

**PARTICIPANTS' PERSPECTIVES OF TRAINING EXPERIENCES: AN
EXPLORATORY QUALITATIVE STUDY**

A Dissertation

by

ROBIN SMITH MATHIS

Submitted to the Office of Graduate Studies of
Texas A&M University
in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

May 2010

Major Subject: Educational Human Resource Development

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ABSTRACT

Participants' Perspectives of Training Experiences: An Exploratory Qualitative Study.

(May 2010)

Robin Smith Mathis, B.A., Texas Tech University; M.A., Texas State University

Co-Chairs of Advisory Committee: Dr. Toby Marshall Egan
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Perceptions concerning training and development continue to appear in practitioner literature; however, the fact that those perceptions are not explored in HRD literature is a problem. The purpose of this study was to examine perspectives of participants in organization-sponsored training. A general qualitative methodology was utilized in this study. Then, through a social constructivism lens, the researcher looked closely at the interactions described in the trainees' experiences in order to understand their assumptions and how they made sense of their experiences.

The researcher collected 10 interviews from participants representing various types of training experiences. The 10 interviewees identified shared experiences that led to the formation of four themes: (1) relevance and applicability, (2) attitudes and preferences, (3) immediacy, and (4) relational learning. Within the first theme, there were three subthemes: (1) responsibility for relevance and application, (2) communicating relevance, and (3) trainees' recognition of relevance and application. Theme 2, immediacy, consisted of three subthemes as well. Immediacy was explained by trainees as verbal, nonverbal, and environmental. No subthemes emerged from the other two themes. Finally, the themes revealed two episodic narratives. The two narratives were "Time is money--Is this worth the time?" and "If you don't care, I don't

care.” The two episodic narratives, pieced together, disclose the idea of the desired training described by the 10 participants.

In conclusion, the findings of the study lead to a number of implications for practice and research. This study demonstrated the importance of trainers and instructional designers to develop clear understandings regarding what trainees think of face-to-face and online training and why they hold those opinions. Also, trainers and/or instructional designers should explore the use of communication and technology theories to develop training modules. In addition to practice, scholars should conduct more qualitative studies exploring trainee perceptions in online organizational training. Finally, the findings of the study showed that instructional communication researchers have not explored the issue of the importance of out-of-the classroom learning experiences in the field of human resource development.

DEDICATION

In honor of Patrick Thomas Mathis

In memory of “Papa” Cecil Clayton Cook

In memory of “Meme” Irene Loffer Smith

I dedicate this dissertation in honor of my son, Patrick Thomas Mathis-my inspiration. He is the essence of all my family’s encouragement and support.

I also want to dedicate this dissertation in memory of my maternal grandfather, Cecil Clayton Cook. Papa was a Training Coordinator for the National Training Fund for Sheet Metal Workers. He was passionate about adult learning and the power of training to influence the performance and development of the worker. Papa was thrilled that I was getting my Ph.D. in human resource development; therefore, I dedicate this dissertation in his memory.

Finally, I dedicate this dissertation in the memory of my paternal grandmother, Irene Loffer Smith. Meme was an elementary teacher. As a young widow and mother, she worked as a full-time teacher on an emergency certification and finished both her bachelor’s and master’s degrees. I found the memory of her faith, strength of mind and will inspirational during this process; therefore, I dedicate this dissertation in her memory.

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Thank you to my family and friends for their constant support and encouragement. I want to thank my very patient husband, Christopher Mathis (Chris), for reading my drafts, helping me through the process and reminding me that what I do is meaningful. Above all, thank you for loving me through a process that brought out the absolute worst in me! Thank you to my mom, Patricia (Pat) Cook Smith, and my dad, J. Michael Smith (Mike), for instilling in me my faith, determination and a solid work ethic. My identical twin sister, Kimberly (Kim), illustrated that dreams can be achieved. Despite her health concerns and obstacles, Kim finished a terminal degree in her passion. She provided an example that showed me I could finish a dissertation! I would also like to thank Alison David and Dahlia Torres for their help with Patrick and their support. Thank you to Drs. Lorelei Ortiz, Jessica Parker-Raley and Sean Horan for coaching.

I would like to thank my committee co-chairs, Drs. Toby Egan and Fred Nafukho, and my committee members, Drs. Katherine Miller and Timothy Mottet, for their guidance and support throughout the course of this research. I want to extend a special thank you to Tim for encouraging me to find a program that allowed me to combine my love of communication and education. You reminded me what a “Texas woman” is capable of accomplishing. In addition, Kathy was a wonderful example of a dedicated teacher, scholar and mother that was especially beneficial to me at this time. Fred, you are an exceptional leader, and I am glad you are now our department head. Finally, thank you to my participants. Thank you to Barbara Stooksberry for her help in editing the manuscript, and to Carol Little for her help with table page numbers.

TABLE OF CONTENTS

	Page
ABSTRACT	iii
DEDICATION	v
ACKNOWLEDGMENTS.....	vi
TABLE OF CONTENTS	vii
LIST OF FIGURES.....	ix
LIST OF TABLES	x
 CHAPTER	
I INTRODUCTION: THE IMPORTANCE OF RESEARCH.....	1
Historical Context	5
Problem Statement	7
Purpose of the Study and Research Questions	8
Significance of the Study	9
Limitations	10
Definition of Terms.....	13
Data Collection Procedures.....	16
Data Analysis Procedures.....	19
Summary of Introduction	19
II REVIEW OF LITERATURE.....	21
History of Human Resource Development (HRD)	23
Theoretical Foundation	28
Relational Factors Critical to Learning Transfer.....	42
Qualitative Research and Participants' Experiences in HRD	52
The Forgotten Voice.....	53
Summary Review of Literature	56

CHAPTER	Page
III	METHODOLOGY 58
	Qualitative Methodology 60
	Research Question 61
	Procedures 61
	Data Analysis Procedures 76
	Researcher’s Role 78
	Trustworthiness and Credibility 79
	Limitations of Study Design 80
	Summary of Methodology 82
IV	FINDINGS 84
	Study Participants 84
	Participant Training Experience 86
	Themes 89
	Episodic Narratives 131
	Desired Training 134
	Summary of Findings 136
V	SUMMARY, DISCUSSION, AND CONCLUSIONS 137
	Summary 137
	Discussion 142
	Limitations 148
	Directions for Practice 151
	Directions for Research in Training and HRD 152
	REFERENCES 155
	APPENDIX A 169
	APPENDIX B 171
	APPENDIX C 172
	APPENDIX D 173
	APPENDIX E 174
	VITA 175

LIST OF FIGURES

	Page
Figure 1 Holistic picture of selected literature	23
Figure 2 Predicted relationships between relational power and instructional influence.....	41
Figure 3 Thematic analysis	89

LIST OF TABLES

	Page
Table 1 Interview Probing Questions for Stage I.....	68
Table 2 Interview Probing Questions for Stage II.....	75
Table 3 The Process: A Picture of the Findings.....	88
Table 4 Key Words/Phrases for Theme 1, Relevance and Applicability.....	95
Table 5 Key Words/Phrases for Theme 2, Attitudes and Preferences.....	108
Table 6 Key Words/Phrases for Theme 3, Immediacy.....	115
Table 7 Key Words/Phrases for Theme 4, Relational Learning.....	124
Table 8 Relational Development During Training Experience.....	130

CHAPTER I
INTRODUCTION: THE IMPORTANCE
OF RESEARCH

When I read my issues of *T+D* magazine (formally called *Training and Development*), I see articles with such titles as “Training Is Broken [There We Said It]”(Maister, 2008) and “Why (Most) Training Is Useless?” (Mosher & Nguyen, 2008). Then, *T+D* kicked off 2009 with an article entitled, “Money Matters, but Training Doesn’t?” (Nancheria, 2009). Every time I read such an article, I wonder why we are not exploring why and how these perceptions exist? In this dissertation, I use a general qualitative approach to study 10 trainees and their perceptions regarding their training experiences. The themes and narratives discussed contribute to human resource development (HRD) and communication scholarship and may be used to inform training practice.

This dissertation consists of five chapters. This first chapter presents a rationale and introduction for exploring perspectives of trainees involved in organization-sponsored training. The second chapter provides a review of literature that supports the rationale and need for exploratory qualitative research examining training and development contexts. Chapter III provides a detailed description of this study’s methodology. Chapter IV reveals the findings from this study. The chapter outlines the four themes and two narratives that contribute to the desired training experience. Finally,

This dissertation follows the style of *Human Resource Development Quarterly*.

Chapter V answers the research questions and provides conclusions and directions for future research.

Chapter II discusses that HRD has, historically, encouraged research in training, although the field of HRD has grown to encompass many more areas involving work-related learning and performance. Moreover, Hanscome and Cervero (2003) and Bunch (2007) found that trainers have a unique role in shaping organizational culture, and the perception of training and development. Organizational culture and perceptions of training can drastically impact perceptions of HRD as a field (Bunch, 2007). In addition to culture, Egan (2008) suggested that a supportive organizational subculture is vital to employee motivation to transfer learning or training content. Egan's findings also support the notion that direct support for training and learning transfer by the most immediate manager or supervisor is a key to learning transfer. Hong Kong, Singapore, Taiwan, and Korea have invested significantly in education, and statistics show that their economic growth has benefited from this investment (Olaniyan & Okemakinde, 2008). Therefore, HRD literature supports exploring the perceptual understanding of the training efforts in other cultures, and this dissertation utilizes an exploratory qualitative research approach to investigate perceptions.

In addition to the rationale for the study, Chapter II reveals gaps in the literature regarding employee experiences with organization-sponsored training. In particular, few studies elaborate upon the experiences of trainees in training contexts. Social capital theory, social learning theory, and social constructivism provide a framework for understanding a variety of worker training experiences. Moreover, leader-member exchange (LMX) literature (Graen & Uhl-Bien, 1995) and relational power and

instructional influence literature (Mottet, Frymier, & Beebe, 2005) explain why interaction and relationships in training need exploration. Furthermore, gaps in the literature as it pertains to relevance, application, immediacy, attitudes, preference, and learning are detailed in Chapter II.

Consistent with guidance provided by Merriam (1998), Chapter III explains the methodology used to frame this study, the research questions, the data collection procedures, data analysis, and my credibility as a researcher. I establish, in Chapter III, that this study was conducted from an interpretivist/constructivist perspective. In addition, I describe how data were collected and analyzed to best answer the study's questions. The steps that I took to analyze the data and ensure trustworthiness are listed in detail in Chapter III. Finally, this chapter explains limitations and challenges the researcher encountered.

In Chapter IV, the study participants--Patrick, Mike, Chris, John, Paul, Kimberly, Patricia, Cydney, Whitney, and Marilyn--identify shared training experiences that led to four themes: (1) relevance and applicability, (2) attitudes and preferences, (3) immediacy, and (4) relational learning. Within the first theme, there are three subthemes: (1) responsibility for relevance and application, (2) communicating relevance and (3) trainee recognition of relevance and application. Theme 3, immediacy, consisted of three subthemes as well. Immediacy was explained by trainees to include verbal, nonverbal, and environmental aspects. Themes 2 and 4 did not have subthemes.

The themes were composed of episodic narratives (see Definitions of Terms section) including "Time is money--Is this worth my time?" and "If you don't care, then

I don't care." The results provided overlapping perspectives that illustrate a collective story that represents the perception and essence of training.

Chapter V outlines a number of implications for practice and scholarship. Trainers and instructional designers should be aware of what trainees think of face-to-face and online training and the elements that shape those opinions. It is important that trainers be mindful of how immediacy and environments are created in their classrooms. Trainers' efforts to build relationships with trainees, and their ability to facilitate relationships among trainees, could impact desired training outcomes. For this reason, trainers and/or instructional designers should explore the use of communication and technology theories to develop training modules.

In addition to practice, scholars should conduct more qualitative studies elaborating upon trainee perceptions of employer-sponsored, web-based training. This study provides insights into an area of instructional communication that was not explored in identified literature. A key question that emerges from this investigation is how out-of-the-classroom communication among trainees influences trainee perceptions of formal training and/or other HRD initiatives. For example, conversations between trainees about their training experiences occur during coffee breaks, before training, during lunch, and after training. It would be interesting to see how this communication with fellow trainees impacts or influences learning and perception of those learning initiatives. The remainder of the chapter will establish the rationale and need for this study. The history and development of the training profession is instrumental in the need for exploring the training experience.

Historical Context

The World War I era is often cited as the beginning of systematic large-scale organization training, and the World War II era marked training as a profession (Ruona, 2001). According to Pope (2000), the 1920s and 1930s emphasized public school systems as the primary source for training and education of the United States (U.S.) workforce. Despite this emphasis, there was criticism that schools failed to provide students with knowledge and skills immediately transferable to the workplace (Herr, 2001). This tension between employers and colleges and universities persisted through the 1940s as the need for supporting the career development of students and employees became an increasingly urgent concern (Pope, 2000). As a result, development became a part of training in the 1950s (Herr, 2001). In the 1960s, the civil rights movement in the U.S. led to major changes in the workplace and to landmark changes in employment and education law.

