Chapter 5: Reflection

Table of contents

CHAPTER 5: REFLECTION 219

5.1. INTRODUCTION 219
5.2. SUMMARY OF THE STUDY 219
5.3. METHODOLOGICAL REFLECTION 234
5.4. SUBSTANTIVE REFLECTION 239
5.5. SCIENTIFIC REFLECTION 243
5.6. RECOMMENDATIONS 246
5.7. SUMMARY 248

5.1. Introduction

This study focused on the following research question:

What is the leverage point that will improve business performance through eLearning?

In order to find an answer to this question, several subsidiary questions were asked. The subsidiary questions were designed through utilising the Systemic Thinking tools and processes. These questions were answered individually in Chapter 4. Collectively, the answers of the subsidiary questions contributed to answering the main research question.

The next section provides an overview of the study from conceptualisation to the end results.

5.2. Summary of the study

In **Chapter 1**, the practical context of the study is painted. Absa is a **financial institution** tasked with providing banking and financial services to the South African population. Absa, as a business, faces various challenges that include rapid technological change, changing customer needs and an increase in customer sophistication, and a need for creation of shareholder value. Absa reacts both strategically and tactically to these challenges.

The building of competencies is both a strategic and tactical requirement (Becker, Huselid & Ulrich, 2001; Gates, 1999). eLearning solutions provide a mechanism to sustain the rapid competency development, necessary for the 'now' (tactical) and the 'future' (strategic).

The Absa Learning and Development Department focuses on delivering the required learning solutions to Business Units within the Absa environment. One of the **delivery mechanisms** implemented by them is **eLearning**. This Department is, however, constantly faced with feedback from the Business Units that their needs are not met. They are also questioned as to what value an eLearning solution has.

The question being asked by Business[1] is: "**How does eLearning improve business performance?"**

A number of studies indicate that **eLearning** is implemented to **improve business performance** (Pope, 2001; McGuire & Goldwasser, 2001; Arnold 2001; Sanders, 2001). However, these studies also indicate there are **various expensive lessons to be learnt**. These lessons span over various disciplines, for example:

- bad design of content.
- lack of skills of the target population.
- lack of technology availability and stability.
- **no clear line of sight between learning results and business results** (Pope, 2001; McGuire & Goldwasser, 2001; Arnold, 2001; Sanders, 2001).

From a Business point of view, the inability to interpret learning results, in relation to company performance, is problematic.

[1] In this study the word **'Business'** refers to the eChannels: Contact Centre Division. It implies that the following stakeholders are part of the grouping – operational management responsible for business results, team leaders, and the employees (also referred to as learners). A detailed description of this sample is available in Chapter 3.

Systems Thinking was introduced to this study to provide an **alternative perspective** for understanding and learning about the underlying structures of the problem, rather than addressing the effects of the problem. The methodology ultimately leads to the identification of a leverage point. The **leverage point** allows the Business and the Learning and Development Department to focus their efforts in **creating a clear line of sight between the content of the eLearning intervention and how it will enable the improvement of business performance** (Becker *et al.* 2001).

In **Chapter 2** the rapidly changing world of work, business performance, eLearning and eLearning in the context of business performance, were debated. In today's new economy, corporations are **increasingly facing new challenges**, such as integration and globalisation, with increased competition, maturing markets and growth in the services sector. The challenges also include rapid growth of information and communication technologies, and the **innovative capability of people** to cope with change. (Gates, 1999; Handy, 2001; Porter, 2001; Thinq, n.d.; Ward & Griffiths, 1996; Weill & Broadbent, 1998).

In addition, corporations are driven by a need to **show short term results**, no matter what circumstances exist (Thinq, n.d.; Weill & Broadbent, 1998).

Business performance is about setting a company's strategic goals and then tracking the progress towards meeting the goals (Becker *et al.* 2001; Porter, 2001; Whitting, 2004). In Absa, the Balanced Scorecard, based on the model of Kaplan and Norton (1996), is utilised to define strategic goals and measure business performance from four perspectives:

1. Financial;
2. Customer;
3. Internal Business Processes; and
4. Learning and Growth.

This view, regarding the measurement of business performance, creates the context within which eLearning must articulate its contribution. eLearning has the potential to **contribute to meeting the requirements** of a rapidly changing world of work. Although not seen as a sole solution, the specific

benefits of eLearning could allow an organisation to learn at the same speed that the organisation is changing at.

Rosenberg (2001:28) **refers to eLearning** as "… the use of Internet technologies to deliver a broad array of solutions to enhance knowledge and performance." Thus, **conceptually**, eLearning as a solution is promising impressive opportunities for people and companies. However, there are **several challenges** that must be faced in order to realise the potential.

The **articulation of the value of eLearning** can potentially be done through the benefits of eLearning. The three areas of categorisation of eLearning benefits are the:

1. cost saving factors: revenue impact, cost optimisation and company infrastructure.
2. performance improvement factors: retention and transfer of learning.
3. competitive position factors: change, empowerment and diversity. (The Corporate Leadership Council, 2001a).

However, the **stakeholders** still have their **own interpretation** of the measures and there is not always alignment of the interpretations between the participating role-players. In order to understand the **actual value of eLearning** to its stakeholders – Business, learners and customers – we need to understand **how to capture** the value. According to Islam (2004), the **way we think about learning measurement** should changed. Islam (2004) states that **critical business requirements, the voice of the customer and the voice of business, should be taken into account when measuring the value of learning programs**.

