sample

A number of written tests can be administered. A cognitive ability test can measure reasoning skills, math skills, and verbal skills. An aptitude test measures a person's ability to learn new skills, while an achievement test measures someone's current knowledge. Depending on the type of job, one or both will be better suited.

A cognitive ability test measures intelligences, such as numerical ability and reasoning. It is important to note that some cognitive ability tests can have disparate impact. Some sample test categories might include the following:

- Reasoning questions
- Mathematical questions and calculations
- Verbal and/or vocabulary skills

Aptitude tests can measure things such as mechanical aptitude and clerical aptitude (e.g., speed of typing or ability to use a particular computer program). Usually, an aptitude test asks specific questions related to the requirements of the job. Personality tests may be measured and then compared with successful employee scores.

The Big Five personality test looks at extroversion, agreeableness, conscientiousness, neuroticism, and openness. Self-assessment statements might include the following:

- I have an assertive personality.
- I am generally trusting.
- I am not always confident in my abilities.
- I have a hard time dealing with change.

Some institutions also require physical ability tests; for example, to earn a position in a fire department, you may have to be able to carry one hundred pounds up three flights of stairs. If you use tests in your hiring processes, the key to making them useful is to determine a minimum standard or expectation, specifically related to the requirements of the job. An HR manager should also consider the legality of such tests. A job knowledge test measures the candidate's level of understanding about a particular job. For example, a job knowledge test may require an engineer to write code in a given period of time or may ask candidates to solve a case study problem related to the job.

Work sample tests ask candidates to show examples of work they have already done. In the advertising business, this may include a portfolio of designs, or for a project manager, this can include past project plans or budgets. When applying for a pharmaceutical representative position, a "brag book" might be required. A brag book is a list of recommendation letters, awards, and achievements that the candidate shares with the interviewer. Work sample tests can be a useful way to test. These work samples can often be a good indicator of someone's abilities in a specific area. As always, before looking at samples, the interviewer should have specific criteria or expectations developed so each candidate can be measured fairly. Once the interview is completed and testing occurs, other methods, including checking references, driving records, and credit history, can be performed. Some companies even use Facebook as a way of gauging the candidate's professionalism.

Reference checking is essential to verify a candidate's background. It is an added assurance that the candidate's abilities are parallel with what you were told in the interview. While employment dates and job titles can be verified with previous employers, many employers will not verify more than what can be verified in the employment record because of privacy laws. However, if you do find someone who is

willing to discuss more than just dates and job titles, a list of questions is appropriate. Some of these questions might include the following:

- What was the title and responsibilities of the position the candidate had while at your company?
- Do you think the candidate was qualified to assume those responsibilities?
- Does this person show up on time and have good attendance?
- Would you consider this person a team player?
- What are the three strongest and weakest characteristics of this candidate?
- Would you rehire this person?

If a candidate will be driving a company car or vehicle, driving records may be checked. Criminal background checks may also be used if the position will include interaction with the public. Some organizations will also require physical examinations to ensure the candidate can perform the tasks required. A final form of testing is the honesty test. A number of “what would you do” questions are asked. The challenge with this type of test is that many people know the “right” answer but may not be honest in their responses.

2.3.4 Making the Offer

Oftentimes once the decision is made to hire a candidate, HR professionals feel their job is finished. But making the offer to the chosen candidate can be equally as important as the interview process. If the offer is not handled properly, you can lose the candidate, or if the candidate takes the job, he or she could start off on the wrong foot.

Detailed information should be asked of the candidate before the offer is even made. As soon as the offer is made, power is shifted to the candidate. To handle this, he suggests asking salary questions in the interview, including the following:

- “If we were to make a job offer today, when would you be in a position to accept or reject the offer?” If the candidate answers “right now,” this indicates they do not have other job offers on the table or if they do, you are their first choice.
- “At what point, EUR/HUF wise, would you accept our job offer and at what point, EUR/HUF wise would you reject the offer?” The advantage of using this strategy is that it gets to the point of understanding the candidate’s expectations. If the interviewee does not respond right away, you can clarify by asking, “I am asking this question because I would like to gauge your interest level. Share with me the ideal salary offer versus at what point you would be willing to walk away from this opportunity.”

Asking these questions can assist in qualifying candidates, based on salary expectations. For example, if a candidate requests 20 percent more than you are able to pay for the job, this discussion can be had before the offer is even made, perhaps making this candidate no longer viable. Once you have determined in the interview process that the salary expectation is in the range of what you can offer, the first step is to make the offer as soon as the decision is made. In a tight labor market, waiting a week or two may impact your ability to hire your first choice.

Based on the range of salary you can offer, consider the following questions when making the offer to a candidate:

- What is the scarcity of the particular skills set?
- What are the “going” wages in your geographic area?
- What are the current economic conditions?
- What is the current pay for similar positions in your organization?
- What is your organizational compensation strategy?
- What is the fair market value of the job?
- What is the level of the job within the organization?
- What are your budget constraints?
- How soon will the employee be productive in the organization?
- Are there other candidates equally qualified that might have lower salary expectations?
- What are the national and regional unemployment rates?
- If you cannot pay more, can you offer other perks such as a signing bonus or flexible work schedule?

3 Delivering and evaluating training

Small and Medium Enterprises and micro Enterprises are often small structures. The time dedicated to the training has to be reduced and integrated to the work of these organisations. Offering training in SMEs and micro enterprises can be difficult - because of the nature of the niche markets a lot of SMEs are in, the managers often considers the themselves as the best trainers for their employees, as they are aware of all aspects of their business. In addition, an intervention from an outside trainer in a SME can be seen as an intrusion as they can be seen as an "inspector" or a problem rather than a benefit. Also, the absence of an employee in the company results in a significant loss of productivity related to the relative mass of staff. The time dedicated to the training has to be reduced and integrated to their work.

However, as the nature of training has changed with the advent of the IT age and the World Wide Web the benefits of which are widely held nowadays - mass communication, mass collaboration, accessibility, optimization of travel, just in time achievement, on-work application, learner-centred process, interactivity, etc. Many elements of ICT based training and e-learning nowadays are highly appropriate for SMEs and micro enterprises as they bypass the difficulties SMEs have in providing training and facilitating an atmosphere of training.

3.1 Identifying training requirements

As you will see from the types of training below, no one type would be enough for the jobs we do. Most HR managers use a variety of these types of training to develop a holistic employee.

3.1.1 Technical or Technology Training

Depending on the type of job, technical training will be required. Technical training is a type of training meant to teach the new employee the technological aspects of the job.

3.1.2 Quality Training

In a production-focused business, quality training is extremely important. Quality training refers to familiarizing employees with the means of preventing, detecting, and eliminating nonquality items, usually in an organization that produces a product. In a world where quality can set your business apart from competitors, this type of training provides employees with the knowledge to recognize products that are not up to quality standards and teaches them what to do in this scenario. Numerous organizations, such as the International Organization for Standardization (ISO), measure quality based on a number of metrics. This organization provides the stamp of quality approval for companies producing tangible products. ISO has developed quality standards for almost every field imaginable, not only considering product quality but also certifying companies in environmental management quality. ISO9000 is the set of standards for quality management, while ISO14000 is the set of standards for environmental management.

Training employees on quality standards, including ISO standards, can give them a competitive advantage. It can result in cost savings in production as well as provide an edge in marketing of the

quality-controlled products. Some quality training can happen in-house, but organizations such as ISO also perform external training.

3.1.3 Skills Training

Skills training, the third type of training, includes proficiencies needed to actually perform the job. For example, an administrative assistant might be trained in how to answer the phone, while a salesperson at Best Buy might be trained in assessment of customer needs and on how to offer the customer information to make a buying decision. Think of skills training as the things you actually need to know to perform your job. A cashier needs to know not only the technology to ring someone up but what to do if something is priced wrong. Most of the time, skills training is given in-house and can include the use of a mentor.

3.1.4 Soft Skills Training

Our fourth type of training is called soft skills training. Soft skills refer to personality traits, social graces, communication, and personal habits that are used to characterize relationships with other people. Soft skills might include how to answer the phone or how to be friendly and welcoming to customers. It could include sexual harassment training and ethics training. In some jobs, necessary soft skills might include how to motivate others, maintain small talk, and establish rapport.

Many problems in organizations are due to a lack of soft skills, or interpersonal skills, not by problems with the business itself. As a result, HR and managers should work together to strengthen these employee skills. Soft skills training can be administered either in-house or externally.

3.1.5 Professional Training and Legal Training

In some jobs, professional training must be done on an ongoing basis. Professional training is a type of training required to be up to date in one's own professional field. For example, tax laws change often, and as a result, an accountant for H&R Block must receive yearly professional training on new tax codes. Some organizations have paid a high cost for not properly training their employees on the laws relating to their industry. Other types of legal training might include sexual harassment law training and discrimination law training.