As the transition from the industrial to high tech and service economies occurred in the 1970s and 1980s, organizations began relying less on formal education and government-sponsored vocational training and workforce development and more on internal training and development programs (Herr, 2001). Other related areas, such as organization development and career development, also emerged, and related efforts soon extended into additional employee development areas, such as coaching, mentoring, and counseling for career, job, and organizational purposes. As these coordinated efforts became part of the day-to-day happenings in large organizations, the term *human resource development* (HRD), which, in the U.S., is often attributed to Harbison and Myers (1959) and Nadler (1970), was embraced by the American Society for Training

and Development (ASTD) in the 1980s. ASTD's definition of HRD included training and development, career development, and organizational development (Desimone, Werner, & Harris, 2002; McLagan, 1989).

Individual perceptions of HRD are broad, and few studies have examined the in-depth experiences of employees in these contexts. In light of a 2000 survey that ranked the training and development of employees as the most vital function that managers faced, more research is needed in the training and development overall (Desimone et al., 2002). In addition, Hanscome and Cervero (2003) and Bunch (2007) argued that trainers have a unique role in shaping organizational culture, and the perception of training and development dramatically impacts the perception of HRD as a field. In order to advance understanding regarding trainee experience in organization-sponsored training, HRD scholars must focus more attention on training and development to more clearly understand the trainee as participant in and interpreter of the training experience.

Training often contributes to learning that occurs in organizations (Bunch, 2007; Hanscome & Cervero, 2003) and may be the area most commonly associated with HRD. Training is not only essential for employee and organizational learning, but it holds a powerful position when it comes to creating and establishing the organizational culture (Bunch, 2007; Hanscome & Cervero, 2003) and influencing employee organization commitment (Bartlett, 2001). However, 20 years has passed since Newstrom and Leifer (1982) emphasized the relevance of trainee perceptions regarding training. Since that time, HRD scholars have done little to explore the trainee experience in-depth (Bunch, 2007; Lombardozzi, 2007; Tannenbaum, Mathieu, Salas, & Cannon-Bowers, 1991; Yukl, Falbe, & Youri, 1993).

Problem Statement

This study addressed several key issues and problems not yet explored in the HRD and training literature. Based on available literature, HRD scholars and trainers have rarely examined in-depth trainee experiences and trainee perception of the training in which they participate (Dougherty & Krone, 2000; Wilson & Cervero 1996a, 1996b). Gorham and Millette (1997) found that teachers are more likely to attribute high motivation to something that they (the teacher) said or did in class, whereas the teacher will externalize low motivation of students. Trainers often take the same approach as teachers when analyzing highly motivated trainees, but will usually attribute low motivation to trainee attributes. In addition, in order to elaborate on motivation and other affective reactions of trainees, it would be beneficial to explore and describe trainee classroom experiences as expressed by training participants through a qualitative research lens.

Available studies explaining or exploring various perceptions of training programs, adult education programs, or HRD programs most often examine instructional design issues, rather than the underlying process or implementation/facilitation of training (Bunch, 2007; Burba, Petrosko, & Boyle, 2001; Cervero & Wilson, 1994; Lombardozi, 2007; Tannenbaum, Mathieu, Salas, & Cannon-Bowers, 1991; Yukl, Falbe, & Youri, 1993; Wilson & Cervero 1996a, 1996b). The training process, as perceived by training participants, needs to be explored as well. In-depth descriptions of participants' perceptions of this process of "being trained" appear to be missing from the research literature on this subject and needs to be explored.

The review of literature illustrates that further research elaborating upon training participants' experiences, perceptions, interactions, and interpretations in training contexts would be beneficial to scholarship and practice. Many assumptions have been made in quantitative research without insight into the experiences of the trainees (McClure & Brown, 2008; Podskoff & Schriesheim, 1985; Raven, 1993; Wallick, 2001; Wang & Wang, 2006; Ya-Hui Lien, 2005). Inherently, quantitative research does not provide perspectives or elaboration on the constructions, interpretations, and underlying assumptions trainees form prior, during, and following their learning experiences (Denzin & Lincoln, 2000), a line of inquiry left to qualitative researchers to explore. This exploratory study is designed to investigate the experiences of trainees in quasi-required, employer sponsored training programs. These programs were formal, to fulfill organizational requirements, face-to-face, and/or online training.

In addition, the role of communication, as established largely by the fields of communication and social psychology, and by related research and theory, appears to be limited from the training and HRD literature (Baldwin, Magiuka, & Loher 1991; Noe, 1986; Tannenbaum et al., 1991). It appears that researchers have not explored trainee experiences and, therefore, have not addressed the meaning or interpretation trainees assign to training processes and procedures.

Purpose of the Study and Research Questions

Although it is predicted that training will be critical to the future sustainability of organizations and even nations (Harris, 2008), we lack an in-depth understanding regarding participant experiences. The purpose of this exploratory study was to elaborate

upon the experiences of 10 individuals regarding their participation in organization-sponsored training programs. As detailed below, the most appropriate methodology for elaboration on and understanding of phenomena such as training and development experiences from the participants' point of view is qualitative (Lincoln & Guba, 1985).

The research questions for this exploratory study are contextualized within qualitative inquiry. Consistent with a general qualitative approach (Merriam, 1998), I used unstructured probing questions during each interview. The overarching research question was this: What is the experience of trainees participating in organization sponsored training?

Subquestions

1. What are trainee perceptions of their training experience?
2. How do trainees describe the context of the training experience?
3. What are the ways in which the instructor was perceived by trainees?
4. How did the manner in which trainees perceived the instructor impact their training experience?
5. How do the opportunities to apply or recall their training experience post-training influence the trainees' perceptions about training?

Significance of the Study

One key issue associated with the significance of this study is its contribution to a body of associated literature. Using the Pro-Quest, Cambridge Scientific Abstract Database, Business Source Complete, and Academic Search online databases, I searched dissertations, theses, and journal articles and concluded that a study exploring training

participant experiences would be unique in a number of areas. First, HRD as a field needs research that qualitatively explores participant experiences in training to more fully understand the process. Second, a search for literature exploring the trainee experiences and/or phenomenology using several search terms--training, training and development, organizational training and development, training and delivery, training and communication, instructional communication--revealed that there is a need for scholarship that elaborated on the trainee experience.

In addition to uniqueness, another element of study significance is the potential contribution of this dissertation to the field of HRD. Findings from this study should benefit scholars, trainers, trainees, and various other HRD practitioners. Scholars should benefit from the heuristic nature of the research. Finally, practitioners should benefit from the possible transferability of results from this study. A qualitative approach should contribute to understanding of the in-depth nature of training as phenomenon from the perspective of study participants (Bunch, 2007).

Limitations

Chapter III discusses the limitations and challenges of the study design. First, it is also critical to understand that this study, primarily the data collection process, occurred during challenging economic times that may have influenced the outcome. The U.S. market was going through the worse financial period since the stock market crash of 1929. The climate was tense in any publicly traded U.S.-based company. Such a climate may have created job security concerns, making potential participants reluctant to participate. Those who did participate might have spent more time discussing their

perceptions had they not felt an urgency to get back to work. Six of the participants worked in publicly traded U.S. companies, so the status of the market may have influenced their responses. In addition, one participant was an associate in a law firm; therefore, her business was directly impacted by the external economic environment. Finally, two of the participants were probably indirectly affected on the job by the economic climate.

Stage I participants were part of an extremely volatile company. The sales employees from Stage I of the interview process were helpful in providing information and answers to questions, yet these employees contributed directly to corporate income generation and made their mark in the company by being out in their respective regions making sales calls and follow-up meetings. Furthermore, on the day I started in Stage I to build rapport, the company (an international airline) had reported a significant quarterly loss. The company had just completed one round of layoffs and had experienced a plane crash during the follow-up and member check process. It is imperative for qualitative researchers within HRD to understand what is occurring in the climate and culture of the organizations that they study. Financial, market, and organizational events can dramatically influence the outcome of essence studies. In addition, because this was an exploratory study, I only formally interviewed the participants once.

Despite the troublesome economic context during which this study was implemented, as a result of this study, we have support to further explore a number of communication, leadership, organizational, and learning theories as they relate to HRD. For example, researchers can further explore leader-member exchange and relational

power and instructional influence in relation to social capital theory and social constructivism within training and other HRD initiatives (Akdere & Roberts, 2008; Akdere, 2005; Cohen & Prusak, 2001; Graen & Uhl-Bien, 1995; Shea, 2003; Vygotsky, 1978). Schriesheim, Castro, Zhou, and Yammarino (2001) found that most studies had not tested LMX (formally called *vertical dyad linkage*) on the dyadic level. In other words, there is a need for more research exploring relationships in various leadership contexts. This study provides a rationale to explore dyadic learning relationships in training or other HRD programs because this study has raised the issue of the importance of learning relationships in the training context. This study also provided support for behaviors and messages that contribute to trust and loyalty and understanding how those same behaviors and messages distinguish expert and referent influence (French & Raven, 1959; Mottet, Frymier, & Beebe, 2005; Raven, 1992).

In one example response from the interviewees in this study, trainees indicated that trainers apologized for the material being presented. In some cases, the trainer may be in a difficult middle place whereby their job requires them to present material he or she does not believe is relevant, current, or presented in a way that is helpful for trainees. A parallel example in elementary education would be teachers required to present material associated with student testing that may not be aligned well with student interests or readiness. This study's focus is on the trainees' perception. The study does not include the trainers' perspective. This study only explores the perceptions of the trainees regarding training; therefore, we do not get any explanations from the trainers concerning the choices they make in their training delivery or to what extent they have the power to make decisions in regards to training.

Definition of Terms

Affective Outcomes - outcomes of learning that focus on changing or reiterating the learners' attitudes, feelings, and motivation. (Beebe, Mottet, & Roach, 2004).

Convenience Sample - "doing what is fast and convenient" in selecting a sample (Patton, 1987, p. 57).

Episodic Narrative - narratives that are constructed by piecing together themes (Riessman, 1993).

Employer-Sponsored Training - training that is encouraged by or made mandatory by one's employer.

Face-to-Face Training (FTF) - training conducted using traditional delivery methods in a classroom or training facility. For the purpose of this study, we are discussing more formal methods such as lecture, team teaching, guest speakers, and trainee participation. We are not talking about hands-on training, such as "on-the-job" training.

Human Resource Development - "systematic and planned activities designed by an organization to provide its members with the necessary skills to meet current and future job demand." (DeSimone, Werner, & Harris, 2002, p. 3).

Influence – This term is used in this study to refer to the combination of communication and relationships.

Instructional Communication - "the process of creating meaning through verbal and nonverbal messages between teachers and students" (Mottet, Richmond, & McCroskey, 2006, p. 5).

Immediacy Behaviors - “those behaviors that communicate liking and engender feelings of pleasure. Immediacy behaviors develop a positive relationship between trainer and trainee” (Beebe, Mottet, & Roach, 2004, p. 199).

Learning Culture - the environment in which learning occurs on a regular basis.

Loyalty- Used in this study when discussing leader-member exchange theory (LMX) to discuss someone’s degree of allegiance to someone.

Member Check - asking the interviewee to verify interpretations and make additions to the interviewer’s interpretations (Creswell, 2007; Guba & Lincoln, 1985; Riessman, 1993; Schwandt, 2001).

Nonverbal Immediacy - “focuses on the unspoken aspects of how you present yourself, such as eye contact, posture, and movement, which influences how you are perceived by others” (Beebe, Mottet, & Roach, 2004, p. 200).

Online Training - a form of distance or e-learning using the computer/internet.

Organizational Learning culture - organizational learning culture is under constant construction, “moving along an infinite continuum towards a harmonious learning environment”(Graham & Nafukho, 2007, p.282).

Organizational Power - the combination of utilizing relationships and communication in order to have influence on an organizational level.

Phenomenological Study - the type of study that “describes the meaning of experiences of a phenomenon (or topic or concept) for several individuals” (Creswell, 2007, p. 236).

Qualitative Research - “an umbrella concept covering several forms of inquiry that help us understand and explain the meaning of social phenomena” (Merriam, 1998, p. 3).

Quasi-required Training – Used in this study to describe training required by the organization, but with choices of the topics and times made by the trainees/employees.

Respect- Used in this study when discussing leader-member exchange theory (LMX) to discuss someone’s degree of value and admiration of someone.

Training and Development - “the focus on changing or improving the knowledge, skills, and attitudes of individuals” (Desimone, Werner, & Harris, 2002, p. 10) or “the planned effort by a company to facilitate employees’ learning of job related competencies” (Noe, 2005, p. 3). Beebe, Mottet, and Roach (2004) divided the definition into two parts: Training “is the process of developing skills in order to more effectively perform a specific job or task” (p. 5). Development- “is any behavior, strategy, design, restructuring, skill or skill set, strategic plan, or motivational effort that is designed to produce growth or change over time” (p. 8). This will be the HRD program context in which this study took place.

