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A Case Study in Telecommuting

This assignment required me to design a case study using the needs analysis process.

Perspective/Background

The director of a communications department would like to require his entire staff to telecommute to work. The director has asked me, an external needs assessor, to develop a training plan that outlines the benefits of telecommuting. Also, I was asked to introduce the staff to Web 2.0 tools. These learning tools will need to be implemented by the staff in order to accommodate the new work environment. To portray the need for a modern learning environment, it is important to understand that the playing fields are becoming more leveled. Galarneau and Zibit (2007) have found the world is coming to understand that today's generation requires a different skill set, such as "critical thinking, teamwork, problem solving, collaboration, facility with technology, information literacy, and more" (p. 61). In relation to my client's employees, Galarneau and Zibit (2007) assert that individuals must possess these skills in order to thrive in a society that is absorbed with new technologies, immediate and ubiquitous communication, and software tools that provide all individuals the ability to collaborate and release creativity.

The demographics of the employees consist of generation X (1961–1981) and Y (1982–2001). They are all technologically advanced and learn best from working with others. The culture of the business environment is very casual, yet the employees are

constantly working, learning, collaborating, and communicating. The environment is fast-paced and always changing. Gordon and Zemke (2000) provide insight into learners' preferences by quoting "Allen Tough also has found that adults prefer learning that is self-paced, matches their own preferences, and is flexible and easy to change if results don't look like they are going to be in line with expectations" (p. 52). As well as my client's need to acknowledge how his employees process information, it is also vital for him to understand the characteristics of today's learners. Specific characteristics include (a) constant control of a situation, (b) quiet environment that is conducive to paying attention, (c) interacting with familiar, yet unknown peers with a desire to work among a team, (d) examining new situations and contexts, and (e) solving problems rapidly and independently (Gibson, Halverson, & Riedel, 2007, p. 182). Gibson et al., (2007) also lists the learning style for new-age learners: (a) aggressively ignores formal instruction; (b) leans on trial and error; (c) includes lots of learning from peers; and (d) sees that knowledge can be consumed in small bits, usually just before you need it" (p. 182). It is important for my client to be introduced to these traits because they perfectly align with his employees' learning preferences.

Training Request/First Meeting

During the initial meeting with my client, I asked pertinent questions so that I could start collecting data. The questions were as follows:

1. Business Needs
 - a. What's not happening in your business that should be happening?
 - b. What business problems exist?

- c. What is going on in the external environment that is related to the problem?

2. Performance Needs

It doesn't seem that there are any performance issues because this training is something that the director wants to implement. The director is not trying to fix a problem—just trying to update the work environment.

3. Learning Needs

- a. What knowledge and skills do you think the targeted employees need to learn to perform the way they should?
- b. How well should they be performing the skills by the end of the training?

4. Learner Needs

- a. What are the targeted learners' backgrounds and experience in this subject matter?
- b. What are their learning styles?
- c. What is their job environment like?
- d. What are the expectations regarding when and how they will attend the training

Data Sources/Collection Methods/Implementation

Data Method 1

Extant Data: Tobey (2005) describes what extant data consists of by quoting, "Existing records, reports, and data comprise extant data, which may be available inside the organization or external to it" (p. 42). Taken from Tobey's (2005) list, the significant

data I collected were financial statements, staffing statistics, climate surveys, performance appraisals, grievances, turnover rates, absenteeism, accident statistics, production and labor costs, waste, and down time. This was crucial information to collect while developing a needs assessment plan for my topic. Telecommuting can improve most of the issues that can be found in the extant data. Telecommuting can most especially improve absenteeism, accident statistics, production and labor costs, waste, and down time issues.

Implementation: I worked with the director of the department by asking for approval to contact the Finance and HR departments. These departments had hard data that illustrated turnover rates, complaints, production costs, etc. Since this is quantitative data, then I will be able to show validity to the training program.

Data Method 2

Interviews: Since the interviews are private, there is no pressure from peers. These one-on-one discussions helped me gather information from individuals before collecting data from everyone in the focus group. I wanted to discover their feelings about telecommuting and if they believed it will be effective. I asked them to give me examples of how it may or may not be effective (especially any previous situations that could have been avoided if telecommuting was in place).

Implementation: I began the interviews with small talk to establish a comfortable setting. Since interviews are time consuming, I made sure to lead directly into closed-ended questions to keep the interview moving along.

Data Method 3

Focus Group: I wanted the group to unravel their personal perceptions about telecommuting by sharing with everyone.

Implementation: The focus group took place in the local library meeting room. Tobey (2005) suggests somewhere familiar, like a conference room, but since my topic revolves around distant locations, then I wanted to get the trainees in that type of environment. We started off the meeting by watching video clips of company testimonials regarding their switch to telecommuting. I encouraged the group to speak and lead the discussion by bringing up a general question, such as, “What did you all think about the video we just watched? This question was then followed with a more specific question, such as, “How could telecommuting personally affect your productivity? The open-ended questions allowed the interviewees to produce in-depth answers and steered the conversation in any direction that was needed.

Data Analysis Findings

Findings and recommendations are not the same. Findings are purely factual information that result from the data, and recommendations are suggestions given by the needs

assessor for how to implement the training (Tobey, 2005). Essentially, recommendations are based off of the findings.

Tobey describes the difference perfectly, “Findings are the ‘what’ of needs assessment—what is going on. Recommendations are the ‘how’ of needs assessment—how the findings will be used to shape the potential training intervention and other influences so that business and performance needs can be achieved” (p. 115).