3.1.6 Team Training

Do you know the exercise in which a person is asked to close his or her eyes and fall back, and then supposedly the team members will catch that person? As a team-building exercise (and a scary one at that), this is an example of team training. The goal of team training is to develop cohesiveness among team members, allowing them to get to know each other and facilitate relationship building. We can define team training as a process that empowers teams to improve decision making, problem solving, and team-development skills to achieve business results. Often this type of training can occur after an organization has been restructured and new people are working together or perhaps after a merger or acquisition. Some reasons for team training include the following:

- Improving communication

- Making the workplace more enjoyable
- Motivating a team
- Getting to know each other
- Getting everyone “onto the same page,” including goal setting
- Teaching the team self-regulation strategies
- Helping participants to learn more about themselves (strengths and weaknesses)
- Identifying and utilizing the strengths of team members
- Improving team productivity
- Practicing effective collaboration with team members

Team training can be administered either in-house or externally. Ironically, through the use of technology, team training no longer requires people to even be in the same room.

3.1.7 Managerial Training

After someone has spent time with an organization, they might be identified as a candidate for promotion. When this occurs, managerial training would occur. Topics might include those from our soft skills section, such as how to motivate and delegate, while others may be technical in nature. For example, if management uses a particular computer system for scheduling, the manager candidate might be technically trained. Some managerial training might be performed in-house while other training, such as leadership skills, might be performed externally.

3.1.8 Safety Training

Safety training is a type of training that occurs to ensure employees are protected from injuries caused by work-related accidents. Safety training is especially important for organizations that use chemicals or other types of hazardous materials in their production. Safety training can also include evacuation plans, fire drills, and workplace violence procedures. Safety training can also include the following:

- Eye safety
- First aid
- Food service safety
- Hearing protection
- Asbestos
- Construction safety
- Hazmat safety

3.2 Developing training material

Either creating or modifying information for training purposes requires some consideration before it is delivered to employees. One should always be aware of the limitations and benefits of the medium through which the training is delivered. To that end, the following are considerations which should be taken into account when considering either creating training material or developing existing material for training. In addition to developing material for pedagogical/ educational purposes, the delivery method

through which the training will be delivered will have an effect on the form of the training material – e.g.: the structure of the video will differ slightly, depending on it is HTML, PDF, video, etc.

Instructional Design

Blended learning approach

Pedagogical approaches

- Behaviourism, cognitivism, constructivism
- Constructivism
- Constructivism & elearning

Principles for design

3.2.1 Instructional Design

Instructional strategies and tactics are methods of instruction. They are anything one can use to enhance learning. If something influences learning but is beyond the control of the designer or teacher, then it is a condition, not a method. Conditions often influence which method will work best. Instructional design affects all aspects of the learning/ teaching process. It is an important pre-cursor to the development and provision of learning content.

When considering instructional design, a number of factors must be first identified and taken into consideration before starting development of material – even as a form of checklist to ensure that the training material, at all times, conforms to these items:

- General objectives, curriculum objectives
- Course objectives
- Learning/performance objectives
- Competencies to be trained
- Tasks in the job role to be trained
- Mental/motoric operations

Furthermore, the target group whom the instructional design is aimed at will be an important factor in developing instructional design - adult learners, for example are generally associated with self-directed learning and fluid abilities more than young learners.

An additional element to consider in undertaking instructional design is context. Context, in relation to learning, usually refers to elements such as the training, the type of learning to be imparted and how this training is imparted. When dealing with instructional design, this is a very broad category and can refer to such elements as the learning environment, the manner in which the learner receives education, how they learner learns, etc.

3.2.2 Instructional Design Processes

The following are the standard phases in the use of instructional design: analysis, design, development, implementation. Evaluation would then follow this process.

- Analyze - define the needs and constraints of learners including learner characteristics and the learning which is meant to occur.
- Design - define the requirements of the learning - the learning objectives - and choose the means which will be used - the methods, the media,, the type of assessment.
- Develop - develop the training material which learners will use.
- Implement - Provide learners with the training material through delivery or distribution of the instructional content
- Evaluate - evaluate the learners, the material and the process as a whole.

3.2.3 Instructional Design Strategies

It is helpful to be aware of the different kinds of strategies and tactics in instructional design.

Instructional Design Strategies typically refer to a wide range of things, including the organization of the content, media selection and utilization, managing and controlling the instructional process, etc.

The following are useful elements, processes, techniques, etc which can be used to help create and/ or develop existing material to make it more suitable for training purposes:

- **2-fold strategy:** Most instructional design models advocate the use of two strategies to sequencing instructional content: the hierarchical approach and the procedural. The learner is taught the task one piece at a time, and it is not until the very end of the instruction that the learner sees and has an opportunity to practice the whole task. These sequencing strategies work well for simple, short tasks, but they don't work for complex cognitive tasks.
- **Simplifying conditions:** Used when training complex cognitive tasks, this involves identifying the simplest kind of case an expert encounters in the real world, and starting the instruction with examples and practice on that kind of case. Next, you identify the conditions which make that kind of case simpler than the most complex kind of case for performing the task. Those simplifying conditions can then be relaxed one at a time, with a module of instruction for each.

NOTE: There are 2 types of understanding:

Conceptual understanding: The basis of conceptual understanding is the development of conceptual/semantic networks

Casual understanding: The basis of casual understanding is the development of causal/mental models

- **Compare/Contrast:** Compare/Contrast is used to point out differences and/ or similarities between separate concepts/ themes/ subjects. The comparison/ contrast refers to inherent key questions requiring the user to think about: "What is being compared? How are they similar? How are they different?" A learner should then compare or contrast the new idea with a coordinate kind or part of the old.
An example for this would be to "Discuss the similarities between the first and second world war". Should you wish, you can structure this specifically - e.g.: "the main commonalties between arms and legs are (1)....., (2), etc"



- **Providing analysis:** Providing analysis is a means of analyzing a new idea in comparison to its component kinds or parts. The learner is required to analyse and break-down a concept into a number of parts and develop explanations for each of these. The concept of this is to determine relationships between information - here, new information and old information
An example for this would be to ask the learner: "Can you think of something that works like a positive feedback system?". This would require the learner to explain why this "something" works like a positive feedback system - though defining what elements of the "something" resemble a positive feedback system.
- **Presenting case studies:** Presenting case studies is a means of demonstrating that the learner understands key concepts of a idea/ concept by showing real-life examples and how these examples embody the concept under discussion. The concept of this is to determine learner's understanding of information and to make them consider real-life implications of this information. An example for this would be to ask a student studying leadership ethics: "Present a real-life example of volcanoes' eruption caused by an earthquake and explain how this occurred"? This would require the learner to present a real-life example of this and to demonstrate how this came about.
- **Presenting analogies and/or metaphors:** Presenting analogies and/or metaphors is a means of describing similarities and differences with a similar idea, which may be outside the area of interest. A known idea is often known as a vehicle and a new idea is often known as a topic. The concept behind this is to provide additional information through demonstration of an existing concept and building on this.
An example for this would be to ask a student to demonstrate in what way one concept/ subject resembles another in its component parts - for example: "How is a text processor is like an advanced typewriter?", "How does an atom resemble the solar system?". Another means is to ask a learner to think of an analogy - e.g.: "Can you think of something working like a computer?".
- **Point out time-relationships:** Pointing out time-relationships is a means of demonstrating part of a process or how information relates to other information. The concept behind this is mainly to provoke "causal understanding". It will often infer relationships between concepts and ask learners to consider how these may be correlational or indicate a probability.
An example for this would be to provide a student with some information regarding a concept/ subject - perhaps in the form of a statement - and ask them to describe the relationship that exists between this concept/ subject and another. For example: "Thunderstorms usually follow hot weather. Please explain why this is."
- **Identify causal relationships:** Identifying causal relationships is a means of demonstrating the cause/effect relationship that may exist with a concept/ subject, or within component parts of a concept/ subject. The concept behind this is mainly to provoke "causal understanding". It will often seek to demonstrate understanding of relationships with concepts and ask learners to demonstrate how these indicate a set of principles.
An example for this would be to provide a student with some information regarding a concept/ subject - perhaps in the form of a statement - and ask them to describe the relationship that exists between this concept/ subject and another. For example: "An earthquake can sometimes cause volcanic eruptions. Please explain why this is and how it occurs."

The following are useful elements that are especially applicable to online or multimedia-based learning:

- **The Multimedia principle:** This principle suggests that one use words and graphics rather than words alone. This recommendation is based largely on the proposition that multimedia presentations (i.e. presentations that contain words and graphics) encourage learners to engage in active learning by mentally making connections between the pictorial and verbal representations.
- **The Contiguity Principle:** This principle suggests that corresponding words and graphics should be placed near each other. Temporally Contiguity means that corresponding words & pictures should be presented at the same time. Spatially Contiguity means that corresponding words & pictures should be presented near each other rather than far away from each other.
- **The Coherence principle:** This principle suggests that adding distracting material can hurt learning.
- **The Redundancy principle:** This principle suggests that presenting words in both text and audio narration can hurt learning. Contrary to the relatively common belief that individual learning styles can be addressed by presenting the same words in textual and audio formats Clarke and Mayer contend that this again may lead to a overloading of the visual channel.
- **The Personalisation principle:** This principle suggests that using a conversational rather than a formal style & tone. Even though a formal style is often thought to be more appropriate to the seriousness of the "learning message" research on discourse processing shows that human beings work harder to understand when they feel they are in a conversation with a partner, as opposed to just received information. A conversational style can be a way then to prime the right cognitive processing in the learner
- **Serial position effect:** This principle suggests that items first (primacy effect) and last (recency effect) in a series are remembered best. The first items get rehearsed more and the last items are still in the memory bank

3.3 Identifying the training delivery method

Depending on the type of training occurring, you may choose one delivery method over another.