Training Process – Used in this study to refer to the communication, implementation and facilitation of training.

Trust- Used in this study when discussing leader-member exchange theory (LMX) to discuss someone’s degree of faith in someone or their perception that they can rely on that person or have confidence in them.

Verbal Immediacy - “includes the way you use words and language to convey a sense of interest and involvement with others” (Beebe, Mottet, & Roach, 2004, p. 200).

Data Collection Procedures

The data collection was conducted in two stages. In Stage I, I interviewed four employees of an airline company concerning their sales training experiences. Though these participants gave valuable information, I implemented Stage II in order to get six more perspectives on training from a variety of organizations, jobs, and professions. This stage provided support and contradictions that were vital to establishing depth in qualitative research. I conducted eight telephone and two face-to-face interviews in both stages of this study. In Stage I, I received clarification and conducted member checks via email. However, in the second stage, I conducted the member check via telephone. Next, I asked the participants in stage two follow-up questions if needed.

Stage I Data Collection

The organizational context from which Stage I interviewees were drawn is an airline company headquartered in the southwestern United States. The participants had all experienced training in the corporate sales department. The company has approximately 43,000 employees total, and the sales department has approximately 700 employees worldwide. Sales employees are strongly encouraged to attend as many training sessions as possible; however, they are required to attend only two training sessions per year. I labeled the Stage I participants' training "quasi-required." The sales managers were given a list of training sessions held at various times during the year. They were allowed to choose which training sessions to attend, but they had to attend a minimal amount of training.

Before interviewing participants who were airline sales representatives, I spent approximately 15 hours shadowing a sales manager and visiting with members of the sales department at corporate headquarters. During this process, sales managers and employees talked openly and freely with me. Also, I talked informally with the sales trainers in order to have a better understanding of the employees who worked in the industry every day. I chose to study this organization because I had a colleague whom I knew from my master's program who was employed with this particular company. He talked about his company and colleagues and indicated that they might be open to participating. Although I had initially intended to observe and interview a larger number of employees from this airline, the number of participants from whom I gained a commitment to participate in the study was four. Based on their company's policy, Stage I participants were able to choose any two training sessions from the training programs made available by the company's internal training division.

Participants in the study were asked first to complete a demographic information sheet reporting their age, race, sex, educational background, experience in years, years with the company, and department. This round was to determine how they described their training experiences and how that training experience related to their expectations or previous training experience. Finally, after the first interviews were transcribed and analyzed, I contacted the participants again via email to revisit the identified themes. Sending them my questions via email allowed them to take their time to think about the questions and call or respond via email with their responses.

In Stage I, the four interviewees were the only prospective airline participants solicited willing to be interviewed. Therefore, the sampling was convenient. Given time

constraints due to distance from the organization, email and phone were the only possibilities to recruit participants at that time. Following interviews with four study participants, I chose to end related-data collection.

Stage II Data Collection

This stage provided the further elaboration often needed in this type of exploratory and thematic qualitative research. It also provided data to support the argument that communication and training procedures are important topics to explore in organizational training. Though the participants in Stage II did not work in contexts different from those from the airline company, they shared the same desires for an effective training experience. Many of the participants in Stage II did not describe their training experience as positive, yet their explanations of what was lacking were juxtaposed to what Stage I participants said was positive about their experiences. In this stage of the study, I collected additional interviews from six different study participants. The interviews were collected using a convenience sampling approach (Patton, 1987). I interviewed people immediate to me who were willing to discuss their training experiences. This stage provided necessary contradictions by including some negative experiences and other industries, which added value to my findings in Stage I.

Participants were asked to complete a demographic information sheet reporting their age, race, sex, educational background, work experience in years, years with the company, and department. I conducted four of the interviews via telephone and two face-to-face. I would have preferred that all the interviews be face-to-face; however.

Nevertheless, the location of participants and restraints on the researcher did not permit face-to-face interviews with all participants.

Three of the six participants were employed by a large manufacturing company headquartered in the southwest U.S. Approximately 11,000 people work at this company. All six interviewees discussed their training experiences, indicating similar themes; however, the airline employees interviewed in Stage I experienced only face-to-face training at work. The manufacturing company in Stage II utilized mainly online training modules. The evaluation of both face-to-face and online training formats added depth to the trainees' descriptions of their experiences. Two of the six participants taught in higher education, and one was affiliated with a small family law firm.

Data Analysis Procedures

I applied steps to analyze the data and identify themes in all the interviews, as recommended by Creswell (2007) and Moustakes (1994). The steps that Moustakes outlined (listed in Chapter III) gave me detail and step-by-step guidance. Consistent with the before-mentioned guidance, I analyzed interview transcripts and data and developed themes and subthemes that characterized key elements of participant perspectives.

Summary of Introduction

An introduction for the remainder of this dissertation was presented in this chapter. It provided a rationale for the deployment of this training- and development-related study in the context of the HRD field. Second, as indicated, HRD and training and development researchers and practitioners have not thoroughly explored the training

experience from the vantage point of trainees using qualitative approaches. Furthermore, it was established that this exploratory study has the potential to make a valuable contribution toward more in-depth understanding of training practice and stimulate additional HRD-related scholarship.

Additionally, the chapter previewed the methodology. I listed the research questions and summarized how I collected and analyzed data in order to address the research questions. The next chapter identifies the need for exploratory qualitative research on training with particular emphasis on the perceptions of training participants in organization-sponsored training programs. The next chapter also provides a review of literature and illustrates how this study addresses a gap in human resource development, training, and instructional communication literature. Chapter III discusses the methodology used in this study. Study findings are described in Chapter IV, and, finally, Chapter V presents a summative conclusion to this study, including discussion and recommended directions for future research.

CHAPTER II

REVIEW OF LITERATURE

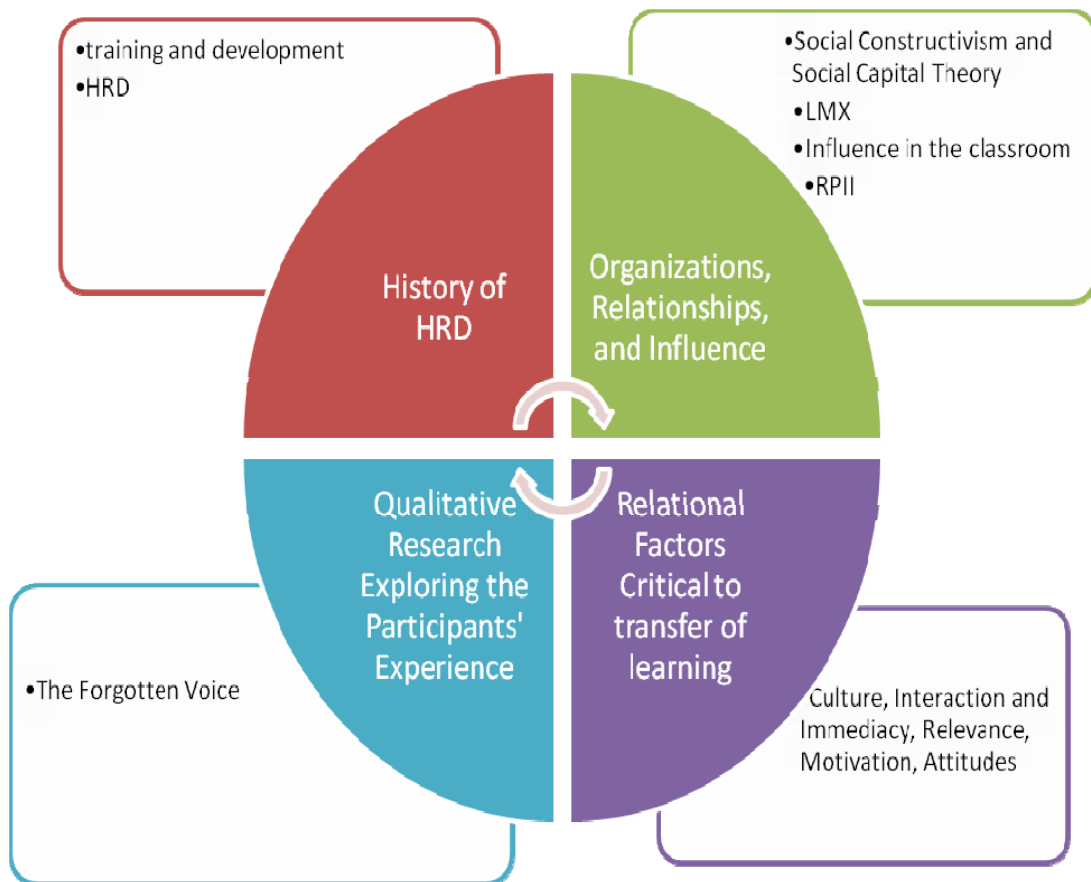
Human resource development (HRD) professionals have voiced concerns regarding the extent to which their contributions were truly valued by their organizations (Gold & Thorpe, 2008; Newstrom & Leifer, 1982; Stamp, 1997; Wilson & Cervero, 1996a; 1996b). Discussion in *T+D* magazine (formally called *Training and Development*) this popular field publication is sponsored by the American Society for Training and Development [ASTD]). In 2008, articles published included “*Training Is Broken [There We Said It]*” and “*Why (Most) Training Is Useless?*” (Maister, 2008; Mosher & Nguyen, 2008). Then, *T+D* kicked off 2009 with an article entitled, “*Money Matters, but Training Doesn’t?*” (Nancheria, 2009). These critiques suggest scholars need to explore how HRD practitioners can have influence with employees and within the organization. This chapter argues that exploring understanding trainees’ experiences in organization-sponsored training from their point of view is critical to effective learning, to the existence of the HRD profession, and, ultimately, to productive societies. In the next section, I discuss how I searched and selected the literature that frames the rationale behind this study.

To find literature relevant to my research, I conducted a search using Pro-Quest, Cambridge Scientific Abstract Database, Business Source Complete, and Academic Search. I then narrowed the database search to communication studies, education, management, and organization studies. None of the studies I found looked at the trainees’ perceptions. My search using the terms “instructional communication” and “phenomenology” revealed one study that explored the experience of having learning

disabilities. I used to terms “phenomenology” and “experiences” because I was interested in any studies that explored the participants’ experience, and phenomenological studies commonly explore the lived experience. This was the only qualitative study that I could find concerning participants’ experiences.

In this chapter, I begin with an historical overview of HRD and the role training and development (T&D) play in relation to the field of HRD. I also establish a rationale for an exploratory study of participants in organization-sponsored training and development. This section leads me to discuss human capital theory, social capital theory, and social constructivism, thus establishing a need to explore relational influence in organizational training and traditional education. Theories explaining the role of influence of relationships in organizations, learning, and, ultimately, HRD are reviewed in the next section. I then review outcomes of learning relationships in the traditional classroom and what those outcomes mean for training and development. Finally, this chapter reviews exploratory qualitative research in training and development, illustrating a significant research gap in understanding the participants’ experiences. Filling that gap would help organizations gain a competitive edge through HRD efforts such as training and development. Figure 1 provides a pictorial summary of the selection of the literature.

Figure 1. Holistic Picture of Selected Literature



History of Human Resource Development (HRD)

The World War I era (1914-1919) is often cited as the beginning of systematic large-scale organizational training and the World War II era (1939-1945) marked the emergence of training as a profession (Ruona, 2001). According to Pope (2000), the 1920s and 1930s emphasized public school systems as the primary source for training and education of the United States (U.S.) workforce. Despite this emphasis, there was criticism that schools failed to provide students with knowledge and skills immediately transferable to the workplace (Herr, 2001). This tension between employers and colleges

and universities persisted through the 1940s as the need to support the competency and career development of students and employees became an increasingly urgent concern (Pope, 2000). As a result, development became a part of training in the 1950s (Herr, 2001).

The civil rights movement, economic conditions (Herr, 2001), and women's liberation created a vision of hope for a better future. People wanted jobs that were personally satisfying and revealed elements of self-efficacy (Pope, 2000). The 1960s and 1970s saw educational policy and legislation that would improve the development of all human beings. Beginning in 1963, recommendations for the betterment of vocational education were formed into the *U.S. Vocational Education Act of 1963* (Pope, 2000). Subsequent updates were implemented in 1968 and again in 1976 (Pope, 2000). Although there are multiple examples of education-related legislation throughout the 1900s, this particular educational act illustrates the national emphasis on personal development and growth. In the 1960s, the U.S. civil rights movement led to major changes in the workplace and to landmark changes in employment and education law.

The vocational education trends of the 20th century can be explained using human capital theory (Becker, 1962; Dodds, Sun, & Roberts, 2008; Olaniyan & Okemakinde, 2008). Human capital theory not only explains how organizations benefit from educating employees, but it may explain how society benefits from education efforts (Dodds, Sun, & Roberts, 2008). Employee education is critical for both the consumers and investment because it provides value to the client or consumer and increases the value of the product or service (Olaniyan & Okemakinde, 2008). Developing worker or employee skills is crucial to productivity. Furthermore,

organizations benefit from specific training (Becker, 1962). Employees benefit from general training, which, in turn, makes the employee a potential asset to more organizations. It is important that organizations invest in training specific to their organization and the employees' needs there in order to gain from the investment in the training. As a result, the need for specific training and educational needs within the organization led organizations to prioritize developing human resources.