Various benefits and challenges regarding eLearning are listed in the literature. However, in practice the current view of measurement, where **non-financial measurements are not commonly acknowledged**, eLearning is regularly put under pressure to prove a 'Return on Investment' (Corporate Leadership Council, 2001a). According to Barron (2002), the key driver of the eLearning investment previously seemed to be **cost savings**. However, many companies seem to have realised that long term benefits such as **increased productivity, improved employee retention or a more agile**

and competitive organisation, are more important. Carter (2002) and Cisco (2002b) also state that the driver for eLearning programs are becoming more aligned with organisational goals and customer needs, rather than cost savings. **However, a language for expressing these non-financial values has not been created.**

Berk (2004) also reports a move in the learning industry towards **reasonable quantitative and qualitative measures** as opposed to highly statistical measures. Given the time, money and effort it takes to design and implement precise measures, it seems as **if executives prefer less accurate but timeous measures to make decisions**.

Various debates exist around business performance, how it articulates value and how eLearning potentially could deliver on this expected value. However, **there still seems to be an undefined gap that accurately articulates and directs the value creation of eLearning in business performance** (Barron, 2002; Berk, 2004; Hall & LeCavalier, 2000; Hartley, 2004; Sribar & Van Decker, 2003)**.**

Systems Thinking allowed the researcher and participants access to individual and collective behaviour, **embedded in a natural world** in which they live and interact – and therefore in the context where the measurement will be implemented (Senge *et al.* 1994). Systems Thinking promotes specific tools and activities that **influenced the design of the research objectives** and subsidiary questions.

This research study therefore focused on the …

Identification of a leverage point to improve business performance through eLearning.

The **research objectives** for this study were to:

- identify the **driver problem** that prevents eLearning from improving business performance.
- design the **systems dynamic model** that represents the driver problem.
- identify the **leverage point** within the systems dynamic model.
- reflect on the **effect** that the **behaviour**, of the individuals participating in the research process, has on the research inquiry.

In **Chapter 3** the research methodology was outlined. The **practical problem** that this study addressed was the misalignment between the views of Business and the Learning and Development Department regarding the value that eLearning adds to business performance. The **core problem of the study** was to determine how eLearning can contribute to the improvement of business performance.

This study aimed at uncovering a deeper complexity by focusing on the structure beneath the 'water line'. Due to the "complexity of the problem" (Saunders *et al.* 2000:86), and the "necessity to discover the details of a situation to understand reality or a reality that is working behind these details" (Remenyi *et al.* 1998:35), the study can be categorised as predominantly a **phenomenological** approach.

The different **ontological properties** of this study included seeing the world and humans as living organisms, part of a systemic whole (Wheatley, 2001). Within the systemic whole, people are social actors that respond humanly to different situations. The systemic whole consists of multiple realities and versions of the truth (Wheatley, 2001).

From an **epistemological** view, the knowledge sources representing **legitimate knowledge** were considered. The knowledge sources included:

- talking interactively with people in groups, asking them about their views, assumptions and beliefs around a phenomenon.
- observing individuals in group interaction.
- participating in a recurring process of data generation and analysis to gain access to the deeper structure of the phenomenon, and to

understand how the events and trends above the water line are influenced by the assumptions and beliefs of people below the water line.

Both an **inductive** and **abductive approach** were used in this study (Mason, 2002, 180). During the first stages of this study, an **exploratory research strategy** was followed to create a deeper understanding of the phenomena at play within the systemic whole of the research project. The overall research strategy was a **qualitative case study**. The **time horizon** of this study was limited to a specific period of time. It represented a snapshot, or cross-sectional view of the systemic reality. The focus group participants were involved in the study during the period June – July 2003. Interviews, focus groups, observation and surveys were used as **data collection methods**. The ethical considerations were taken into account for each of the data collection methods during the design and implementation of the data collection instruments.

The **inquiry process** was implemented in **three** phases:

- **Phase 1:** Preparation for focus groups;
- **Phase 2:** Execution: Focus groups data collection, analysis, verification and observation; and
- **Phase 3:** Closure of the process.

In **Chapter 4** the results of the systemic inquiry process, designed for this study, were presented. A **second level of analysis** included throughout, noted the similarities and differences between the outputs produced by the focus groups. The final picture integrated the outputs produced by the focus groups into one system dynamic model with an emerging story. Specific results were produced for each research objective[2].

Research Objective 1: To identify the driver problem that prevents eLearning from improving business performance

[2] Colour coding is used in the report to cluster the relevant research objectives. This colour coding has been used throughout the report.

In Focus group 1, the driver problem was identified as Theme 8: "**Overall communication between stakeholders is insufficient**". In Focus group 2 the driver problem was identified as Theme 2: "**We have not marketed/ communicated the value of eLearning**". In Focus group 3, the driver problem was identified as Theme 3: "**The concept of eLearning being just another way of learning is not understood – mind-shift**". In Focus group 4, the driver problem was identified as Theme 2: "**What's in it for me? – all stakeholders**."

Focus groups 1 and 2 **both touched on communication**, with the first being more generic and the second focusing on the specific topic of the value of eLearning. Focus group 3 looked at the **eLearning mental model**, while Focus group 4 brought the individuals' need to **understand the value of eLearning** to the fore.

An integrated digraph was designed by the researcher using the input from the verifiers, the observers and the moderator. Based on the relationships defined in the integrated digraph, the **driver problem** was identified as:

Theme 1: There is no shared meaning regarding eLearning: implementation, business value, and terminology.

This driver problem was used as the basis from which to work, in order to define the system in focus and, in the end, to design the systems dynamic model for the study.

Research Objective 2: To design the systems dynamic model that represents the driver problem

A system in focus (SIF) was designed by the four groups, based on the integrated digraph. The SIF was stated as:

A system in focus is a system that will **entrench** a shared mental model of eLearning and its **contribution** to **enhance** business performance.

At this stage, the number of focus group participants was reduced to 21, and only three focus groups were formed. Based on the SIF, each of the three focus groups defined their stakeholders in terms of power and influence. The two stakeholders identified by **Focus group 1** were:

- Business – eChannels Head; and
- eLearning Sponsor – Head of People Management.