2 important elements are tools for creating training and tools for delivering training:

3.3.1 Providing Training

3.3.1.1 PPT

The PPT file format is primarily associated with '*PowerPoint*' by *Microsoft Corporation*. A PPT file consist of a number of individual pages or "slides". Slides may contain formatted text, charts, images, graphics, movies, sound effects and other objects, which may be arranged freely on the slide.

You have several types of possibility after you have made a presentation: it can be printed, displayed live on a computer, or navigated through at the command of the presenter.

Examples for programs that open .ppt files:

- *Mac OS*
 - Microsoft PowerPoint
 - Apple Keynote
 - Nuance OmniPage Pr
 - X
 - OpenOffice.org Impress
- *Windows*
 - Microsoft PowerPoint
 - Microsoft PowerPoint Viewer
 - Nuance OmniPage Professional 17
 - ACD Systems Canvas 11
 - OpenOffice.org Impress
- *Linux*
 - OpenOffice.org Impress

PPT Add-on: Articulate

Articulate Presenter allows you to create Flash presentations/ animations and SCORM-compliant courses directly from Powerpoint. Articulate Presenter turns the slides in a powerpoint into a series of flash slides in a customizable player. In addition, an audio voiceover may be recorded for each slide in an articulate presentation and used to provide a running commentary over Articulate's final presentation. Articulate also provides a means to include additional learning resources, such as a glossary, a 'notes' feature, a reference tab, etc.

As well as standard text and images, articulate also provides a means to include web objects, flash movies and interactive activities.

The advantage of articulate is the ability to directly translate learning material (in a powerpoint format) into accessible, branded interactive learning material. The ECQA uses articulate as a means of content development due to its reliability and consistency.

WEB LINK: Articulate Homepage (with trial): <http://www.articulate.com/>

MEDIA: Video on using Articulate (completed).

3.3.1.2 HTML/ XML

HTML

HTML stands for Hyper Text Markup Language. It is the predominant markup language and encoding scheme to create and format web pages. It provides a means to create structured documents by

denoting structural semantics for text such as headings, paragraphs, lists etc as well as for links, quotes, and other items. It allows images and objects to be embedded and can be used to create interactive forms. It is written in the form of HTML elements consisting of "tags" surrounded by angle brackets within the web page content It can include or can load scripts in languages such as JavaScript which affect the behavior of HTML processors like Web browsers; and Cascading Style Sheets (CSS) to define the appearance and layout of text and other material.

HTML is the predominant markup language and encoding scheme to create and format web pages. Scripts (Javascript) enable authors to design interactive sites. Cascading Style Sheets define the appearance and layout of text and other material.

XML

XML files are mainly associated with 'Extensible Markup Language' developed by the World Wide Web consortium. The xml language uses a tagged structure to create documents such as web pages, as its ancestor HTML as well. The tagged structure makes easy to create different appearances of contents and to differentiate the form and the content. Xml files are simple text files, so these can be edited by any text editor.

XML is designed to carry, not to display data. This means that unlike HTML, XML is not a means of displaying information over the web, but a means of transporting and storing data and transferring this data across a number of platforms.

WEB LINK: Blue Griffon Web editor: <http://bluegriffon.org/>

MEDIA: PDF/DOC on basic HTML (completed).

3.3.1.3 PDF

File extension PDF is the abbreviation of Portable Document Format. PDF files enable cross-platform document exchange. They can be viewed on PC, Mac, Linux computers as well as many other electronic devices.

There are programs that can only read PDF files, such as Xpdf, Foxit and Adobe's own Adobe Reader. PDF readers are generally freely available for users. There are many software options for creating PDFs, including the PDF printing capability built in to Mac OS X, the multi-platform OpenOffice, numerous PDF print drivers for Microsoft Windows, and Adobe Acrobat itself. There is also specialized software for editing PDF files.

PDF files can consist of text, images, forms, annotations, outlines, and other data; they preserve fonts and formatting electronically across multiple platforms and appear the same on the screen as they will when printed on paper.

PDF documents are indexed by search engines, so they can be searched for and viewed in a Web browser using the free Adobe Reader plug-in, that's why this file extension is a quite common document file on the Web. PDF files are widespread in the publishing and advertising industry, lots of government forms and applications are stored in this format and it is one of the favourite file formats of ebooks

PDF file format exists since 1993 but it became an Open Format only in 2008. It means that now anyone is able to write software, which can generate/edit/create PDF files without risk of violating patents.

WEB LINK: Acrobat Homepage: <http://www.adobe.com/products/acrobat.html>

MEDIA: PDF/DOC on creating PDFs (completed).

3.3.2 Delivering Training

3.3.2.1 Blog

What is it?

A blog is a basic web page with posts presented in reverse chronological order. Posts can be retrieved via an RSS reader (such as Google Reader), negating the need to visit the blog.

Google uses its blog to communicate new products or offerings. CNN uses blogs as an alternative news source. NASA has a launch blog. Well known people like Dave Barry, Scott Adams (Dilbert), and Tom Peters use blogs as well. Even the president of Iran has a blog. Blogs figured prominently into the last American president election, providing candidates with another venue to connect with voters.

The simplicity of blogs is deceptive. Blogging enables unique opportunities for educators to improve communication with (and between) learners, increase depth of learning through reflection, and enable the formation of diverse viewpoints and perspectives. Perhaps most importantly, they enable educators to connect with each other.

How does it work?

Prospective bloggers can sign up with an online services – such as Blogger or Eduspaces – or download software to a server and host their own blog (Movable Type or Wordpress).

Posts can be made through a desktop application (such as Microsoft's Live Writer) or through the interface accessible with a web-browser.

Blogs generally allow readers to provide comments. Due to spam, many bloggers use anti-spam measures such as holding comments in moderation or requiring commentators to enter information (often a captcha) to verify a person, not a script, is entering the comment.

How can it be used for teaching and learning?

Blogs are simple tools for learners and educators to use in teaching and learning. Educators can use a blogs to update learners on course activities, post reflections on in-class or online conversations, and to

share journal articles and related course resources. Learners can use blogs to reflect, connect with others, use as an e-portfolio or journal, and comment on important posts made by other learners.

WEB LINK: Wordpress homepage: <http://wordpress.com>

MEDIA: Video guide on using Wordpress (completed).

3.3.2.2 CMS

What is it?

A content management system is a computer application that is used to help manage the work flow needed to collaboratively create, edit, review, index, search, publish and archive various types of digital media and text-based content.)

How does it work?

Wikis *can be remote hosted* (such as PBWiki, WetPaint, or collaborative Google Docs) or *hosted by an institution* – such as MediaWiki or the wiki feature in Moodle. Wikis can be open - where anyone can create an account and edit - or closed - requiring approval from a site administrator. *Edits may be handled through simple editing with wiki markup* (similar to HTML) *or a Word-style formatting bar* (in hosted wikis such as PBWiki).

How can it be used for teaching and learning?

Content Management Systems are frequently used for storing, controlling and publishing media rich content which is relevant to your website and can support such features as numerous articles, blogs, e-commerce features, multiple users with multiple access levels, collaborative content development, etc. A content Management System can support media such as images, audio files, video files and can also allow for the upload of such data into a "media library" and provide document management and numerous other features.

WEB LINK: Drupal homepage: <http://drupal.org>

MEDIA: Video guide on using Drupal (completed).

3.3.2.3 VOIP

What is it?

VOIP refers to the technologies, protocols and methods used for the use of "telephony" - voice communications & sessions over IP networks such as the internet. VOIP services and applications are what are used to facilitate this - the most prominent of which is Skype. There are a large number of

applications for VOIP in e-learning mostly related to communication services and can be similar in many ways to video conferencing.

How does it work?

VOIP services in e-learning are in many ways similar to Web conferencing - particularly with continuing development of VOIP services, which bring additional functionality to many VOIP applications - including webcam sharing, screen sharing, document uploading, chat functionality, etc. VOIP would generally provide less functionality than video conferencing (online presentation, screen sharing), but would be less demanding in terms of internet speed and necessary software.

How can it be used for teaching and learning?