Changes in public education and policy led to the development of HRD (Harbison & Myers 1959; Herr, 2001; Nadler, 1970; Pope, 2000). As the transition from the industrial to high tech and service economies occurred in the 1970s and 1980s, organizations began relying less on formal education and government-sponsored vocational training and workforce development and more on internal training and development programs. Other related areas, such as organizational development and career development, also emerged, and related efforts soon extended into additional employee development areas, such as coaching, mentoring, and counseling for career, job, and organizational purposes. These elements were often coordinated centrally within organizations, and such efforts emerged as part of the day-to-day happenings in large organizations. The term *human resource development* (HRD) which was coined in the U.S. by Harbison and Myers (1959) and Nadler (1970), was embraced by the American Society for Training and Development (ASTD) in the 1980s. ASTD's definition of HRD included training and development, career development, and organizational development (Desimone, Werner, & Harris, 2002; McLagan, 1989).

In light of the changes in training and HRD, it is important to define and discuss the purpose of training and development today (Beebe, Mottet, & Roach, 2004;

Desimone, Werner, & Harris, 2002; Noe, 2005). Training and development (T&D) is “the focus on changing, or improving the knowledge, skills, and attitudes of individuals” (Desimone, Werner, & Harris, 2002, p. 10) or “the planned effort by a company to facilitate employees’ learning of job related competencies” (Noe, 2005, p. 3). Beebe, Mottet, and Roach (2004) define training as “the process of developing skills in order to more effectively perform a specific job or task” (p. 5) and development as “any behavior, strategy, design, restructuring, skill or skill set, strategic plan, or motivation effort that is designed to produce growth or change over time” (p. 8).

A survey that ranked the training and development of employees as one of the most critical jobs that managers faced suggests that more research is needed in the training and development area (Bunch, 2007). Financial and personal investment in training by an organization and its employees is important. Training establishes organizational cultures, has an impact on the perceptions of other HRD efforts, and is linked to national economic growth (Bunch, 2007; Hanscome & Cervero, 2003; Olaniyan & Okemakinde, 2008). In addition, Hanscome and Cervero (2003) and Bunch (2007) found that trainers have a unique role in shaping organizational culture, and the perception of T&D is strongly associated with the perception of HRD as a field (Bunch, 2007). Finally, the economic growth experienced in Hong Kong, Singapore, Taiwan, and Korea after a significant investment in education suggests there is a real payoff to be gained by such training (Olaniyan & Okemakinde, 2008). It is important that HRD scholars focus more scholarly attention toward the advancement of training and development.

Summary: Historical Context

This section has established the role that T&D played in the creation of the field of HRD (Desimone, Werner, & Harris, 2002; Elliott, 2000; Harbison & Myers, 1959; Herr, 2001; Nadler, 1970; McLagan, 1989; Ruona, 2001). Furthermore, examining the history of HRD reminds us that the field of HRD has grown to encompass more initiatives, and continuing research on training remains important. Moreover, Hanscome and Cervero (2003) and Bunch (2007) found that trainers play a unique role in shaping organizational culture, and the perception of T&D drastically impacts the perception of HRD as a field (Bunch, 2007). Finally, the literature reviewed shows that countries such as Hong Kong, Singapore, Taiwan, and Korea have invested more in education and training than many other Asian countries, and their economic growth has reflected their investment (Olaniyan & Okemakinde, 2008). This success illustrates how educational trends led to arguments by HRD scholars and practitioners that investing in human resources will benefit the organization both in the short-run and in the long-run. The section above also elaborated upon the notion that human capital theory not only explains how organizations benefited from educating employees, but that society can benefit from educational efforts as well (Becker, 1962; Brooks & Nafukho, 2006; Dodds, Sun, & Roberts, 2008; Nafukho, Hairston, & Brooks, 2004; Olaniyan & Okemakinde, 2008).

HRD scholars must focus more attention on the advancement of T&D. Because HRD is constantly changing to meet the demands of organizations and society, additional research should look at trainee interaction and experience during training. This section created a rationale for exploring a theoretical framework to examine

relational influence and to analyze literature that has looked at significant relational factors contributing to training efforts. The following section examines related theoretical foundations associated with organizations, relationships, and influence.

Theoretical Foundation

This section reviews relational theories that have been used to predict and explain how relationships impact learning or influence others. One key characteristic of relationships and learning is “influence.” Exploring relational influence in the traditional classroom and organizations will be the focus of this section.

Organizations, Relationships, and Influence

Lin’s (2001) social capital theory advanced human capital theory and HRD by illustrating the importance of forming relationships. Social capital theory explains why T&D efforts, as well as other educational efforts such as continuing professional education and independent learning, are critical. Social capital theory (SCT) is defined by Lin (2001) as “the resources embedded in social networks accessed and used by actors [...] and can also be envisioned as investment by individuals in interpersonal relationships useful in the market” (p. 25). Though there are many definitions, Lin (2001) reiterated that the group and the individuals within the group both benefit from the relationships. Colman (1988) found that social capital theory potentially explains the high school dropout rate, therefore establishing that SCT can impact employees’ attitude and perceptions toward training. Combining SCT and social constructivism builds a rationale for exploring relationships in today’s training and development context.

Social learning theory broke away from behaviorist theory through the work of Bandura in the 1960s (Merriam & Cafferella, 1999). Social learning theory accounts for both the learner and the environment in which the learning takes place. “The social constructivist view...posits that knowledge is ‘constructed when individuals engage socially in talk and activity about shared problems or tasks’” (Merriam & Cafferella, 1999, p. 262). Therefore, social learning theory supports the exploration of the learner and his or her environment, and social constructivism says that the relationships are critical to the learning environment. Meaning is made through conversation and dialogue between those with shared experience (Merriam & Cafferella, 1999; Vygotsky, 1978).

Social constructivist researchers can shed light on how trainees construct knowledge and how they establish the learning communities in their professions, and studies have created a rationale for looking at social constructivism in the training context (Brockman & Dirx, 2006; Cooper, Basson, & Schaap, 2006; Vygotsky, 1978). For example, a program developed using principles of social constructivism as foundational elements was found to result in a significant increase on the experimental group’s creativity, adaptability, and self-acceptance (Cooper, Basson, & Schaap, 2006). In other words, the trainees are passionate for change and are open to approaching problems in new ways. They accept change and adapt accordingly, and they feel competent and confident. Brockman and Dirx (2006) found that relational and dialogical constructs were instrumental in learning. Their findings included qualitative accounts of what relationships and social interaction meant to the learning process. Aaron said, “I learn how to solve problems through past experience, other operators, and

job training...” (Brockman & Dirkx, 2006, p. 209). Prior knowledge was identified as a resource for working through problems. One way that the participants in Brockman and Dirkx’s study gained knowledge was through stories from co-workers. “It’s the operators that give me knowledge, not the office people [management]” (p. 210). In conclusion, this study revealed that “[learning] is a together process...so if I learn something from someone, then you remember it and you tell somebody else about it. It’s kind of a continuation” (p. 210). Another operator said, “People before me passed on things to me, and I have always told people that have gone on after me—if you have any questions and I can help.” Denny wraps up the power of social learning by saying, “if you don’t work together, you’d go nuts” (p. 210).

Another qualitative study illustrated that people wanted to be included with those with whom they work (McClure & Brown, 2008). Building trust with those with whom you work can lead to increased intimacy followed by shared values and communication that could promote learning. McClure and Brown (2008) and Brockman and Dirkx (2006) built a rationale for continued work on relational learning that includes shared values and communication.

Organizations that invest in social relationships and interactions among their employees will see a *return on intangibles* (ROI) in the market (Akdere, 2005; Brooks & Nafukho, 2006; Cohen & Prusak, 2001; Shea, 2003). Akdere (2005) argued that HRD scholars should explore SCT in HRD, whereas Brooks and Nafukho (2006) build a strong argument linking social capital and HRD for the competitive edge of today’s organization. In other words, this is a sociological theory that makes sense in HRD, but one that has not been thoroughly explored. Social capital could improve organizational

performance (Brooks & Nafukho, 2006). It is crucial to explore the trust and shared comprehension, standards, and actions that connect networks and learning communities (Cohen & Prusak, 2001). Shea (2003) said that individuals reach self-actualization by having a caring person in their lives, and that they seek relationships with those who have more knowledge than they do (Vygotsky, 1978). Therefore, the process allows for the essence of their experiences to become known as they share with others.

Now that we know that relationships are critical to learning and performance, exploring how those relationships operate and work together will benefit HRD scholars and practitioners. Akdere and Roberts (2008) and Akdere (2005) discussed how social capital theory acts on the macro-, meso-, and micro-levels. Social capital is concerned on the macro-level with societal and economic development. The meso-level is concerned with organizational development, and the micro-level is concerned with individual growth and development.

Lin (2001) stated that social capital is developed from individual capital when information, influence, and social credentials are created and then reinforced. Findings from the studies reviewed by Lin suggest that we are more likely to initiate and engage interpersonally among those from similar backgrounds and positions. People either work in expressive or instrumental manners. They work either to maintain relationships or to gain resources or relationships. Some implications of social capital for HRD include

- 1) Social interactions and relationships are important in organizations;
- 2) Phenomenon explanation affects how organizations function;

- 3) HRD knows that relationships are important in getting expertise from resources to improve organizational performance;
- 4) Trust in each other and the organization are critical to HRD; and, finally,
- 5) Work teams are important in HRD practice and are only beneficial if members work well together. (Akdere, 2005)

Relationships are vital to organizations and learning; therefore, it is important to explore theories that have explained both relationships and influence in the organization and influence in the classroom.

Leader-Member Exchange (LMX)

LMX is a theory that frames how leadership relationships work in organizations (Graen & Uhl-Bien, 1995). There are three major components of LMX, including the leader, the follower, and the relationships that emerge (Graen & Uhl-Bien, 1995). Within these relationships, trust, respect, and loyalty are key characteristics of successful LMX interactions. According to LMX theory, leadership is both behavioral and emotional. Only when there is mutual trust, respect, and loyalty can a leader-follower relationship develop. An interpersonal relationship is one in which both parties (supervisor and subordinate) influence each other (Graen & Uhl-Bien, 1995). From this perspective, leaders must establish high levels of trust with their followers. Most leaders have a desire to establish trust in order to have influence on creating a shared vision for their organizations. Also, leaders must earn respect from their followers. When leaders establish trust and respect, follower loyalty is more likely to be created.

An important point in LMX is that leaders do not experience loyalty from followers unless they have exchanged trusting and respecting moments (Graen & Uhl-Bien, 1995). Schriesheim, Castro, Zhou, and Yammarino (2001) found that most studies had not tested LMX on the dyadic level, though the theory was originally called *vertical dyad linkage*. Hence, further scholarship is needed to develop LMX. Also, social interaction at work has not been adequately explored, and the exchanges between leaders and followers play an important role in skill transfer and motivation (Scaduto, Lindsay, & Chiaburu, 2008).

Current research suggests that interpersonal communication strategies can be used to create the partnership relationships necessary to achieve mutual goals (Mueller & Lee, 2002). Communication satisfaction is just one of many dependent variables influenced by high LMX. Lee (2001) proposed that the quality of LMX influenced perceptions of organizational justice and cooperative communication in work groups. There is a strong correlation between social relationships and organizational commitment (Madsen, Miller, & John, 2005). According to Douglas and McCauley (1999), management development literature reveals that formal relationship development programs are a growing trend in organizations; however, results show that only 20% of organizations have implemented programs internally and that only large organizations had successful programs. This is probably due to the bureaucratic nature of the organizations that do not lend themselves to informal relationship initiatives. In addition, these relationship development programs are usually for employees moving into management. As a result, it is critical to see how relationships have been developed to

influence learning in the traditional classroom in order to begin to understand relationships in employee-sponsored training.

Influence in the Classroom

In the 1980s, when HRD was emerging as well, instructional communication scholars conducted a series of studies exploring communication in the classroom (McCroskey & Richmond, 1983; McCroskey, Richmond, Plax, & Kearney, 1985; Richmond, 1990; Richmond, McCroskey, Kearney, & Plax, 1987; Richmond & McCroskey, 1984). These studies are reviewed in the section that follows. However, it is important to note that these studies sparked a line of research that determined that influential power was relational, thus supporting the notion of exploring influence in the training classroom. HRD professionals need to understand the significance of relationships and communication in this realm. The *Power in the Classroom* studies (McCroskey & Richmond, 1983; McCroskey, Richmond, Plax, & Kearney, 1985; Richmond, 1990; Richmond, McCroskey, Kearney, & Plax, 1987; Richmond & McCroskey, 1984)) provide support for how and why interpersonal power influences students and parents to fight on behalf of the teacher.

