The Strategic Role of Training and Development at a North American Airline

Pantelis Paspaliaris

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By: Pantelis Paspaliaris

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Signed by the final examining committee:

Frederica Martin	Chair
Robert Bernard	Examiner
Gary M. Boyd	Examiner
Vivek Venkatesh	Supervisor

Approved by   Richard Schmid
                       Chair of Department of Graduate Program Director

_____20_____   Brian Lewis
                                Dean of Faculty

Abstract

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Training and development (T&D) (also known as Human Resource Development – HRD) and its strategic role are currently debated at the national, organizational and individual levels. General literature regarding its impact is undecided. In the airline industry, training literature and studies have been confined to either "great carriers" such as Southwest and Singapore Airlines or to technical areas of expertise such as engineering, maintenance and navigation of aircraft. Very little work has been done at the broader levels of a typical network airline carrier, particularly its frontline branches. Therefore, the current qualitative study will focus on if and how training and development is strategic at the organizational, departmental and individual levels of an international North American airline. Here, a collective case study approach is used whereby three frontline departments from three distinct branches (Airports, Call Centers, and In-Flight) have been assessed. Semi-structured interviews have been conducted with a Training Manager, Curriculum Developer/Instructor and Frontline employee from each branch making a total of nine interviewees. This study will show if and how each department deems T&D as strategic in its own way. It also shows how the three different T&D departments have different requirements to become more strategic due to the very different nature of their work.

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Chapter 1: Introduction

This chapter will delineate the reason why this study has been undertaken, what is expected to be achieved, and how it will contribute to the T&D literature and the airline industry. This section is a roadmap that will set down the rationale and parameters of the study through the statement of the problem, the purpose of this study, its importance and potential contribution, and finally the rationale for studying the Strategic Role of Training and Development at a North American Airline.

Statement of the Problem

While large and successful carriers such as Southwest Airlines and Singapore Airlines benefit from extensive research on their success, their culture, their training and their personnel development strategies, very little literature has targeted T&D at "everyday" international network airlines. Additionally, while maintenance, engineering, piloting and safety are also cited extensively in the training and aviation literature, less can be found on an airline's frontline staff training departments – specifically airports, in-flight and call centers.

Therefore, the aforementioned gaps in the literature indicate that some form of study needs to be done on T&D at a typical North American network airliner, specifically, its customer-facing (frontline) T&D departments. This study seeks to complement the existing literature by ensuring that a new dimension of T&D from a network carrier is added. T&D at network carriers and their frontline departments have not benefited from the same spotlight as other carriers or the technical branches.

Since the objective of research is to explore and benefit one's world, it is important to explore all phenomena within its grasp and not just the exceptions. This study seeks to do

just that: to fill in the gap that exists regarding frontline T&D at an everyday international network carrier. This qualitative study will be exploratory in nature and, therefore, a starting point for further research. Others who are interested in this subject may further explore the meaning or implications of this thesis by studying other and different types of airlines worldwide.

Purpose of the Study

The purpose of the study is to explore if and how T&D plays a strategic role in the context of an international North American network airliner. Using a bottom-up approach (the how), this study provides us with indications that T&D, in this particular North American airline, is or is not strategic (the if). To achieve this, the three departments assessed will give us a broad overview of how some of the interviewees may or may not view training as strategic.

Importance of the Study

The study is important because: (a) a limited body of knowledge exists on frontline staff T&D of network airline carriers; (b) a limited body of knowledge exists on traditional airliners and their HRD practices; and (c) different methodology, such as a qualitative collective-case study approach, will be used to look at strategic T&D.

Frontline T&D departments of international network carriers have not been researched as well as engineering, maintenance and pilot training. These technical areas of expertise are well researched due to the essential nature of their function (i.e., ensuring the plane takes off, flies and lands safely). Because these areas of expertise are highly regulated and safety for an airline is of primary concern, significant capital and interest have been

invested. Frontline T&D literature for airlines is of secondary concern maybe due to each

airline's tailoring of T&D or perhaps because it is not deemed as essential as the technical

aspects of flying. This study will throw some light on how one airline in particular deals

with its frontline T&D strategically.

Currently, a modest amount of academic literature exists for large traditional

network airliners. While the likes of Southwest and Singapore Airlines are frequent

examples used in academia because of their above average performance and their good

human resource capabilities, other international network carriers of good or average

standing are not as well researched. Therefore, the importance of studying airline carriers

of good international stature and how they conduct their T&D is necessary in order to

contribute to the literature and to understand what is done and what can be improved

upon. The current study is a starting point for how a good or average network airline deals

with its human resource development with reduced and/or break even profits.

Finally, it is important to note that this study is qualitative in nature. Qualitative

research in essence "relies on the views of the participants in the study" (Creswell, 2005).

While the literature justifies the roadmap to follow for this study, the approach is entirely

independent and original in that it seeks the participants' perceptions to indicate whether

or not the role of T&D is strategic at their airline. The perceptions from the interviewees are

entirely independent from the literature.

Scope of the Study

The study's focus is on three different T&D departments that train employees in

direct contact with the customer. The three bounded systems in this study include Airports,

In-Flight Service and Call Centers. A cross-section of employees was selected for this study.

Three people from each branch (a total of nine for the whole study) were selected to be interviewed for this study: a Training Manager (one who manages a training department, plans or schedules training and leads a group of specialists or instructors); a Curriculum Developer/Instructor (a specialist); and a Frontline employee.

The three departments were selected because of their important positions within the airline – they are customer-focused areas – and because they are the first one thinks of when using particular services of an airliner. A view of the systems of the three departments gives us a good perspective of what is happening as a whole versus in an isolated system. Although the study of this particular unit of analysis may not be transferable to other airliners of similar size and reach, it gives us some insight into how an airline plans, develops and implements its T&D strategy.

The employees that have been interviewed for this study are representatives of each branch. The intent of having a cross-section of employees (Training Manager, Curriculum Developer/Instructor, and Frontline employee) is to produce as broad a view as possible in this particular unit of analysis (the North American airline). A cross-section of employees helps in a holistic development of themes.

Overall, the approach of trying to view this unit systemically (three different departments and three different employees per branch) enriches our understanding of T&D at this North American airline. It provides an insight into how things work as a whole and could be managed differently.

Rationale of the Study

The study aims to use three frontline training departments at a North American airline as the unit of analysis to explore whether or not and how their role is strategic.

Specifically, the questions used to guide the exploration of strategy and T&D are:

(a) Does the HRD/Training function play a strategic role within the organization?

(b) To what degree does the HRD/Training play a strategic role?

(c) What resources are needed to ensure that the HRD/Training function becomes a more integral and strategic part of the organization?

These questions may not necessarily yield a clear yes or no answer; they could instead encourage the interviewees to describe why they think their T&D departments play a strategic role in their branch (and company) or why not.

Although this study has not been developed as Action Research, the data can be (and will be) used to better the organization's functioning. The study, therefore, helps both to complement the current academic knowledge and to help improve the setting used for this thesis.

Chapter 2: Literature Review

There is much in the literature that deals with training and development and its strategic impact in several areas. However, this type of research is lacking within the airline and aviation environment. Because this particular research topic is quite specific, immediate literature pertaining to training and development and strategy within an airline was difficult to come by. In order to begin exploring the strategic role of training and development within an airline, it is important to investigate contingent literature that can help us develop an initial understanding of the phenomenon. The three bodies of literature that we will explore include: current airline and aviation training practices, the strategic role of HRD and training as it pertains to firm performance and organizational strategy, and employees' perceptions of HRD and training.

Current Airline and Aviation Training

When one thinks of airline or aviation training, pilot simulators, customer service focus and airport operations come to mind. While these specific categories are indeed part of the function, training and development, the airline industry focuses on safety first and service second. We shall review the literature regarding both safety and service, and will conclude with how some airline cultures successfully integrate the HRD function.

On Safety Training

Since the airline industry was deregulated in the 1970s, it has made a conscious effort to integrate and instill a safety culture through training and policies (Appelbaum & Fewster, 2004; Lu, 2005). Governments have played and are still playing a pivotal role in establishing minimum requirements of safety standards for this industry (Lu, 2004; O'Brien, 2008). In order to compete with each other, airlines consider safety as the baseline measure since passengers now take this for granted.

Safety, however, cannot be taken for granted. While safety is of primary importance, airlines will often only fulfill the minimum legal requirements necessary (Appelbaum & Fewster, 2004; Arnoult, 2000; Sweet, 2006). For instance, Maintenance Resource Management (MRM) training is a requirement in Canada under Transport Canada, as well as in Europe, but not in the US because the Federal Aviation Administration (FAA) does not require such training. Airlines in the US strongly oppose MRM training because of cost, lack of resources from airlines and the FAA, and the air carriers' voluntary participation in the Air Transport Surveillance System (ATOS) (Lu, 2005). Security training is also highlighted by the Transport Security Administration's need to standardize training for airport

managers because as many as 30% of small to medium-sized airport personnel have not been trained (Sweet, 2006). This shows how minimum requirements for safety training impact the way airlines regulate their operations.

Governments are not the sole bearers of promoting safety cultures. Although Appelbaum and Fewster (2004) explain that safety standards in some areas still remain inadequate, they also point out that this is largely due to poor Human Resource Management (HRM) practices. The authors state that unhealthy organizations are conducive to poor human factor decisions. In addition, they raise the issue that bureaucratic organizations inculcate a "quick fix" culture that may not lead to information being actively sought or inquiries being actively developed.

To counter this, some stakeholders have embraced the government's requirements and pushed the safety training agenda even further. Stakeholders such as unions have pushed for safety training from their carriers when incidences such as air rage were going up (Arnoult, 2000). Flybe, a UK based carrier, has been working with the UK national skills training system to get cabin crew nationally recognized as a professional skill. The support from the government will not only standardize the cabin crew function but it will also recognize it as a vocational skill (Learmount, 2008). Other airlines partnered with the International Air Transport Association (IATA) to develop its Operational Safety Audit (IOSA) in 2003, and some are currently developing IATA's Safety Audit for Ground Operations (ISAGO) (O'Brien, 2008). The ISAGO is aimed at standardizing airport safety audits performed by air carriers. O'Brien (2008) has stated that more than 500 audits have been conducted under the IOSA. Many stakeholders (Aviation Handlers Association, Flight Safety Foundation, Ground Accident Prevention) have been contributing to ISAGO's

development and standards.

Airlines who do not abide by these regulatory bodies may suffer consequences. Kingfisher Airlines, for instance, did not pass its IOSA audit and will thus have to wait for IATA membership (Mathews, 2009). The failure to meet this international standard can affect code share agreements and global alliances that carriers have set as a minimum to join their club. Although the safety audit of Kingfisher revealed several findings regarding its pilot training, it does not mean that the airline is unsafe. It simply means that they will have to undergo further audits to ensure their membership of the IATA.

While the majority of the aviation literature focuses on the effects of training of safety, less has been found on service. Because of competition, service, like safety, plays a strategic role in the airline's survival.

On Service Training

Airline customer service training is not as well documented in the literature as safety. For many airlines safety is of primary importance but service, although necessary, is an extra investment some carriers reluctantly invest in.

One airline that is often cited as a model of service training is Singapore Airlines (SIA). SIA invests heavily in its front line employees because it believes that this strategy impacts the customer (Appelbaum & Fewster, 2004; Wirtz, Heracleous, & Pangarkar, 2008; Chong, 2007). Training at SIA ensures alignment with the strategic goals of the company. SIA has a history of focusing equally on people and on processes. SIA's concept of Transforming Customer Service (TCS) ensures a 40-30-30 distribution of focus in resources (40% on training, 30% on processes and procedures and 30% on new product development) (Wirtz et al., 2008). Training is the focal point of SIA's strategy. This is

exemplified by the flight attendants' basic training course that lasts up to 4 months, one of the longest in the industry.

Other airlines also invest in service training in different ways. British Airways for instance has invested in an online system to ensure that its cabin crew is competent with a new PDA system (a type of onboard sales handheld system) (Little, 2006). Although the training was technical in nature, the e-learning system was beneficial because it did not disrupt the work schedules of the crew nor did it require extra classroom-base costs. Training for cabin crew is indeed a challenge because they are mobile and have irregular schedules. E-learning seems to be part of the solution.

Service training for most organizations, however, is perceived as a cost. Wirtz et al. (2008) state that:

> many companies make the error of viewing training as a cost rather than as an investment; and of those that view it as an investment, many limit the training to technical aspects of the job rather than aiming to develop employees more holistically [...].

This is in line with the literature on airline safety training, specifically that unless it is mandatory, it will not be conducted. Training and development should be viewed holistically as part of a larger strategy. Let us examine what the literature mentions regarding HRD integrated within the airline function.

On Integrating HRD (T&D) into the Airline Function

Integrating the HRD function into the airline system is best exemplified by SIA's strategy to incorporate the 40-30-30 philosophy regarding Transforming Customer Service. SIA's role is to excel in every way by investing in its people, processes, and products. Its vision according to Chong (2007) is to integrate the training function as "the 'first frontier'

in the battle for the customer." SIA's seven training schools – cabin crew, flight operations, commercial training, information technology, security, airport services training, and engineering – attest to its dedication to human development (Wirtz et al. 2008). This is confirmed by Appelbaum and Fewster (2004) who report that SIA invests 15% of payroll in training, while US carriers invest only 1.5%.

Appelbaum and Fewster (2004) suggest that HRM expertise in Organization Development, Diversity, and Training and Development are necessary to strengthen both internal marketing strategies and employee commitment. They suggest that bureaucratic structures plague the organization with inefficiencies such as poor Crew Resource Management, high human factor errors and airline disasters. Conversely, Appelbaum and Fewster (2004) also state that low-cost carriers like Southwest Airlines (SWA) are effectively using HRM because they monitor employee performance, actively seek information from employees and invest in their human capital.

HRD's training and development benefits are well known (Appelbaum & Fewster, 2004). They help in the strategic alignment of the organization, motivate employees to perform according to organizational vision, and ensure adherence to safety and service standards set forth by the organization.

The literature on airline or aviation safety training is extensive whereas service training literature is not as comprehensive. Finally, the literature on the integration of training as a strategic role in the airline industry is discussed at a macro-level (with more focus on SWA and SIA). To explore this further, we will focus on what the literature has to say about the role of HRD and training in organizations.

The Strategic Role of HRD and Training

HRD is a subset of Human Resource Management practices (Auluck, 2009). HRD focuses primarily on the development of the individual and the organization. Definitions of HRD vary from organizational learning to career development, to promotion, policies, and training (Auluck, 2009; Nadler, 1981). Definitions of HRD are not quite simple or comprehensive. By the same token, the term strategy is also problematic because each person has a different meaning for it (Kalman, 2008). This section will explore the literature as it pertains to HRD theory, evidence-based HRD, and HRD as strategy.