Some of the standard uses of VOIP in e-learning include:

- Establishing an online "presence" - which enables learners to contact their tutor (or other learners) - an important factor in e-learning
- Hosting one-to-one or one-to-many interactive meetings with learners to clarify learning points or answer questions to problems which learners may have encountered.
- Hosting creative activities such as brainstorming, group discussion, etc.
- Host a discussion between tutor and learners or learners and learners
- Perform a walkthrough of a given task or piece of software with the tutor (or a student) talking through a process

Furthermore, the use of VOIP provides opportunities for the development of a number of generic skills:

- Working in groups/ teams
- Problem solving and developing solutions
- Communication skills
- Moderating and facilitating discussion

WEB LINK: Skype homepage: <http://www.skype.com>

MEDIA: Video guide on using Skype (completed).

3.3.2.4 Video

What is it?

The last decade has seen the web transition from a text-based medium to a multi-media platform with audio, video, and greater interactivity. For educators, this presents a great opportunity to add diversity and variety to courses. While video-taped lectures have been common on university campuses for decades, the increased bandwidth available to most computer users has opened the door for *a new approach to extend lectures - enabling learners to view missed (or not fully understood) lectures* at their convenience.

How does it work?

Video in education runs a spectrum from easy-to-create “talking heads” (recorded with a web cam) to edited professional quality resources. Easy to create video – with a web cam, Flip Video, or video recorder – are more accessible to individual educators than studio-produced recordings.

After videos have been created and edited, they can be *uploaded to a university site or posted on a public site such as YouTube or blip.tv.*

How can it be used for teaching and learning?

Video can be used for:

- Short demonstrations
- Incorporate video from experts
- Incorporate video developed by other institutions/organizations as open educational resources
- Add recorded presentations of conferences (like TED Talks) as curricular resources
- Pre-class videos to place future lectures into context
- Use videos to review key concepts discussed in class (for learner review or to augment lectures)

WEB LINK: Youtube homepage: <http://youtube.com>

MEDIA: Video on using the youtube editor: <http://www.youtube.com/watch?v=F1RoZafZGeU>

3.3.2.5 Learning Management Systems

A Learning Management System (LMS) *supports the management of tasks emerging during the operation of a distinct team/group.* It is possible to appoint tasks for the whole group or for individual members of the group. They can also submit their documents, regarding these tasks which can be later evaluated. One can set out deadlines to tasks, which appears in the time schedule of the scene. The calendar management gives an overview of the different tasks in the research areas.

It is also possible to view a summary of the tasks, results and achievements of a scene, which can be saved in a format available for other office applications. Assignments can be provided and the papers can be submitted in electronic format. Other participants can evaluate these. Tutors can also produce an automatic tests

How does it work?

A place to meet: Students and teachers may use their computers to go to a virtual meeting place instead of all students having to physically travel to a single location.

A place to interact: All users can interact with each other in a structured and effective way. Students, for instance, can indicate when they want to speak by virtually raising their hand. Teachers can then grant this permission by providing audio and video access to this student. Teachers and students can also make use of instant messaging and chat functions on most asynchronous software.

A place to view material: Most synchronous e-learning systems will support projection of still, animated, and video images, powerpoints, shared viewing of documents such as powerpoints, word files and the sharing of desk-top applications.

A place to collaborate: Most synchronous e-learning systems will have a host of collaborative tools as standard. These can be used to support collaboration between teachers and students and students and students - providing instant polling, whiteboard marking and application sharing. Many synchronous learning systems can also provide "breakout sessions" - which allow students to work together in groups.

How can it be used for teaching and learning?

From a tutor's point of view, a synchronous system can be effectively used to:

- *Present educational material in slide form or in video form* with a speaker communicating to an audience - this is the simplified scenario in a 'virtual classroom' - which mirrors standard practice of a face-to-face classroom scenario. Many synchronous e-learning systems will also provide the possibility of recording this lecture.
- *Perform a 'walkthrough' of a task by demonstrating the procedure step-by-step.* This may be communicated through means of a video lecture (showing pre-recorded material), or through use of real-time application sharing to demonstrate an application.
- *Host a collaborative session in which the learners may make use of the communication and collaborative tools* in the system to demonstrate their own understanding of a task and follow a 'learning-by-doing' approach to a given task.
- *Host a discussion between tutor and learners or learners and learners.*

WEB LINK: Moodle homepage: <http://moodle.org/>

MEDIA: Video guide on using Moodle (completed).

3.3.3 Non-Web Based Training

Although the SME2 project has identified the use of online training as a fairly optimum means of providing training, there are times when it will not be necessary or possible. The following is a list of other forms of training delivery:

3.3.3.1 On-the-Job Coaching Training Delivery

On-the-job coaching is one way to facilitate employee skills training. On-the-job coaching refers to an approved person training an employee on the skills necessary to complete tasks. A manager or someone with experience shows the employee how to perform the actual job. The selection of an on-the-job coach can be done in a variety of ways, but usually the coach is selected based on personality, skills, and knowledge. This type of skills training is normally facilitated in-house. The disadvantage of this training revolves around the person delivering the training. If he or she is not a good communicator, the training may not work. Likewise, if this person has "other things to do," he or she may not spend as much time required to train the person and provide guidance. In this situation, training can frustrate the new employee and may result in turnover.

3.3.3.2 Mentoring and Coaching Training Delivery

Mentoring is also a type of training delivery. A mentor is a trusted, experienced advisor who has direct investment in the development of an employee. Mentoring is a process by which an employee can be trained and developed by an experienced person. Normally, mentoring is used as a continuing method to train and develop an employee. One disadvantage of this type of training is possible communication style and personality conflict. It can also create overdependence in the mentee or micromanagement by the mentor. This is more different than on-the-job coaching, which tends to be short term and focuses on the skills needed to perform a particular job.

3.3.3.3 Brown Bag Lunch Training Delivery

Brown bag lunches are a training delivery method meant to create an informal atmosphere. As the name suggests, brown bag lunch training is one in which the training occurs during lunchtime, employees bring their food, and someone presents training information to them. The trainer could be HR or management or even another employee showing a new technical skill. Brown bag lunches can also be an effective way to perform team training, as it brings people together in a more relaxed atmosphere. Some companies offer brown bag lunch training for personal development as well.

One disadvantage to this type of training can be low attendance and garnering enough interest from employees who may not want to “work” during lunch breaks. There can also be inconsistency in messages if training is delivered and not everyone is present to hear the message.

3.3.3.4 Job Shadowing Training Delivery

Job shadowing is a training delivery method that places an employee who already has the skills with another employee who wants to develop those skills. Apprenticeships use job shadowing as one type of training method. For example, an apprentice electrician would shadow and watch the journeyman electrician perform the skills and tasks and learn by watching. Eventually, the apprentice would be able to learn the skills to do the job alone. The downside to this type of training is the possibility that the person job shadowing may learn “bad habits” or shortcuts to performing tasks that may not be beneficial to the organization.

3.3.3.5 Job Swapping Training Delivery

Job swapping is a method for training in which two employees agree to change jobs for a period of time. Of course, with this training delivery method, other training would be necessary to ensure the employee learns the skills needed to perform the skills of the new job. Job swap options can be motivational to employees by providing a change of scenery. It can be great for the organization as well to cross-train employees in different types of jobs. However, the time spent learning can result in unproductive time and lost revenue.

3.3.3.6 Vestibule Training Delivery

In vestibule training, training is performed near the worksite in conference rooms, lecture rooms, and classrooms. This might be an appropriate method to deliver orientations and some skills-based training.

Many organizations use vestibule training for technical training, safety training, professional training, and quality training. It can also be appropriate for managerial training, soft skills training, and team training. As you can tell, this delivery method, like web-based training delivery, is quite versatile. For some jobs or training topics, this may take too much time away from performing the actual "job," which can result in lost productivity.

3.3.3.7 International Assignment Training

Since we are working within a global economy, it might be necessary to provide training to employees who are moving abroad or working abroad. Ensuring success overseas is reliant upon the local employee's learning how to navigate in the new country. The following topics might be included in this type of training:

- Cultural differences and similarities
- Insight and daily living in the country
- Social norms and etiquette
- Communication training, such as language skills

This training is best delivered by a professional in the region or area in which the employee will be working.

3.3.4 Individual Vs Group Work

An important factor to consider when developing the training delivery method online management plan is to consider whether the learning that will take place will be individual or group work. Learning may be broken down into the following categories:

- Individual - This would involve a learner performing self-initiated learning. The role of the instructor would be in directing as opposed to providing learning.
- Cooperative - This would involve a number of learners collaborating to developing a final product or learning in a collaborative environment.
- Competitive - This would involve having a limited number of available "rewards" - such as offering accreditation or promotion to those learners who perform the best.

Despite which category is chosen, it is essential that a tutor be available at some stage of the training to communicate with learners. There is no online learning that is truly effective without some form of human contact for communication, collaboration, etc.