Focus group 2 went through two cycles of stakeholder identification. They went back to the identification of the stakeholders and subsequently identified the following two stakeholders:

- People Management (Learning and Development Consultants and People Management Account Executives); and
- Strategic Business Unit or Group Specialist Function management.

The two stakeholders identified by **focus group 3** were:

- Middle management; and
- Instructional Designers.

In the next task set to them, the focus groups identified two 'Measures of Performance' (MOP) per stakeholder grouping and the relevant co-producers for each of the two MOPs.

Focus group 1

The co-producers for **MOP 1**: Level of profitability through sales and services touched on topics such as training, recruitment, resourcing, motivation and productivity. The co-producers for **MOP 2**: eLearning Sponsor – successful completion of eLearning courses (level of participation) included topics on resourcing, competence, course content, technology infrastructure, significance of eLearning and business requests for eLearning.

Focus group 2

The co-producers for **MOP 1**: Level of utilisation of the eLearning platform was formulated around topics on learner interest and awareness, eLearning education, support content relevance and access to eLearning. The co-producers for **MOP 2**: Level of productivity included topics on participation,

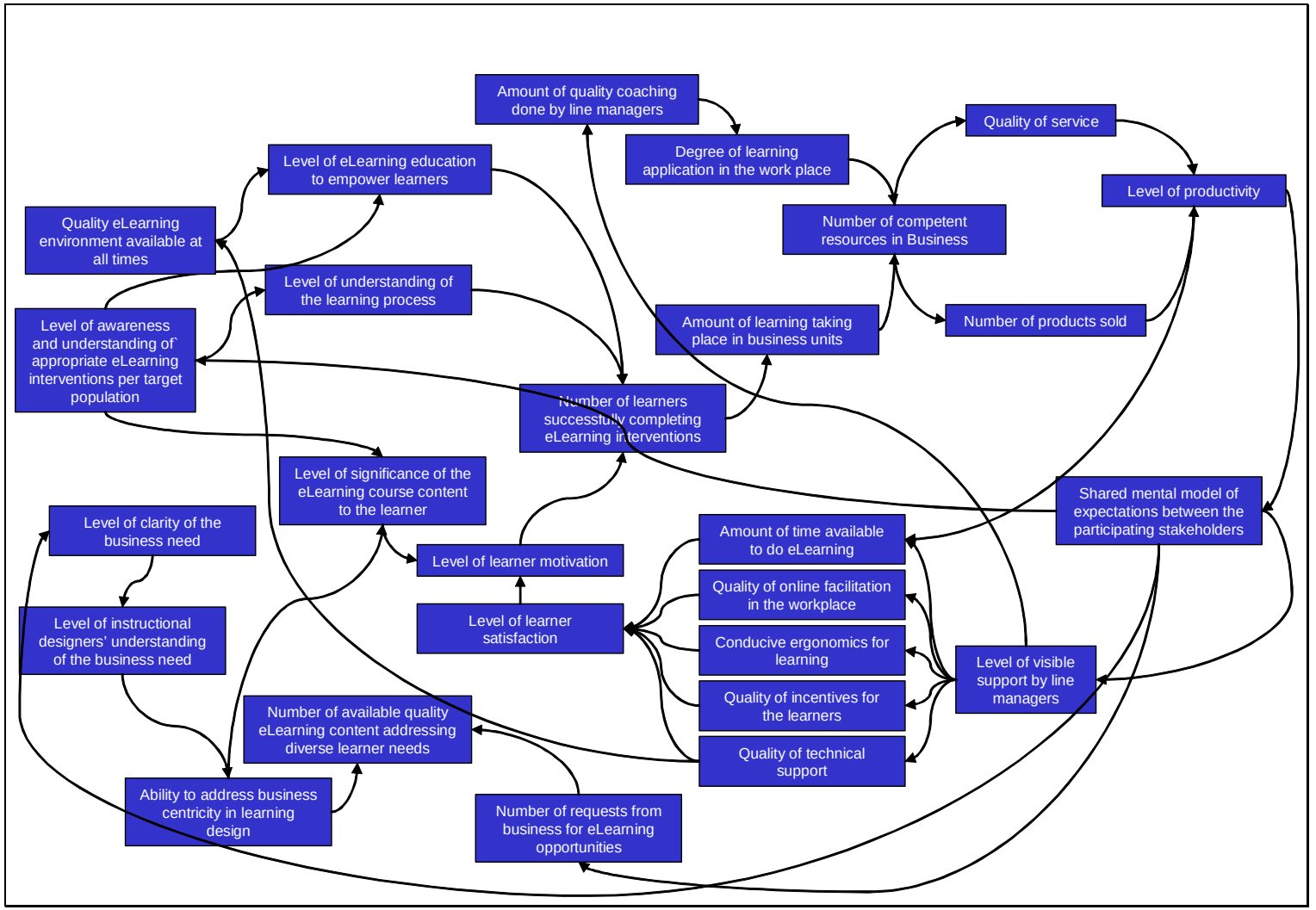
learning, ergonomics, training time, flexible delivery, availability of the eLearning platform and competence.

Focus group 3

The co-producers for **MOP 1**: Level of achievement of business performance touched on topics regarding competence, commitment, motivation support and the application of learning in the work environment. The co-producers for **MOP 2**: Level of learner satisfaction achieved included topics on facilitation, motivation, competence, learning content, significance of eLearning, technology infrastructure and support.

Three systems dynamic models were designed by the focus group participant. From these models the researcher designed an integrated systems dynamic model that represents the total system designed by the three focus groups. The integrated systems dynamic model is represented in Figure 5.1.

Figure 5.1: Integrated Systems Dynamic Model



Note: An enlarged copy of the integrated systems diagram can be obtained in Chapter 4, Figure 4.13.