HRD Theory

The dilemma of HRD's level of impact on organizations has been greatly debated in the literature. In the 1980s the debate was whether training had the ability to prove that change has occurred (Zenger, 1980). Training has been seen as something to avoid, and for a time the Organization Development Division of ASTD became its largest subunit (Zenger, 1980). Argyris (1999), who is an advocate of organizational learning, has also questioned whether organizations can effectively incorporate organizational knowledge creation. Argyris (1999) states that while CEOs know that the learning function should be an integral part of the organization they are not sure whether Human Resources (HR) can deliver. Hansson (2007) further distinguishes training from HRM. While training deals with individual learning, HRM deals with overall organizational effectiveness. The debate about what HRD and training is and what it should be is still ongoing today.

Currently, the HRD function is seen as segmented, lacking coherence, and composed of various interventions that are supposed to enhance individual and organizational

learning (Hamlin, 2007). According to Hamlin (2007), HRD's lack of coherence impedes it from any strategic value and from having a seat with senior management. Wang and Wang's (2006) study regarding China and HRD also shows that a lack of coherence or a piecemeal approach to personnel development has hindered it from creating a competitive advantage through its human capital. Mabey (2004) also sees HRD as a non-strategic element in the US and in Europe, where its link between human development and business strategy is weak. However the literature does stress that HRD plays an important role in organizational effectiveness and people development at an organizational and national level (Mabey, 2004; Hamlin, 2007; Wang & Wang, 2006).

Some view HRD's function from a cost-driven perspective whereby the more one invests in one's human capital, the better the organizational outcome (i.e. return on investment – ROI). According to Krohn (2000) human capital should be aligned with capital theory. Lewis (2005) and Hassan, Hashim, and Ismail (2006) have a different view. They state that employees do not see themselves as a capital that is being invested in and neither do they see themselves as being locked in a corporation. Lewis (2005) also states that employees will align themselves with corporate objectives if the HRD intervention is aligned with their aspirations. Similarly, Hassan et al. (2006) state that 90% of the employees surveyed do have an expectation that organizations will help them develop. Zaleska and Menezes (2007) agree: due to flattened organizational structures and short term contracts, training must become more transferable and general (i.e. mentoring, job rotation) as people are more mobile than ever before.

Ordonez de Pablos (2004) agrees with the view that if organizations invest in their human capital, they will reap the benefits. She mentions that the "black box" between the

HRM systems in place and the organizational outcome is important in creating the organization's competitive advantage. In her study she concludes that knowledge stock found at the individual, group and organizational levels contributes to organizational performance. With this in mind, we must ensure that the HRM practices are conducive to enhancing the knowledge stock.

Although the HRD literature has helped us create some kind of theory, we still need some concrete examples. Therefore, in order for HRD to play a strategic role, it is important to have evidence of its impact on organizational outcomes. To do this, the literature should provide some instances of evidence where HRD is indeed strategic and useful.

HRD as an Evidence-Based Approach

Auluck (2009) states that HRD suffers from a low status because of its exclusion from the decision-making process. Poor decisions are made without it which in turn lowers its status even more and diminishes its credibility (Auluck, 2009). Hamlin (2007) stipulates that HRD must therefore become evidence-based (i.e. must prove that the performance initiatives are working) in order to break this self-perpetuating cycle. Some evidence is available to show HRD's viability as a strategic partner.

Hansson (2007) found that if an organization performed needs analyses, had a policy regarding HRD, had educated employees and a strong record of profitability, the intensity and incidence of training was likely to be higher. If some of these elements were missing, training intensity and incidence would be lower. In support of this, Hassan et al. (2006) also noticed that ISO companies obtained higher means on HRD variables. Companies that had better learning, training and development, as well as reward and recognition initiatives, promoted more HRD. They found that companies that invested more

in training and development could benefit from higher organizational performance. Among several variables, they found that employee satisfaction resulted from employee development, training and action research as well as from reward and recognition. They found that firms who invest more in general training and make it part of their regular HRM initiatives have a higher likelihood of being profitable.

HRD, however, cannot be regarded as the sole predictor of firm performance. The training-firm productivity variable is strongly moderated by organizational strategy (Thang & Buyens, 2008). Thang and Buyens (2008) found that training and organizational strategy operate as one system. According Thang and Buyens (2008), the impact of training on individuals was greater if it was aligned with organizational strategy. Another variable, namely senior management support, is also crucial. Kalman (2006) studied the transformation of a training and development function where its goal was to gain more credibility with management. With the help of an advisory board, this particular department had to develop alignment of organizational strategy and be in sync with the organizational goals. Senior management, the speed of the change, and the operational plan for this department were all factors in determining its success.

Peterson (1997), however, cautions against applying a one size fits all HRD strategy. He states that the US concepts and tools of training and development do not necessarily work everywhere. A case in point is where Organizational Development practices in the US will not have the same impact in Confucian societies. The same is to be said for Japanese work ethics. A manager from Japan cannot enforce group conformity in the US. Peterson (1997) states that HRD functions such as training and development or organizational development must be culturally sensitive in order for their interventions to work.

Internationally, HRD initiatives do not get the same funding either. Mabey (2004) states that the mean EU investment per manager is 2513 Euros on average per year for management development initiatives. Zheng and Hyland (2007) note that non-Asian multinationals spend approximately 1000 Dollars per person on training, while Asian multinationals spend approximately 100 Dollars. Numbers alone cannot infer if training is good or not, but Zheng and Hyland (2007) have noted that many Asian companies have now found out about the importance of HRM practices. Wang and Wang (2006) corroborate this with the case in China where management development and HRD are still in the development stage.

HRD evidence and theory are two important elements for ensuring that it becomes strategic. Some of the literature points to several theories and current practices about how HRD can become even more strategic.

HRD as a Strategy

Mabey (2003) explains that the HRD function is fragmented which in turn causes its lack of credibility. Fragmentation and lack of coherence come from organizational leaders who see HRD as a solution to expansion and growth, and from employees who see it as a chance to improve their career opportunities. Mabye (2003) suggests that HRD is unable to define its outcomes clearly. He notes that it is important to specify what strategic decisions the HRD function must make and what process it will use to go about it. Some literature suggests that this has already begun.

Auluck (2009) states that HRD develops people, promotes operational objectives, and focuses on individual learning. She also mentions that the function is transitioning itself from training and development to more comprehensive and strategic HRD function. From

the people she surveyed regarding the status of HRD in the last 5 years, she found that 69.9% of the HRD/Training Specialists and 68.6% of the HR personnel believed that HRD has become more strategic while only 47.4% of the managers believed so (Auluck, 2006). While HRD enhances organizational effectiveness, promotes organizational and individual learning, and upholds the idea of people as assets, its status is still relatively low among non-HR professionals (Hamlin, 2007; Auluck, 2009).

Although the status of HRD is low, organizational or national policies can help counter this trend. Quite a number of articles have shown the link between having a policy and ensuring HRD is practiced (Hansson, 2007; Hassan et al., 2006; Clardy, 2008; Gray & Mabey, 2005; Wang & Wang, 2006). Hansson (2007) and Hassan et al. (2006) mention that policies do increase the presence of training. While Hansson (2007) mentions that written policies increase the incidence of training, Hassan et al. (2006) noticed that companies who comply to standards (like ISO) were more likely to have better HRD processes. Gray and Mabey (2005) indicate a similar pattern whereby small European firms that do have a policy about HRD are more likely to fulfill the needs of the organization and the individual employees.

It is possible for HRD to become part of the culture of the organization. Clardy (2008) shows how a huge institution such as the US Federal Government has successfully introduced HRD policies to guide and administer the delivery of training. In Japan the Management Training Program (MTP) was instituted in 1952 by USAF personnel to help build managers (Robinson & Stern, 1995). Since then the MTP has grown and been modified and is used today in companies such as JAL, Toshiba, Toyota and Nissan, among others. Now, the MTP and its modified versions are a pre-requisite for anyone who wants to go into

middle and senior management. The reason it spread in Japan is largely due to the government's rigorous and uniform standards nationwide. At the other end of the spectrum, China still does not have policies regarding HRD and training as it pertains to its managers and is currently suffering from "borrowed" experience (Wang & Wang, 2006).

At the micro-level, McIntyre (2004) argues for having HRD actively participate in the process of mergers and acquisitions from A to Z. One of the reasons is that HRD can take care of both the task and the human aspects during a merger. Change is often poorly managed and mergers and acquisitions often fail because of the human aspects. McIntyre (2004) postulates that HRD is well positioned to help with change issues – especially at the human level – and it should therefore be treated as a strategic business partner. At the individual firm level, Enz and Siguaw (2000) give countless best practices by many hotel chains where HRD addresses various needs such as consistency, culture and commitment. These examples illustrate how HRD is strategic and how it must be integrated in the culture.

As Peterson (1997) notes, HRD is about learning and creating a culture of patterned thinking. HRD as a concept is multi-faceted and complex. The real testers of HRD, however, are the people who go through processes such as training.

Employee Perception of HRD and Training

Whereas theory, practice and the strategy of HRD are important, employees at all levels are the ones who go through the actual training interventions. Senior managers, line managers and employees have different perceptions of what HRD is and of its usefulness.

Many training departments know that getting the support from senior managers is of primary concern. The importance of having senior managers on board lies in their ability to review policies, oversee curriculum and evaluate the worth of projects. This is not always

easy because senior managers see the training function as a cost rather than as an investment (Hamlin, 2007; Giangreco, Sebastiano, & Peccei, 2009). Conversely, some senior managers do see value in HRD initiatives such as instructional design, and believe that their training managers can add value to the firm (Kalman, 2006). Kalman (2006) also noted in her study that senior managers wanted training and development to be aligned the corporate priorities in order to contribute more to growth and development. Gray and Mabey (2005) noted that the larger the firm is, the more likely managers are to see a link between HRD and strategy.

As for line managers (LM), the perceptions of HRD are varied. In small firms, Gray and Mabey (2005) have noted that owners prefer informal learning methods rather than standardized processes. In turn, the LMs in small firms are clearly focused on career development in order to access better jobs. Because of the potential loss of LMs, the owners of small firms do not see the benefit of having standardized training methods. In larger firms such as Hilton, LMs are expected to deliver and promote HRD initiatives (Watson & Maxwell, 2007). While this expectation has been set forth by the HRD function, LMs at Hilton are more focused on short term pressures and goals; they are unable to fully participate in training and development functions such as identifying training needs, ensuring participation in training initiatives, and evaluating outcomes. LMs do play a strategic role in HRD and in organizational strategy but short term pressures and heavy workloads do not allow for such activities. Santos and Stuart (2003) have noted, however, that if LMs participated in the training process, they would see it more favorably.

Overall, the employees' view of HRD is positive if certain factors are present. Montesino (2002) observed a low to moderate positive correlation between perceived

training alignment and strategic direction. However, he did note a more positive correlation between awareness and commitment to strategic direction. This means that trainees who were more aware and noticed a connection between training and strategic direction were more able to apply the skills they learned than those who did not. Giangreco, et al. (2009) also noted that the usefulness of training was moderated by (a) how the trainer performed, (b) how the training was organized, and (c) how useful it actually was. If all three elements were present, organizational commitment was deemed higher (Giangreco et al. 2009). In a study, Tsai and Tai (2002) found that employees who were mandated to go to training were more motivated than those who volunteered. The training, however, has to be mandatory and not manipulative. Transfer of learning to the workplace is possible if the employees believe their new behavior will lead them to a promotion (Santos & Stuart, 2003).

Another moderator that affects employees' view of HRD is the organization's investment in human capital. Day and Peluchette (2009) found that faculty professors perceived less investment in training led to less engaged employees. McGahern (2008) shows that employees who notice their organization actively investing money and time in their well-being will be happier and more motivated to deal with customer complaints.

Chapter 3: Research Design and Methodology

This section will focus on the procedures used to enter the site, collect the information from participants, analyze the data collected, and ensure its validity and originality. Because this is a qualitative study, the following chapter will focus on "procedures followed" rather than "methods," usually reserved for quantitative approaches (Creswell, 2005).

Site and Sample

The site chosen for this study is a North American airline with well over ten thousand employees. As a network airline with various hubs across its system, it serves continents or geographical areas including Europe, Asia, Oceania, North and South America and the Middle East. The airline has won numerous awards from business travel magazines and international surveys, and currently leads its peers in on-time departures and technological innovative solutions for its passengers.

Three departments tasked to train frontline employees were chosen for this study. Specifically, the training departments chosen included Airports that train customer sales agents in passenger handling, security and ground servicing of aircrafts, Call Centers that train customer sales agents in reservations, special requests and changes to itineraries, and In-Flight Services that train flight attendants in in-flight safety and service procedures.

The sample used for this research site includes a Training Manager, a Curriculum Developer/Instructor, and a Frontline employee from each branch. A total of nine individuals were used for this study. The reasoning for maintaining this sample includes: (a) having a cross-section of individuals from various ranks; (b) ensuring all samples have worked in or received training – that is, they are directly involved with training one way or another; (c) ensuring triangulation of information, therefore potentially increasing its validity; and (d) potentially having a well-rounded or representative view of the phenomenon, which is whether T&D is strategic.

The training departments currently work independently from one another. Scheduling, design, and delivery practices are different from one department to another. The organizational structure for each training department, however, is somewhat similar.

They each have their manager of the training department and the curriculum developers or instructors who are the specialists, in this study the Training Manager and the Curriculum Developer/Instructor.

Either because of size of department or numbers of employees, some training departments are more centralized than others. For instance, scheduling, design and delivery are centrally organized for In-Flight due to stringent mandatory safety rules, whereas airports are centrally organized for design and delivery but scheduling is left to the airports. Call Centers, because of their smaller employee size and remote workstations, are centrally organized.

Research Approach

A qualitative approach is used in this study because no pre-determined variables have been identified to be described. As Creswell (2005) notes, qualitative research is best suited when one does not know any variables and it is best to simply explore. Because we do not know if T&D plays a strategic role in this North American airline, nor have any concrete variables been developed to guide a quantitative approach, the qualitative and exploratory methods are best suited for this type of research.

A collective case study was used to guide the research. This study looks at multiple cases (the three training departments) to give insight to one issue. In essence, three bounded systems (or three cases), Airport, In-Flight, and Call Centers, were chosen to describe as broadly as possible the strategic role of T&D (the central issue of interest). By using the collective case study approach, one is able to assess each training department individually while ending up with one large case; the phenomenon to be explored in this case is whether T&D is strategic.

The unit of analysis for this study is the North American airline. It is deemed as such because this study focuses on what it means for a North American airline to have or not have strategic T&D. For this unit of analysis, three specific bounded systems have been selected: the first bounded system is the Airport training department, the second bounded system is the In-Flight Service training department, and the third bounded system is the Call Center training department. [See Figure 1: Unit of Analysis and its Bounded Systems].

