**7 Training, Learning, Talent Management, and Development**

**Case 7.1. The Need for Training and Development: Should You Use Massive Open Online Courses (MOOCs) Such as Coursera and Udacity to Recruit and Retain Talent?**

Juan Salmeron graduated from Small-Town College two years ago and was excited to land a job in customer service with AT&T. He rose quickly in stature at the local AT&T office and became the go-to guy when someone needed to understand some new technology.

After 2 years, Juan figured he was marketable and wanted to see if he could land a larger position with another firm. He worked hard on his résumé, cover letter, references, and copies of his college transcripts.

Juan interviewed well at California Mutual Insurance (CMI), and his dreams came true! Juan was hired as a corporate trainer. His job responsibility was to teach the insurance employees at CMI about how to use the latest technology to improve their own performance on the job.

Thus, Juan had to develop a process to help teach the insurance employees about technology in the workplace. The obvious option was to actually hold courses at CMI’s headquarters. Realistically, Juan could offer two or three courses a week. But each employee would have to leave desk and job duties to attend the face-to-face (F2F) training courses.

Juan could also try to hire experts in technology topics, and they could then develop a course to train the insurance employees. However, this would require extra financial costs to hire the expert and videotape the lectures. Juan could also decide to hold courses in a synchronous or asynchronous distance learning format. *Synchronous distance learning*occurs when the trainer/teacher and his employees/pupils interact in different places, but during the same time. Thus, students and the trainer might select Tuesday night as the time when they hold the training class. The trainer could be on his or her laptop computer at home, and the employees could access their training course at night. On Tuesday night, there would be a specific class where the trainer and all the students would meet online and discuss the material to learn. Synchronous learning would require the trainer and employee to meet at a specific time.

*Asynchronous distance learning* occurs when the trainer and the employee interact at different times. Students enrolled in an asynchronous course are able to complete their work within a certain time period. Thus the employee would access the learning site within a time period such as one week. The employee would review the material, watch videos, and take any exams, as necessary. Thus, the trainer and employee would have more freedom to complete assignments within a pre-established time period.

As a third option, Juan could use massive open online courses (MOOCs) offered by online providers such as Coursera and Udacity. MOOCs are free online courses offered by experts at no cost. MOOC course topics range from law, education, engineering, management, and all areas of technology. As Coursera explains: “Coursera is an education platform that partners with top universities and organizations worldwide, to offer courses online for anyone to take, for free. Learners can choose from hundreds of courses created by the world’s top educational institutions. Courses are open to anyone, and learning is free.”1

For example, Juan could encourage his employees to take a course on Gamification. Gamification is a course offered at the University of Pennsylvania, through Coursera, and taught by Associate Professor Kevin Werbach from The Wharton School of Business. The initial section of the course had 80,000 students followed by a section of 63,000 students.2

Gamification is taught in four to eight weekly modules and is offered in different languages. *Gamification* is the adaptation of digital game technology applied to human resource and other business issues. Thus, Juan’s employees could learn to develop a game, whereby their customers are rewarded points or in-game rewards for checking their insurance policies, investment accounts, and so forth on a regular basis. The goal is to make “the game” addictive so that customers check their own accounts on a more regular basis. The idea is to simulate games such as Angry Birds where customers actually want to check their accounts.

Many people in HR feel MOOCs could be a major part of recruiting, training, and developing employees with online degree certifications.3 Udacity has a program that allows employers to review the student résumés. Over 350 large organizations, such as Facebook, have paid Udacity and Coursera to match them with high performing students.4

MOOCs can have thousands of students sign up for a course online. Students often earn a certificate for completing the course. HR departments can also develop their own certificate or reward for their employees that complete a MOOC. Companies such as AT&T are using Udacity’s MOOCs to train their employees in new areas of science and technology. Starbucks offers employees free tuition to participate in Arizona State University’s online courses.

HR departments are also interested in recruiting people who have completed MOOCs. They were originally interested in students that completed a science- or technology-related course. Tech-oriented companies such as Amazon, Facebook, and Google have paid Udacity and Coursera to match them with their top students.

**Case Questions**

1. Would Coursera or Udacity be a viable option for all human resource departments to train their employees?
2. Would HR be eliminating themselves from their own job if they use Coursera?
3. Would MOOCs be a good recruiting method for attracting top talent?
4. Should Juan use a synchronous or asynchronous training format if he decides to use a MOOC to train his employees?
5. What are two advantages and two disadvantages of gamification of the HR functions?