The purpose of McCroskey and Richmond's (1983) study was to establish valid and reliable scales to measure power/influence in the classroom. McCroskey and Richmond found that teachers viewed themselves as more likely to utilize reward, referent, and expert power (all powers defined below); however, the students perceived the teachers to utilize lower levels of power. The teachers and students shared a little more than 20% of the variance, meaning that teachers and students saw the behaviors as

positive power; however, teachers reported their own behavior to be more positive than did students. The researchers argued that students' perceptions of power should be explored because they respond in the classroom based on their perceptions. *Power in the classroom I* (the first study of many) revealed that the students do perceive teacher power, but that teachers must establish power with each new set of students.

As a result of the previous study, that found that students do recognize power in the classroom, wanted to know if different levels of power influence student cognitive and affective learning (Richmond, & McCroskey, 1984). As a result, higher referent power was associated with cognitive learning. Coercive power and legitimate power slow cognitive and affective learning. Referent and expert power support or increase learning. This finding supports the first study of this series because referent and expert are the most common uses of power. Reward was not found to influence either type of learning. Although reward does not increase learning, it does not impede learning; therefore, it can be used until the teacher can establish referent or expert power.

The next series of studies examined communication techniques that were utilized in the classroom and associates those techniques with perceptions of influence. Richmond, McCroskey, Kearney, and Plax (1987) found that effective teachers are perceived to use positive *Behavior Alternative Techniques* (BATs) and that teachers perceived to be poor utilized more negative BATs. Furthermore, teachers outside of a student's major area utilized more antisocial or negative BATs. Kearney, Plax, Richmond, and McCroskey, (1985) concluded that BATs and BAMs (*Behavioral Alternative Messages*) that resulted in rewards from student behavior was useful when the students were resistant to a new teacher or a new learning experiences. The

researchers of this power series studies recognize the importance of including student perceptions in their program of research.

Furthermore, McCroskey, Richmond, Plax, and Kearney (1985) concluded that it is crucial to focus on student perceptions in future studies. Student perceptions differed from those of teachers. Teachers trained in instructional communication do make different choices regarding the use of BATs/BAMs. Future research will look at the primary function of BATs and explore communication as a primary focus in the affective learning relationship. Immediacy accounted for at least 12% of the variance in both studies (Plax, Kearney, McCroskey, & Richmond, 1986). Model A informs the use of BATs in order to influence students and is supported by the data. BATs are ultimately related with affective learning based on the perceptions of teacher immediacy. The concept of immediacy in the classroom will be explained further in the “relational factors critical to learning transfer” section. The next theory explores a way to predict or explain the (teacher, student, relational etc.) influence in the classroom.

Relational Power and Instructional Influence

Mottet, Frymier, and Beebe, (2005) took Kelman’s (1958, 1961) level of influence and combined it with French and Raven’s (1959) social power in order to meet our instructional needs today. Raven (1993) discussed how French and Raven’s (1959) social power has been operationalized in a variety of ways, that improved scales have been developed, and that Raven had developed a new model to distinguish between impersonal and interpersonal power. Below, I review French and Raven’s (1959) social power theory and studies critiquing the social power theory. I then review Kelman’s

(1958) levels of influence theory. Finally, I outline how relational power and instructional influence could explain trainee perceptions and particularly the need for qualitative research in the area of relational influence in the organizational training classroom.

The study of social power and influence has been most predominate in industrial, organizational, and social psychology literature, and French and Raven (1959) is one of the most widely recognized conceptualizations of social power (Podsakoff & Schriesheim, 1985; Raven, 1993). Social power was derived from Kurt Lewin's theory of power (Raven, 1993). Just a decade ago, a discussion of social power appeared in virtually every introductory textbook in the fields of organizational behavior and social psychology (Podsakoff & Schriesheim, 1985). French and Raven's social power looked at power from a dyadic micro-level relationship. For example, the work of French and Raven, who have studied social power for years, has been predominately used to explore power in organizations. However, French and Raven's focus was on interpersonal relationships within the organizations, and that has been used more than any other conceptualization of social power.

The primary focus of French and Raven's (1959) bases of social power is to understand social influence. The development and adaptation of French and Raven's model of social power will be discussed after an explanation of the bases of power. French and Raven understood that many systems play a part in power and influence; however, they emphasized the dyadic relationship. Following are the original five bases of power that formed such a relationship.

Reward, Coercive, and Legitimate Bases of Power. The ability for someone to be influenced by an agent or initiator has to do with the agent's legitimate power and power to reward or punish behavior (French & Raven, 1959). This is a complex base of power because it is the most culturally bound. This base of power means that the agent has a title or position that makes sense that they would have influence in one's life. For example, seniority in a company may give someone legitimate power, but the degree of power may be culturally interpreted (French & Raven, 1959). However, the relationship does not necessarily warrant a role relationship; it can result as a mutually agreed-upon understanding that one can stipulate behavior to the other.

Expert and Referent Bases of Power. The agent is viewed as having valuable knowledge or credentials (French & Raven, 1959). This is the broadest base of power because the agent can be completely unaware of this level of power. Referent power is when the person (P) identifies with the values and beliefs of the agent. He or she admires the person and is attracted to that person's choices and behaviors in a given situation (French & Raven, 1959). Usually those who have referent power also are seen as possessing expert power (Podsakoff & Schriesheim, 1985). It is important to clarify that some articles report a 6th base of power (Raven, 1965). This base is called informational; however, it tends to be lumped in with the base of expert power. Someone that has informational power is probably considered an expert. It has been hard to operationalize distinctly the difference between the power to provide valuable information and the power to provide expert knowledge.

Kelman's Levels of Influence

Kelman (1958, 1961) provided a theory that described levels of influence that explained how people are influenced by one another. They will comply with organizational change and consultant recommendations, but compliance does not have a lasting effect on the organization's stability. At the compliance stage of influence, values and beliefs are not changed within the employee. The employee has merely learned how to comply or react to please the leader. Often, in the compliance level of influence, employees are seeking rewards or discouraging punishment building partner-like relationships is not a goal.

Identification. Strong working relationships are more likely when the client develops beyond compliance to identification and internalization. Immediate behaviors (described in the next section) help to move one beyond compliance. Identification occurs when employees identify with the beliefs and values of their organization or employer and when the employee can see the good or benefit to what is happening at work. The employee desires to reciprocate the feelings and expectations of the employer. For example, let us consider the trainer-trainee relationship to illustrate the difference between compliance and identification. The trainee complies with NEO (new employee orientation) to resist a punishment (termination) or to gain a reward (keep the job). However, trainees or new employees might actually listen to the training and put down their newspapers when they identify with the values and beliefs of their new organization.

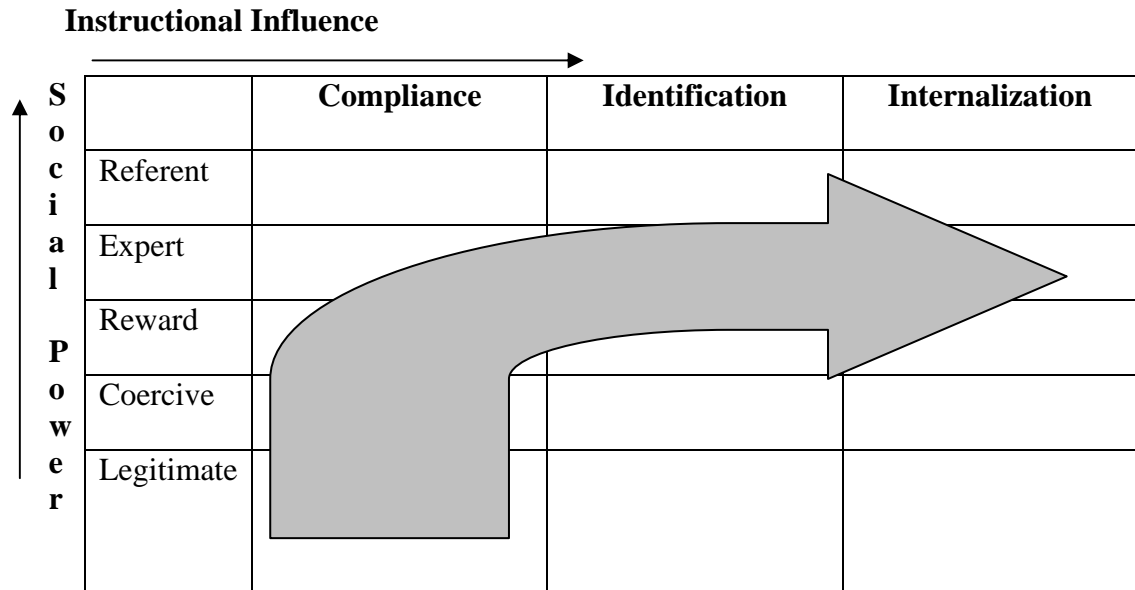
Internalization. Lastly, internalization occurs when students or trainees perform the task or integrate the change without even thinking about it (Kelman, 1961). They

believe in the law, shall we say, and that they are moral and ethical people by acting within it. Trainers or HRD professionals have the power to influence followers to identify; however, when an employee internalizes the same values and beliefs as the organization, a partnership has been formed. We need to explore specific communication behaviors that can aid in current organizational trends.

Summary: LMX, Relational Power and Instructional Influence

This section summarized relational theories that could influence learning or our understanding of perceptions surrounding various learning experiences. LMX theory was comprised of trust, loyalty, and respect and has been shown to influence training transfer and organizational commitment. The following quote summarizes the findings of the classroom power studies and the relational power and instructional influence (RPII) theory: “Power is context or relationship specific. A person is not ‘powerful’ or ‘powerless’ in general, but only with respect to other social actors in a specific social relationship” (Shafritz, Ott, & Jang, 2005, p. 285). French and Raven have typically been used to predict and measure quantitatively. Nevertheless, Podsakoff and Schriesheim (1985) and Raven (1993) suggested that qualitative studies explore the actual messages and effects of power through primarily observations. Furthermore, Kelman’s levels of influence have been measured through attitude scales, questionnaires, and interviews.

Figure 2. Predicted Relationships between Relational Power and Instructional Influence



(Mottet et al., 2005, p. 275).

Finally, this section of the literature review identifies that a teacher has influence in the classroom. Those who have influence have lasting power. Studies support the notion that establishing influential relationships in the classroom benefits both the teacher and the students. However, studies have not explored what this “looks like” for the adult learner within organizations. Though questions have been raised about power, influence, and immediacy for trainees, scholars have not explored these issues in depth from a communication perspective.

Relational Factors Critical to Learning Transfer

Significant challenges for HRD include changes in workforce demographics, global competition, skill gaps, and encouraging life-long learning and organizational learning (Desimone, Werner, & Harris, 2002). Training is central to learning that occurs in organizations; therefore, it is important to explore relational factors that influence training transfer and learning. Many studies have looked at T&D issues within the context of HRD. There are a number of factors that influence transfer of learning (Egan, 2008; Egan, Yang, & Barlett, 2004; Lim & Johnson, 2002). Training transfer must be measured and explored in order to report back to managers that the training is working (Garavaglia, 1993).

Burke and Hutchins (2008) explored best practices in training transfer, and they found a number of new variables, such as peer involvement, informal communication, and face-to-face communication, to study. More specifically, this study was designed to explore variables or concepts such as culture, interaction, immediacy, motivation, relevance, and attitudes that are critical to peer, informal, and face-to-face communication. Training transfer can be measured qualitatively by questionnaires and reports or quantitatively by surveys. Trainers must do their part to ensure that the trainees are motivated and have learned the desired objectives in order to transfer the learning so that the organizations and employees can grow (Yamnill & McLean, 2001). Many factors influencing training transfer has been explored and measurements developed (Egan, Yang, & Barlett, 2004; Egan, 2008; Holton, Bates, & Ruona, 2000; Seyler, Holton, Bates, Burnett, & Carvalho, 1998). This section primarily explores how

culture, interaction, immediacy, motivation, relevance, and attitudes influence training transfer.

Culture

The culture of the organization impacts transfer of training (Egan, Yang, & Barlett, 2004; Egan, 2008). Egan, Yang, and Barlett (2004) and Baldwin, Magiuka, and Loher (1991) found that organizational learning culture significantly influenced trainee motivation to transfer learning. More importantly, Egan (2008) found that subcultures within organizations impact learning transfer. For example, the sales department of an international airline would be a subculture of a larger organizational culture. More specifically, Egan found that innovative, supportive subcultures are strongly associated with employee motivation to transfer learning. It was suggested that more exploration be conducted to identify behaviors that support employee learning and learning transfer-oriented subcultures. Based on the aforementioned findings, interaction between employees and those who support learning is an important element that can be related to training contexts as well.