In order to classify the form of training setup/ provision – which determines, among other things, the level of human contact, a useful type of classification that was originated by a team in France is called a "Competice". The different Competice models can be illustrated as follows:

	S1 Enriched trainer presence	S2 Improved trainer presence	S3 Trimmed- down trainer presence	S4 Reduced trainer presence	S5 Almost nonexistent trainer
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					presence
COMPARABLE TRADITIONAL PRACTICE IN ADULT TRAINING	<p>Face-to-face lessons using audio-visual teaching aids.</p> <p>Audio-visual equipment and material at the trainer's disposal</p>	<p>Instructions regarding personal work to be done before and after face-to-face lessons</p> <p>Traditional training with Trainer presence. Preparation and consolidation during trainees' own time.</p>	<p>Self-study time included in the course</p> <p>Personalised training paths, training with selfstudy : APP, normalisation,</p>	<p>Made to measure training by selfstudy.</p> <p>Face-to-face monitoring and control.</p> <p>Personalised teaching and training (by) with self-study.</p>	<p>Made to measure training by selfstudy.</p> <p>Face-to-face monitoring and control.</p> <p>Personalised teaching and training (by) with self-study.</p>
TRANSFER TO OPEN LEARNING	<p>Multimedia resources permanently accessible for everyone on the local network.</p>	<p>Instructions for work before and after face-to-face periods, using the tools and resources of distance-learning.</p>	<p>Transfer of lesson sequences, training aids and complementary activities onto distance-learning tools.</p>	<p>Made to measure training by selfstudy through distance learning.</p> <p>Monitoring and control at distance.</p>	<p>Same as S4 + Sharing of knowledge between trainees and distant trainer.</p>

Deciding the competence model should involve a focus on the infrastructure that your organization possesses. It is important to bear in mind, however, that human contact is essential to effective training regardless of the competence model to be used.

3.4 Evaluating the training

If you implement a new, or add unproved multimedia technologies and unverified pedagogies to existing learning services, they could cause many problems, being:

- difficult to understand and to learn to operate, or
- inefficient to use, or inappropriate for learning, or
- unpredictable and unreliable, or
- unpleasant to look at and clumsy to use, or
- having all these defects, hidden for you during the design and development stage.

3.4.1 What to evaluate:

To evaluate a training program you need to identify the components of your program. The main components in such systems are:

- Learning materials
- Support system.

However, these do not exist in isolation; they should be a part of an integrated program. A training programme is a circular process continually fed by inputs from the needs analysis and the evaluation. The purpose of the evaluation is to provide a flow of useful information to help refine and develop a scheme and to ensure that the needs of learners and organization are being met.

3.4.2 When to evaluate

There are two timings for evaluation:

- During the training program development and implementation, and it is said to be 'formative'. A formative evaluation is aimed to check progress and to develop suggestions for improvement.
- After a program to examine results and impact and to decide on continuation. This evaluation is known as 'summative'.

A summative evaluation of learning materials starts with their implementation, i.e. when a formative evaluation of the support system and whole program is conducted.

An important practical note is that in the early stages of the development and design of learning materials, changes are relatively inexpensive. The longer the process has progressed and the more fully the system is defined, the more expensive the introduction of changes will be. It is therefore important to start assessment as early as possible and focus on the formative evaluation.

3.4.3 Checklist for evaluation planning

1) What is evaluation about?

What is the object of evaluation, e.g. learning materials or a support system, or both? For a multimedia materials questions to be answered are: What is the goal and the objectives of the interactive multimedia product? What is its target audience? In what environment will it be used? What content is included? What media elements? What graphical user interface features are utilized?

2) Which questions will the evaluation address?

Which decisions about the products or processes of development or implementation may be influenced by the evaluation? what questions should the evaluation answer?

3) How to collect information?

Which methods are more appropriate to answer the evaluation questions within the limits of the budget and timeline? from whom to collect data? What sampling methods to use? what instruments to use?

4) How to analyze and interpret data?

What procedures to use for analysis and interpretation? what criteria for judging results to chose?

5) How to communicate?

Who should be informed about the findings from the evaluation? how the information will be shared with the audience? Formal, informal report? Written or oral? what to report to particular audiences? when?

6) How to plan and organize work?

What tasks to perform? when? how? by whom? how much the activity will cost?

7) How to evaluate the evaluation?

How to assess the quality of design? how to assess the quality of methods? how to assess the quality of results and conclusions?

3.4.4 Evaluation tools

3.4.4.1 Interviews

Interviewing involves face-to-face meetings between two or more people where the respondent answers questions from an interviewer. The answers are recorded during the interview and summarized afterwards. The data can consist of direct quotation and responses from people about their experiences, perceptions, attitudes toward the system or prototype.

Advantages of interviews:

- its capacity to avoid the 'artificiality' inherent in experimental methods;
- it permits flexibility, allowing you to pursue unanticipated lines of enquiry ;
- it enables the collection of detailed qualitative material which may not be revealed by questionnaire.

Disadvantages of interviews:

- it is costly and time consuming to implement, analyze and interpret;
- interviewers can influence interviewees, and there is a wide margin allowed for interpretation of questions by both interviewer and interviewee;
- 'reactive measurement effects' can cause failure to elicit appropriate information;
- its generalizability is limited and its outputs present particular problems of analysis (in terms of standardisation, coding and statistical testing).

3.4.4.2 Direct observations

Users may be directly observed doing specially devised tasks or doing their normal work, with the observer making notes about interesting behaviour or recording in some way, such as by timing sequences of actions. Objective features of user interaction which may be recorded manually include time to complete task, points of apparent user difficulty, number frequency and approximate duration of relevant events, e.g. errors made, approaches to using the system etc.

Advantages of direct observations:

- They avoid placing the observer and respondent in the artificial context of the laboratory and provide opportunities to examine 'natural' behaviours.

- The data gathered are probably more reliable than those from questionnaires and interviews which involve recall of past events, and are prone to interviewer and respondent bias.

Disadvantages of direct observations:

- However direct observation is often an obtrusive method because users may be constantly aware of their performance being monitored, which can alter their behaviour and performance levels.
- Also, although the observer may take notes, the record of the observation will usually be incomplete.
- Another problem with direct observation is that it only allows a "single pass" at the data collection, and the valuator rarely gets a full record of user activity for several passes at the detailed analyses.

3.4.4.3 Protocol analysis

Protocol analysis involves the recording and analysis of the behaviours engaged in by users when performing tasks. In addition to recording what happens during task performance, for example, by using video, users are prompted to 'think aloud' and describe the protocols they are using to solve problems. Variations of the technique involve 'interruption analysis', where the observer stops the user when a particularly complex or unintelligible protocol is identified, in order that it can be unpicked and analyzed. Verbal protocols contain users' spoken observations, i.e. the audio record during the observation. It may be combined with the video record or to be collected on its own. From such a protocol it is possible to obtain a wide range of information such as, for example, the way that the user has planned to do a particular task, his/her reaction when things go wrong and whether or not he/she understands the error messages provided by the system and so on.

Advantages of protocol analysis

- A session can be replayed allowing a fuller analysis of the interaction than it is permitted by direct observation.
- Reliability of data analysis can be increased by having a number of evaluators analyze the same record.
- Verbal protocol analysis may be the only source of data on the cognitive processes involved in using the system.

Disadvantages of protocol analysis:

- Recording is obtrusive. It may interfere with users performance as it may cause the subject to feel self-conscious and unable to talk to colleagues or to ask for help.
- Analysis of tapes is very time consuming, as well as the analysis of large volumes of verbal data.
- Think aloud protocols are intrusive and the intrusion may completely change the nature of the interaction.

4 Communicating and collaborating

4.1 Gathering and responding to feedback

4.1.1 Performance Appraisal

A performance evaluation system is a systematic way to examine how well an employee is performing in his or her job. If you notice, the word systematic implies the performance evaluation process should be a planned system that allows feedback to be given in a formal—as opposed to informal—sense.

Performance evaluations can also be called performance appraisals, performance assessments, or employee appraisals.

It probably goes without saying that different industries and jobs need different kinds of appraisal methods. For our purposes, we will discuss some of the main ways to assess performance in a performance evaluation form. Of course, these will change based upon the job specifications for each position within the company. In addition to industry-specific and job-specific methods, many organizations will use these methods in combination, as opposed to just one method. There are three main methods of determining performance. The first is the trait method, in which managers look at an employee's specific traits in relation to the job, such as friendliness to the customer. The behavioural method looks at individual actions within a specific job. Comparative methods compare one employee with other employees. Results methods are focused on employee accomplishments, such as whether or not employees met a quota.

Within the categories of performance appraisals, there are two main aspects to appraisal methods. First, the criteria are the aspects the employee is actually being evaluated on, which should be tied directly to the employee's job description. Second, the rating is the type of scale that will be used to rate each criterion in a performance evaluation: for example, scales of 1–5, essay ratings, or yes/no ratings. Tied to the rating and criteria is the weighting each item will be given. For example, if “communication” and “interaction with client” are two criteria, the interaction with the client may be weighted more than communication, depending on the job type. We will discuss the types of criteria and rating methods next.