**Case 7.2. Talent Management and Development: The Talented Harry Saunders’s Career Development at the Big Buy Supermarket**

Developing talented employees requires planning on the part of human resources. The career of Harry Saunders is a good example. Harry progressed in his career by using three options: formal education, experience, and employee assessment.

Harry’s father worked in the marketing department at The Big Buy Supermarket chain in Florida. With a little help from his father, Harry was able to get a job as a bagboy during high school. Harry enjoyed using the cash register since he liked numbers. Harry also displayed social skills since he liked talking to customers.

After high school, Harry went to college and tried different business majors until he concentrated on accounting. Harry knew he had knack for numbers, and accounting came easy to him. After graduating from college, Harry was offered quite a few positions to work for local and national accounting firms. At such a firm, he would go on the road and conduct audits of his clients’ accounting books. He would travel quite a bit—but he would be well paid and eventually would become a certified public accountant (CPA).

However, the HR Department at The Big Buy had no desire to lose an employee it felt had the potential to be a top-level manager. Thus, HR offered him a position in the accounting department at a competitive salary with the CPA firms. Since Harry liked working at The Big Buy, and even followed in his father’s footsteps, he accepted the position.

Harry enjoyed organizing the accounting department at The Big Buy for nearly a decade. The supermarket chain grew to more than 100 stores. Harry felt he needed to get a graduate degree in marketing to help further his rise in management. The Big Buy offered 100 percent tuition reimbursement. It took Harry 2 years to complete his MBA in marketing.

After 20 years in accounting, Harry felt he was tired of running the same old accounting data. He was not as marketable as he once was because he had never become a CPA. He also missed working directly with customers.

Thus, Harry contacted HR, and they worked closely with him to find a new spot in the organization. Harry took a *psychological test*, which is a series of multiple choice questions about what motivated Harry in a work environment. The test results indicated Harry was equally happy working with data and people.

Harry was promoted to the new position of database marketing manager. In that position, Harry would work with large amounts of sales data that were being generated by the computer systems at the 100-plus stores Big Buy owned. Harry’s job would be to analyze sales data to find products that were selling unusually well or poorly at each of the stores. Harry hired two young computer science majors to run the computer programs, sort the data, and help Harry make a weekly presentation to senior management about the results of the data.

Harry felt a strong resurgence in his career. He was thrilled to be working with customers again. He often visited stores to ask customers about various food items. He felt this boots-on-the-ground strategy would help him to better understand the overall sales data produced by his two employees back in the home office.

Harry became a popular speaker at supermarket conferences, as mining the data from large computer systems was an increasingly important task for all supermarket chains. Harry used his mathematical skills honed by a decade in accounting to understand the trends in food shopping. Harry was the first person to create a grocery store customer loyalty card, where shoppers paid $20 a year for the right to get lower prices on selected products. The idea of shoppers paying for a membership to buy groceries at a traditional supermarket was unheard of at the time Harry tested the idea. The result was that the customers of The Big Buy loved paying for the card so they would get lower prices on selected items throughout the store. Harry and his team could better track customer purchases and buying habits because shoppers were using their Big Buy card.

Harry took a few quiet moments to review his career by using the four stages of career development: Exploration, Establishment, Maintenance, and Disengagement. He felt fortunate to have started his career in the exploration stage by considering different job opportunities after he finished college. He experienced the establishment stage in his career by working in the accounting department for what felt like a long time—20 years. He feels refreshed to have transferred to marketing and has found the whole process of tracking customers a great part of the maintenance stage in his continued career at The Big Buy. Harry also felt he was in no rush to disengage from the company anytime in the near future. With the full support of his wife, Harry plans on working at The Big Buy instead of taking any type of early retirement offer.

**Case Questions**

1. How did Harry and HR use formal education to further his career?
2. How did employee assessment help Harry to advance?
3. Explain how Harry went through the career stages of Exploration, Establishment, Maintenance, and Disengagement.
4. What are some of the individual and organizational consequences that occurred as a result of the organizational career planning process at Big Buy?
5. Why did Harry’s attitude and performance dramatically change after changing from the accounting to the marketing department?

**Notes**

1 <https://www.coursera.org/about/>.