The integrated model represents the following story:

The starting point: A shared mental model	
The starting point of the story is a **shared mental model** of expectations between the participating stakeholders (Business and Learning and Development) regarding the contribution of eLearning to business performance. The shared mental model influences four elements on the systems dynamic model: 1. Level of **visible support** of the line managers; 2. Level of **clarity of business needs** to all relevant stakeholders; 3. **Number of requests** from business for eLearning opportunities; and 4. Level of **awareness and understanding** of appropriate eLearning interventions per target population.	
The level of support from line managers	
The **level of support from the line managers** becomes visible through elements such as the quality of incentives available for the learners; provision of time to do eLearning during work hours; quality of online facilitation in the workplace; conducive ergonomics for learning; provision of quality technical support; and provision of quality coaching by line managers. The combination of the six factors above leads to an increased level of **learner satisfaction**. If the learners feel good about their achievements and the recognition thereof, this will **increase their motivation** to participate in eLearning courses.	
Quality of the technical support	
The increased quality of **technical support** leads to the availability of twenty-four hours a day, seven days a week quality eLearning environment. Having such a stable, accessible environment could allow an **increased** number of learners in Absa **access** to learning through the provided eLearning courses. An increased level of **clarity** of the **business needs** will increase the level of understanding (or shared meaning) that the instructional designers have of the topic at hand.	The increased understanding will, in turn, increase the ability of the instructional designers to address **business centricity** in their designs. This element, together with the increased number of requests from business for eLearning opportunities will lead to richness in the availability of flexible quality eLearning content addressing diverse learner needs. The availability of quality eLearning opportunities will increase the potential number of learners completing eLearning interventions.

The level of awareness and understanding	
The increased level of **awareness and understanding** about eLearning interventions available for specific target populations as well as the business centricity of the learning design will increase the level of significance of the eLearning course content to the learner. An **increased level of significance** will increase the **internal motivation** of the learner, which will, in turn, enable the **successful participation** of learners in eLearning interventions.	The increased level of awareness and understanding will further lead to an increased level in eLearning education empowering the learner, as well as ensuring an enhanced understanding of the learning process. These two elements may both lead to an increase in the number of learners successfully completing eLearning interventions.
The effect on business productivity	
The **completion of eLearning courses** increases the amount of learning taking place in the Business Unit. The learning, together with the quality coaching by the line managers [Business], increases the degree of learning application in the workplace and thus increases the number of competent resources in line. The more competent resources will provide improved quality of services and sell more products. The successful conclusion of these transactions will lead to an increased level of productivity – improving the bottom line [business results]. With more money available, Business can increase the quality of incentives for the learners. The **story closes with the start in mind**. Every time the systemic route is completed, the shared mental model of eLearning contributing to business performance is enriched and confirmed, leading to positive reinforcement of the phenomenon.	

Research Objective 3: To identify the leverage points within the systems dynamic model

Focus group 1: The starting point of the story is a shared mental model for eLearning.

Focus group 2: The starting point of the story is the awareness and education that will create a shared mental model regarding eLearning.

Focus group 3: The starting point of the story is an alignment between the stakeholders and shared meaning regarding eLearning.

The three leverage points that were identified are similar in that they address how people think about eLearning. The recurring message is about **common understanding between stakeholders**. This implies that both **Business** and the **Learning and Development Department** must have the same departing point for eLearning. There must therefore be viable conversations that establish exactly which results obtained, will create the clear line of sight, between the learning intervention and the improvement in business performance.

Based on the integrated systems dynamic model, the starting point of the story is a **shared mental model** of expectations between the participating stakeholders (Business and Learning and Development) regarding the contribution of eLearning to business performance. This leverage point identified from the systems dynamic model is:

A shared mental model of expectations between the participating stakeholders

In this study the shared mental model is about how eLearning can improve business performance. The stakeholders represented in this study are:

- Business: Operational management and employees; and
- Learning and Development: Operational management and Instructional Designers[3].

[3] A detailed breakdown of the sample participating in the study is available in Chapter 3.

Thus, the leverage point for improving business performance through eLearning is a **shared mental model of expectations between the participating stakeholders** with regards to how the eLearning solution will contribute to business results. **In addition the systems dynamic model also highlights the requirements that are necessary from a Business point of view to capitalize on the eLearning intervention**. Examples of these requirements are 1) Support from operational management and 2) a stable technology infrastructure.

Observers collected data regarding Research Objective 4 throughout the execution of the study.

Research Objective 4: To reflect on the effect that the behaviour, of the individuals participating in the research process, has on the research inquiry

The behaviour of the individuals was reported throughout each of the research objectives. The behaviour of the focus group participants was summarised by the observers as follows.

Summary as provided by observers

The observers qualify the outcome of the three-day session as being a true and valid representation of the collective view of all participants. The methodology that was applied ensured open discussion on the topic and each participant was able to contribute to the shared working space. The researcher did not influence the methodological process used during the focus groups. The moderator was an objective and neutral role-player, who executed the required steps of the selected methodology without influencing content. The profiles of participants at this session represented both a Learning and Development and a Business view. This inherently resulted in participants from a variety of different levels of work being represented. The participants eloquently captured the value of the integrated participation at the end of the session.

Summary as provided by observers, continued

Both Learning and Development and Business representatives reflected on the three days and ***stated that their personal learning was to listen to one another and to really hear what each other's needs were.*** *The opportunity for the levels of true dialogue and shared understanding that took place between Business and Specialist Functions in this process is highly valuable in the business context and should not be underestimated. The process may be complete, but this component of the study has initiated an exciting journey ahead for Absa with regards to eLearning.*

The effect of the research process on the individuals was also accounted for due to a request from the verifiers. A questionnaire was designed and implemented aiming at obtaining feedback about the **Systems Thinking process**, the **logistical arrangements,** the **objectives of the session** and the **learning** that took place. Overall, the feedback was positive. Learners felt that they learnt something new, and that their questions were answered and that the **logistical arrangements** in terms of food, venue, arrangements and the length of the session were sufficient. The tasks set to the groups were clear and the topic they learnt most about was Systems Thinking, followed by the relationship between eLearning and business performance.