Each bounded system will, therefore, carry three individuals that will be interviewed. The individuals interviewed are a cross section of people directly involved with the training department – the Training Manager who runs a training department, the Curriculum Developer/Instructor who is a specialist in the training department, and the Frontline employee who follows some type of training at the training department.
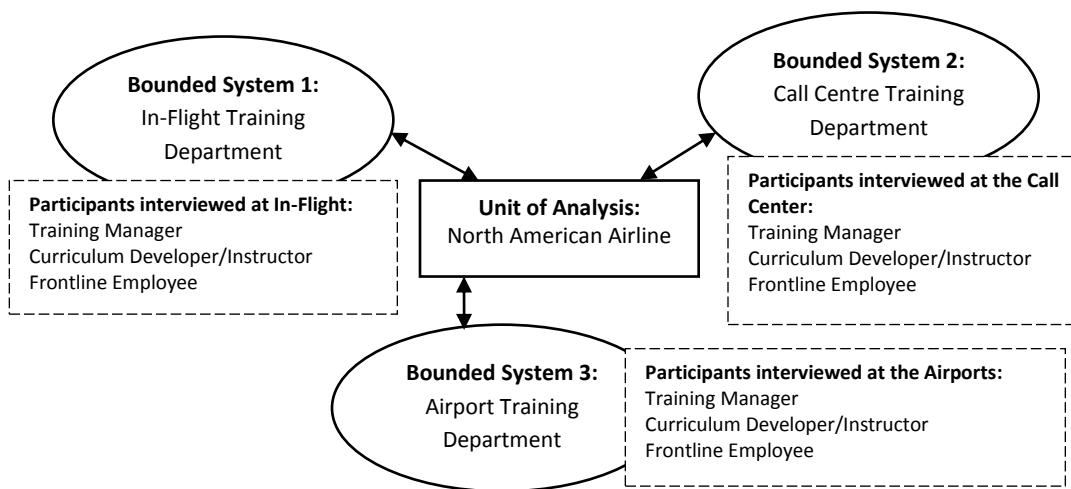
Figure 1: Unit of Analysis and its Bounded Systems

Data Gathering Methods

Access to the site was permitted in part because the researcher knew some of the members in its senior leadership. The senior leadership was the first point of contact in

order to gain access to employees directly involved with T&D. Both the interview protocol and a Thesis Brief Sheet (see Appendix A for Interview Protocol) were shown to the senior leader in order to convey a sense of how the interviews would be done and what would be asked. The goal of the study was also explained (i.e., requirement to fulfill a Thesis and gain experience in doing research).

From that point, a whole list of names was given to the researcher. Although the names of the participants given to the researcher were through a snowball sampling, the final selection remained in the hands of the participants themselves (to participate or not to participate). First, the researcher e-mailed all the participants and directors or upper middle management. The participants were the Training Managers, Curriculum Developer/Instructors, and Frontline employees. The participants were e-mailed a Call to Participants (see Appendix B for Call to Participants) using BCC in order to maintain anonymity (and confidentiality), and instructions were given in the e-mail to REPLY only and not to click on REPLY ALL. Directors/Upper Middle Management were in CC since they were aware of the study and were used, with their consent, to support the study by showing up on CC.

The method used to collect the names of participants was a quasi-snowball sampling. The reason it is deemed "quasi" is because a true snowball sampling technique "proceeds after a study begins in which the researcher asks participants to recommend individuals to study" (Creswell, 2005). In this study, the senior leader recommended how to proceed but did not at any instance promote the use of one participant over another. Neither did the Directors/Upper Middle Management promote one participant over another. On the contrary, they encouraged the mass e-mail technique and let the

participants decide for themselves if they wanted to participate or not. The sole criterion was to have one participant from each hierarchical band (i.e., Training Manager, Curriculum Developer/Instructor, Frontline employee).

While this technique was easy for the Training Manager and Curriculum Developer/Instructor, the Frontline employee followed true to snowball sampling. Here, once the study had commenced, the researcher asked the Training Manager and the Curriculum Developer/Instructor if they personally knew of several frontline employees who would be interested in participating in such a study. The sample for frontline employees was limited and, therefore, followed true to snowball sampling methodology. Once again an e-mail was sent to the Frontline employees asking them for their voluntary participation.

Once the participants accepted the invitation to be interviewed, locations most convenient to them were selected to conduct the interviews. For the majority of the participants, one-on-one interviews were held at their own locations in their training departments in a closed room away from the main offices. In one instance, one participant (the Training Manager of Airports) elected to do the interview off-site at a suitable airport.

During the interviews a tape recorder was used and the interview protocol was read to the participant, specifically the section, "Describe the research to the participant". The e-mail Call to Participants did explain the role of the research and the ability to opt out but it was deemed more ethical to re-read the "Describe the research to the participant" section in order to emphasize the voluntary and confidential nature of this research. The consent forms were then given to the participants and signed. A copy was given to them and a copy was kept for the researcher's file.

The intent of the research was to stick to the interview protocol as much possible. In a structured interview the researcher must ask precise questions in a specific order and not deviate from the series of questions, and even the probes must be planned (Bailey, 2007). In this research, the intent was to stick to the script as much as possible but the researcher soon realized that the interview was neither built nor structured to be conducted in such a rigid format. Instead, the interview protocol (or guide) had questions for a topic but they were not necessarily asked in a specified order (Bailey, 2007). This resulted in the research being conducted a semi-structured way, thus taking the form of semi-structured interviews.

The interviews lasted between 20 and 45 minutes depending on the questions, the probing and the amount of information the participants wanted to share. Some participants were more concise in their statements and offered little explanation while others provided a lot of examples with their statements. Because the intent was not to have a structured interview but to follow a more "discussion-like" process, some questions were dropped or re-worded.

For instance, question 2:

> According to you, do you believe that the training and development function plays a strategic role within this airline? [Probe: Why do you think so? What are the clues that make you think this?]

and question 3:

> To what degree does training and development play a strategic role in this airline? [Probe: How does your department go about making strategic decisions?]

of the interview protocol went hand in hand. That is "do you believe…" and "why do you think so?" easily answer "to what degree…". Or vice versa, "to what degree…" often gives

you an insight into "why do you think so?" It was often difficult to distinguish questions 2 and 3 from one another when asked in sequence but with discussion both questions eventually asked themselves or backed one another up.

Finally, throughout the individual interviews a digital tape recorder was used to record the interviews. The digital files were then stored on the computer, on a USB key, and on the digital recorder itself as back up. The digital tape recorder was in view in the middle of the table. It was also mentioned in the Interview Protocol that the interviews would be taped. No participant objected to the taping and none seemed to be inconvenienced by having this instrument on during the interviews. In addition to taping, notes were taken by hand. These notes were typed on a Word document and stored. No physical evidence remained.

Validity and Originality of Data

Although validating questions using a qualitative approach is not necessary per se (Moghaddam, 2006), it is necessary to ensure that the question answers the topic being researched. Validity of the questions was undertaken by drafting and redrafting the questions in order to make them as concise and coherent as possible. The number of questions related to the strategic role of T&D was kept to a minimum in order to allow space for dialogue and build freely on what the participant thought was important to say.

Also, another employee from a training function who was not involved with the research was approached and asked if he/she would review the questions and give feedback on them. Here, an interesting thing happened: the term strategic was not that clear. Questions asked from this employee included: What does strategy mean? What does it entail? From what angle are we tackling strategy?

In order to rectify a potential stalling of answering questions, the researcher included a definition of the term strategy; one that can be found on the Internet if one looks for it. The definitions e-mailed to the participants to ensure a baseline of understanding were:

> As James Brian Quinn indicated in *The Strategy Process: Concepts and Contexts,* "a strategy is the pattern or plan that integrates an organization's major goals, policies, and action sequences into a cohesive whole. A well-formulated strategy helps to marshal and allocate an organization's resources into a unique and viable posture based on its relative internal competencies and shortcomings, anticipated changes in the environment, and contingent moves by intelligent opponents." All types of businesses require some sort of strategy in order to be successful; otherwise their efforts and resources will be spent haphazardly and likely wasted.

and,

> Management plan or method for completing objectives; plans of procedures to be implemented, to do something.

These definitions (taken from http://www.answers.com/topic/strategy - a website that the general population has access to) tried to ensure that participants understood the meaning of strategy as it pertained to this study.

Again, the reasoning for focusing on the questions is important because valid questions will only increase the likelihood of participants answering or giving information in the direction sought. Not reviewing the questions and not ensuring their validity can potentially mislead the interviewee.

Validity of the data on the other hand is ensured because of triangulation. In this research, because the study has been designed with a cross-section of participants, that is the Training Manager, the Curriculum Developer/Instructor and the Frontline employee, themes created will be more valid than if, for example, only one individual from each

bounded system was simply interviewed. The information collected draws on multiple sources of information from various branches and layers in the organization; this in turn increases both accuracy and credibility up to a certain point.

Validity of the data was further pursued by ensuring confidentiality on several occasions. Because the study was conducted at a workplace setting, there could be a fear of saying too much. Ensuring confidentiality was mentioned both in the Call to Participants and the Interview Protocol. This gives participants the opportunity to speak as freely as possible during the interviews.

Validity of data was also ensured through careful coding (i.e. ensuring enough occurrences from different participants were noted). In an excel grid sheet created to code, a column was added titled "Says Who" (See Table 1 of Excel Grid Sheet below). At first glance, the code may have had just one occurrence with one person participant acknowledging it (low validity) but by layering the codes, several participants may have talked about a certain theme using different examples, therefore increasing the validity of the themes encountered (high validity).

Code Title	Number of Occurrences	Says Who	Falls Under/Taxonomy
Benchmarking and Sharing with Other Departments	1	TM(1)	Knowledge Management
Bulletins	1	FRL(1)	Knowledge Management
Centralized Structure – Communication	1	FRL(1)	Knowledge Management

Table 1: Example of "Says Who" Excel Grid Sheet

Furthermore, probing and asking the participant to repeat or expand at certain points in the interview were also important for validity. By being asked to expand, the participant enriches his or her statement and proves it or disproves it. An example of this is where the interviewer asked the Frontline employee to clarify a conflicting statement on

communication. The following example illustrates how probing ensures some validity:

> INT: [...] earlier we said there is a lot of information out there in different areas like the portal the *this*, the *that*, and here we are saying, [...] that communication is lacking. Try to put the two together to make it clear for me.
>
> FRL: Yes. It's all... Well first of all what are they communicating? Is it communicating the information that we really need to deliver the product? And is it delivered to the right group of people at the right time? [...] I see there is a lot of information, a lot of fluff, a lot of statistics.

It is important to use such techniques in order to reduce ambiguity and seek clarity in the information. The researcher must be in tune with the interviewee and actively listen for any discrepancy.

Methodology (Data Analysis Approach)

The data was transcribed on Word documents. There was a Word document for each participant interviewed. Once everything was transcribed word for word, the documents were saved on a USB key. A 30-minute interview took approximately six to eight hours to transcribe (listening to the recording and typing out the interview word for word). All nine interviews were transcribed in this manner and saved as Word documents.

The technology used to initially code the data was HyperResearch, a software package for qualitative data analysis. Each individual bounded system was treated as one case. Therefore, one case has three interviews in it (those of the Training Manager, the Curriculum Developer/Instructor and the Frontline Employee). Training and Development – Airports for instance was deemed as one case. Training and Development – In-Flight Service and Training and Development – Call Centers were the two following cases that were entered into HyperResearch. Their respective interviews were attached in Rich Text

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Format since HyperResearch was unable to recognize the Word document. One interview at a time was coded under each case.

Initially, an open coding process was used to break the data down. At the beginning of the study, with the first interview, codes were used in an open and unfocused manner. As Moghaddam (2006) points out, open coding is used to categorize many individual phenomena. In this study, codes were not pre-determined prior to the analysis. Instead, the analysis itself began the process of open coding.

As interviews were added for analysis, codes changed: some would be dropped, some would be edited and others would be re-worded. The open coding methodology gave rise to a total of 50 codes for all nine interviews combined. Initially, the first interview created approximately 40 codes and by the end of all nine interviews, 50 codes were created. These 50 codes were kept throughout the analysis process for all interviews. The 50 codes were part of the Master Code List maintained in HyperResearch. As the analysis progressed, the Master Code List was always available for reference. None of the cases used all 50 codes from the Master Code List.

As the study progressed, it was necessary to come back to previous interviews and re-code or refine the initial findings. Re-assessing codes from previous interviews was difficult because this meant re-working and re-assessing the validity of the first code assigned. Additionally, there were times when a segment of the text belonged to two or three codes. This increased the number of codes per interview. Reviewing and re-assessing prior coding was difficult but necessary in order to create a coherent image and to sort out the bigger picture.

Once the open coding was done, an Excel Grid Sheet was developed to include all the

information retrieved in the interviews. Each case (e.g., Training and Development – Airports, etc.) had one excel sheet to itself. The three interviews for that case were on this one sheet. The excel sheet had six columns with the following titles (See Table 1 for an example of part of the excel sheet used):

Code Name: This is the code that was used during open coding and part of 50 codes in the Master Code List

Number of Occurrences: The number of times one found this code within the case in question.

Says Who: This section lets us know if it was the Training Manager, the Curriculum Developer/Instructor, the Frontline employee, or any combination of the three.

Falls Under/Taxonomy: This was later developed to help organize the information. This is part of the axial coding that ensued.

Significant Finding or Quote: Quotes or paraphrases were used in this section to illustrate the codes.

Main Idea: This was used/reserved for the researcher to synthesize each idea.

While the excel sheet was being prepared, the process of Axial Coding had already begun. Because 50 codes are too many to use for an analysis, it is important to reduce the number of codes and amalgamate them in way that shows a relationship among one another (Moghaddam, 2006). In this case, the 6th column was added, "Falls Under/Taxonomy". This column was introduced to synthesize the codes and create some type of hierarchy, some type of organization. Axial coding helped the study create a meaning to the, at first glance disparate, codes already attributed.

Following the initial axial coding exercise, a concept map hierarchy was used to

organize the codes in a more visually agreeable manner. A hierarchical concept map was created to show the interrelationships of the numerous codes and their axial codes that held them together. The hierarchical map included two layers of codes (the lower layer being the open codes and the upper layer being the axial codes). Each box (i.e. each code) in the lower layer was colored green, red, or blue. Green indicated that the code had a good or positive meaning; red indicated a negative meaning or something that was not done; blue indicated a future state or what could/should be. Each lower layer box also included the number of occurrences, which was taken directly from the excel sheet. The upper layer boxes remained blank but included the total of occurrences gathered from the lower layer. See Figure 2 below for an example and See Appendix D for a detailed view of all taxonomies of open and axial coding.