2 McWilliams, Julie, “Coursera at Penn Surpasses One Million Enrollees,” *Penn Current*, May 9, 2013.

3 Quinn, Jody, “Mining the MOOC: HR Looks to Online to Recruit and Train Employees,” *Skilled Up.com*, August 25, 2014.

4 Wheeler, Kevin, “Why MOOC’s Might Change Your Recruiting Methods,” *ERE Media,* March 4, 2014.

**9 Rights and Employee Management**

**Case 9.1. Coaching, Counseling, and Discipline: HR’s Role—Document, Document, Document**

Andrea Watson works in the small human resources department at ABC Fitness Center. There are currently about 50 employees working at ABC Fitness. Andrea enjoys the process of hiring and providing an orientation program for new employees. However, she does not like the responsibility of firing employees when they do not fit into the culture at ABC Fitness.

To overcome her own hesitation with firing employees, Andrea reviewed the *coaching* process, *counseling* process, *progressive discipline* process, and the *tests for just cause*used in disciplinary investigations. Andrea started to study and implement these processes about 2 years ago at ABC Fitness.

ABC Fitness uses the coaching process to give employees feedback to improve their performance over time. *Coaching* involves four steps: (1) describing the current performance, or what is currently being done by the employee; (2) describing the desired performance, or what the manager wants the employee to change; (3) getting a verbal commitment from the employee to change; and (4) following up to make sure the employee is behaving in the desired manner. Coaching is often associated with sports coaches such as Mike Krzyzewski at Duke University or Bill Belichick with the New England Patriots. However, coaching can be just as effective in a business situation as in sports. Employees in every organization need to receive positive feedback and support while doing their jobs.

Counseling is provided for employees who are not currently working at an acceptable level. Guidance is provided to help get the employee back on track. *Management counseling* involves giving the employee feedback so he or she knows a problem is affecting job performance. Employees with severe personal problems can be referred for help to the employee assistance program (EAP) to get assistance.

Unfortunately, some employees just cannot get their work performance to an acceptable level. Progressive discipline is then used to try to solve minor disciplinary infractions. *Progressive discipline* is a series of steps to help provide discipline:

* Step 1. Informal talk
* Step 2. Oral warning
* Step 3. Written warning
* Step 4. Suspensions
* Step 5. In some cases, demotion or transfer, or
* Step 6. Dismissal

A key element in disciplinary investigations is *just cause*. Just cause is a set of standards used to test for fairness in an organizational setting to ensure that any disciplinary action taken has reasonable cause. The tests attempt to ensure that the individual knew what the rules were, that there was reasonable evidence or proof that the person violated or disobeyed the rules, and that, if the rules were violated, the disciplinary action was appropriate and fair.

Andrea wasn’t sure if all of these processes were conducted in the case of Derek Struble. Derek was an employee who worked at ABC Fitness for the last 20 years. He didn’t exhibit the greatest level of enthusiasm with the health center’s fitness members, but he was also never rude. He assisted fitness members whenever they needed help.

Andrea reviewed Derek’s file and found he was in a graduate, nonprofit management program, which was supported by ABC Fitness since it paid half the tuition. His file contained limited documentation that Derek was at times not as “cheery” or “happy” as one might expect at a fitness center. The file mentioned that Derek didn’t generate enough personal fitness training, which members paid for and which helped finance the fitness center.

Andrea was fairly sure Derek wasn’t fired due to gross negligence (such as leaving the fitness members unattended). Nor was he fired due to serious misconduct, such as hurting another employee or doing harm to the company. Actually, Derek was very actively trying to recruit new members to the facility.

Thus, Andrea wished she had more documentation that would show that Derek had been coached, counseled, or had even gone through progressive discipline. She could find in the file only some notes that Derek could be more pleasant and should improve the number of paid training sessions he conducted in the fitness center.

Andrea was also concerned with the fact that Derek was 39 years old. The Age Discrimination in Employment Act of 1967 prohibits discrimination against persons 40 years of age or older. Congress found that older workers were disadvantaged in their efforts to retain employment and especially in regaining employment when released from a job.1 Since Derek was 39, he was certainly very close to age 40 and could file a lawsuit against the fitness center.

Andrea had a meeting scheduled with Derek later in the afternoon. Her major thought was something her former director of human resources at her last job used to say, “Document, document, document.”

**Case Questions**

1. Do you believe Derek received any of the four steps in the coaching process?
2. Did Derek receive progressive discipline?
3. Was there just cause to discharge Derek?
4. Would you, from what you know, discharge Derek?
5. How would the Age Discrimination in Employment Act of 1967 apply if Derek was 40 years old?

**Case 9.2. Trends and Issues in HRM: Mindfulness—a Thoughtful Theory About Leadership**

Astrubal Gonzalez worked as the food service manager at Big-Time Hospital in New Haven, Connecticut. Unfortunately, the food at the hospital was viewed as terrible. Still, since Astrubal’s food service was the only place in the hospital to get food, sales were stable.