In the process of design and execution of the study, various lessons were learnt. These lessons are reflected as methodological, substantive and scientific reflections.

5.3. Methodological reflection

The methodological reflection focuses on the extent to which the research approach influenced the eventual results.

An attempt was made to ensure the **purity of the results** of the study through the actions listed below.

- The researcher deferred bias by letting a focus group do the data collection and analysis. Furthermore, a moderator guide was designed and developed to guide the data collection and analysis

workshops. This ensured objectivity in the implementation of the research process.

- The outcomes of the Systems Thinking Focus groups were triangulated with external expert reviews and observations of how the behaviour of the participants in the focus group influenced the results.
- Multiple data collection methods were used to ensure reliability. The methods included interviews, focus groups, observers and a survey. The validity of the study was ensured by using a real-life example.
- The results were verified by comparing them to the literature through examining the recurring messages and pointing out the differences therein.

The following **positive aspects** were identified regarding the research methodology:

- The Systemic Thinking methodology ensured a recurring analysis of data-mining from what 'is' to what 'ought to be'. The first round of analysis explored the problem deeper in terms of 'what is'. The second round of analysis unearthed a solution with a different focus, defining 'what ought to be'.
- The process proved to have a built-in rigour, as Focus group 2 had to re-identify their stakeholders. When defining the co-producers for the measures of performance, the group realised that the measures of performance would not deliver or directly influence the defined system in focus. The group therefore had to rethink the stakeholders that they had defined.
- The three focus groups were used to design the answer. Although the three groups worked independently and worded their starting point of the stories, as well as the actual stories, differently, the recurring message pointed to the same starting point – the creation of a common understanding of expectations between the stakeholders participating in the eLearning intervention. The stakeholders being the learners, the Learning and Development Department and the Business Owner of the learning intervention.
- The three focus groups were all exposed to exactly the same moderator and inquiry process at the same time. The focus groups therefore all had the same advantages, support and **difficulties**.

- The concern to generalise the results of the study was **low** as there was an understanding that the context within which the research was conducted greatly influences the outcome of the research results. The research study was therefore contextualised clearly as relative to culture, organisation and people. Certain sections of the study can however be transferred to practice, for example, the change in attitude towards measurement and the application of the research design as a problem-solving methodology for complex value-add projects.
- Verifiers checked the answers produced and commented on the answers. These comments of the verifiers were reflected and incorporated in the results of the study. The verifiers also advised the researcher to allow the focus group participants to reflect on the process that they were exposed to.
- At the end of the implementation process, the focus group participants were allowed to reflect on the effect that the inquiry process had on them. This allowed the researcher to gain a deeper insight about how people feel when exposed to a Systems Thinking process. It also allowed the researcher to have a picture of how the Learning and Development Department and Business can work together to potentially design and agree on the outcomes of an eLearning program. The reflection also provided feedback on whether the inquiry process that the focus group participants were exposed to had any effect in solving the original problem, i.e. eLearning contributing to business performance.
- The success of the reflection process of the focus group participants also points to the strength of the design of the study in using verifiers to comment objectively, out of context, on the content produced by the focus group participants.
- The total implemented process was continuously tracked by observers in terms of the group, moderator and researcher behaviour. The observers ensured that both the moderator and the researcher kept to the contracted rules of objectivity. This was important in the light of the research being carried out as a qualitative study and that the focus group participants were known to the researcher, the researcher could easily have influenced or dominated the focus groups to produce answers based on the view of the researcher. Due to the positional

power of the moderator as leader of the group, she could also have subjectively influenced the outcome of the study.

- This study was part of a real-life-eLearning problem in an ecologically sound environment. This contributed to the value of the research for the company, as well as to the intellectual puzzle as to **how eLearning can enhance business performance**.

The following l**imitations of the research methodology** should be considered:

- In the process of executing an objective research process, the researcher had no control over the selection of the colleagues of the focus group participants or of the quality of the interviews that were conducted with them.
- Due to the fact that the researcher did not want to influence the outcome of the study, some of the arguments that were documented by the focus group participants did not reflect the actual conversations that took place. In some cases, where English was the second or third language, the participants also seemed to have a problem in articulating the actual meaning of what they were trying to say.
- An organisational problem that inhibited the study was the amount of time that the focus group participants had available to participate in the study. This implied that the focus group sessions had to be implemented in the shortest time possible. The study also had to be completed during working hours, so the focus group participants had to make and extra effort to attend the sessions in their already-busy schedules. Some of the participants were tired and this might have inhibited the quality of the content captured.
- The limited involvement of Executive Management was also seen as a constraint. Executive Management was only involved in the verification sessions. This limited the influence that they could have on the outcome of the focus groups. It also limited the interaction in terms of having Executive Management voicing their opinions to their subordinates regarding their expectations from eLearning. However, the presence of Executive Management during the focus group sessions, might have limited the openness and honesty with which the focus groups participants contributed to the content.

- The verifiers were concerned about changing the context within which the Systems Thinking diagrams were designed, as they felt that they might change the content of the diagrams, without understanding why the focus group participants designed the diagram as such in the first place. This feeling tended to constrain the verifiers within themselves to alter results. They therefore contained their changes to comments on how they felt a diagram or relations could have been made differently. The verifiers therefore, were faced with an interesting paradox: while they were requested to objectively study the results; they were concerned that their objectivity did not take the context of the study into account.

Form the researcher point of view the execution of the research methodology was both empowering and disempowering to me at the same time. While I understood that I designed the methodology as objectively as possible on purpose, I, at many times during the process, felt frustrated that I could not dive in and help the focus group participants to solve the issues that they were grappling with. This created the realisation within me that I cannot save or help Business, or the Learning and Development role-players. They had to grapple with the problems and challenges themselves in order to come to 'their own common understanding' and not my potentially-theoretical view of what should be done. In the end, it was astounding to see how the different focus group participants came to the conclusion that if they wanted eLearning to make any difference in their business environment, they would have to work with each other and not against each other.