The above mentioned method helped the researcher create, organize and make sense of the themes expressed by the participants. Each case was able to tell its own story and build its own hierarchy with its own information. This eventually helped in the creation of themes that we shall explore in depth in Chapter 4: Data Analysis.
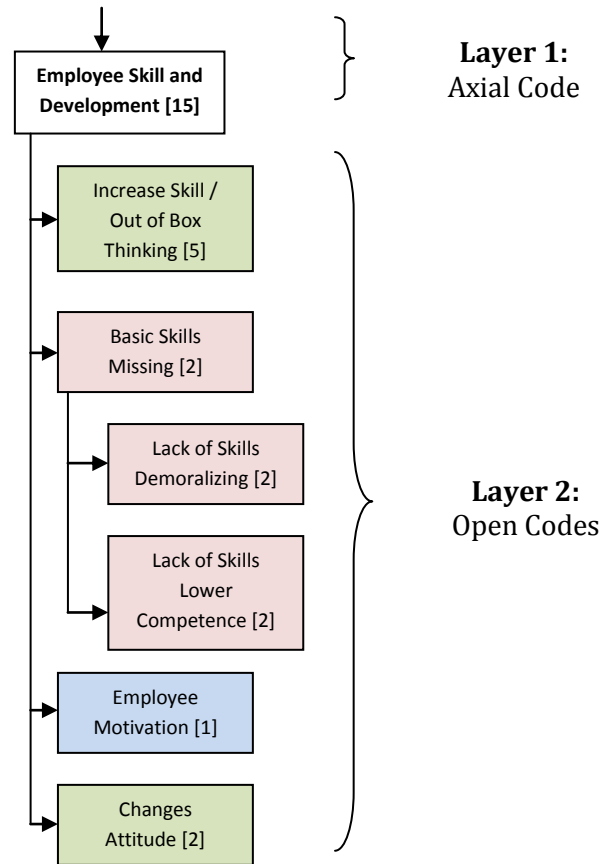
Figure 2: Layers 1 and 2 Coding with Occurrences in Brackets

Chapter 4: Data Analysis

This section will cover the three T&D departments studied using the methodology aforementioned. Through the semi-structured interviews and their subsequent coding several themes emerged. The axial coding (see Appendix D) organized the open coding more succinctly and an effort was made to group several axial codes together. For instance, in the subheading *This is an Operational World* for Call Centers, the axial codes used

included Planning, Scheduling and Manpower, Operations, and Administration of Training. Every effort was made to include as many open codes as possible. However, as the analysis was being done, some open codes fitted better under other axial codes and were therefore moved.

Originally, the intent of this study was to create one mega-theme since all T&D departments belonged to the same airline; this quickly became impossible because through analysis it was discovered that each branch had its own values, mores and ways of functioning. This is what happens when one decides to pursue a study with open coding: things change from what the researcher may have originally planned. In addition, each branch viewed training slightly differently as their scope of work, their frontline population, and the way they organized their work was slightly different from one another. Nevertheless, the open codes, the axial codes, and the quotes do support each theme and sub-theme per case.

For the case of T&D at the Airports, the main theme is *From Schedules to Management Support to Structure,* as it is stated that scheduling and management practices as well as organizational structure affect the T&D department.

For the case of T&D at Call Centers, in the main theme *From Operations to Knowledge to ROI,* we will see how the operations such as irregular operations, knowledge of the training function as well as the various products, and the ROI regarding the T&D department's worth affect the branch.

For the case of T&D at In-Flight Services, in *From Employee Development to Talent Management,* employee perception and management perception as well as personnel development seem to influence how T&D is portrayed.

The ideas for these themes did not emerge per se but were self-evident in the data. Bailey (2007) states that qualitative researchers' final product is a creation of observations and interactions *actually* observed. What makes the data "emerge" is the way it is organized and presented; the data itself, however, does not "emerge". Therefore, the above mentioned themes are grounded in quotes and patterns observed by the analysis.

Airports: From Schedules to Management Support to Structure

For T&D at Airports, schedules, management behavior and organizational structure seem to revolve around "Operations". Prior to beginning the analysis for Airports, it is important to define "Operations". The "Operation" at airports is defined as the actual work activity that frontline personnel are involved in to serve the customer. When individuals are working in the operations, they are physically tending, moving and catering to the customer. On the other hand, when individuals are working strategically, they are organizing, contemplating and drawing up different methods of work (not necessarily working with the customer directly). This section will show that operations largely affect how T&D at Airports is conducted, managed and organized. Scheduling, management (and a mandatory structure) support, as well as organizational structure are the themes that will be explored here.

The Crux of Planning, Scheduling and Manpower

The "operation" in this company is similar to that of on-time departure, an acronym often used by airline personnel to indicate on-time departure. On-time departure is very often a selling point for an airline and can be a contentious issue when various departments are involved in ensuring timing standards are met. When they are not met, potential finger

pointing occurs. As a Training Manager of Airports indicated, operational managers stress the importance of being on time in order to avoid the "blame-game" of not achieving the desired results. Operations and on-time departures are synonymous in that they are the airline's main goal, along with safety. The Training Manager indicated "the emphasis is on our customer and getting the bags and customers to their destination safely. On-time departure is important but it's not the end all, be all." A Curriculum Developer/Instructor attests to this by stating: "The operation counts. It comes first."

Why is the operation an important subject in the discussion of planning, scheduling and manpower? During regular days, the operations run as usual and little is affected. But when one adds irregular operations (heavy snow, rain or important national security breaches) or an unusually high absenteeism day, training is affected. These particular days affect the training's schedule.

The T&D department at the airports uses the term used "Relief." What it means is that extra reserves or additional personnel are scheduled on particular days to ensure that training schedules are covered and that the personnel get trained. Currently, this is not what is happening. Employees are taken away from training when irregular operations occur and when "holes need to be covered," as a Frontline employee suggests, when there is a high level of illness (absenteeism). As it stands, the built-in relief for training is taken away to cover the operations as required. Operational managers see the relief as an added source of help to deal with sometimes chaotic situations. The Training Manager of the T&D department points out that they are dealing with the resources available. He says "[...] right now its XX% of the manpower built in as training relief to cover off training. The [airport] stations use that to cover off illness. And [operational managers] feel that if they can't cover

all their holes [so] they say 'o.k. we won't hold training today'." This causes some disturbance from a training point of view.

Furthermore, the Training Manager states that "there is talk with station managers to plan training [...] [We] can agree to something and then next week all training will be cancelled because something hit the fan. So, I think we can have a huge impact. I don't think we have the best impact at this point because there is not enough proper management of resources."

The resources the Training Manager mentions include planning and scheduling. The lack of planning and scheduling of human resources (i.e. employees scheduled for training) results in missed opportunities to attend training which can result in employees who have no training or are partly trained. The Curriculum Developer/Instructor also attests to this. "[A] big issue that airports especially have is the manpower. [...] It's not properly planned or scheduled." This can have some adverse consequences for employees being trained (or partly trained).

The Training Manager used a concrete example to illustrate this point. During a summer period, airport employees were hired to work on the airport ramp. At a certain point during their course, the new airport ramp personnel were solely trained on baggage operations. When the peak hit, these new employees were picked up and sent to baggage immediately never to come back and finish the rest of their training. During the summer period that ensued, there was a shortage of fully-qualified airport ramp personnel because they were solely qualified on baggage. The operations forced training and employees not to be fully trained and, therefore, to be only partly qualified for some jobs. This illustrates a clear tug between planning for operations and planning for training.

The lack of scheduling and planning has a direct impact not only on the operations, as mentioned above, but also on training classes. A Frontline employee mentioned "Poor schedules leads to having courses repeated over and over again. Whereas, if it were better managed, the number of course 'X' could be reduced [...]". Inefficient planning and scheduling do create redundancies of classes being given to ensure everyone becomes fully qualified.

Managers and specialists are not the only ones to notice that the planned manpower (or relief) is not used for training purposes but also for operations. The airport Frontline employee is aware of the need to cover both training and operations as she succinctly puts it: "You need agents to cover the operations and the training. You need to backfill the operations." The Training Manager, the Curriculum Developer/Instructor and the Frontline employee are all aware of this dilemma where training and operational obligations need to be met.

This tug, however, should not last much longer. A training scheduler is currently in the works. For the time being, some airport stations do not notify the training stations of employees who are absent or unavailable to go to training. The airline company is looking at a more efficient airport-wide resource/manpower system. The Curriculum Developer/Instructor explains that the "[System] scheduler [will be] introduced in the near future. It will plan the XX% relief for training." The Training Manager also indicates that in addition to controlling the pre-determined relief, this system will also use more automaticity, control airport personnel's qualifications and check work-schedule legalities. It will be able to control the human resources allocated to both operations and training. The system will give "more control over the scheduling, the planning, and getting the bums in

seats," says the Training Manager.

The Essence of Management (and Mandatory) Support for Training

Even though operations affect training schedules, management must also ensure that training initiatives are supported and adhered to. The Training Manager believes that it is important to have branch managers support training and have a "no qualification = no work" rule. This in turn will enhance the credibility of training. For the time being, operational managers may not see the value of putting employees through training when they need those employees to "operate".

The Frontline employee sees it this way: "I think management should be sat down and told the importance of training." The Frontline employee continues to mention that when it is time to take agents away from the operations to go to training, it is always a "battle." For instance, the Frontline employee witnessed an operational manager telling a curriculum developer/instructor: "Why are you taking my agents away at the rush time of the day?" The Training Manager supports the Frontline employee's assertions by mentioning "I think the value needs to be translated to the operational managers that there *is* value."

By explaining the value of training to the operational managers and by ensuring a "no qualification=no work" culture, training can set itself up for success and reduce the incidences of a partly trained workforce. But for now, operational managers do not see training as an "assignment" (a term that explicitly means mandatory). Instead, operational managers pull employees from training because they do not see the corporate value of it; they see training as optional. The Frontline employee witnessed another incident, to illustrate this point, between a Curriculum Developer/Instructor and an operational

manager:

> You know it's 9:10 now [and] I still don't see [the agent]
> upstairs. You'd be the first one [...] telling [the agent] "well
> you are not at your position, you are late for your break or
> why did you just show up now to work?" Its fine for them to
> be late for training but it's not fine for them to be late for
> their other assignments?

The Frontline employee further explains in the interview: "You know, the whole mentality is

'Oh well training is not an assignment. Training is an option.' No it's not an option."

Indeed, some training is not an option – it's regulatory. The Training Manager

confirms this:

> Some [training] are regulatory like [dangerous goods] and
> [catering to customers with disabilities] and biomechanics
> [...]. And ultimately, because they are regulatory, if they don't
> have them compliant they really shouldn't be out in the floor
> working [...]. The operation views them as "They know their
> job, they just don't have their compliance."

Other departments, like In-Flight Service, are highly regulated by the government

bodies. They are more regulated than airports are. This may potentially cause a difference

in how training departments are managed. More regulation may encourage more

systematic training. Furthermore, regulation may increase the perception, from managers,

that training is of primary importance. As the Curriculum Developer/Instructor states, "for

example within in-flight, I believe [training] always has, always been, and always will be of

the highest priority." The Curriculum Developer/Instructor points out that:

> Everything [at] In-Flight works because they are so tightly
> regulated. Whereas, with airports and call centers, [we are]
> not so much regulated. We had nobody on our back like [the
> government] coming in and doing audits.

To enhance this perception of importance towards management, the Curriculum

Developer/Instructor is currently working on establishing a yearly recurring program to

ensure that training is followed and stays current and up-to-date. This will ensure that no

one is left untrained or, as the Curriculum Developer/Instructor explains, "expires." In the

Curriculum Developer/Instructor's own words:

> So looking at when a certain course expires, calculating it in
> to the plan. Making sure year by year we have a recurrent
> program, which we never really had before that is consistent
> and that follows the plan and that it meets the requirements
> so that no employee is expired or untrained.

Organizational Structure

The back and forth between a decentralized and a centralized structure for the T&D

department ties in to the issues raised earlier regarding scheduling and planning, as well as

the need for a more systematic support from management. The training department went

from a centralized structure towards a decentralized one. Although it is working under a

decentralized organizational structure, the department is migrating back to a centralized

structure with the advent of eventually merging with the other frontline training

departments in the company.

What this means for training is that, at this point of time, airport stations seem to be

in control of training schedules rather than the training function itself. As the Training

Manager witnessed:

> I wasn't in training at the time but in the late 90s training
> was centralized for airports and then it was de-centralized
> and went back to the stations. And as soon as that happened,
> the stations were in control of it and if they felt that money
> shouldn't be spent [...] and so training did not happen. And
> that has developed at the stations where training isn't as
> important as [on-time departure] for example.

Scheduling is still organized in a decentralized manner. Each station schedules

training according to the model it has been using. This view is supported by the Training

Manager's statement that it is "Not the same in all stations. In [BCD] scheduling is managed by instructors versus the resource department." This results in having various airports functioning in various ways and may have an impact on the efficiency and effectiveness of training. "Because of the inconsistencies everybody in every station is getting a different message, a different training, a different presentation, and different curriculum developer/instructors," states the Training Manager. Differences in stations do not ensure a uniform training initiative.

But change is happening. Centralization is in the works. Some departments, such as the In-Flight Service training department, seem to be much more centralized, the Curriculum Developer/Instructor asserts. The Training Manager points out that there is currently a move back to centralization: "It's interesting now that in the last three months [we] are now being brought in a centralized. Both Call Centers and Airports training are being centralized under one management and they are not isolated anymore."

The Training Manager believes that a centralized structure will bring some promise to the airport world. Branches will not be isolated anymore and there will be a better control of resources (i.e. planning of participants in classes), that is, the scheduling will be taken away from each individual station. The control will be up to the training scheduling.

Centralizing the function may be the answer for Airports. According to the Curriculum Developer/Instructor:

> I mean, I feel like we need a good structure in place. It starts with having the right people, having the right leader […]. Somebody who has that knowledge, who has that strategy, who knows what needs to be incorporated in training...

The training department at Airports is at the beginning phase of its centralization. It is too early to tell its outcome but the Training Manager and the Curriculum

Developer/Instructor are ready for it and can see the potential benefits to it.

Call Centers: From Operations to Knowledge to ROI

The training and development world at Call Centers, although similar to Airports because of the scope of the work (i.e. reservations), had specific themes in and to itself. Like Airports, Call Centers are affected by the "operations." Operations, as the data will suggest, impact the way training can be developed and disseminated. Another theme noted in this section is the management of knowledge: how the training function and the product it is requested to deliver are managed. The final theme explored is return on investment or how to prove to others the Call Center's training worth.

This is an Operational World

Operations can affect the training department's mission. Training may potentially be sidestepped in the name of dealing with the operations, especially during a major disturbance such as irregular operations due to snow or rain, or even unusually busy periods. As the Curriculum Developer/Instructor puts it:

> [When] someone who is not in the operation, you have to backfill right? You have to replace them. So if they're in training [then] that training better be worthwhile. And in our world, although we plan to […] have a set amount of agents that we can take away from the operation every day. It's still so many agents not answering phones.

The Training Manager of the Call Center training department is cognizant, as are others at his branch, that training is important but that it must also cater to any operational eventuality. He states, "So, there is a desire, there is a sincere desire. But reality is [that] operations sometimes, you know, take over."

Call Center agents are also aware of the necessity to have people on the lines versus in training. When asked why this is the case, the Frontline employee of this department mentioned that time is a factor. "Because they can't release that many people for that length of time from the phones." To the Training Manager, the Curriculum Developer/Instructor, and the Frontline employee, the Call Center is considered as being at the front end where passengers make initial contact with the airline.

The Training Manager continues to state that the training's mission is geared to increasing the call center's agents' skills but it takes extra effort to do so with operations being prevalent. "You know, you try your best to give training but as soon as it is impacting the operation too much, it is [...] pulled," he mentions. He says this in relation to operational managers who sometimes are forced to cancel training due to busy or irregular operations. Occasionally, training was not re-scheduled. Now, however, discussions are occurring so re-scheduling is assured. The Training Manager states, "[The operations manager] has committed to [that] if we cancel we make sure to re-schedule because sometimes it was just cancelled and there was no time to reschedule."