My findings as applied to each assessment stage

1. Business Needs and the Training Intervention

a. Incorporate 21st Century work tactics

i. Telecommute, participate in globalization and promote individual empowerment

1. “The one thing we must do is equip American workers with more tools and social supports to reduce the new pressures of global competition” (Friedman, 2007, p. 379).

2. “Globalization has the ability to empower individuals and enrich our cultural cornucopia...”

(Friedman, 2007, p. 482).

b. Increase productivity while decreasing labor costs

c. Increase work morale and decrease turnover rate by aligning the employees’ work needs with the business needs.

2. Specific Desired Work Performance

- a. Increase in the need for international collaboration
 - i. “If the flat world is about connecting all the knowledge pools together, we want our knowledge pool to be the biggest”
(Friedman, 2007, p. 390).
 - b. Focus on task product: “. . .it doesn’t mater what steps the performer takes—what matters is that the product produced meets specific quality standards” (Tobey, 2005, p. 101).
 - c. Remote environment must be adequate enough for employees to perform skills (proper software, Internet access, Blackberry’s, etc.).
3. Training Design Information
- a. Learning activities will consist of tutorials of Web 2.0 tools.
 - b. There doesn’t seem to be a need for activities to persuade the learners’ attitudes towards the new environment. Employees are already excited!
4. Training Delivery Information
- a. Online training after hours will ease the employees into the feel of telecommuting
 - b. One face-to-face session will focus on tutorials for technology tools

My statistical method used for analyzing my data

I used *frequency* to facilitate meaning to my extant data results. For example, how many times did ex-employees state similar comments during exit interviews?

Discuss my non-training needs assessment findings

Organizational Structure and Workforce: There is resistance between the structure of the organization and how the employees prefer to work in order to be efficient. Employees are independent and part of a generation that collects information on their own.

The demographics consist of generation X (1961–1981) and Y (1982–2001).

External Pressure: There is a growing need for national and international collaboration.

Companies are becoming more successful if they break down their walls and choose to not work in a silo. Friedman (2007) quotes, “If you spend your whole life in one silo, you will never have either the knowledge or mental agility to do the synthesis, connect the dots, which is usually where the next great breakthrough is found” (p. 316).

Data Analysis Recommendations

My training recommendations

1. Learning objective
 - a. Integrate telecommuting as a 21st Century work approach
2. Activities to focus on skills
 - a. Practice with working from a remote location
 - i. Delivery method: online training after hours
 - b. Read The World is Flat to understand a brief history of the 21st Century
 - c. Learning activities will consist of tutorials of Web 2.0 tools such as Skype, Podcasts, Wikis, Instant Messaging, and Text Messaging

3. Training materials
 - a. Web 2.0 tools and tutorials
 - i. Delivery method: one face-to-face session
4. Learning environment
 - a. Flexible, accommodates group collaboration and allows the learners to choose the pace
5. Audience
 - a. Training is best suited for independent works that contribute to a team, have a high experience with technology, and prefer discovery-based learning.
 - b. At the end of training, employees should perform the skills with the confidence to work alone (physically) and in a group (virtually).

My rationale

I made these recommendations to meet the needs of the company. The company needs were discovered while executing the needs assessment study. Through this study, I learned what the business goals were and the type of learners that will be trained. My goal is to “replicate the job environment as much as possible...” (Tobey, 2005, p. 120).

My non-training recommendations

1. Survey employees to see if they have high or low work morale
2. Research the levels of productivity
3. Research the frequency of turnovers
4. Research labor costs

My rationale

Essentially, I made non-training recommendations to depict the big picture, opposed to just focusing on one specific training need. I made these recommendations because it is important to include all factors that could potentially affect job performance and business goals. Since I chose to address all factors, then my training efforts have a higher risk of succeeding. Also, if I immediately introduce all factors, then I can avoid the chance of my training program being the “scapegoat for the failure” (Tobey, 2005, p. 120).

How did I forecast the ROI?

1. Identification of the business goal
 - a. The client calculated the expected decrease in labor costs
 - b. The HR department attributed a dollar value to a reduction in turnover
2. Expected benefit
 - a. My client and I reached the conclusion that 100% of the employees will successfully work from home. This will save money with transportation and onsite energy costs. It will improve work morale, which will decrease the turnover rate and increase the productivity rate. The quality of work will increase and the nature of online communication will bring everyone closer together and will build bigger and brighter ideas.
3. Costs to consider
 - a. Salary of needs assessor
 - b. Overtime costs for after hour training sessions
 - c. Technology tools, gadgets, and software

Client Communication

Define my goal: My priority of the meeting will be to make sure that I define my presentation goal, which is to persuade my client to approve the training proposal.

Know my audience: My client and the entire staff will be at the meeting. Since I am working with a demographic that works best when asked for their ideas, opinions, advice, etc., it is important that they are included in all steps. The meeting will be casual to match the style of the employees and the environment.

Separate findings from recommendations: I will present my findings and recommendations at different points of my presentation. I will spend more time talking about the recommendations rather than the findings. I will also create a media-related or interactive type of transition from the two topics.

Presentation media and style: I will design an interactive PowerPoint presentation to accommodate the audience's learning style and to capture their attention. I will begin the presentation with a Web 2.0 tool, to instantly introduce them to what they will eventually be learning.

Handout materials: I will provide the staff with a brief handout of my PowerPoint presentation. The handout will also provide additional resources, like book recommendations and Web 2.0 sites.

References

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