I was also impressed by the level of commitment and effort that the focus group participants displayed to the study, taking into account their already-busy schedules. This commitment indicated to me that there is a real need to discuss the value of eLearning between all stakeholders as well as the impact that the behaviour of the different stakeholders has on each other. It also indicated to me that the stakeholders tried to reach out to each other to come to a common understanding.

I was further intrigued to see how the whole inquiry came together and how the **participants collectively interacted** and extended themselves in

collaboration, negotiation, explanation and support, in order to create a commonly agreed outcome.

The methodology provided specific results that were compared to the results of the literature review.

5.4. Substantive reflection

The substantive reflection focuses on comparing the results found in this particular research to other research on the same topic.

Literature on eLearning indicates both successes and failures. Benefits reported by students and supervisors include using skills learnt on the job – including writing, computer skills, better communication and management skills, convenience and consistency of training. **Failures** of eLearning include the lack of completion of some of the participants. Students cite **busy schedules** and **lack of time** and computer-related problems as reasons for not being able to complete the courses (United States Department of Agriculture, 2002). Research conducted by the Corporate Leadership Council (2001a) found that **accessibility, browser technology and download** time are also **limitations** of eLearning. Absa faces **similar problems** to other organisations in the new economy, for example, increased competition due to diversification of markets, rapid growth of information and technology. In the South African context the development of skills in order to keep up to the ever growing demand for skilled resources is specifically important.

The literature provides an abundance of examples regarding **challenges with aligning learning outcomes to business performance** (Corporate Leadership Council, 2001a; Forman, 1994; Swanson, 2001a). The problems with improving business performance through eLearning listed in the focus groups of this research were **motivation**, **lack of management** support, **access** to technology, lack of time to work on eLearning computers and the lack of establishing the desired **business results upfront**. The problems experienced in the Absa system are **also experienced elsewhere** in the world, albeit in theory or practice. One challenge that is very specific to South Africa and Absa, is the lack of ubiquitous access to computers and the availability of bandwidth.

One of the driver problems listed in the literature transpires as the lack of alignment of Executive Management with eLearning implementations. However, in this study, the alignment of the total picture was identified as a systemic problem. The major stakeholders identified in the literature were **executive management, learning designers and the technology** partners. In this study, the stakeholders were positioned **one level down** from Executive Management onto the actual business owners of the learning content. The **learners** were also identified as stakeholders as they had a major influence on the outcome (or success) of the eLearning intervention.

An explanation for the identification of different stakeholders might be that Absa has already implemented eLearning and wants to take it to a different level of contribution to business performance. The literature advising the alignment of Executive Management usually aimed at supporting organisations that are implementing eLearning for the first time.

Measures used in case studies are as much focused on revenue creation or productivity as cost savings. It indicates that the measures are therefore becoming more balanced. However, even though the measures are looking wider than cost savings, they are **still focused on financial measures** and non-financial measures are visibly absent (Cisco, 2002a; Hall & LeCavalier, 2000; Harvard Business School Publishing, 2002; KPMG Consulting, 2001; Nucleus, 2001; Wick & Pollock, 2004). The measures of performance designed during the study varied from:

- quantitative, with a low level of complexity, for example, the level of utilisation of the eLearning platform; to
- qualitative, with a **high level of complexity**, for example, the level of achievement of business performance. The more complex measures of performance included commitment, competence, motivation, coaching and understanding of eLearning value as a co-producer of business performance.

Critical success factors on which eLearning adopters focus are executive involvement and ownership, integrated eLearning, stable technology infrastructure, cultural change and focused measurement aligned with

company objectives. These critical success factors **create focus points** and therefore represent the current **theoretical leverage points** (Fireman, 2002; Carter, 2002; Coné & Robinson, 2001; Corporate Leadership Council, 2001a; Swanson, 2001b; Tanquist, 2001; The HRD Group Ltd (UK), 2003; United States Department of Agriculture, 2002).

The assumption that **critical success factors create focus** allows the researcher to compare the leverage point identified in the study to the critical success factors identified in literature. The leverage point of the study – a shared mental model of expectations between the participating stakeholders – therefore adds a different dimension.

While all the critical success factors that were identified in literature are included in the systems dynamic model (Figure 5.1), they do not represent the starting point, i.e. the creation of a shared mental model of expectations between all stakeholders in order to attain the desired results. The critical success factors also do not include the right level off stakeholders that were relevant in this study. In this study it was seen that while Executive Management might support the concept of eLearning from a sponsor perspective, operational management can sabotage and disable the implementation as they see eLearning as impacting on time to work and not as an opportunity to enhance their business performance.

The leverage point for this study **should however not be seen in isolation**. It is not the ending point of a study, but the starting point of a story told by Business and Learning and Development. Although the starting point is the creation of a shared mental model or picture of expectations regarding eLearning contributing to business performance, the message within the story told is also very powerful.

Following the arrows of the story in Figure 5.1, one can see that there are certain co-producers that influence the success of eLearning. These are:

- a positive mindset of operational management; and
- a stable technology infrastructure.

These two elements set the next layer of foundation upon which a successful eLearning story can be expanded. Another important point in the story is that

there is **no direct arrow on the diagram between the eLearning intervention and the profit of the business**. The story that is told says the focus group participants acknowledge that the eLearning intervention will increase the competencies of the learners. These newly acquired competencies must however become a reality in the workplace. Only through providing a better service, or selling more products, will a bigger profit be made.