Having more agents, although a bit unrealistic because of the financial predicament the airlines are in today, is what the Training Manager suggests. He knows it is unlikely and he says it half-jokingly, but he states that "You know, I wish I had a bigger pool of [call center] agents. It's weird that I am saying that right now. [But] I am limited in the number of courses or classes I can do." Manpower is needed as much in training, as it is needed in the operations.

The interviews with the Training Manager and Curriculum Developer/Instructor reveal, however, that cancelling classes is not done sporadically. It is pre-planned most of

the times, as the Curriculum Developer/Instructor mentions: "Getting people in the class is

not as much of an issue as I know it is in other branches. So in that respect, at the branch

level I think there is an understanding of the value of training." Cancelling classes also has

an adverse effect on the agents. By cancelling a class, the Training Manager feels as though

he short-changed his agents. He mentions:

> [I] started last year […] to manage the agents' expectations
> because I felt [they] were upset because a lot of training was
> scheduled and cancelled last minute. So I try not to schedule
> or plan too much ahead [and] not to advertise "Oh yes,
> training is going to be doing this and […]." No. I am staying
> away from that because then the agents are disappointed,
> [and] with reason. So […] when I am saying we are going out
> with this training, it's because I am pretty sure it's going to
> happen.

By not overpromising, the Training Manager manages the call center agents' expectations

by cancelling as infrequently possible. He has done so by taking extra steps to mitigate

these cancellations by talking to the operations managers and by affirming his position:

> So sometimes, you really have to put your foot down to say
> "[…] Enough. We need to train and too bad, the operation is
> going to suffer." […] I think […] now we've come to a pretty
> good agreement, comfortable zone. But yet again, we haven't
> had a very difficult [season].

Operations and the cancellation of classes do impact the way training is delivered

but other more intangible aspects, such as culture, also impact training. The idea that there

is no vision regarding training makes it difficult for them to "stick with it," mentions the

Training Manager. Hopefully, this will change by "put[ting] his foot down," as he said

earlier.

Operations ultimately impact the time available to deliver training and the efficiency

of the way it is delivered. Even when the training turnarounds are tight, the training

department must "make it happen." Training is also pushed into such an operational mode. The result is that the training must cut down the number of hours of the courses and focus solely on the heart of the issue. The Frontline employee notices this. He states:

> And I would imagine this is the same for all branches, including call centers. So if a training, for example, is required for a product that lasts or is recommended to last four hours, they will cut it down to two.

When the Curriculum Developer/Instructor talked about the short timelines to produce and deliver, she said, "We can't meet the target, and the company [will answer me back]: 'No, you're going to make it happen'."

Because of this, training remains at the basic level. The Frontline employee describes it in his statement: "Well, to hit the mark, you're going to do this [in the new computer] program. These are the easy steps… and we'll deal with whatever complications come up when they do. That is more or less the message." Training is therefore short with little impact on more difficult scenarios.

Managing the Knowledge: A Matter of (Training) Function and Product

Managing the training function requires a good understanding of employee development principles as well as the management of technology and processes. This in turn will help frontline employees handle the products according to company guidelines and specification.

The Training Manager, the Curriculum Developer/Instructor, and the Frontline employee all acknowledge that the agents need to have the details of a product as well as how it works in order to provide an efficient service to the customer. Training is therefore crucial to increasing an employee's skill:

> So when a new product is launched, example: our preferred
> seat fees, when a customer calls, he wants to know can I sit?
> How much is it going to cost? How do I collect this money? If
> these are the different types of routings, [how much] do I
> charge? Is he connecting overnight? All these questions come
> up in training.

Training is important in that it disseminates the technical knowledge required for this

agent. While technical knowledge is important, the Curriculum Developer/Instructor also

stresses the importance of providing soft skills training too:

> [We need] to ensure that not only our agents have the
> technical skills to assist the customer but [that they] also
> have the customer service training skills or the customer
> service skills so that there is a positive impact on the
> conversation.

Soft skills, according to the Curriculum Developer/Instructor, are as important as technical

skills. Both are an integral part of managing the training function as much as they are of

developing the employee. T&D's role is to ensure this.

By ensuring that the technical knowledge and the softer skills are learnt, they also

ensure that the employees are ready to use the innovative tools at their disposal. To do this,

they must give an opportunity to the frontline employees to practice with the tools. The

Training Manager, however, states that the tools do not reflect the current state. He says:

> The training environment hasn't been refreshed. So, for so
> many years we're working with very limited version of a
> training environment in which it doesn't really reflect reality.
> So you are training your agent on a system that should be
> reflecting reality which is not. So you are always pretending.

More specifically, because of the risk of working in "live" mode (which could

potentially change a passenger's profile by accident), a less risky approach is used to train

agents on – a static mode. However, the static mode is frozen to approximately 10 years ago

and a lot of changes have occurred since then. The new products, therefore, are not

supported in this "static" mode. The Frontline employee expresses this issue:

> It's either time, it's either technology sometimes. Our training
> department doesn't have the technology to really give us the
> actual training that we need. Many times we want hands-on [to
> practice on "live"]. [Our system] doesn't have certain files that
> they can build in our examples. It's just [that] technology is
> lacking.

The Curriculum Developer/Instructor also confirms this point:

> Have the IT branch come on the floor and see what it is to
> work with a system that is 15 years old. A lot of attention is put
> out there on the customer and yes, the customer can check in
> through his mobile device but meanwhile I still have an agent
> who works in such an old environment that is not compatible
> with any windows application.

Because the training tools are out of date and technology does not correspond to real-time

scenarios, employees are left to imagine. "So you are always pretending. So it's not

conducive for learning," says the Training Manager.

And yet, there is some hope that eLearning may change all this. "Learning from

screenshots versus from learning on playing in a training environment is quite a different

experience. I am hoping that with eLearning, we'll be able to bridge some of those gaps,

namely by doing simulations," says the Curriculum Developer/Instructor. Simulations via

eLearning could therefore help replicate actual scenarios in real time without any

disturbance to actual files.

But updated technology (or eLearning) is only part of the solution. The airline must

also keep employees up to date. Training is an important vehicle used to deliver corporate

messages. The Curriculum Developer/Instructor believes in this:

> Well, the message now they also say, culture change, right now the
> corporate objectives, there is one called "culture change". And culture
> for me is really... a change of culture takes time. And I think the voice
> to do it is through training. We, the training, and I say we, we are the
> ones who talk to the agents. We are the messenger.

Delivering the message is important at all levels. The Frontline employee validates this

assumption: "It's important that you keep the frontline agents up to date with what the

company wants to put forth."

Lack of training and the absence of communication will result in employees not

knowing how to use certain products. From a customer service standpoint, this can have a

negative impact on the potential passenger or also have agents unable to "up-sell" a

product. The Curriculum Developer/Instructor confirms:

> The role of an agent is comprised of many facets. And if you
> don't have the proper training, you can miss opportunities.
> You can miss opportunities to make a sale. You can give a bad
> impression to a customer because of the way you serviced
> them or simply because you don't know your products.

But communicating does not solely lie in the hands of the training department at the

Call Center. All departments involved have a role to play in communicating about changes

and new products. Training in itself is not the only solution.

The Frontline employee mentions, "It's important as a company that when these

changes occur of this nature impacts airports, call centers that it's really clear that everyone

is aware. Some way, somehow, so that we don't have these clashes." But he also states that

training is not necessary for every single change or new product introduced. He says, "If it's

something of a policy change like the baggage, the fare class realignment, you don't need an

in-class training of any degree. Before their start of their shift to at least brief them and say:

'This is changing as of this day, this is what's going to happen'."

When communication is lacking, however, training is there to fill the gaps. Training,

as mentioned earlier, does communicate the changes and is the voice of the company.

Additionally, when employees see training, they think that the corporation has a desire to

invest in them. The Training Manager states the positive effect of having his department

involved in disseminating knowledge:

> We are also the voice of the company, of the higher
> management and of the company to the agent, in a way. We are
> not the only one but I see it like that. So, if the agent sees that
> there is training happening, then they would feel that there is a
> serious desire to train.

Playing such a role enhances their value in front of the eyes of the employees. Their value,

however, must also be shown to others. The Curriculum Developer/Instructor states that

their role isn't simply to educate and communicate to the employees but also to show other

departments what they can offer. She mentions,

> I think we need to educate them as well. Because I can tell you
> what our perception is of marketing, I can tell you that
> marketing doesn't know what we do. We know what they do
> whether we agree or disagree is another conversation but I
> don't think they understand what our role is.

Training has come a long way according to the Curriculum Developer/Instructor.

"Training has changed over the years […]. So I think we don't toot our horn loud enough

within the organization to be taken seriously," she asserts. For the Call Center training

department, its goal will be to prove itself to others.

ROI: Proving Yourself to Others

Return on investment does not only mean that the training department at the Call

Centers has to develop programs that are deemed relevant; they also have to prove that

they have an important function in the corporation. The senior management levels must

understand the value of training and how important it is to provide the tools necessary for

the frontline employees to do their jobs. In this branch, the "top," specifically the Director of

the Call Centers, is supportive of the training initiatives. "Well, from my director. My

director really wants to try to push the operations to sometimes let the training happen

although it will have a negative impact on the operations," says the Training Manager. When

asked by the interviewer to confirm:

> Interviewer: So you said the director or whoever it is. The
> director has the desire to push and sometimes will push
> through for training.
>
> Training Manager: Absolutely.

Management support is there.

The support required to ensure the relevancy of the training department also lies in

the hands of the training staff. The Curriculum Developer/Instructor says that it is their role

to support the frontline employees.

> So, yes, I think that our responsibility in training is to ensure
> that not only our agents have the technical skills to assist the
> customer but also have the customer service training skills or
> the customer service skills so that there is a positive impact
> on the conversation.

Training is responsible for setting the tone of "support" to the frontline

employees.

Support from immediate superiors, like the Director of Call Centers, is established

and firm. Support from the company is not so clear. Training believes that management

views training as an issue. When asked "What do you think the company would say in

regards to training?" the Curriculum Developer/Instructor answered the following:

> Hmmm, I view training as a problem. Not as a solution. I don't
> necessarily understand the value of training and where and
> what training has to contend with. If I think of IT, as [the
> company] I have as an expectation [of] IT to develop
> something: they are going to give me a work plan and I know
> that they are going to have to make a needs assessment, to
> eventually get into development, test their product and then
> come up with a launch date. [...] I don't think in those terms
> for training. For training, my expectation is "make it happen".

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To fix this perception, the Curriculum Developer/Instructor mentions that training should

be sitting right next to the top decision makers (for instance, have closer ties with

marketing). They need to be next to the people who take the decisions because if they are

not, decisions may not be implemented in the way they had hoped for. The Curriculum

Developer/Instructor states:

> [Training needs] to be at the table with the all the players
> who make the decision. Right now, the way our organization
> is set up... Like I said, training, we are the last to know when
> really we should be the first to know. We should be better at
> planning. We should also be able early on to raise any flags.
> Understanding that we are a large company and that, when
> marketing comes up with an initiative, they don't necessarily
> fully understand how it's going to be implemented in the
> different branches.

More to the point, the Curriculum Developer/Instructor worries that if the organization

does not see training as a priority, nothing will change. The Training Manager asserts this: "I

think investing in training... you need to invest in training for the long-term. I don't think

there is a culture of training [...]. I don't think so." The Curriculum Developer/Instructor

attributes the lack of training culture in this company in her following statement:

> And the reason why there is that perception is because I
> think we are not good as a company to show the return on
> investment. We don't have enough metrics on the training
> side to be able to say "You know what? You've lost a few
> hours on the operation but look at what you've gained." We
> don't have that.

To some degree, the training department itself must make an effort to show its worth. The

Training Manager, the Curriculum Developer/Instructor, and the Frontline employee,

however, are not blind to the fact that because of the airline's financial volatility, training

has to wait until some form of capital is invested into it. The Frontline employee says it well:

"We all know that the company has been in financial difficulties in the last few years.

Understandably, they have to look at cost cutting measures."

"The company sees training as an expense," says the Curriculum

Developer/Instructor. Cost does indeed play a big role on what is done and what is not done

at the training level. The training department does not have a method in place to justify its

cost in financial terms (i.e. metrics and measurements regarding their value). This may,

therefore, hinder their chances at justifying themselves to the corporation.

The corporation maybe sees them as a capable department able to do with the strict

minimum. As the Curriculum Developer/Instructor mentioned earlier, the company already

knows that the training department can achieve its goals. "And I think we are not taken

seriously because, like I said earlier, we don't have any ROI metrics to show them and

because we *always* make it happen," she says.

In addition to the lack of metrics, changes at the executive level also add to the

confusion of following a direction:

> Because it's so hard to provide your ROI for training, I don't
> think we can from the bottom-up raise the flag so there is a
> permanent understanding. I find with every new player at
> the executive level, depending on whether it is a priority or
> not for them, that's when training is seen or perceived as
> important or not important.

Even though training currently lacks some elements for being taken seriously, some

big investments are currently being made. With the advent of eLearning, there is talk that

investments are occurring at the training function. The Curriculum Developer/Instructor is

realistic: "So I am looking forward to see what impact [eLearning] will have on Call Centers."

The training department is at a new crossroads and changes are coming. The Training

Manager gives a brief introduction to what that may be:

> So sometimes I am wondering o.k. we are going to break the silos between call centers, in-flight and airports but are we going to create silos within call centers? [...] So of course, as long as we still work close to one another [...] you know, it's a vision.

This is a vision that is currently in "the making."

In-Flight Service: From Employee Development to Running a Department

The data analysis for the In-Flight training department resulted in focusing on employee development and the knowledge of how to run a department. Employee development focuses primarily on how to develop frontline employees as well as the specialists working within the department to achieve their full potential. Essentially, employee development consists of increasing the employees' skill, motivating them to go above and beyond, and listening to them when changes are proposed. The second theme to appear in this case is the knowledge on how to run a department. This knowledge stems from the mandatory culture in which T&D operates, the needs brought forth by the interviewees, and the desire to be a co-operative and knowledge-sharing department.

Employee Skill and Development

Training, according to the Training Manager, Curriculum Developer/Instructor and the Frontline employee of In-Flight, helps increase skills. It is considered useful in building up skills and knowledge for the workplace. The Frontline employee mentions that one's abilities can be enhanced with training programs such as onboard sales and learning about different cultures. The Frontline employee mentions: "If we want to promote sales, well we can have training on sales. [...] If we are to go to new destinations, we could have cultural

training [...] and how to deal with that."

Training is viewed as the vehicle to increase one's skill. In the Training Manager's words, "Yes, the short answer is I do believe we have a fairly substantial role [in] impacting [how] a flight attendant acts, reacts, and then takes that information back on the line and then deals with the frontline public." The Curriculum Developer/Instructor attests to this by noting that training influences the success of the corporation. The more training that is given to an individual, the better skilled he or she becomes. Unanimously, they agree that training is useful for increasing the employee's skill.

Training, according to the Training Manager, is also an opportunity to touch base with the flight attendants. Training not only enhances the flight attendants' skill but also acts as a vehicle that through which to receive information from the frontline. "It's also an opportunity to touch base with the flight attendant. [The training department] can find out if they feel that their needs are being met from a training perspective." Because of this, the Training Manager affirms that training has made a positive change in the way that flight attendants see training and its ultimate purpose: that of ensuring the flight attendants have the ability to perform their job well. The Training Manager believes that thanks to their ability to listen to their frontline, they have changed the flight attendants' attitude towards training, and ultimately towards their job, by ensuring they are more knowledgeable.