Interaction and Immediacy

It has been argued that interpersonal interactions play a role in learning in the traditional classroom and in organizational training (Akdere, 2005; Brockman & Dirks, 2006; Burba, Petrosko, & Boyle, 2001; Cooper, Basson & Schaap, 2006). Therefore, this section will explore the behaviors and communication that are crucial to interpersonal interactions. Limited research in the distance education environment has found that interaction did not significantly impact learning or satisfaction in a web-conferencing

situation (Stephens & Mottet, 2008). It is imperative that we explore interaction in training in order to understand the trainee perceptions concerning the role of interaction. Burba et. al. (2001) identified key communicative skills that help teachers and trainers in educational interaction. These same behaviors could be beneficial to HRD professionals who desire to create trusting and respectful relationships with their colleagues and subordinates. Two skills that would aid HRD professionals or managers in influencing others are enthusiasm and interaction (Burba et. al, 2001).

Enthusiasm and interaction are critical instructional behaviors. The category of enthusiasm consists of using tools such as humor, dramatic speaking styles, facial expressions, moving and interacting with the trainees, expressing energy, smiling, eye contact and gesturing (Burba et al., 2001). Empowerment is a popular buzzword and sometimes is perceived as an empty concept in organizational programs; nevertheless, engaging in interaction behaviors may create ownership in employees' minds (Baldwin, Magiuka, & Loher, 1991), and that is empowering. Interaction with the trainee includes calling students or trainees by their names, actively listening to student experiences, allowing them to participate in the training, encouraging questions and praising trainees. Interaction behaviors give trainees ownership in their training experience. Students respond in school when the curriculum is adapted to their needs and experiences. Likewise, trainees will respond positively when allowed to take an active role in training that could positively impact their jobs and careers.

Clarity, enthusiasm, and interaction were found to be significant ($p < .05$) for trainees in the United States and in other, Western and Eastern cultures (Burba et al., 2001). This finding is important to trainers because it reveals that effective instructional

behaviors are tools that trainers can utilize safely with a variety of audiences and cultures. All of these skills are important to building relevance, increasing motivation, and creating immediacy.

Enthusiasm and interaction were found to be significant ($p < .05$) in training classrooms worldwide. Clarity behaviors include giving clear examples, using multiple examples, repeating important information, demonstrating application of content, expressing interest in student progress or development, and using visual aids (Burba et al., 2001). These types of behaviors also aid in reducing the trainee anxiety (Burba, et al., 2001). Though such instructional behaviors as interaction, utilizing clear examples, and applying relevant examples to trainee jobs are significant, it is important to understand what the behaviors may be communicating to students or trainees.

Instructional communication scholars have researched how instructional behaviors send messages of immediacy to students in traditional education settings. Immediacy is a communication concept that explains how certain verbal and nonverbal communication behaviors reduce tension and psychological distance (Mehrabian, 1971). Immediacy behaviors “are those behaviors that communicate liking and engender feelings of pleasure. Immediacy behaviors develop a positive relationship between trainer and trainee” (Beebe, Mottet, & Roach, 2004, p. 199). Immediacy has had limited exploration in the organizational training setting. However, some key findings in instructional communication play a central role in interpreting the experiences of trainees in the face-to-face training context. When exhibited by teachers, immediacy behaviors may be likely to increase rapport with students (Duplin-Bryant, 2004). Rapport is crucial in establishing relationships of mutual trust. Immediacy communicates

a sense of caring for the student and his or her needs. In turn, students feel comfortable, which creates a receptive learning community (Easton, 2003).

There is a positive correlation between both teacher verbal and nonverbal immediacy, motivation, and learning (Christophel, 1990). Furthermore, Christensen and Menzel (1998) examined the relationship between teacher verbal immediacy and student state motivation. A one-way ANOVA showed a significant positive difference between the perceived cognitive learning and state motivation across levels of teacher verbal immediacy. The studies show that, although nonverbal immediacy might be perceived as having a higher impact on student learning, the collinear measure reinforces that the two (verbal and nonverbal) work together. Immediacy can be achieved by using referential skills, which are communicative behaviors that make people feel good; immediate behaviors tend to increase learning (Frymier & Houser, 2000). As mentioned before, enthusiasm and interaction were found to be significant ($p < .05$); therefore, this finding reinforces the contention that such skills are possibly important in training and development contexts. When effective communication establishes interpersonal relationships in the workplace, trust and respect increase, thus establishing rapport. The concept of immediacy has been explored in regard to online courses.

The context of online courses is critical to training and development contexts as well. However, in a 2005 study, learner-to-learner immediacy (created in online discussion rooms/boards) did not influence course outcomes or the interactivity of the course in the online course context (Conway, Easton, & Schmit, 2005). Distance education findings continue to be nonconclusive; however, a study conducted in 2006 supported further exploration of media richness theory's role in the satisfaction and

interaction of students in distance education environments (Daft, Lengel, & Tevino, 1987; Rupp, Gibbons, & Snyder, 2008; Shepherd & Martz, 2006). Interaction and Immediacy in the classroom has been found to impact a number of outcomes in the traditional setting and may impact learning outcomes in training and development. Githens (2007) argued that interpersonal interaction is critical to professional development course participants, and he found that the role of the instructor is crucial to developing and facilitating those relationships. Because the findings have been supported in the traditional face-to-face learning environment, it would be worth exploring if immediacy is mentioned in the same training context.

Relevance

Trainees expect that training will be relevant to their needs and their jobs (Yamnill & McLean, 2001). It is frustrating for trainees to be pulled away from work demands to experience training that does not meet their goals and expectations. Trainees and students are less likely to listen and retain information if the training content is not relevant to their development in their jobs, careers, or personal goals (Yamnill & McLean, 2001). It is imperative that trainers and prospective trainees communicate relevance, as it is likely to influence employee motivation to learn and motivation to transfer learning (Yamnill & McLean, 2001).

Students in face-to-face college classrooms who perceived their teachers to be making the course content relevant were more motivated to study.

A positive, moderate sized correlation (.46) between state motivation and teacher relevance was found (Frymier & Shulman, 1995). Although the present study used a cross-sectional design in which causal relationships were difficult to

isolate, we do have reason to believe that the teacher efforts to make content relevant may have led to the increase in motivation (Frymier & Shulman, 1995 p. 48).

Immediacy, clarity, redundancy, and humor, previously mentioned as appropriate instructional behaviors, have been found to build relevance in the minds of students (Frymier & Houser, 2000; Frymier & Shulman, 1995). Trainees are able to organize the information related to their jobs and their needs. Clarity, defining objectives, providing clear examples, and repeating important information in an entertaining manner may maintain trainee attention throughout a training session. As a result, the trainee may be more able to make connections clearly, more willing to listen to the trainer, and have a greater likelihood of retaining the information presented (Frymier & Shulman, 1995).

Burba et al. (2001) illustrated the importance of clarity behaviors in international training. Instructor self-disclosure by providing examples and encouraging discussion may be used to clarify course content as well as building relevance and increasing learning (Witt & Wheelless, 2001). Nevertheless, Chesebro and Wanzer (2005) found directions for future research that still need to be explored. First, they suggested investigating which strategies were effective for communicating relevance. Also, Chesebro and Wanzer (2005) recommended exploring learning strategies that may help students appreciate content relevance. Finally, these authors suggested that researchers and teachers involved in distance education explore the various strategies used in that setting to communicate relevance. Baldwin, Magiuka, and Loher (1991) found that simple fostering the trainee's perception of empowerment or of the relevance of the training content can dramatically increase motivation.

Motivation

Trainees who are motivated are more inclined to learn (Guerrero & Sire, 2001). Guerrero and Sire (2001) found that motivation measured by self-efficacy and instrumentality had a positive influence on the learning of French workers in a training program. In the aforementioned study, trainees who perceive that training meets their needs were motivated and learned more information and vital skills than trainees who did not perceive that the training met their needs. For example, if employees are having difficulty with managing upset customers and that difficulty is impacting their job satisfaction, they will be motivated during training to listen, learn, and transfer their training to their jobs. Motivation impacts our next training concern, training transfer (Tannenbaum, Mathieu, Salas, & Cannon-Bowers, 1991).

As with teachers, trainers are often faced with the challenge of motivating trainees who do not come to the training session motivated and excited to learn. The lack of motivation may be attributed to a number of factors, including, but not limited to, a poor work environment and lack of peer and supervisor support. Though a trainer cannot control many of the personal and organizational factors related to trainee motivation, the trainer can attempt to build motivation and content relevance within the context of the training relationship and by appropriate use of training content. Thus, establishing a powerful position with trainees will increase motivation and perhaps impact organizational power. A trainee's motivation also has been shown to influence learning outcomes (Christensen & Menzel, 1998; Christophel, 1990). Though I acknowledge that secondary and college instructors, as well as adult educators, do not encounter the same situations found in organization-sponsored training, some of their experiences are

transferable to the trainers' work situations.

Motivation plays a huge role in student and trainee learning. Everything from perceived credibility, immediacy, and environment can be attributed to motivation (Christensen & Menzel, 1998; Christophel, 1990; Facticeau, Dobbins, Russell, Ladd, & Kudisch, 1995; Gorham & Millette, 1997). Learning outcomes are a crucial part of any training program. Many times, the affective objectives or outcomes are underestimated (Christophel, 1990). Gorham and Millette (1997) found teachers more likely to attribute high motivation to something they said or did in class. Trainers often take the same approach as teachers do when analyzing highly motivated trainees. However, trainers will usually attribute de-motivation to laziness on the part of the trainee and not as a result of a poor training session. Trainers may also fail to realize that affective outcomes lead to cognitive and behavioral outcomes. Or, the trainer may struggle with ways they can build affect for the content and skills that they train or teach. Perhaps trainers feel that the time constraints of a training program do not allow for relational or affective influence. The ability to build affect into the learning process creates influence in the training classroom.

Attitudes

Trainee attitudes are critical to training effectiveness (Noe, 1986; Noe & Schmitt, 1986). Chih, Liu, and Lee (2008) found that positive attitudes of trainees are imperative if one expects trainees to attend training and increase learning. In addition to the communication issues in training, studies continue to explore trainee transfer (Baldwin & Ford, 1988; Ford & Weissbein, 1997). Ford and Weissbein (1997) and Baldwin and

Ford (1988) define transfer of learning as “the degree to which trainees effectively apply the knowledge, skills and attitudes gained in a training context to the job” (Baldwin & Ford, 1988, p. 63). Tannenbaum et al. (1991) found that a positive attitude increases motivation, and an increase in motivation increases trainee transfer of learning. When trainees are given choices and options in training, their motivation increases, as does their learning (Baldwin et al., 1991). In addition, trainees’ intrinsic reward increases when they feel good about themselves (Factau, Dobbins, Russell, Ladd, & Kudisch, 1995). Trainee self-image impacts appreciation for what is being learned and for the person presenting the information.

Summary: Relational Factors in Learning

To summarize, relational factors in learning, culture, and subcultures of the organization impact transfer of training (Egan, Yang, & Barlett, 2004; Egan, 2008). There are many relational factors that impact learning. It has been argued that interpersonal interactions play a role in learning in the traditional classroom and in organizational training (Akdere, 2005; Brockman & Dirkx; 2006; Burba, Petrosko, & Boyle 2001; Cooper, Basson, & Schaap, 2006). Instructional communication scholars have researched how instructional behaviors send messages of immediacy to students in the traditional education setting. Immediacy is a communication concept that explains how certain verbal and nonverbal communication behaviors reduce tension and psychological distance (Mehrabian, 1971). Instructor immediacy impacts training relevance, and trainees expect relevant training that is aligned to their needs and their

jobs (Yamnill & McLean, 2001). Motivated trainees are more inclined to learn, and trainee attitudes are critical to training effectiveness (Noe, 1986; Noe & Schmitt, 1986).

Qualitative Research and Participants' Experiences in HRD

Wang and Wang (2006) asserted that little HRD research had been conducted concerning participant experiences in HRD programs and initiatives. I commend them on their efforts to examine participant experiences and feel that more qualitative research is warranted in various other experiences. More qualitative research is needed to increase the transferability of findings to additional HRD-related contexts (Miles, & Huberman, 1994; Moerer-Urdahl, & Cresell, 2004). Additional exploratory qualitative research may broaden transferability to a variety of HRD contexts. The more qualitative research conducted in HRD, particularly training, the more likely it is that employees can relate to the findings of the studies.

Results from a study conducted by Wallick (2001) indicated CEOs felt it was the responsibility of managers, not trainers, to determine workplace learning needs. They do not fully understand the practitioner's role in workplace learning. However, how can we really understand the role of HRD professionals without discussing participant experiences? Wang and Wang (2006) were on the right track when they initiated research that looked at participant understanding of the learning experience. On the other hand, we continue to ask managers to help us understand the training or HRD perception when it might be more fruitful to ask those participating in the various HRD initiatives about their experiences. In summary, based on the review of literature conducted for this study, published reporting of perspectives regarding trainees in organization-sponsored

training appears to be largely restricted to the perspectives of executives and managers (Wallick, 2001; Wang & Wang, 2006).