The CEO of the hospital, Jean Curry, wondered how she could improve the quality of the food in Big-Time Hospital. Her first priority was to create a change process to help the food service employees who were in denial that their food quality could be improved. She had to help them forget about the daily grind they had repeated for years and learn a new way to do their jobs. She had to get past their resistance to change and help them see that a modern food service operation could lift employee morale around the hospital.

On the way to work on the train, Jean happened to read about an interesting leadership theory called *mindfulness*. She thought mindfulness sounded like a process with which the employees could develop a renewed sense of mission toward delivering better food quality and service. She decided to contact human resources about exploring mindfulness as a way to replace mindlessness.

The human resources department responded by researching mindfulness as soon as it received the call from the CEO. If Jean Curry called, HR was certainly going to respond. The first step required defining leadership and mindfulness.

*Leadership* is the process of influencing employees to work toward the achievement of organizational objectives. In Jean’s case, she was the leader, and it was her idea that using mindfulness might be the solution to motivating her food service personnel.

HR found out that mindfulness is an area of leadership study that has become more popular in the last decade. There are numerous summits and conferences devoted to teaching the process of mindfulness. Jon Kabat-Zinn, former professor at the University of Massachusetts Medical School, describes mindfulness as “paying attention in a particular way: on purpose, in the present moment and non-judgmentally.”2

By comparison, mindlessness refers to our subconscious, out-of-habit, or repetitious actions, placing limitations on what we can accomplish. A mindless worker would rather continue the same steps and procedures used in the past at work.

Mindfulness enables employees to be fully aware of their mind, body, and spirit. Mindful people are fully aware of what is happening around them. A mindful employee has a high level of self-confidence, which gives the employee the belief that failures and challenges can be overcome. Mindful people can visualize great change instead of placing limitations on what they can do to lead the organization.3

A mindful manager can lead the employees to reach higher levels of success. But to do this, the mindful manager needs to learn to be compassionate, more self-confident, and an authentic leader. Recent organizations to embrace mindfulness include Google, Harvard Business Schools, and the Seattle Seahawks football team in the NFL.4

Employees would most likely find it easier to enjoy mindlessness on a regular day at work. However, an organization needs to strive for mindfulness every day at work to help develop a company culture of innovation and creativity. Mindful employees look for new ways to solve problems. To help develop mindful employees, HR needs to set the standard by offering training on leadership concepts such as the benefits of mindfulness. HR and managers in the different divisions can work together to model the behavior of being mindful so that employees can learn to bounce back from failure, learn to be more confident, and thus be actively aware of their surroundings at work and in their industry.

Jean decided she was going to also have to learn to use mindfulness if she expected to have such a culture exist at her hospital. She had to exhibit behaviors that showed she was innovative and creative. She wanted to be a leader who embraced everything at work and shared the success with her employees.

After a series of training sessions led by HR, the food service personnel started to feel more self-confident about their jobs. They were encouraged and wanted to cook more creative lunch and dinner options. They were excited to see which new food options were well received by the employees of the hospital. When a food item was not well received, they didn’t get disappointed as they would have in the past. They just used that experience as a learning situation. Their self-confidence and creativity were evident in the variety of food they offered and the upbeat customer service provided to their customers.

Jean was so excited about the results of implementing mindfulness that she was ready to spread the leadership theory throughout the entire Big-Time Hospital organization.

**Case Questions**

1. How does mindfulness compare to situational leadership?
2. How does mindfulness compare to the definition of leadership?
3. What are some ideas about how human resources can teach employees to be more mindful?
4. Do you think Astrubal will find it easy or difficult to become a mindful leader?
5. After mindful training, what could Astrubal do to show he is a more mindful manager?
6. How did Jean use the stages of the change process?

**Notes**

1. <http://www.eeoc.gov/laws/statutes/adea.cfm>.

2. Garms, Erica, “Practicing Mindful Leadership,” *Association for Talent Development,* March 8, 2013, <https://www.td.org/Publications/Magazines/TD/TD-Archive/2013/03/Practicing-Mindful-Leadership>.

3. Moua, Mia, “Mindfulness and Self-Efficacy,” *Leading With Cultural Intelligence,* <http://catalog.flatworldknowledge.com/bookhub/reader/5575?e=moua_1.0-ch04#moua_1.0-ch05_s04>.

4. <http://www.mindfulleader.org/#home>.