The Frontline employee sees this a little differently. "[...] a lot of flight attendants are disillusioned regarding their role in the company. So, [the company has] to work on that." Although the Frontline employee agrees that training is useful in building one's skill, he also argues that that it is necessary to be heard. For the Frontline employee, this seems to be a central argument: "[flight attendants] were not interested because they didn't believe in it."

He continues, "What I would do is make the [flight attendants] participate more… but it has to be well managed, not just a chit-chat. [Training] would also have to work on the employee's motivation."

Regarding motivating the flight attendant workforce, the Curriculum Developer/Instructor agrees that it is necessary to motivate employees in order for them to buy into a training program. Specifically, she states, "The human side is that people need to buy into the program. So if they don't believe or they don't value the project, the whole training can be useless or viewed as useless. So yeah, you need to convince or motivate the employees. Make them understand the why."

The Training Manager's view is that that the training department has made inroads in motivating the frontline employees. Flight attendants are coming to training with more respect for training and with a little more motivation. Specifically, she mentions, "I think the flight attendant population, more than they used to, are a little bit more invested in the success of the company." Nevertheless, she still puts in a word of caution that not everyone is like that: "I would say in short, [before], flight attendants would come in begrudgingly— do their training and go home. Because they had to; they had no choice. Maybe [they still feel] like that in some portion of the population."

Motivation, however, is a two-way street according to the Frontline employee. He states that "it comes back to the employee to do this work [regarding motivation], to take initiative and to be proactive [in their training]."

Given this motivation dilemma, the Training Manager knows that she can influence change but that it takes time for it to materialize: "It's slow but changes do happen." The reason for change being slow is because, at an airline, priorities change quickly and this

creates uncertainty in where people need to focus. Nevertheless, the Training Manager says

that the airline company and the training department could be one of innovation and

change for the department's employees and the frontline employees. But due to a lack of

talent management initiatives, a lack of tools for frontline employees, and lack of

instructions to do their job well, this is not always easy. The Frontline employee voices this:

> I would like that they give me the tools that would help me
> do my job in a newer and better way. Things that [training]
> does well, they should continue on doing it. But we should
> always be ahead to be innovating and ahead of the
> competition. Otherwise, forget it. [...] Now I am inventing
> something: let's say that passengers don't understand how to
> use [product ABC]. They will give us a small document that is
> very well hidden on the website [...] and it's always up to us
> to figure things out.

Change, however, is on its way. The Curriculum Developer/Instructor alluded that

since the hiring of the new Distance Education Director, innovation and change are in the

air. The hiring of such a person indicates that the company is ready to tackle things in a new

way. She also alludes to the fact that other positions such as Talent Manager and other

positions in the Organizational Development sphere have opened up. She mentions:

> Maybe because I think of what I've seen in HR—the positions
> that are opening up. [...] It seems like they are beefing up in
> HR. And we know that if you want your business to be
> successful, you need to bring in the right people or develop
> the people that you have internally. So did they recognize this
> and [now] are trying to work on it and create a department?
> [...] At one point, all HR was outsourced. It was just left with a
> minimal skeleton here to take care of the day to day paper
> and administration. So yeah, that is pretty much what I am
> thinking that is happening.

For the time being, however, innovation, change, and managing talent are still in

their infancy stage. The Training Manager confirms the Curriculum Developer/Instructor's

view on talent management and change:

> We try very hard to find ways to influence from within,
> promote from within. But [...] I've seen over the course of my
> career [a] heavy brain drain where people are disenchanted
> with their position and lack of mobility within the company
> and look elsewhere. I think that if we had a program that was
> much more consistently applied and actually produced
> results where people could see that there was [...] talent
> management that was really working in the favor of the
> employee, we'd probably be keeping people a lot longer.

Weaving into this discussion is the Curriculum Developer/Instructor's affirmation that, "What management is not recognizing [is] the talent that they have here. And they are not bringing it to the next level."

Because of the lack of mobility and lack of development, training staff are forced to look elsewhere to develop. According to the Training Manager, more training and professional development for her direct subordinates could help retain her employees. She mentions that some departments, such as Marketing, receive more training and are better versed than her training staff because their function is deemed more important or more essential than hers. But she also states that the Executive branch is slowly realizing the potential that her staff and frontline employees have. She states:

> And in the last 3 to 4 years, I've seen the executive branch
> realize that there is a whole lot more than can be gleaned
> from the expertise of people who may not have the job title
> but certainly have the potential to offer that kind of
> information or the kinds of suggestions that could really
> make a difference in the company.

New HR positions opening up, a new Distance Education Director, and the change of attitude towards training from the frontline employee group and the senior management group are indications that the In-Flight training department is moving forward. But as mentioned earlier by the Training Manager, "it does take time for things to happen but they are happening."

Knowing how to Run a Department: From Regulations to Leaders

The mandatory nature of the In-Flight Service branch forces the training department to think, behave and act in those terms. The mandatory atmosphere due to government regulations drives the training department to become one of checklists and validation of knowledge. As the Curriculum Developer/Instructor succinctly put, "Regulatory, therefore, no choice."

Although a mandatory culture is prevalent in the department's function, it also comes at the expense of the frontline employees' development, that is, the training exists primarily to qualify them governmentally. "We are forced to do it. Our hands are tied. We have no way out of the regulatory component of training to the flight attendants. So, we really can't 'develop' a flight attendant in that particular training program. [It is] just to maintain qualifications, basically," acknowledges the Curriculum Developer/Instructor. The Frontline employee also supports the idea that training is essentially mandatory: "Yes, yes, yes… [training] is an essential element because if we are not trained, we can't operate. It's as simple as that. They can't do without training." The feeling of training simply to get one's qualification permeates the thinking of all interviewees, including the Training Manager. She says,

> In training, I sense that again, it's the view that a lot of people
> have of training is that you come here to learn. But part of the
> [reason] that you come here is just to provide
> acknowledgement of your competencies. [...] I think if we
> forget about the learning aspect and we worry more just the
> about validation aspect. Then [the] instructors don't have to
> be developed, they just have to sit there with a checklist and
> make sure people do their job.

The training function at In-Fight is deemed mandatory and, therefore, essential. It is

needed in order to maintain the pre-established standards set by government regulations. "Obviously, we have a great emphasis on emergency related procedures in training and that's our opportunity to ensure that they are maintaining their standards and qualification," states the Training Manager.

Factors other than the mandatory nature of the industry also impact the way the training department is run. Leadership, compensation and return on investment also influence the role of T&D at In-Flight.

Leadership is often congruent to change. A leader is supposed to bring value to the current state and change things for the better. For the time being, the Frontline employee and the Curriculum Developer/Instructor are unable to see what direction the leadership wants to take. "There is no strategy because the management in place is not really saying anything," says an interviewee. Sometimes not saying anything may be misinterpreted as inaction on the part of the leadership. Being closer to the executive leadership, the Training Manager, sees things slightly differently: "Other people can be more cynical in their response and say: 'I just don't think that the company wants to do it'. I truly believe that there is purpose and value in what we do and usually we are supported by the executive team." The Training Manager, because of her position, may be able to see the overall picture which the Curriculum Developer/Instructor and Frontline employee do not have access to.

It is not only leaders that affect the training's functioning. Compensation and the ability to attract good Curriculum Developers/Instructors were also mentioned during the interview. According to the Frontline employee and the Training Manager, compensation structure for T&D employees at In-Flight is far below industry standards. This may result, according to them, in quality of personnel that is below average and not completely

competent. The Frontline employee mentions that

> Like everywhere [here], I find that the salaries are not very,
> very high. So, we find ourselves with resources that aren't
> always of the highest caliber in the market.

The Training Manager affirms this view. She says:

> I fear that there are other influences like the pay structure in
> the airline industry is far below the industry standard if we
> have an equivalent person working in another field teaching,
> or facilitating, or designing training... they probably get paid
> XX% more than they get paid here in the airline industry.

Without the pay structure in place, future Curriculum Developers/Instructors will need to be developed. For now, instructors ideally need to have both flight attendant experience and adult learning/training experience. The Frontline employee explains:

> You need to have been a flight attendant. Not necessarily 10
> years. It depends with each individual. Some understand [the
> job] quickly, while others need more time. I think it's
> important.

The Training Manager, though, thinks in broader terms, since she sees Curriculum Developer/Instructors developing into newer roles, that is, training in other areas of the company. For the time being though, she states, "we don't spend enough time thinking at what we can do to improve the quality, skill, and potential of the instructor."

Just as training staff need to be developed, training programs also need to be evaluated. For the time being, however, it is unknown whether training is efficient or effective. The common consensus is that there is very little way to track whether or not the training was efficient – by efficient, we mean the training program ensures a good return on investment. In relation to training that was offered to Flight Attendants a year ago, the Frontline employee states, "I can't tell you if it was really a success or not." The Curriculum Developer/Instructor echoes this same predicament. She says, "You give them the training

but there is no way of measuring if it was effective." The Training Manager too, in her

interview, comes to the same conclusion,

> I can get a sense that flight attendants used to come in here
> and think this was just a necessary evil. They had to come in
> and get their training and leave. But we are not really sure if
> it had any kind of impact or if there were any take-aways that
> would really influence the way that they would work or deal
> with passengers.

But investments are made in the training department. E-Learning is a brand new

product the training department is developing, while the facilities (classrooms and

simulators) are deemed adequate. As the Training Manager put it, "And here we are, at the

cusp of financial crisis, and we get approval to move forward with our […] e-Learning plan,

for example. And although, probably, the drop in the bucket is quite small, it is a substantial

investment to make." Regarding the facilities, she states that "from a facilities perspective,

we've improved leaps and bounds from the past. I can say that maintenance support from a

facilities perspective is going well." In addition, other training departments such as Airports

and Call Centers do look up to the In-Flight due to their centralized, mandatory and

stringent scheduling processes. In-Flight has, as perceived by other training peers, invested

in and standardized a lot of practices.

Not only do other departments look towards what works at In-Flight and what

elements can be used, but the leadership encourages In-Flight training staff to go out and

learn from other departments. The Training Manager is in favor of the skill development of

her Curriculum Developer/Instructor: "Somebody might have exposure to something that

has happened in Marketing […], and just because of that small exposure, they realized that

something can be improved upon." Bringing knowledge from the "outside," according to

her, has a great advantage in building the knowledge of the Curriculum

Developer/Instructor. Also, she mentions that it is important to have her staff understand other departments so that the training does not remain in a silo.

While the Training Manager believes that her internal staff need to go out and "learn," so do frontline employees also look towards the training department as their source of information. According to the Frontline employee, the vision, the mission and the organization's priorities are not well communicated. Training, he believes, could be the place where all this information is shared:

> We should be talking about this during training. A bit more than the two sentences that are read to us. For the time being, [the mission, vision, and priorities] are simply seen for 5 to 10 minutes out of [X] days training […] The way it's being taught right now, the participant is not very active.

According to him, training is quite passive.

When prompted in the interview if these priorities are not otherwise communicated, he answered, "Yes, they are communicated. If I want, I could research it and find out what is our vision, mission and all that. But is it easy for me to locate it? Not necessarily." He further explains that "I find that flight attendants are not considered as active members of training."

He goes on to explain that really training should be a place where employees are also heard. Training, as it stands, does not provide a space for employees to be heard: "There isn't really any way to propose improvements or changes during training." The Training Manager on the other hand is frank in her description: "Again, we see things that are extended beyond the role of In-Flight training that we probably can't address but we can be the conduit […] to move that information to the right department."

The Training Manager agrees with the Frontline employee in that communication is

necessary overall and that training can provide it. In relation to what other Frontline

employees and departments have to share, she states:

> I think [what] we need, which is a very basic need, is […]
> transparency and communication which is what every
> company needs. You can't function effectively if you don't
> know what the partner influences that affect your world are
> doing or what direction they are taking you in.

In short, partners from other departments that have a direct impact on training

need to communicate clearly in order to help improve their mandate as a training

department.

Chapter 5: Conclusion

The aim of this particular research was to approach an answer to the question of

strategy and if and how it impacted training and development at a North American airline.

The semi-structured interviews with the nine individuals led to data that spanned many

topics including management, organizational structures, return on investment, as well as

planning and scheduling. Initially, a central theme regarding the three bounded systems'

strategic role was sought. Although this was initially attempted by the researcher, the data

did not permit one to come to such a firm conclusion (i.e. a "yes" or "no" answer). The

reasons for this are various but most probably because of their departments' functional

differences and the fact that they are decentralized in nature. Specifically, each training

department has its own mandate and employee population to take care of.

The three training departments function individually from one another due to their

different scope of work, their varied schedules and their respective employee group. The

current decentralized nature of the three departments led each to have its own culture,

rules and issues. The dissimilarities between departments outnumbered the similarities.

While the Airports are in the midst of planning more systematically for training, Call Centers are focusing on proving their worth and trying to find a balance between operations and training, and In-Flight is focused on how to develop its personnel.

With this in mind, this chapter will attempt to explain how each department is at a different stage of its development, and how its role in this airline is neither strategic nor un-strategic, and finish with the study's limitations as well as a roadmap for the training departments at hand.

Stages of Development: From Basics to Focusing on your Customer

Stage 1 – Planning the Basics: Scheduling People to Class

Training at Airports is at the beginning phase of its development. The courses have been built, the classes are ready, and the instructors are there. What is missing? The students. While this may sound absurd in other industries such as pharmaceuticals, insurance or consultancy firms, the volatility in scheduling at Airports should not be underestimated. Irregular operations such as a closure of a major Midwest airport can account for huge disruptions in air network traffic, passenger misconnections, and cancellations. "All hands on deck" are required during these periods. Thus, when training is scheduled and out of the ordinary situations occur, operations will take precedence. "Our focus isn't always on [Training] it's on getting people there. It's the biggest frustration of our instructors," says the Training Manager of Airports.

While irregular operations and out-of-control weather does account for this, systems must be in place to ensure adequate staffing. As it stands, training "relief" (the number of participants scheduled for training at a particular time) is often used up to cover

illness or even peak times during the day. Because the culture is operations-based, training understands the implications of not having enough manpower to push the flights forward to on-time departures. The passenger comes first, as the Training Manager of Airports says: "Training is maybe not as equally credible as the operation because the operation is important to get the passengers moving."

In order for this department to focus on other issues of an intrinsic nature such as the quality and efficiency of training programs or the necessity to prove their worth via ROI measurements, it needs to tackle the basic issue of planning and scheduling training with precision.

With the current process of centralization, scheduling at airports will have a chance to rectify this. The Curriculum Developer/Instructor of Airports confirms the change: "[a system] scheduler [will] be introduced in near future. It will plan the XX% relief for training." The Training Manager of Airports mentions, "Both call centers and airports training are being centralized in one management group and they are not isolated anymore." Synergies will therefore be created amongst these two systems.