So, while the focus group participants agreed that the eLearning intervention does not directly impact on the business results, they did agree that a well designed business centric eLearning solution **will provide them with the required competencies to sustain a business in the changing world of work**. The focus group participants also agreed through the model that there might be additional reasons for the lack of business performance. For example, the eLearning intervention could have been successful, but the lack of application of the learning though increased sales and services might the reason for lack of business performance.

Different people see different aspects of the **same phenomenon**. People's attitudes, beliefs and views influence how the relationships within the systemic whole are seen and reflected. The outcome of discussions is subjective and contained to the specific context in which it takes place. All events and trends are driven by a deeper structure of beliefs and assumptions of the individual (Wheatley, 2001).

Thus, the theory of Systems Thinking, which is part of the ontological basis for this study, clearly indicated that the **assumptions and beliefs of individuals frame** what they say and what they do. In this study, **a similar trend was observed**. However, when asking the focus group participants to reflect on this, they indicated that they appreciated the growth that they were exposed to in realising that there was more than one version of the truth out there.

When comparing the outcomes of the study to the literature, the researcher found that the **problems defined in literature and those found in Absa are the same**. However, the leverage point that resulted from the study provided a different answer to the problem, **solving it from an alternative**

perspective. This might be due to the design of the systemic model from an 'ought to be' view rather than an 'as is' view.

As a result of the systemic process, where the focus group participants were allowed to co-create the results of the study, additional literature was added to Chapter 2, based on concepts introduced to the study by the verifiers and the focus group participants. The literature topics include a wider research on measures as well as a more extended understanding of the performance framework that Business uses to articulate value.

5.5. Scientific reflection

The scientific reflection focuses on the contribution of this study to the 'scientific body of knowledge'.

The leverage point identified as a result of the research inquiry was the creation of "… **a shared mental model of expectations between the participating stakeholders**."

Thus, it is not only about the measures of eLearning and business performance. It is also about the alignment of expectations and the beliefs and assumptions around the measures resulting from the focus group participants. The measures that were defined through a process of common understanding will be successful as we are delivering and focusing on the expectations of our business partners – thus focusing on the '**return on expectation**'.

The **meeting of minds around the expectations will create a language,** at the point of value creation, that all role-players in the system understand. It is not a universal language, but one that is co-created through viable conversations between people, that have the influence to make the programme a success, and that can pro-actively support the learning.

Reasons of why it is difficult to link learning to business performance seems to **depict themselves in the philosophy of human beings**. Based on 'Who I am, I want to hear what is right for me'. For example, if it is assumed that senior executives in financial institutions function from a fundamentalist perspective, and learning people function from an interpretive or humanist

perspective, it emerges that the **type of knowledge that is 'true' and that each of the individuals 'believe' can differ significantly**. The creation of a shared mental model therefore does not lie only on the content level, i.e. which measures will show the 'truth', but on the 'internal being' level, where there is an alignment of minds about what they believe as real. So while the outcome of the study from a content level indicates that the creation of a shared mental model is a leverage point, the **underlying intent seems to be the creation of a shared epistemology of eLearning solutions**.

The focus group participants also recognised that it is sometimes necessary to slow down, have human contact and go back to basics in order to survive in a business world that is rapidly changing.

The accountabilities and responsibilities for the different activities required to improve business performance through eLearning became more apparent though the design of the systems dynamic model. The responsibility of learning lies with **both** the Learning and Development Department and with the Operational Managers. The Learning and Development Department needs to ensure a quality learning process and that all the relevant tools for learning are available. Operational Management needs to ensure that the support and environment (or opportunity to learn) for learning are available. Thus, learning has to be elevated to equal strategic importance than other business activities.

Learning **then becomes a co-created process** where the 'one believes in the other' (the eLearning stakeholders). Moving learning to this context reduces the formal requirements for financial or formalised metrics and ratios. During the design of the Systems Thinking diagrams, it became clear to both Business and the Learning and Development role-players that the instructional designers will not intuitively know how to address business centricity in their designs. Business role-players also acknowledged that including business centricity in the learning content would promote the success of learning and, ultimately, the improvement of business performance.

The **common framework of the systems dynamic model** also facilitated how Business and the Learning and Development role-players should