The Forgotten Voice

As I mentioned earlier, *T+D* magazine published articles in 2008 and 2009 that warrant a look at trainee perceptions regarding training. These articles are similar to the Newstrom and Leifer (1982) article, “Triple Perceptions of the Trainer: Strategies for Change,” which concerned the position and perception of the trainer. Twenty-six years later, the practitioner literature is still discussing issues of influence and change for organizational training. It does not matter if the article has the words “training,” “useless,” “perceptions,” or “change” in the title, when the conclusions are the same. I argue that it is time to establish a research agenda that explores the negative perceptions of trainees and why they exist? This section will explain why exploratory qualitative research is the best methodology to explore work experiences and perceptions of trainees in organization-sponsored training contexts. Furthermore, this section will reveal how little scholars have explored trainee experiences in order to continue to develop organizational workers.

HRD scholars and trainers have yet to examine in-depth trainee experiences and trainee perceptions of training in which they participate (Caputo & Cianni, 1997; Dougherty & Krone, 2000; Wang & Wang, 2006; Wilson & Cervero 1996a, 1996b). In addition to potentially elaborating on motivation, relevance, attitudes, and other affective reactions, it would be beneficial to explore and describe trainee classroom experiences as elaborated upon by individuals who have participated in training. Available studies

explaining or exploring various perceptions of training programs, adult education programs, or HRD programs most often examine instructional design issues rather than the process as described by the participants (Bunch, 2007; Burba, Petrosko, & Boyle, 2001; Cervero & Wilson, 1994; Lombardozi, 2007; Tannenbaum, Mathieu, Salas, & Cannon-Bowers, 1991; Yukl, Falbe, & Youri, 1993; Wilson & Cervero 1996a, 1996b).

In-depth descriptions of participant experiences of the process of “being trained” appear to be missing from research. Though qualitative methodologies have been used to explore management perceptions of training programs and MBA student perceptions of their education (Wallick, 2001; Wang & Wang, 2006), it appears that HRD researchers have ignored the trainee perceptions of their experiences. The meaning or interpretation trainees assign to training processes and procedures, therefore, has not been adequately addressed. The remainder of this chapter establishes that HRD scholars tend to look at training and education programs from a managerial perspective, thus supplying support for the argument that the “worker’s voice” is becoming marginalized or “gendered.” In other words, I am not talking about the feminine female in the workplace. I am exploring the idea that giving voice to management concerning training rather than to those who actually participate in the training programs, minimizes the importance of the employees’ experiences. Though employees other than women have often been labeled as “gendered,” jobs, experiences, and departments of the organization can be gendered as well. Buzzanell (2000) explained “gendered” in regard to criticizing “traditional works in order to define its limits and domain so that we see alternatives” (p. 48). For example,

Bullis and Stout (2000) illustrated how a profession can be gendered or excluded:

However it is important to acknowledge that exclusions vary by context. Exclusions are often directed at the feminine rather than the biological females. For example, biologists in the forester-dominated U.S. Forest Service have long been marginalized. Because of their emphasis on “biotic communities” and “webs of life.” Their voices represented unwelcomed criticisms of the more traditional practices of “tree harvesting.” (Bullis & Stout in Buzznell, 2000, p. 65)

Thus, professions or positions can be marginalized in the organization.

Furthermore, various experiences can be marginalized by extending a voice to some and not to others. The fact that trainee experiences have not been explored because of unwelcomed criticism or the need to give voice to management establishes this as a gender issue. The notion of critically examining the practices and professions of HRD through a feminist or critical lens has emerged in the past decade (Bierma, 2005; Brown, Cervero, & Johnson-Bailey, 2000; Fenwick, 2005; Howell, Carter, & Schied, 2002). Caputo and Cianni (1997) found that black women were not engaging in training opportunities as white women were. Exploratory qualitative design would explain to HRD scholars and practitioners possible reasons for these choices. In light of the trainee perceptions being undermined, organizational training is, by definition, genderized (Ashcraft & Mumby, 2004; Bullis & Stout, 2000; Fenwick, 2005; Poell, 2007). Training and development departments face the irony of existing in practice, maintaining a close connection with organizational concerns, and a more immediate formal obligation to worker welfare. This dialectic struggle warrants exploration (Fenwick, 2005).

In conclusion, my review of HRD literature revealed that limited work has been conducted in understanding the employee training experience (McClure & Brown, 2008; Wallick, 2001; Wang & Wang, 2006; Ya-Hui Lien, 2005). The qualitative scholarship that has been conducted in HRD has explored CEO perceptions, MBA student

perceptions, the phenomenon of belonging and inclusion at work, and Taiwanese women working as clerks and administrative assistants. In light of the role that training continues to play in HRD, the phenomenon of relational learning in formal training should be examined. Exploratory qualitative research can help us to understand the training experiences so that we can understand what is important to the employee (McClure & Brown, 2008; Ya-Hui Lien, 2005). Therefore, HRD scholars better understand what needs exploration. We can provide scholarship that informs practitioners on possible adaptations and shared interests (McClure & Brown, 2008).

Summary Review of Literature

The review of the selected literature has created a rationale for more exploratory and thematic qualitative research in formal organizational T&D. Though HRD definitions often include initiatives such as career development and organizational development, the history of HRD, and the large number of organization-sponsored training efforts that remain a central element of employee development efforts, reminds us of the importance of training-related research. Educational methods have branched from training to coaching and on-the-job learning, to name a few. Nevertheless, Hanscome and Cervero (2003) and Bunch (2007) have found that trainers have a unique role in shaping organizational culture, and the perception of T&D drastically impacts the perception of HRD as a field (Bunch, 2007). Finally, Hong Kong, Singapore, Taiwan, and Korea have invested in education, and their economic growth has benefited from this investment (Olaniyan & Okemakinde, 2008).

This chapter provided a review of related literature that supports the framing of my study. Social capital theory, social learning theory, and social constructivism provided a framework for the formal face-to-face training context under investigation. Yet, LMX and RPII explained why interaction and relationships in the context of organization-sponsored training need exploration. Therefore, I was led to look at organizational culture, motivation, relevance, interaction, attitudes, and training transfer. This chapter supports the need for an exploratory qualitative study describing the experiences of trainees in organization-sponsored training. This literature provided related perspectives that support relationships as vital to workplace learning and, ultimately, as possible support for the formation of a competitive edge for an organization (Brooks & Nafukho, 2006; Olaniyan & Okemakinde, 2008). However, we do not have adequate elaboration whereby employees describe what training-related relationships look, sound, and feel like. And yet we know that the affective domains of training are as important as the cognitive and psycho-motor dimensions. This literature review identifies a gap in incorporating organizational and instructional communication literature with HRD-related scholarship. Finally, this chapter provided an argument for the utilization of exploratory qualitative research in formal training. As described in Chapters IV and V, research should explore and describe trainee classroom experiences as elaborated upon by individuals and analyzed by researchers from interpretivist/social constructivist perspectives (Bunch, 2007; Burba, Petrosko, & Boyle, 2001; Cervero & Wilson, 1994; Lombardozzi, 2007; Tannenbaum, Mathieu, Salas, & Cannon-Bowers, 1991; Yukl, Falbe, & Youri, 1993; Wilson & Cervero, 1996a, 1996b).

CHAPTER III

METHODOLOGY

Chapter III is organized into five sections. The qualitative methodology used in this study is outlined in the first section. Then, the research questions are presented. Next, two data collection stages are outlined. After discussing data collection procedures, the chapter describes the data analysis techniques employed. Finally, Chapter III discusses how the researcher's trustworthiness and credibility were established. In this final section, study design limitations are also conveyed.

The review of available literature revealed a gap concerning the exploration of trainee perceptions of their training experiences. Overall, the review of literature (Chapter II) illustrated that further research elaborating upon participant experiences, interactions, perceptions, and interpretations in training contexts would be beneficial to HRD theory, research and practice. Many assumptions have been made in quantitative research without insight into the experiences of the employees (McClure & Brown, 2008; Podskoff & Schriesheim, 1985; Raven, 1993; Wallick, 2001; Wang & Wang, 2006; Ya-Hui Lien, 2005). Inherently, quantitative research fails to provide perspectives or elaboration on the constructions, interpretations, and underlying assumptions (Denzin & Lincoln, 2000). Trainees form perceptions prior, during, and following their learning experiences that can be thoroughly explored only through qualitative research. The exploratory study outlined in this chapter was designed to examine the experiences of trainees in quasi-required, organization-sponsored training programs with the following features—formal, quasi-required, face-to-face, and online training.

This exploratory study was based primarily on convenience sampling. Patton (1987) defined convenience sampling as “doing what is fast and convenient” (p. 57). The participants interviewed were convenient to the researcher, which means they were willing to be interviewed; however, the participants had distinctive characteristics that are discussed later in this chapter. There were other people asked, in Stage I, to participate in the study who chose not to. This is discussed in more detail later in the chapter. The intended impact of this exploratory study is to inform the field regarding employee training perceptions and experiences. The interview process occurred in two phases, including:

- Stage I. The four interviewed were the only participants willing to be interviewed after I conducted job shadowing and observed a two-day training within the airline organization. Email and phone were the only possibilities for recruiting participants at that time. After conducting these initial interviews, I chose not to go back to the organization to find more participants. I chose to find six more participants who had different organizational and professional experiences.
- Stage II. Six more perspectives were added for depth and elaboration purposes. These participants were personal contacts, friends, or relatives convenient to me. The six participants were the first six people I asked to interview concerning their training experiences.

The research problem and literature gap are addressed by the methodology outlined in this chapter. The first section is organized into four subsections. The first section elaborates upon the qualitative methodology utilized. General qualitative

research is discussed in the second subsection. The third subsection discusses the research questions. Finally, the research procedures are explained.

Qualitative Methodology

An interpretive, general qualitative methodology (Merriam, 1998) was utilized in this study. Then, through a social constructivism lens, I looked closely at the interactions described in the trainees' experiences in order to understand their assumptions and how they made sense of their experiences (Holstein & Gubrium, 2005). In other words, I formed an interpretation of the participants' experiences by talking with them and having them talk about how they made sense of their training experience. Interviews were used to collect data from study participants. The data were descriptive, and the descriptions revealed themes that led to general elaboration related to the study purpose and research questions. According to Merriam (1998), qualitative researchers are interested in understanding the meaning that people assign to their experiences. In this study, I was interested in gaining knowledge from the *emic* or insider view. Another characteristic of general qualitative methodology is that, as the researcher, I am the primary tool for collecting and analyzing data. Finally, this study was inductive in nature. It built a theoretical explanation for the meaning of the training experience and allowed the researcher to generate a few hypotheses for future research.

A foundational approach to this study was informed by social constructivism (Holstein & Gubrium, 2005). Social constructivists desire to understand the world in which they exist, whether it is work or personal (Creswell, 2007; Denzin & Lincoln, 2000). Experiences are not assigned to an individual, they are developed through the

participant's interaction with others. Therefore, the training interactions must be explored to fully understand the training phenomenon. The phenomenon of the trainees' training process was examined in this exploratory descriptive study.

Research Question

The main key research question in this study was: What is the experience of employer-sponsored training from the perspective of trainees? This question was answered with an initial interview with participants and a follow-up email and/or phone conversation. Additional probing or subquestions were also asked of participants, including:

What were trainee perceptions of their training experience?

How did the trainee describe the context of the training experience?

What were the ways in which the instructor was perceived by trainees?

How did the manner in which trainees perceived the instructor impact their training experience?

How do the opportunities to apply or recall their training experience post-training influence the trainees' perceptions about training?

Procedures

The procedures were organized into two stages. Stage I was divided into six parts: (1) organization, (2) characteristics of study participants, (3) participant description, (4) data collection, (5) telephone interviews, and (6) follow-up email. The first stage was conducted during the end of 2008. I interviewed four members of an

airline company concerning their sales training experience. Though these participants gave valuable information, I implemented a second stage in order to get six more perspectives from a variety of organizations, jobs, and professions. This stage provided support and contradictions that were vital to gaining the depth of description for which I was striving.

Stage II provided data to support the argument that communication and training procedures are important to explore in the training experience. Stage II is divided into similar parts: (1) organization, (2) characteristics of study participants, (3) participant description, (4) data collection, and (5) interviews. I then outlined the data analysis procedures. This section discusses how transcendental phenomenology steps were implemented to analyze the interviews. Finally, I describe the researcher's role in understanding and interpreting the data.

Participant Interviews: Stage I

Data were collected in Stage I in the sales department of an airline. I did not have knowledge of specific job demands, stresses, or educational needs of the people in this industry or in corporate sales. I had developed relationships with former and current trainers in the airline industry, who led me to believe that this type of organization would be beneficial to understanding the training experience. Though I had a purpose in selecting the airline industry, I chose an airline company that was convenient to my home so that I could meet the study participants in person. Though all interviews occurred over the telephone, I had met the four participants and established rapport.