Stage 2 – ROI: Proving your Worth

While the training department at Airports is dealing with scheduling, Call Centers' training seems to have some control on the operations. Maybe this is because of the smaller number of employees, maybe because of different work schedules, or maybe because of the nature of the work. Training at the Call Centers is at another stage of its development, that of proving its worth to others, specifically to other departments in the company. The financial difficulties of the airline do put a stress on how training is delivered, especially since it seen as a cost center. "I'd say that a blanket statement not necessarily just for call

centers, but overall, I think training is still perceived as an expense," says the Curriculum

Developer/Instructor of Call Center training. The view of the employees is that training is

not seen as valuable. A clear example of this is the cutting of soft skills training. As the

Curriculum Developer/Instructor puts it: "It's always, and we see it when times are tough,

the first thing that's cut is service training, soft skill training because it is deemed not

essential."

In order to change this perception, training at Call Centers must change the way it

sells itself to others. The Training Manager of Call Center training and the Curriculum

Developer/Instructor do not believe that they are justifying their worth as they should. "The

reason why there is that perception is because I think we are not good as a company to

show the return on investment," concludes the Curriculum Developer/Instructor. At this

stage, the training at Call Centers must show its value through metrics and achievements.

Proving their worth is slowly being achieved. This is done through constant

communication with the employees. "There's been an effort from the management group to

give rationale behind decisions, to give a clear explanation […] what their training is about,"

says a Frontline employee at the Call Center. Level three evaluations (from the Kirkpatrick

model) are also being introduced by the Curriculum Developer/Instructor to show the value

of training not only to other departments but to the employees as well. The Frontline

employee at the Call Center attests to this:

> I would have to say that they are doing a big effort in
> delivering all […] kind of information. Whatever avenue that
> they have at hand, whether it's a communiqué, whether it's
> through e-mail, posting hand-outs, in-class training, they do
> deliver. They even asked agents as to what they would need,
> how they would like it. So they always tried to make an effort
> to cover whichever […] avenue was at hand.

This shows that they have started the process of proving themselves.

Stage 3 – Focusing on Developing Your Client: The Employee

Maybe it is because of the mandatory culture that permeates In-Flight training or maybe it is because the schedules of flight attendants are so precise that room for error (in training or scheduling) is intolerable, but the mandatory culture at In-Flight increases its training value by default. As the Frontline employee put it: "They can't do without training." Operational certificates are pulled if the flight attendants are not trained to standard.

With the scheduling and value bases covered, the training department at In-Flight focuses on developing the employee. The Curriculum Developer/Instructor of In-Flight states that training "influences the success of your business. The more training you give an individual, the better that their skills become." Such is the current philosophy at In-Flight. And although this is the philosophy, the department still needs to communicate and funnel information from the flight attendants. "There isn't any real way to propose any improvements during training," says a Frontline employee from in-flight.

Skill development is indeed at the top of In-Flight Training's priority list but employees do see it as an avenue where they could potentially share more. But just like the Airports and the Call Centers, In-Flight also struggles to get people qualified to ensure the operation is running smoothly. "That's very much an operations minded company where the approach to things is make-do with what you have, figure it out for yourself and make it work," as the Training Manager of In-Flight put it.

But changes have been noted in the training department at In-Flight. The Training Manager shares her experience:

My impression is, having been […] in training as a manager

> for 5 years […] it does take time for things to happen but they
> are happening.

Therefore, developing people is coming to the forefront of the training department's philosophy. "I think flight attendants genuinely feel that there is purpose and value in what we do versus just directive and requirement from a regulatory standpoint," asserts the Training Manager.

And where is Strategy in all this?

The term strategy has yet to be used in the data analysis or in their interpretations or themes. The purpose of not using strategy more prominently earlier was to describe the current state of the three bounded systems rather than to ask them to agree or disagree as to whether their role was strategic or not. For the most part, the occurrences found in the interviews (see Table 2) between a positive strategy (i.e. T&D plays a strategic in this airline), a negative strategy (i.e. T&D does not play a strategic role in this airline), and an ambiguous strategy (i.e. T&D plays somewhat of a strategic role in this airline) were not conclusive enough nor were they strong enough to create a "yes" or "no" answer or a "black" or "white" picture.

	Airport	Call Center	In-Flight
Ambiguous Strategy	4	4	7
Negative Strategy	15	9	8
Positive Strategy	14	3	7

Table 2: Occurrences Where Strategy is deemed Ambiguous, Negative or Positive

Nevertheless, it is important to focus on the "gray" that this study produced. The strategic role of training and development at *this particular* North American airline remains inconclusive. Therefore, a theme could not be clearly developed. But the insights provided by the interviewees do offer details on how to better assess the role of strategy of training

and development at a company.

At the airports, the strategic role of training has improved from what it once was. "Yes, it's way better than when I started," states the Training Manager. But there is still the feeling that training at airports is still fragmented due to little or no investment or ad hoc forethought. The Curriculum Developer/Instructor of airports indicates this:

> There has been very little involvement. And I feel that in the airport world, a lot of the strategy of what was to be developed or what people were to be trained on was ad hoc. It was flavor of the month. Whatever was 'hot.' Let's just train that.

The Training Manager even used a number to answer the question, "'To what degree do you think' training and development plays a strategic role?": "Right now, I think it probably plays 30%." But because of the current restructuring measures (such as the amalgamation of all frontline departments under one roof), synergies are bound to sprout. In addition the Training Manager does believe that senior management's support is a clear indication of seeing T&D as a strategic force in the company. "I can see that because we are reporting to the [Senior Executive], he is able to communicate to [our] resource VP who is on board [with the vision]. I understand he is on board," states the Training Manager of Airports in relation to the Senior Executive's vision of training within the company. Such support shows that the company values training.

The Call Centers, just like the Airports, also assert that its strategic role is bigger than what it was. The Training Manager of Call Centers also asserts the positive change, albeit more ambiguously, of its strategic role: "I think there is a lot of desire to be strategic but I find that [...] we have a reality of Call Centers with the operation." Operations will always impact the way training is done.

From a Frontline employee perspective from the Call Centers, the opinion is different. In a direct way, the Frontline employee of the Call Center says, "I would say it's minimal" in relation to how the company views the role of training and development.

But the Call Center interviewees unanimously agree that it should play a more strategic role and that regardless of changes, it should increase its value as a strategic player. As mentioned in the data analysis, immediate directors (and even operational managers, now that the Training Manager has established rules on cancelling classes) do view training as valuable. "In the call center world, I think we are lucky, in a sense, that our branch sees the value of training that we do have," says the Curriculum Developer/Instructor.

At In-Flight, some are just waiting to see what will happen before they pronounce themselves on the term strategy. "So, I don't know. Will the budgets remain the same? I don't know. If the budget remains and there is a decrease in human resources (instructors or personnel), that will then signify that training still remains important. But if the objective is to simply reduce cost, then we've lost," says the Frontline employee. The ambiguity of the strategic role of training is further supported by the Training Manager of In-Flight: "I say 'well enough' because I know that in the position that the airline is in currently or that the state that it's been in the last few years, it's a struggle to win over to change things." Because of the financial predicament the airline finds itself in, the strategy of training is deemed as acceptable for what it is.

Some other personnel closer to the training function also are unsure of the strategy. The Curriculum Developer/Instructor states that a lack of training initiatives by the company leaves the employees to guess the importance of their role. The Curriculum

Developer/Instructor of In-Flight reports:

> The reason why I would come to that answer […] I would
> assume that if he would recognize that there would be more
> management training. So for example, […] in the past they
> used to have the [TQM] training. I don't see it as popular as it
> was in the past. I don't know if that is still. Is that an old
> objective that is still lingering? [...] I'm not seeing any
> development along that particular side of the business.

The Curriculum Developer/Instructor finds it difficult to answer this question and assumes

that training's strategy may simply be inexistent.

Once again though, all interviewees at In-Flight believed that training should play a

more strategic role. The Training Manager of In-Flight coins it well:

> I would have to say yes. Obviously we play a […]key role
> based on the influence we have on flight attendants. When
> they come into the training center it is a small portion of time
> of their whole year but we do notice that there is an
> opportunity to engage them to potentially refresh, renew
> their philosophy on customer service.

The indications for all training departments are clear. With a new culture being

promoted by Senior Executives, with the new HR positions opening up in Talent

Management and Organization Development, with the merging of all training departments,

and with everyone's desire to develop their frontline, it can be seen that they still consider

themselves strategic. All training departments have come a long way from not being

strategic to an ambiguous but optimistic view of their role. As this is happening, more and

more indications are showing up that the airline is working towards making training more

strategic. The efforts may not at first appear concerted but the current ad hoc initiatives

may slowly pave the way for a strategically strong training and development function in the

future.

Application and Limitations of the Study

The study does have some relevance to other academic realms as well as restraints due to its design and qualitative nature. Whereas restraints due to the questions asked and answers received were also prevalent. Relevance in the areas of strategy and training and development is noted in this study.

Asking interviewees directly about strategy, an elusive construct, still managed to garner responses from a continuum of no, maybe, to yes. This shows that, although strategy is not clearly definable, interviewees did have some sense of what it meant and were able to answer it. Some interviewees needed some prompting. For instance the Frontline employee from the Call Centers asked the interviewer, "What do you mean exactly?" Once it was explained, the answers came out naturally, stating their position regarding strategy and training and development.

The goal of asking if training was strategic was not solely to get a "yes" or "no" answer since those static and limiting answers would not give us the details required to support such claims. Therefore, the use of probes, the active seeking of more details, and the actual relevance of details to the initial study question, did prove useful. "Yes" or "no" were therefore supported by examples. The only difficulty with the details was that it was left up to the researcher to determine if the details were deemed in the "yes, these details prove that you are strategic" category or in the "no, these details prove that you are not strategic." The researcher of this study stayed away from this dichotomy since the pronouncement of "for" or "against" by the researcher would show bias. Instead, the study tries to show strategy as a continuum (with different realities, different departments, different people). The quotes were extensively used to prove the graded differences.

In short, the limitation of the ambiguity of the term strategy was overcome by probing. In addition, the limitation of the term "strategy" was overcome by giving a definition (via e-mail) as well as explaining its meaning to some interviewees during the interview. These two limitations did impact the interviews because although the researcher anticipated such reactions, he should have been better prepared.

Another limitation of this study is the fact of getting everyone's voice heard through quotes. The researcher's inability to come to a clear theme of the strategic role of training and development required that many quotes be used from the different perspectives. Themes were created regarding processes, policies and personal views on training but these were from varying degrees. While occurrences could have been used to support the various themes, these would not have been reliable as data was malleable and some occurrences fitted indirectly under other themes. To overcome particular limitations, such a study would benefit from quantitative rigor.

The benefit of this study is that it has explored a phenomenon regarding what it could potentially mean to be strategic. Such exploration gives rise to different venues of interest: scheduling and manpower, return on investment or sitting at the table with the decision makers, and employee development beyond the simple instructor-led classroom (i.e. listening to your employees). All these venues could be used to develop either a quantitative instrument or a more tailored mixed-methods study that could further explore and define the strategic role of training and development in this company.

Exploring the realities of a company such as this one (a typical international North American carrier) gives the study a richer understanding of what impacts the training function. Although the results are limited to this system only, it does show how training is

not always clear-cut and that administering training is sometimes difficult especially in industries where 24-hour operations, a highly mobile workforce and dispersed geographical locations play an important (and sometimes daunting) role in determining how things are run.

The next section will recap some of the ideas presented by the interviewees on how to make things better at their site. The goal of the following section is to promote as well as expand on some of the ideas already proposed.

Where to Go From Here: Toward a More Strategic Role

Ethnographical studies, action research, and other forms of qualitative inquiry require some form of roadmap (or constructive suggestions) whenever possible for the betterment of the research site in question. This section indicates four areas that the airline can use to enhance the strategic role of training and development and bring their function to the next level. The suggestions forwarded below are none other than ideas already expressed in the interviews by the interviewees; the best ideas usually come from the employees themselves (in this case the interviewees). This section is a synthesis of those ideas on why they should be introduced. Their introduction will not only enhance the individual departments but will bring the airline's T&D to a higher playing field.

System Scheduling / Manpower Planning

One of the most basic administrative tasks in training is to ensure that your employees show up for their training. A system must be put in place to calculate accurately the ratio of employees and trainees needed. This system may incorporate the percentage of the absent workforce and the measures to cover it but should not touch the trainee ratio

established (unless it is deemed an irregular operation). The tool itself, however, is only as good as its implementers (or operational managers and training managers). If the tool calculates the ratios correctly but the managers from both the operations and training sides do not respect it or modify it, then the process loses all credibility and scheduling reverts back to being one of "operations at all cost." The tool will be easy to implement but ensuring its systematic use and buy-in will be even more important.

ROI Methodology: For All

All training departments will benefit from having pre-established Return on Investment methodologies. From the three training departments only one spoke about ROI and that was Level three from the Kirkpatrick model. There are various ROI methodologies out there (although Kirkpatrick's model most prevalently focuses on the learning function). Using an ROI methodology will show to others that training is useful because it will have a tangible way of indicating if a training initiative was successful and why. Currently, the lack of measures does not enhance (nor debase) the training function. Instead of being a training function deemed as an expense, the ROI methodology can help in raising training's value by proving or disproving the quality of their work.

Centralization

Centralizing and decentralizing each have their pros and cons. On a global scale where markets are differentiated and cultures impact regional sales, it makes sense to have a decentralized structure. But, in the same geographical area to have three or four structures with similar expertise creates silos with pockets of knowledge being dispersed. Centralizing the training function will have several advantages:

(1) One leadership: this leader, just like ROI, will be able to negotiate, plan, and lead the

training function as one voice. With the training function being so vast, the weight of any decision will be bigger, and therefore will be considered more.

(2) Negotiating in bulk: Technologies, lesson plans, projectors and classrooms will be more efficiently used under a central system. Any new items or systems invested in will be shared among three (e.g., buying a new LMS vendor).

(3) Sharing expertise: One department is better at ROI than the others, while another department has systems in place to ensure class schedules and that qualifications are met, and another department has available instructors to help. Ideally, all expertise can be and should be shared among all the departments.

(4) Cost cutting initiatives: Just like point number 3, centralizing means that the company and the departments will be able to negotiate or cut costs on technologies needed.

Centralization, however, does not mean one size fits all. Each population has different needs and while some systems can be shared (e.g., tracking one's qualifications), some others cannot, like cabin simulators and computer systems reserved for agents.

This roadmap simply reiterates what some interviewees had on their mind or viewed as an issue. It is important to remember, however, that the ultimate client for any training function at any organization is the learners. All training and development strategy must strive to enhance their skills, knowledge, and abilities that ultimately ensure the company's long-term success.