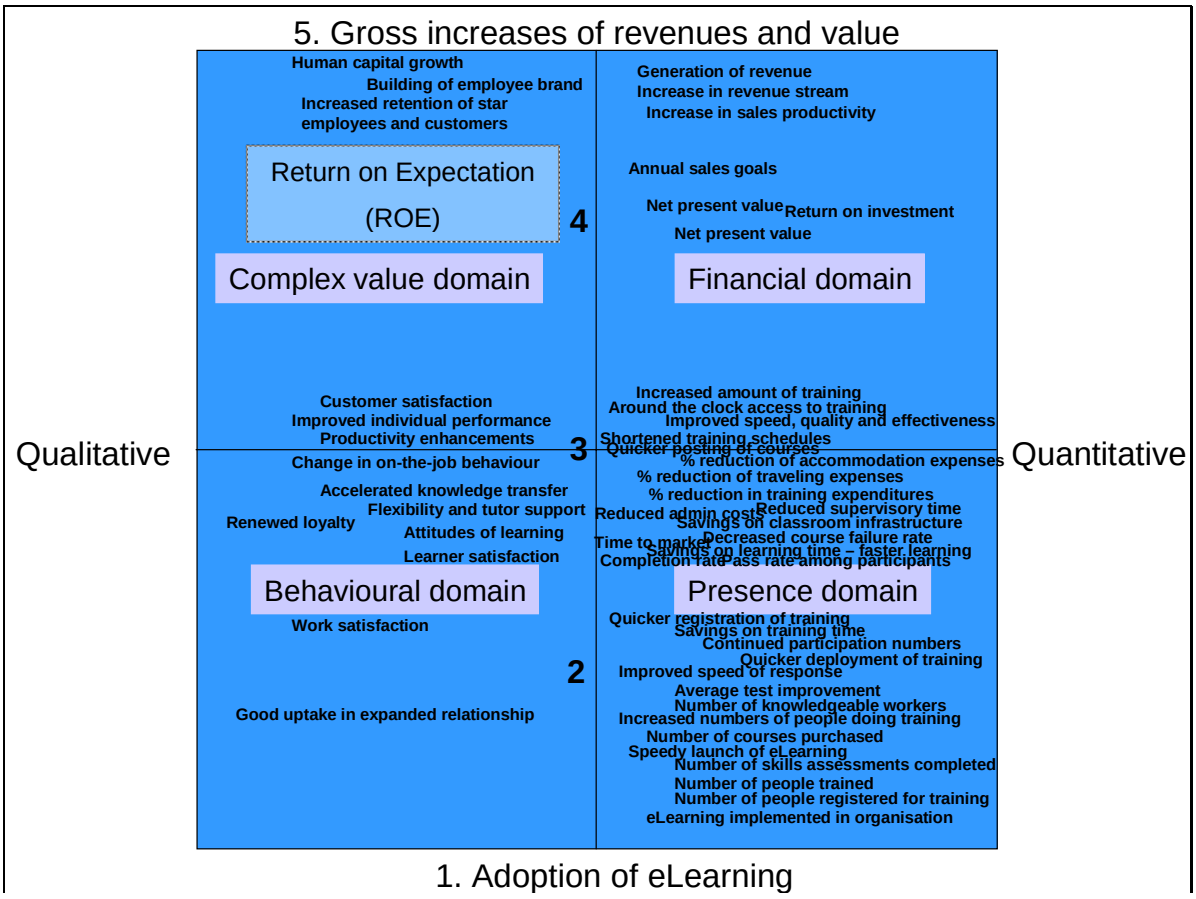
collectively and in an integrated manner, work together in order to ensure the improvement of business performance. It further illustrates to the stakeholders of eLearning that both the **tangible and the intangible measures** have to co-exist in order to realise the benefits of eLearning.

Thus, measurement is **relative to the context** in which is applied. Measurement of eLearning and articulation of its value in Business could be complicated due to:

- **measurements not linked** to business outcomes (line of sight of action vs. result);
- difficulty in defining and measuring the **actual outcome**; or
- the action of learning **not being part of a formal process** which then cannot be tracked.

Despite these difficulties, stakeholders still require an explanation of their investment. At this point the contracting of the 'Return on Expectations' (ROE) can contribute to the creation of a shared mental model about the required 'value' that eLearning must add to business performance. Linking the ROE back to literature, it creates an additional measure in the 'Complex value' domain. Figure 5.2 shows the positioning of ROE within the abundance of other measures available in literature.

Figure 5.2: A representation of the collective view of eLearning measures



The need for viewing measurement differently is illustrated in the example given by Cronje (2003) reflected on families and 'return on investments' stating that we do not determine the ROI of our families. He compared this to learning and organisations, declaring that organisations should accept learning as part of their being, and move away from linking money to learning.

5.6. Recommendations

From a **policy point of view**, financial institutions should re-look at the way that they measure and articulate the value of learning, as the study indicates that the intangibles of eLearning are as important as the tangibles. Organisations also need to look at taking ROI[4] out of the learning language as learning in itself does not create ROI. Business should take non-financial measures more seriously and officially include them as part of their financial statements in order to have a holistic picture represented in the balanced scorecard – finance, customer, process and learning and growth. Further

[4] Return on Investment

both qualitative and quantitative measures should be used in reporting to paint a total picture of a situation and not only a one sided financial picture. eLearning solutions should be integrated more effectively into the overall people management practices. All eLearning solutions should be designed and developed together with line management and the receivers of learning. This co-design should not only be a mechanistic involvement, but a passionate embracing of commitment and involvement by all stakeholders.

From a **practical point of view**, in-depth, viable conversations should take place between line managers (or the influencers of the learning) and the Learning and Development Department. The viable conversations should focus on the creation of common understanding about the exact nature of change that the eLearning programme must effect. During these conversations the individuals must let go of the notion to be only financially effective and also look at the change on the holistic system.

The process utilised for this study – the research methodology – can also be implemented to define and prioritise the eLearning problem and defining the system and measures of performance that 'ought to be'. From this, a leverage point can be identified that all relevant stakeholders can focus on to ensure success. Utilising this process will help business to implement small, but effective incremental changes that have an immediate systemic effect.

Further research:

During the research process, the researcher was continuously diverted into new areas of interesting potential research. These potential research topics are listed below.

- Expand on the epistemology of learning or learning organisations.
- Define the change enablement to move organisations to a new way of thinking about non-financial measurement of learning.
- Define the inter-dynamics between business, organisational learning and technology.
- Apply this methodology to other companies and comparing results.

Further development:

The actions relevant for further development are listed below.

- Investigate how to elevate learning to the same level of importance of other business processes.
- Develop a value system that defines what might be 'good' eLearning and what might be 'bad' eLearning.
- Develop an implementation plan for implementing the results of this study.
- Work with the classification of measures in literature in terms of their complexity.

5.7. Summary

This study explored the traditional challenge of articulating the contribution of eLearning to business performance in an unbounded way. Systems Thinking was implemented to question the beliefs and assumptions around how the contribution of eLearning is articulated. The results of the study indicate that the leverage point for successful contribution of eLearning to business performance is …

A shared mental model of expectations between the participating stakeholders.

Once Business and the Learning and Development Department starts going through the constructive cycle of the systemic model repeatedly, they will continuously build the **shared mental model of expectations**. This constructive cycle will build on the:

- Level of **visible support** of the line managers;
- Level of **clarity of business needs** to all relevant stakeholders;
- **Number of requests** from business for eLearning opportunities; and
- Level of **awareness and understanding** of appropriate eLearning interventions per target population.

This constructive cycle will therefore continuously allow eLearning to contribute to the improvement of business performance.