4.1.1.1 Graphic Rating Scale

The graphic rating scale, a behavioural method, is perhaps the most popular choice for performance evaluations. This type of evaluation lists traits required for the job and asks the source to rate the individual on each attribute. A discrete scale is one that shows a number of different points. The ratings can include a scale of 1–10; excellent, average, or poor; or meets, exceeds, or doesn't meet expectations, for example. A continuous scale shows a scale and the manager puts a mark on the continuum scale that best represents the employee's performance.

The disadvantage of this type of scale is the subjectivity that can occur. This type of scale focuses on behavioural traits and is not specific enough to some jobs.

Many organizations use a graphic rating scale in conjunction with other appraisal methods to further solidify the tool's validity. For example, some organizations use a mixed standard scale, which is similar to a graphic rating scale. This scale includes a series of mixed statements representing excellent,

average, and poor performance, and the manager is asked to rate a “+” (performance is better than stated), “0” (performance is at stated level), or “-” (performance is below stated level). Mixed standard statements might include the following:

- The employee gets along with most co-workers and has had only a few interpersonal issues.
- This employee takes initiative.
- The employee consistently turns in below-average work.
- The employee always meets established deadlines.

4.1.1.2 Essay Appraisal

In an essay appraisal, the source answers a series of questions about the employee’s performance in essay form. This can be a trait method and/or a behavioural method, depending on how the manager writes the essay. These statements may include strengths and weaknesses about the employee or statements about past performance. They can also include specific examples of past performance. The disadvantage of this type of method (when not combined with other rating systems) is that the manager’s writing ability can contribute to the effectiveness of the evaluation. Also, managers may write less or more, which means less consistency between performance appraisals by various managers.

4.1.1.3 Checklist Scale

A checklist method for performance evaluations lessens the subjectivity, although subjectivity will still be present in this type of rating system. With a checklist scale, a series of questions is asked and the manager simply responds yes or no to the questions, which can fall into either the behavioural or the trait method, or both. Another variation to this scale is a check mark in the criteria the employee meets, and a blank in the areas the employee does not meet. The challenge with this format is that it doesn’t allow more detailed answers and analysis of the performance criteria, unless combined with another method, such as essay ratings.

4.1.1.4 Critical Incident Appraisals

This method of appraisal, while more time-consuming for the manager, can be effective at providing specific examples of behaviour. With a critical incident appraisal, the manager records examples of the employee’s effective and ineffective behaviour during the time period between evaluations, which is in the behavioural category. When it is time for the employee to be reviewed, the manager will pull out this file and formally record the incidents that occurred over the time period. The disadvantage of this method is the tendency to record only negative incidents instead of positive ones. However, this method can work well if the manager has the proper training to record incidents (perhaps by keeping a weekly diary) in a fair manner. This approach can also work well when specific jobs vary greatly from week to week, unlike, for example, a factory worker who routinely performs the same weekly tasks.

4.1.1.5 Work Standards Approach

For certain jobs in which productivity is most important, a work standards approach could be the more effective way of evaluating employees. With this results-focused approach, a minimum level is set and the employee’s performance evaluation is based on this level. For example, if a sales person does not

meet a quota of ... HUF/EUR, this would be recorded as nonperforming. The downside is that this method does not allow for reasonable deviations. For example, if the quota isn't made, perhaps the employee just had a bad month but normally performs well. This approach works best in long-term situations, in which a reasonable measure of performance can be over a certain period of time. This method is also used in manufacturing situations where production is extremely important. For example, in an automotive assembly line, the focus is on how many cars are built in a specified period, and therefore, employee performance is measured this way, too. Since this approach is centered on production, it doesn't allow for rating of other factors, such as ability to work on a team or communication skills, which can be an important part of the job, too.

4.2 Promoting communication and collaboration

Management style ties in very closely with communication style. There isn't necessarily one management style that is better than another; they are simply different and might be used in a variety of situations.

4.2.1 Task Style versus People-Centered Style

When we look at the styles of management, we see that most styles fall into one of two categories, a task-oriented management style or a people-centered style. A manager with a task-oriented style will focus on the technical or task aspects of the job. The concern for this manager is that employees know what is expected of them and have the tools needed to do their job.

A people-oriented style is more concerned with the relationships in the workplace. The manager emphasizes the interpersonal relations, as opposed to the task. The manager is most concerned about the welfare of the employee and tends to be friendly and trusting.

Understanding these two main differences in management style, we will now look at other possible styles a manager might use.

4.2.2 Participatory, Directing, or Teamwork Styles

Utilization of a participatory management style involves both a task-oriented style and a people-centered style. This style emphasizes how the employee's assigned task fits into the bigger picture. This style will provide support and input where needed. As a result, the focus is on the task but also on the person and the relationships required to get the task done. This style might be used when the employees are experienced and the deadlines reasonable enough to provide the time needed to focus both on the task and the person. If more hands-on management is required, a directing management style might be appropriate. Consider a very tight deadline or an emergency situation in which someone needs to be calling the shots. For example, in your doggie treats business, you just received an order for one hundred dog cookies by later this afternoon. You might consider using a directing style to make sure it gets done on time. This style doesn't focus on the person, but rather focuses on getting the task done; hence it tends to be more of a task-oriented style.

A manager who uses a teamwork management style believes there is a value (or necessity) in having people work in teams. As a result, this style tends to require a people-centered approach. Relationships are most important, and assuming the individuals work well together, the task will be successfully

accomplished. The advantage to this style, given the type of task and situation, is that as a manager you are able to pool resources and abilities from several different people. Use of a team style can also provide big benefits for the company.

4.2.3 Autocratic, Participative, and Free-Reign Styles

An autocratic style of management involves the task-oriented style. The focus is on getting things done, and relationships are secondary. This type of manager tends to tell people what to do and takes a “my way or the highway” approach. Another description for this type of manager is a taskmaster. This person uses his or her authority and makes all the decisions as to who does what, how it is done, and when it should get done.

On the other hand, a participative style constantly seeks input from the employees. Setting goals, making plans, and determining objectives are viewed as a group effort, rather than the manager making all the decisions. At the other extreme, a free-rein style gives employees total freedom to make decisions on how things will get done. The manager may establish a few objectives, but the employees can decide how those objectives are met. In other words, the leader tends to be removed from the day-to-day activities but is available to help employees deal with any situation that may come up.

4.2.4 Path Goal Model for Leadership

The path goal theory says that the role of a leader is to define goals and lay down the path for the employees to meet those goals. Aspects include clarification of the task and scope of the process. Clarification of the employee’s role and clarification around how the success of the task will be measured are key aspects in this model. The leader also is involved in guidance and coaching surrounding the goal and removes obstacles for employees that might affect the completion of the task. The path goal theory says that if employees are satisfied by the leadership style, they will be motivated toward the goals of leadership. Part of the model also stresses that the skills, experience, and environmental contingencies of the job play a role in the success of the leader.

4.3 Communication and collaboration tools

4.3.1 Blogs

Blogs are best used when individuals provide more than the minimum amount of information and are prepared to discuss a topic at length. As they are an excellent means to facilitate discussion, learners who are interested in debate and dialogue will get the most use from blogs. People looking for communication and collaboration who are short on time will probably not have time to read a series of long blog posts. Blogs are designed to be updated frequently and so can be used for someone who wishes to provide a number of pieces of related information.

Blogs can be used to facilitate:

- **Information sharing** - Blog posts can offer all kinds of information – a post could be a user’s opinion, a link to a resource, etc. As a post can be tagged, viewers can access similar subject posts immediately from one post. A blog can quickly and easily address a large number of users with whatever form of information is required.
- **Collaboration** - If a number of individuals can post to a single blog, it can be used to facilitate a group project. Users can work on adding information to a given topic through 1 person writing something & then other users commenting on it or adding additional information.
- **Communication** - A blog entry could be seen as a means to “start a discussion”. An author creates a post in which they offer an opinion/ ask a question, link to a resource, etc. Other interested users can then comment on this and a discussion can develop from this.

4.3.2 Social Bookmarking

Social Bookmarking tools such as DIGG or Delicious are best used for sharing information. As social bookmarking can be easily updated and made available to others immediately, they allow for simpler distribution of resources. Social Bookmarking may seem like an individual task, but it allows users to benefit from the insight of others when researching and supports problem based group activities assessment. Users should be encouraged to bookmark resources as a constant activity, to ensure that a well-developed and well-maintained repository of resources is available for all.

Social bookmarking can be used to facilitate:

- **Information gathering & sharing** – Bookmarks are primarily used for information gathering and sharing. A bookmark is an extremely fast and easy way of gathering & distributing resources. The sharing of a bookmark also means that a bookmark can be saved by others - and may be added to that user’s own collection (information sharing). When a bookmark is made, a tag is assigned to classify the information allowing users to search for resources that have been assigned that particular tag. Thus, by selecting a tag it is possible to access a wide array of bookmarked items related to that tag.
- **Research** - Social Bookmarking has benefits in terms of research as it allows people to view a user’s collection of bookmarks. A user could be asked to gather a number of resources related to a particular topic as part of initial research – developing a pool of information that they can refer to for later development.
- **Identifying trends** - Bookmarking can also be useful in highlighting current online trends and conventions and in the case of institutions and companies, can show what the most popular intranet pages are. This would be very useful for developing products/ services.