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Appendix A – Interview Protocol

Interview Protocol

Project: The Strategic Role of Training and Development at a North American Airline

Time of Interview:_____
Date of Interview:_____
Interviewer:_____
Interviewee:_____ [Delete name once electronically transcribed]
Position of Interviewee:_____

Describe the project to the participant:
(a) The purpose of this study is to study the strategic role of the training and development function at a North American airline. (b) Only employees in the training function and front line function will be interviewed. (c) The data will be digitally recorded and remain with myself, Pantelis Paspaliaris, on my personal computer and laptop as well as my personal USB (the computer and laptop will be password protected and solely I will have access to them). I will be the only one listening to the recordings. No one will have access to the recordings. The recording will be input into a Qualitative Research software for analysis. Any hand written document will be typed unto a word document and saved on a dedicated USB key. No one but myself will have access to the USB key. No identifying marks such as names will be on any data. (d) The data will be stored solely on a USB key. Only I will have access to the USB. (e) You are free to discontinue from the study without any consequence to you and no one will be notified of the event. (f) The interview will take 30-45 minutes. (g) Do you have any questions? (h) Please sign the consent form.

Questions
1. Please indicate the (a) years you have been working for the airline, (b) years you have been working in for the training function/front line function, and (c) your current role.

2. According to you, do you believe that the training and development function plays a strategic role within this airline? [Probe: Why do you think so? What are the clues that make you think this?]

3. To what degree does training and development play a strategic role in this airline? [Probe: How does your department go about making strategic decisions?]

4. What resources (human, physical, or organizational) are needed to ensure that the training and development function becomes a more integral and strategic part of the organization?

5. Is there anything else you would like to add regarding your department's strategic role within this airline?

[Thank participant for their participation. Re-assure them of the confidentiality of the responses and the potential for re-contacting them].

Appendix B – Call to Participants

Subject: Call for Participants for Research Study

Research Study on the Strategic Role of Training and Development at a North American Airline

About Myself
My name is Pantelis Paspaliaris and I am currently a graduate candidate for the MA in Educational Technology (a subject that focuses on adult learning, instructional design, and the administration of training and development) at Concordia University (http://doe.concordia.ca). ███████████
███████████████████████. In order to complete my masters, it is a requirement to conduct a research study within my field of study.

About the Research Project
The goal of this research study is to explore the way that various stakeholders at an airline such as managers of training (those who supervise the learning function), instructional designers or trainers (those who design or train the employees), and the employees view their training and development function from a strategic standpoint. In particular, the study seeks to understand if the stakeholders view training and development as strategic, to what extent do they view their training and development function as strategic, and what resources (human, physical, or organizational) would be required for them to become more strategic and aligned with business objectives.

Participants
At this time I am searching for managers of training, those responsible for the administration of the training function (from In-flight, Airports and Call Centers) and for instructional designers or trainers (design or delivery) (from In-Flight, Airports and Call Centers). Ideally, they would have worked for the airline industry for a minimum of 5 years and they would be in the training function for at least 3.

What's Involved?
I would like to schedule an interview at your convenience of approximately 30-45 minutes at a place of your choosing. I am particularly interested in exploring how the training and development function is strategic, if at all, to what degree it is or it is not, and what is required to make it more strategic.

All participants of this study will be provided with full confidentiality. The information that I will gather in this research will remain confidential: all names and identifying information of participants will be removed from the data before it is used. Participants are free to stop the interview or remove themselves from the study at any time without any consequence.

Reply to:
Pantelis Paspaliaris
Masters Student, Educational Technology (Option: Human Performance Technology)
Concordia University, Montreal, Quebec
████████████████████████████████████

Supervisor:
Dr. Vivek Venkatesh, Concordia University

Appendix C – Consent to Participate

CONSENT TO PARTICIPATE IN RESEARCH STUDY ON THE
STRATEGIC ROLE OF TRAINING AND DEVELOPMENT AT A NORTH AMERICAN AIRLINE

This is to state that I agree to participate in a research study being conducted by Pantelis Paspaliaris, student of the Graduate Program in Educational Technology at Concordia University, Montreal, Quebec, Canada. Contact information: Pantelis Paspaliaris, █████████████████████ ██ Supervisor contact information: ██

A. Purpose
The purpose of this study is to explore how an airline carrier in North America views its Human Resource Development/Training and Development role from a strategic perspective. Through interviews, the study will investigate how training personnel and employees view the HRD/Training function in relation to the overall company strategy.

B. Procedures
Part I: The research study consists of one semi-structured interview that will last between 30 to 45 minutes at the time and location of my convenience. The interview will be digitally recorded as well as stored. The hand written notes will be typed unto a word document on a USB key that only (P. Paspaliaris) will have access to. No name will appear on any hand or electronic written document. Part II: A follow-up interview or informal conversation *may* ensue in order to clarify or expand topics discussed at the interview. A Note on Data: *Storage of data* will be kept on my personal computer, personal laptop, and on a USB key which are password protected and solely I (P. Paspaliaris) have access to. Information will not be saved on any work computer. All data will be deleted 5 years after the project has been submitted and approved by deleting the documents and then emptying the computer's "Trash" mechanism.

C. Conditions of Participation
I understand the following:
- That I am free to withdraw my consent and discontinue my participation at any time without negative consequences. Notice to discontinue may be given to Pantelis Paspaliaris or Dr. Vivek Venkatesh by email or phone.
- That my participation in this study is strictly confidential. That means the researcher will know, but will not disclose, my identity nor my position in the company. My name and my function will only be identified by pseudonyms in any research reports.
- The data from this study may be published. No identifying information will be included in any publication. If a quote that I made is presented, it will be with a pseudonym or similar but generic function title (ex: if my title is Instructional Designer the identifier could be changed to Curriculum Developer).
- The data from this study will be summarized as an Executive Summary ███████████████████ ███████████████. The Executive Summary will refer to departments instead of individual names and functions.

I also give consent to the researcher to record the interviews on a digital audio recorder, and take handwritten notes during the interview. The audio recordings and observation notes will not be made available to anyone except the researcher.
I have carefully studied the above statement about the research and understand this agreement. I freely consent and voluntarily agree to participate in this study.

NAME (please print)_____
SIGNATURE _____
If at any time you have questions about your rights as a research participant, please contact ███████
Research Ethics and Compliance Officer, Concordia University, ████████████████████████

Appendix D – Taxonomy of Open and Axial Codes

Training and Development at AIRPORTS

Employee Skill and Development [15]

- Increase Skill / Out of Box Thinking [5]
- Basic Skills Missing [2]
  - Lack of Skills Demoralizing [2]
  - Lack of Skills Lower Competence [2]
- Employee Motivation [1]
- Changes Attitude [2]

Structure [24]

- Centralized Structure [11]
  - Centralized Communication [4]
- Decentralized Structure [5]
  - Decentralized Structure (Planning in Hands of Instructors) [5]

Management Support [9]

- Management Awareness of Training Benefits [2]
- Management Support is Important [1]
- Frontline Management Support Lacks [6]

Mandatory & Safety [13]

- Mandatory Culture [6]
  - Mandatory Training [5]
- Safety Culture [1]
- No Refresher Training [1]

Knowledge Management [5]

- Better Communication Between Departments [2]
- Understanding Roles of Other Departments [2]
- Community of Practice [1]

Training and Development at **Airports Coding 1 of 2**

Training and Development at **Airports Coding 2 of 2**

The diagram contains the following elements:

Training and Development at AIRPORTS

Return on Investment [13]
- Justify our Investment of Cost [1]
- An Investment [12]

Administration of Training [25]
- Knowledge of Running a T&D Department [1]
- Leadership [2]
- Cancelled Classes [5]
- Lateness to Class [3]
- Modernize Outdated Training Pgms [3]
- Skilled Instructors [6]
- Technology [5]

Planning, Scheduling & Manpower [24]
- Manpower to Cover Operations [4]
- Poor Planning and Scheduling [9]
- Training Planner and Scheduler [11]

Operations [11]
- Operations Before Safety [1]
- Operations Before Training [10]

Strategy [31]
- Negative [15]
- Positive [14]
- Ambiguous [4]

THEME 1 – Planning, Scheduling, and Manpower (See: Planning, Scheduling, and Manpower 24; Operations 11)

THEME 2 – Management Support for Training (See: Management Support 9; Mandatory & Safety 13; Employee Skill and Development 15)

THEME 3 – Organizational Structure Basics (See: Structure 24; Administration of Training 25)

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                                                    ┌─────────────────────────────────────────┐
                                                    │  Training and Development at CALL CENTERS │
                                                    └─────────────────────────────────────────┘

┌──────────────────┐  ┌─────────────┐  ┌──────────────┐  ┌──────────────┐  ┌──────────────┐  ┌──────────────┐
│ Employee Skill   │  │ Structure   │  │ Management   │  │ Mandatory &  │  │ Knowledge    │  │ Return on    │
│ and              │  │ [2]         │  │ Support [11] │  │ Safety [7]   │  │ Management   │  │ Investment   │
│ Development [14] │  │             │  │              │  │              │  │ [15]         │  │ [18]         │
└──────────────────┘  └─────────────┘  └──────────────┘  └──────────────┘  └──────────────┘  └──────────────┘
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Employee Skill and Development [14]:
- Increase Skill / Out of Box Thinking [4]
- Innovative Force or Facilitate Change [5]
- Employee Motivation [1]
- Changes Attitude [1]
- Lack of Skill Lower Competence [3]

Structure [2]:
- Decentralized Structure [2]

Management Support [11]:
- Management Support is Important [5]
- Management Awareness of Training Benefits [6]

Mandatory & Safety [7]:
- Mandatory [4]
- No Refresher Training [3]

Knowledge Management [15]:
- Benchmarking and Sharing with other Departments [1]
- Centralized Communication [1]
- Bulletins [1]
- Too Much Information [1]
- Better Communication Between Departments [7]
- Understanding the Role of Other Departments [2]
- Function not Communicated [2]

Return on Investment [18]:
- Justify our Investment of Cost [8]
- An Investment [2]
- Training Seen as a Cost [8]

Training and Development at **Call Centers Coding 1 of 2**

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Training and Development at CALL CENTERS

Administration of Training [27]

Planning, Scheduling & Manpower [10]

Operations [11]

Strategy [16]

THEME 1 – This is An Operational World (See: Planning, Scheduling, and Manpower 10; Operations 11; Administration of Training 27)

THEME 2 – Managing the Knowledge: A Matter of Function and Product (See: Knowledge Management 15; EE Skill & Development 14)

THEME 3 – ROI: Proving Yourself to Others (See: Return on Investment 18; Management Support 11)

Personnel Works Hard [1]

Leadership [3]

Modernize Outdated Training Pgms [2]

Cut Corners [8]

Technology [9]

Effectiveness or Efficient [4]

Manpower to Cover Operations [3]

Changing Scheduling and Manpower [3]

Classes Cancelled [2]

Poor Planning and Scheduling [2]

Operations Before Training [11]

Ambiguous [4]

Positive [3]

Negative [9]
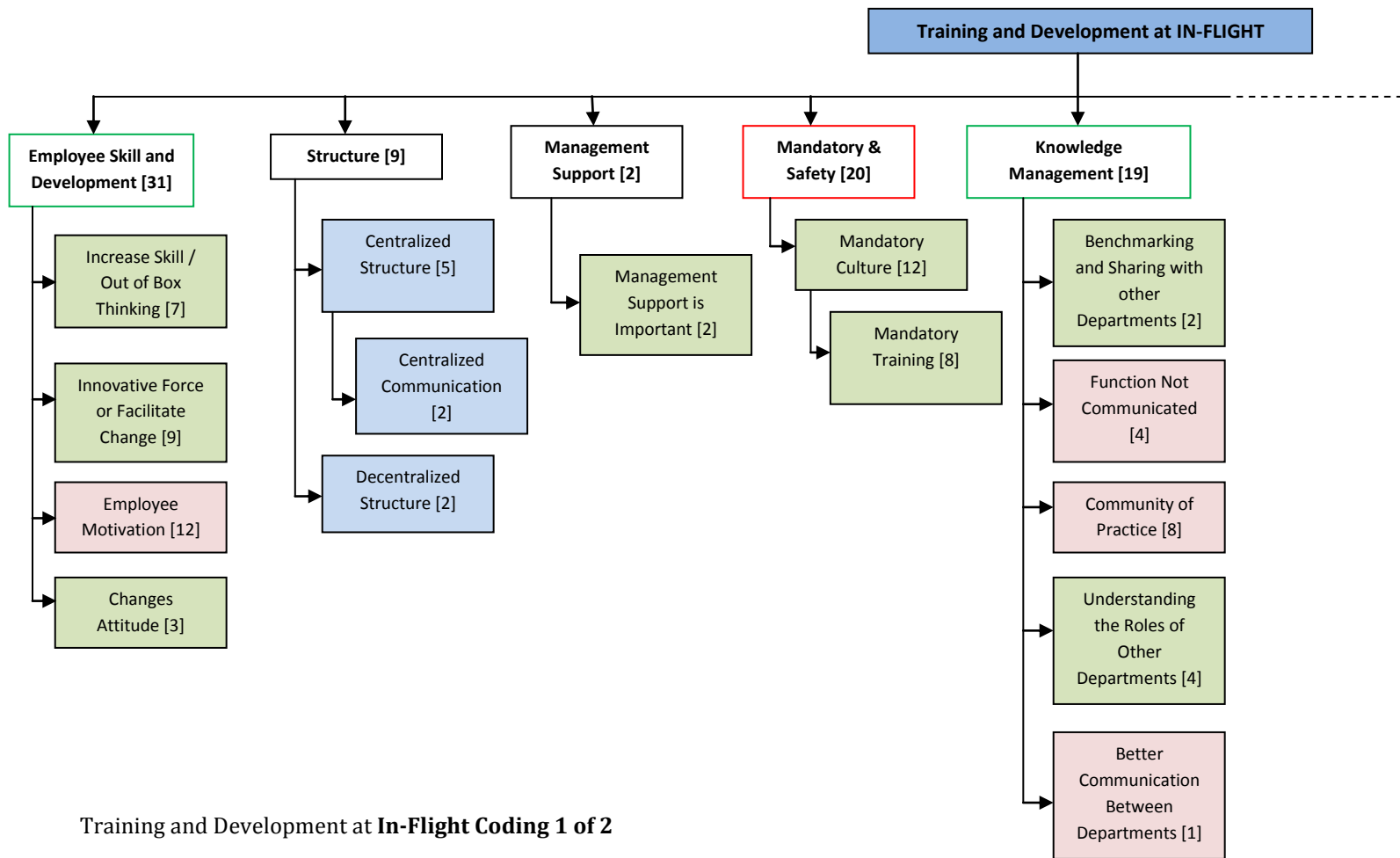
Training and Development at **Call Centers Coding 2 of 2**

Training and Development at **In-Flight Coding 1 of 2**

Training and Development at **IN-FLIGHT**

Return on Investment [19]

Administration of Training [48]

Operations [4]

Strategy [16]

Justify our Investment of Cost [8]

An Investment [11]

Knowledge of Running a T&D Department [1]

Leadership [4]

Compensation Structure [5]

Talent Management [14]

Modernize Outdated Training Pgms [4]

Skilled Instructors [9]

Technology [4]

Effectiveness or Efficient [7]

Operations Before Training [4]

Ambiguous [7]

Positive [7]

Negative [8]

Strategic in the Face of Change [1]

THEME 1 – The Importance of Remaining Current (See: Administration of Training 48; Mandatory & Safety 20)

THEME 2 – Employee Skill & Development: Listening to Others for Change (See: EE Skill & Development 31; Knowledge Management 19)

Training and Development at **In-Flight Coding 2 of 2**