4.3.3 Wiki

A wiki is basically a simple web page that anyone can edit. This functionality can provide a collaborative writing tool that users can access and contribute to, and which can represent discussion. A prime example of this can be the use of wikis in developing an extensible document which can be constantly added to (for example product/ service information, internal task information, etc.): In addition, a wiki

can be used to provide updatable management documents, such as internal policy information, processes, etc.

Wikis can be remote hosted (such as PBWiki, WetPaint, or collaborative Google Docs) or hosted by an institution – such as MediaWiki or the wiki feature in Moodle. Wikis can be open - where anyone can create an account and edit - or closed - requiring approval from a site administrator. Edits may be handled through simple editing with wiki markup (similar to HTML) or a Word-style formatting bar (in hosted wikis such as PBWiki).

Wikis can be used to facilitate:

- **Information sharing** – As wikis are a means of developing collaborative documents, wikis are ideally suited to information sharing – providing information which can be frequently updated to reflect changes to content. The advantage of being a constantly updated document is further enhanced by the ability to view previous versions of a wiki (via the “wiki history” tool) allowing users to see where changes were made and to track the “evolution” of the wiki & its content over time. Wikis also allow comments, allowing users to give their opinion on the information contained in the wiki so a wiki is not limited to information which cannot be challenged or questioned.
- **Collaboration** – Wikis can be used collaboratively by allowing a number of individuals to work on a single wiki – this is especially true of group wikis, which allow all group members to work on a single wiki, developing different iterations of the wiki and storing all previous versions. By using wikis collaboratively in a process such as this, it is possible to facilitate a group project. Users developing a wiki on an area of expertise/ information will constantly revise the information on the wiki to ensure that the most up-to-date and accurate information is reflected on the wiki & offer differing opinion through the comments function.
- **Distribution** – Wikis can be used to distribute information and workload. Group wikis in particular facilitate the ability to make numerous changes to a single wiki, thereby allowing the development of a document amongst a number of platform users. Such features can be especially useful for something like a group project- providing users with an initial wiki and then asking them to make changes to update the wiki with correct/ up-to-date information.

4.3.4 Email

Electronic mail, often abbreviated as email, e.mail, or e-mail, is a method of exchanging digital messages, designed primarily for human use. E-mail systems are based on a store and- forward model in which e-mail computer server systems accept, forward, deliver and store messages on behalf of users, who only need to connect to the e-mail infrastructure, typically an e-mail server, with a network-enabled device (e.g., a personal computer) for the duration of message submission or retrieval.

Most organisations will have their own email client in use – generally email clients do not tend to differ hugely in terms of function.

Email can be used to facilitate:

- **Communication** – Email can be used to communicate with someone in privacy. Emails should be used to facilitate asynchronous communication (as one would use typically use email)

- **Distribution** - Email can be used to distribute information and files in privacy. The need to inform certain users on the platform, without wanting to let other users know could be done via the messaging system.

4.3.5 IM (Instant Messaging)

Instant Messaging (IM) relies on entering text, not speaking. To this end, it is a useful tool for facilitating communication with partners/ other organisations whose speaking abilities in a language may not be very strong. The IM tool provides a means for them to consult a reference source (a book, a language dictionary, a translation device, etc) when communicating with another user. The IM tool may be especially useful in facilitating group activities, such as group discussion, brainstorming, gathering group opinion, etc.

IM tools can include Google Talk, which is particularly useful if the organisation or clients have a google mail account. Jabber is a very useful open source IM tools and so can be edited and customised to suit the needs of your organisation. Windows Live Messenger is useful as it is standard with Windows Operating Systems – so if all employees have this, it is an immediately available IM tool. Finally, ICQ is a commonly used IM client in Russia and Germany, which may be useful to be aware of if dealing with clients from these areas.

Instant Messaging can be used to facilitate:

- **Communication** – The primary function of the IM tool is to facilitate communication. An IM tool is especially useful for communication with more than 2 users. The IM tool provides everybody with the same ability to put their point of view across. Unlike the VoIP/ Skype tool, a user does not need to speak louder than another to put their point of view across. All users have the same opportunity to communicate their opinion.
- **Collaboration** – As mentioned, the IM tool provides all users with an equal ability to put their point of view across. The text which they type remains in the IM window and can be viewed by all other users in the same IM room. This makes the IM tool especially useful for collaboration – in particular for functions that involve many users such as brainstorming and other creative development techniques.

4.3.6 VoIP (Voice over Internet Protocol) Tool

The primary synchronous (real-time) communication tool in the platform is the voice over IP/ Skype tool. The main advantage which the VoIP tool possesses is its ability to let users speak to each other. This can be particularly useful for collaboration as it allows users to brainstorm in real-time.

The VoIP tool can be used to facilitate:

- **Communication** – The primary function of the VoIP tool is to facilitate communication, but in addition to this, it also provides a means of developing communicative skills. This can then be extremely useful for additional work and in real life also.
- **Assessment** - The VoIP tool can be an extremely useful means of assessing a user's spoken language abilities. As the users must communicate verbally, their language skills can put be into

practice and good practice in speaking a language can be encouraged (e.g.: both listening and speaking skills are improved).

- **Collaboration** – As mentioned, the VOIP tool provides all users with an equal ability to put their point of view across. This makes the VOIP tool especially useful for collaboration – in particular, as with the IM tool, for functions that involve many users such as brainstorming and other creative development techniques.

4.3.7 Podcasting

Podcasting is the distribution of audio online through RSS. Technology has developed to the point where one can record and distribute audio files with only a computer, a microphone, and internet access. Of particular potential in audio is the increased use of different audio tools for easy collaboration (such as Seismic or Voice Thread). While podcasting is generally a one-way flow, collaborative audio creation around images adds the learner's/listener's voice to the exchange.

Podcasts can be created with Audacity, Odeo, Garage Band, or digital voice recorders. Audio files can be shared via services such as PodBean, iTunes, or plugins for blogging software (such as Word Press). As with blogs, learners can subscribe to RSS feeds of podcasts. Learners can listen to podcasts on a computer or iPod (or similar audio device).

Podcasting can be used to facilitate:

- Information sharing – Podcasting can make audible information accessible to all via download.
- Distribution – Podcasting can be accessed as many times as required.

4.3.8 Video

The last decade has seen the web transition from a text-based medium to a multi-media platform with audio, video, and greater interactivity. Easy to create video – with a web cam, Flip Video, or video recorder – are more accessible to individual educators than studio-produced recordings and the increased bandwidth available to most computer users has opened the door for a new approach to extend businesses.

The Video toll can be used to facilitate:

- **Information Sharing** – Information sharing can be achieved very easily and quickly through video. The advantage of video is that it allows for very visible information to be put across featuring both visual and audible information. Examples of video for information sharing can include short demonstrations, recorded presentations, video developed by other institutions/organizations, etc.
- **Distribution** – Video is an excellent means to distribute information, particularly due to the advent of easy video recording, using video recorders, web cams, flip Videos, even mobile phones.
- **Collaboration** - Due to the advent of easy video recording, the possibility for developing a large pool of resources is strong. By encouraging employees to develop their own video resources for

their work tasks, their work processes, etc. a large pool of very practical video learning resources.

4.3.9 Document Repository

The Document repository tool should be used when necessary. As the tool provides a means to upload information which could not otherwise be made available through the platform, the document repository tool should be used primarily to provide information (e.g.: the document repository) which could not be made available through other tools on the platform (therefore, if the document being uploaded is plain text without formatting, or a link, there is no need to leave this information in a document repository – it can be added via a blog post or a bookmark).

Document repositories can be used to facilitate:

- **Information sharing** – The main use of the document repository tool is in providing access to information which cannot be displayed via other means. Through the document repository, it is possible to make available any type of document repository for other users to download.
- **Distribution** – Files in document repositories can be downloaded as many times as required. A user who uploads a file to a document repository can determine who has access to the document repository, when it can no longer be downloaded, etc.
- **Organisation** – Through the document repository tool, it is possible to upload documents which will aid in the organisation of activities. These include gantt charts, time plans, activity lists and other documents which are required to provide more information to a user that what can be added to an event calendar.
- **Collaboration/ Evaluation** – A common use of the document repository tool in a manner very useful to everyday work processes would be getting employees to complete a task on their local machine and then to upload the file(s) to the document repository. This can also be used to help evaluate the work done as all others with access to the file can provide feedback, encouraging participation & communication.

4.3.10 Social Media

Social media is an emerging tool in the use for communication and collaboration in an SME. In addition to its functions for marketing, advertisement, recruitment, etc. it has emerged as a dynamic tool for internal use in an organisation.

Social media can be used to facilitate:

- **Collaboration** – When a user is friends with another user who is a co-worker, or even with someone with similar interests with whom he can collaborate, the process of joint development of content can begin easily. This, in turn, allows users to develop a collaborative mindset. Another important facet of the friends system is the ability to determine who has access to content developed, who has the ability to communicate with who, etc.
- **Communication** – An extremely useful facet of the social media tool is the variety of communication tools available – facebook, for instance, has a wall, which functions as a blog of

sorts, as well as gathering posts from friends, which functions as social bookmarking, and chat, which functions as instant messaging, etc. Users who are friends in most social networks can usually send each other private messages, view each other's content by default and comment on this content.

- **Organisation** – Gathering a collection of friends on a social network is an extremely useful means of developing a pool of expertise and/ or skills in human resources. To this end, it is suggested that collections of friends be grouped according to an area of interest.

4.4 Time management and tracking tools

Time management and tracking is a hugely important element in and SME.

4.4.1 Calendar tools

Calendar tools are hugely useful in terms of time management and tracking, in addition to be hugely useful for project elements such as organisation and tracking meetings and appointments. Typical tasks for project management include elements such as tracking the number of hours worked and on what, the creation of start and end dates for tasks, the reviewing of tasks and development of timeplans, etc. Typically on Calendars, users can be assigned for certain tasks and responsibilities. All assigned users and reviewers can typically enter comments on a task to discuss it.

Some frequently used calendar tools include:

- Google calendar - <http://www.google.com/calendar>
- 30 boxes - <http://30boxes.com>

4.4.2 Task List

Task lists are useful for organizing tasks and processes. Typical tasks involve adding tasks that need to get done, prioritizing them, and checking them off when they are done. This is very useful for avoiding difficulties in scheduling and ensuring that processes run smoothly and that tasks are not overlooked and put aside and forgotten.

Some frequently used task list tools include:

- Google tasks - <http://mail.google.com/mail/help/tasks>
- Remember the Milk - <http://www.rememberthemilk.com>

4.4.3 Project management

Project management systems involve the combination of a number of different tools –typically including elements such as calendars, task management tools, task logging tools, document repository tools, etc. Project management systems can sometimes be too much for a particular organisation, depending on its needs.

- Thymer - <http://www.thymer.com>
- Reverb - <http://reverb>
- Project Bubble - <http://projectbubble.com>

4.4.4 Analytics & Time Management

Time management tasks and analysis tools are typically used to track activity performed. This has the advantage of allowing one to identify habits in their work processes, reducing and eliminating waste and redundant tasks. The analytics element of these tasks allow one to break down websites visited, software used, etc.

- Ronin - <http://www.roninapp.com>
- Toggl - <https://www.toggl.com>

4.5 Time management procedures

There are a wide variety of time management procedures available nowadays. Included below are 4 time management techniques commonly held to be highly effective for SMEs:

4.5.1 The Pomodoro Technique

The concept behind the Pomodoro technique is to break down periods of activity into 25-minute intervals. Entrepreneur Francesco Cirillo, who developed this method based on the concept that one's mind can focus effectively for approximately 25 minutes, called these periods "pomodoros" (Italian for tomato). The technique requires one to decide what they wish to accomplish for the day by breaking their day down into constituent tasks and then focusing on one task for 25 minutes, work free of distractions and focus solely on this until the timer, set to 25 minutes, rings. Following this, a 5-minute break is taken to allow the brain to rest and recharge and then the process is repeated. Every four intervals, a longer break of between 10-20 minutes, is taken. These are the basics of the technique - the technique gets more complicated as one progresses with it.

4.5.2 18 Minutes

The concept behind 18 minutes is somewhat similar to the pomodoro technique. The process is broken down into 3 main stages.

At the start of the day, one develops a list of what they wish to accomplish for the day to ensure that they are successful. In the book "18 Minutes: Find Your Focus, Master Distraction, and Get the Right Things Done" the author, Peter Bregman chief executive officer of the global management consulting firm Bregman Partners, asks "What can you realistically accomplish that will further your focus for the year and allow you to leave at the end of the day feeling that you've been productive and successful? Then take those things off your to-do list and schedule them into your calendar." Following this, one should take one minute per hour of work to refocus and review the last hour. Finally, one should review what they have completed at the end of the day.

4.5.3 COPE

Developed by personal productivity expert Peggy Duncan, the COPE technique – or, the Clear-Organized-Productive-Efficient technique – focuses on the root cause of why workers tend not to have enough time to complete all tasks during the day. The system “incorporates getting to the root cause of why you don't have enough time and what you can do about it”. The process focuses on the analysis of one’s activities by logging all activities and eliminating time wasting activities. Following this, one should organize and prioritize tasks and focus on completing tasks without multitasking.

4.5.4 ABC & Pareto Analyses Combo

This technique pairs the combination of the ABC and Pareto analyses techniques. The ABC technique involves categorizing tasks to A (personal / professional long-term goal), B (important, but doesn't meet the "A" criteria of urgency) or C (nice thing to do, but really not that important) categories. The Pareto technique suggests that 80 percent of tasks can be completed in 20 percent of disposable time and the remaining 20 percent will take up 80 percent of time. Therefore one should focus on the 20 percent of tasks that really matter throughout the day.

The combination of these two techniques involve the categorization of tasks throughout the day to focus on the most important tasks.

4.6 Social media

An essential elements in social media is that it provides a means for participants to develop communities of practice (CoPs) – these are gatherings of users who share a common interest, craft, and/or a profession and who work collaboratively to discuss, share and improve their knowledge of this common knowledge/ skill area. The advantage of social media is that it facilitates effective CoPs by providing a way for members to share tips and best practices, ask questions of their peers, collaborate on documents and discussion boards, provide constant updating of information and provide support for each other. In this way, CoPs can help provide collaboration, motivation and communication.

As mentioned previously, Social media is used to facilitate:

- Collaboration - If a number of individuals can post to a single social media page – like a facebook wall, it can be used to create a shared resource – with the information on this social media page limited to the social media’s main subject matter (e.g.: a project task/ deliverable/ target group, etc.). As the social media page is shared, there will be a number of users adding to it (therefore, if a user contributes, it is still worth them revisiting the social media page often in order to view posts left by other users) and other users can comment on these posts. The final product is something similar to a blog with contributions from a number of users on a very specific subject.
- Communication – Social media networks offer a number of different tools for communication purposes. The primary social media communication tool is typically a messaging system which can be sent internally in the platform to other users. A social media page/ wall as discussed

above can make it possible for users to start discussions and communicate with other social media members by leaving posts on this common section.

- Information gathering & sharing – Social media networks are an excellent means of gathering and sharing information on a specific topic or language, for a specific, limited number of users. As a member of a social media network related to a particular area of expertise (such as a professional area of expertise or a specific language) can be specific in providing information for this area. In addition, via the social media communication tools the social media network is an excellent place to make requests for information related to a particular users's subject area.
- Organisation – as part of the social media network, members can categorize themselves according to their areas of expertise. In this way, it is possible to identify an array of people who possess knowledge of a very specific area, which can then be useful in seeking sources of information.

The use of a social network as a business tool has been somewhat overshadowed by the huge use of it in everyday life (e.g.: facebook), but social software has a role in business, facilitating communication and collaboration which are organic and emergent, formed from bottom-up control rather than top-down design. Information sharing in social network platforms typically revolve around the use of a core set of tools which allow the publishing of updatable web pages – such as wikis and blogs. For example, In Facebook, a post on a wall could be used to outline a user's opinion or interpretation of some information, a link to a resource, etc., the facebook chat function could be used as an instant messaging tool to collaboratively discuss a task or deliverable, etc. When using a social network for information sharing, it is beneficial to consider information sharing in a social context – e.g: information may be shared one-to-one, one-to many, many-to-many, many-to-one, etc. This in turn can determine the tool on the social network which is used to share information. Mass online collaborative projects are very suitable for social network platforms as these projects are often facilitated using a combination of social software and collaboration tools, all of which could be provided by a social network.

A consideration in using communication tools in a social network platform is whether a tool is synchronous or asynchronous. Within Facebook, for example, there are a number of asynchronous communication tools such as discussion groups and walls which can aid in the development of particular information areas. Synchronous communication tools in Facebook are mainly focused on developing communicative skills as well as forming contacts with other users from the social media network. As communication in a social network platform is so myriad and as there are so many tools for communication, for business purposes it is often easier to think of communication in a social networking platform in terms of its social context and its appropriateness in reaching its intended target audience – e.g.: communication tools may be one-to-one, one-to many, many-to-many, many-to-one, etc.

Undoubtedly, the main advantage which using social network platforms for education provide lies in social interaction. This social/ contextual interaction affects all elements of the platform's main characteristics – information sharing, collaboration and communication – thus leading to the characteristic "bottom-up control" rather than "top-down design" approach for learners. It is necessary to

be aware & if possible, develop a plan of action around social interaction on the platform – including guidelines on the use of particular platform tools for particular purposes and particular audiences in order to promote, encourage and moderate interaction.

5 Acknowledgements

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