I had never worked in the airline industry or corporate sales. I did not understand the nature of the job or the stresses on the sales employees within a volatile industry. Before interviewing participants, I spent approximately 15 hours shadowing a sales manager and visiting with members of the sales department at headquarters. During this process, sales managers and employees talked openly and freely with me. I talked further with the sales trainers in order to have an understanding that would aid me in analyzing the shared understanding of those employees who work in the industry every day. Again, I chose this industry, though I did not have prior experience in it, because I had a colleague whom I knew from my master's program who was employed with this particular company. He talked about his company and colleagues and indicated that they might be open to helping me with my research.

Organization

All interviewees in Stage I were employed by an airline company headquartered in the southwestern United States. The participants had all experienced training in the corporate sales department. The company employees total approximately 43,000, and the sales department has approximately 700 employees worldwide. Sales employees are strongly encouraged to attend as many training sessions as possible; however, they are required to attend only two training sessions per year. The participants are able to choose any two training sessions they would like to attend from the training programs made available by the company's internal training division. Those in management roles are required to attend one training a year. They may choose from such trainings as effective presentation skills, professional selling skills, and "foot in the door." Also, the company

offers personal development and motivational training. The sales training is always presented by one of two trainers, with the other often assisting the primary trainer. The training is usually conducted at headquarters, but the two trainers have also traveled to present sales training in “hub” cities for the company in order to meet trainee needs.

Characteristics of Study Participants

All participants were college educated, and one held a graduate degree. Three were Caucasian, and one was Asian. They live and work in the southwestern, southeastern, and midwestern U.S. and “off-shore.” Below is a description of each participant so that it is clear how their demographics and experiences provide different perspectives.

Criteria for Participation. The criteria for study participation were as follows:

- Participants must have experienced sales training within their company.
- The participants (through observations and conversations) seemed to be willing to provide feedback.
- They were willing to participate in an interview lasting 30 minutes to one hour.

Prior to extending interview requests, I shadowed one sales manager, introduced myself to those stationed at the headquarters, went to happy hour with two sales managers, attended a two-day training, and had lunch with the trainees. Though participants met outlined criteria above, it is important to understand that the interview sample was convenient in that they were “willing” to share. One person I asked said “no,” and others did not respond to the email request. Three from Europe did not respond, nor did two from the United States. I did not go back to the organizational site

or call others after the holidays because I had reached a redundancy of information from the four participants. The account of their sales training perceptions gave me the information needed. I would have liked to have interviewed a few of the international participants; however, the significant time differences and language barriers likely influenced their decisions not to participate in the study.

During this stage, I examined the training and learning experiences of three men and one woman. One woman and one man gave me their business cards and said they were willing to help me. Approximately four weeks had passed since the last training they had experienced. However, they mentioned other training experiences in the past to provide depth and elaboration. Two other participants' training experience had occurred months before their interviews. One participant allowed me to shadow him on the job, and I was interested in formally interviewing him based on unique things that he said in a conversation regarding his sales training. He discussed the importance of interaction among trainer/trainees and trainees/trainees. I enjoyed visiting with him about his experience and found that he could add description and detail to the other interviews. It had been over 6 months, but less than 12 months, since his last training. Finally, I interviewed a sales manager who participated in training, but who also had started helping with training from the instruction point of view. Though everyone interviewed had experienced the training that I observed, two of my participants were not present during my observation. The participants selected ages ranged from 25-64.

Participant Descriptions. Stage I participants had experienced training in the same department by the same trainer. They all experienced sales training, software training, and motivational training with the same trainers. They recalled specifically their

training experience in 2008. However, I allowed them to refer to any recall they had that contributed to their training experience. Pseudonyms were used for each participant.

“Christopher.” The participant was a Caucasian male, age range 31-35, and was the sales manager-South Central Region. He had an undergraduate education and had worked for another airline company before coming to work for this airline company.

“Kimberly.” This participant was an Asian female, age range was 56-60, and was the sales manager-North America sales. Kimberly had an undergraduate education and had previous careers in banking and human resources. She had worked for this company for 30 years.

“Mike.” The participant was a Caucasian male, age range 61-65, and was the sales manager for the Arizona, Kansas, and Missouri region. He had an undergraduate education and had worked for the airline company for 36 years. In addition, Mike had worked in in-flight and operations before entering sales.

“Patrick.” The participant was male, age range 20-25, and was the manager-sales coordination. He had a master’s degree and had worked for this company for less than two years. This was his first job in the airline industry.

Data Collection

This section describes how I collected my data in Stage I. I conducted telephone interviews and received clarification and member check via email after the analysis stage. If I needed clarification, I asked questions at that time. Also, I allowed participants to clarify or add to what they thought of the analysis as well.

Telephone Interviews. Participants were asked first to complete a demographic information sheet reporting their age, race, sex, educational background, experience in years, years with their current employer, and department. They answered the questions on the demographic sheet via telephone. The first round of interviews occurred once I obtained Texas A&M University Institutional Review Board (IRB) approval. I would have preferred to have conducted the interviews face-to-face, but the location of the participants and restraints on the researcher did not permit face-to-face interviews. As mentioned before, I selected participants who had indicated interest in helping with the study. Also, two of the participants had mentioned in conversations, valuable perspectives regarding their training experiences that I wanted to further explore. I invited the participants to talk in an unstructured manner regarding their perception of their individual training experiences.

All participants initially were asked the same questions regarding their training experiences. The amount of probing I did during the interview was directly related to the extent to which interviewees did or did not offer elaboration. However, it is important to note that, consistent with an exploratory qualitative approach, the questions or prompts were very open-ended. These questions or prompts ensured that I did not guide the participants to respond in accordance with my assumptions or my experience; rather the emphasis was on supporting the interviewee in the reporting of her or his individual experiences and perceptions. Regularly asked questions were as follows:

1. Tell me about this training experience.
2. Tell me about the environment or circumstances that influenced or affected your experience of this training session

Table 1. Interview Probing Questions for Stage I

Interviewee Name	Interviewer Probing Questions
Christopher	<p>What was your feedback to them?</p> <p>Was there anything in particular that they did in the training activity-wise or hands-on or instruction-wise that really made that a good training experience?</p> <p>Interaction with each other, the participants, the trainer, or both?</p> <p>What do you think that they do that makes you feel comfortable being open and honest with them about what you need?</p> <p>So, given that one was behavior training and one was technology training, do you find that you can see a difference maybe in the environment in the way that the trainers presented the information?</p>
Kimberly	<p>So even after training, you can go back and contact her with questions and things like that?</p> <p>Have you had training experiences in the past that you didn't think were as good or beneficial as this training experience?</p> <p>Do you typically go to more technical type training than sales skills training?</p> <p>Have there been times on the job where you recall actually using what you learning in the training?</p>
Mike	<p>Did she do anything specifically in the conducting of the training or the delivery of the training that really helped drive that home for you?</p> <p>Can you recall a specific incident or something that she did that's an example of that?</p>
Patrick	<p>So you like the interaction and all with other trainees?</p> <p>Describe <i>terrible</i>.</p> <p>How did the trainer demonstrate a different experience? What were some of the good things that you liked as far as preparation and organization that you saw from the trainer?</p> <p>So your colleagues or co-trainees, their attitudes kind of impacted your attitude? Do you think that had an impact on the trainer's success?</p>

Follow-up Email. Finally, after the first interviews were transcribed and analyzed, I contacted the participants again to revisit the identified themes via email. I asked the participants to verify my themes if valid and add clarification if they felt it was needed. By sending them the questions via email, I allowed them to take their time to think about the questions and call or respond via email with their responses. This was both a member check of the initial interpretations of themes and a way to further gather thoughts or ideas from the participants that I needed. This stage was to aid in providing more detailed description or perhaps “member check” the emerging themes. The themes (detailed in Chapter IV) were relevance and applicability, attitudes and preferences, immediacy, and relational learning. When conducting a member check, the participants review the transcripts in Stage II (Greenfield, Anderson, Cox, & Tanner, 2008; Guba & Lincoln, 1985) and were asked to verify interpretations in Stage II while those in Stage I just verified my interpretations (Guba & Lincoln, 1985; Riessman, 1993; Schwandt, 2001).

Participant Interviews: Stage II

Stage II provided the further elaboration needed in exploratory qualitative research. Though the participants in Stage II did not work in sales for an airline company, they shared the same desires for an effective training experience. Some of the participants in Stage II did not describe a positive training experience, yet this disparity does support the themes from Stage I. Chapter IV explains in further detail how the stages work together.

In Stage II, I conducted six additional interviews. The interviewees were, again, part of a convenience sample. I interviewed people immediate to me who were willing to discuss their training experiences. This stage provided necessary contradictions through some negative experiences and perspectives of interviewees from industries different from those of Stage I participants.

Organization

Three of the six participants were employed by a large manufacturing company headquartered in the southwest United States. Approximately 11,000 people work at this company. All six interviewees discussed their training experiences and indicated similar themes; however, the airline organization in Stage I implements only face-to-face training in their sales department. The manufacturing company in Stage II utilizes mainly online training modules, and the evaluation of the two added depth to the description of the trainees' experiences. Two of the six participants taught in higher education, and one of the participants was affiliated with a small family law firm. These participants' training was face-to-face.

Characteristics of Study Participants

Participants' education ranged from high school diploma to terminal degrees. All of the participants were Caucasian. Four participants were female and two were male. I did make a conscious effort to find women to balance the experience as much as possible. They lived and worked in the southwestern U.S. Below is a description of each

participant. The fact that they represent a variety of organizations and professions added further exploration for the shared experience.

Criteria for Participation. The criteria for study participation were as follows:

- Participants must have experienced training for their job sponsored by their employer.
- The participants were willing to participate in the study.
- They were willing to participate in a phone or face-to-face interview lasting 30 minutes to one hour.

Participant Description. The following participants had experienced training in different organizations by various trainers. They discussed general training experiences, including antitrust training, ethics training, required continuing education, mediation training, new-employee orientation, and product knowledge training. As in Stage I, in an attempt to maximize interviewee responses and openness to the interviewer, an open-ended questioning approach was utilized in all interviews. All names used in this chapter and in Chapter IV are pseudonyms for the participants.

“*Cydney.*” This participant was a Caucasian female in her late 20s who had a PhD and was an assistant professor and Basic Course director for a university in the southwestern United States. She has worked with the university for one year and has conducted training for graduate teaching instructors and adjunct faculty, as well as practiced sound instructional practices in her college classroom. I knew that Cydney would examine her training experience with a critical eye for this study.

“John.” This participant was a Caucasian male in his mid-to late 30s with MBA and JD degrees. John was vice president of Investor Relations and Treasury for a Fortune 1000 manufacturing company and had been with this company for 10 years. This participant’s career had always been with his present company. Given our relationship [Because of our friendship] I had heard him discuss both positive and negative training experiences. I felt that including his experiences would add to the scholarship of understanding training perceptions and experiences.

“Marilyn.” Marilyn was a Caucasian female lawyer in her early 30s. She had worked with her present firm in the Dallas/Ft. Worth area for three years. Prior to joining the family law firm, Marilyn was an assistant district attorney for one of the largest counties in Texas. I asked Marilyn to participate because she is extremely vocal with her opinions. I knew that she would not mind sharing her thoughts on her training experiences.

“Patricia.” This participant was a Caucasian female in her early 50s who had a high school diploma. She is a legal assistant for a Fortune 1000 manufacturing company and has been with the company for over 30 years. Patricia had been a participant in a pilot study that I conducted two years earlier.

“Paul.” This participant was a Caucasian male in his mid-50s. This participant has an undergraduate education and is the director of corporate real estate for a Fortune 1000 manufacturing company. Paul has been with this company 15 years. Prior to joining this company, he worked with various financial institutions in real estate. I know this participant personally. Paul has a vast amount of experience in his field and has

worked for a number of organizations. More importantly, he is a storyteller. I knew that he would describe in detail his experiences and would be willing to provide colorful detail and examples in his descriptions.

“*Whitney.*” This participant has an MA degree and works as a lecturer and as assistant Basic Course director for a southwestern U.S. university. She held the position as Basic Course director for one year and assistant Basic Course director for one year. Whitney is a Caucasian female in her late 20s who had been in pharmaceutical sales before entering the teaching profession. This participant, like Cydney, teaches and has conducted training for graduate teaching instructors and adjunct faculty. It is important to note that Cydney and Whitney do not teach or train at the same university.

Data Collection

The next sub-section will detail the interview process. I discuss how I collected the interviews and how the interviews were conducted. Finally, the section below will provide examples of questions asked to participants.

Interviews. Participants were asked to complete a demographic information sheet reporting their age, race, sex, educational background, experience in years, years with the company, and department. Some participants were asked demographic information sheet questions via telephone. I conducted four of the interviews via telephone and two face-to-face. I would have preferred to have conducted all the interviews face-to-face, but the location of participants and restraints on the researcher did not permit a face-to-face interview. I allowed the participants to talk about what they wanted to talk about as long as it had to do with their perception of their training experiences. If they wanted to discuss their experiences in relation to other training experiences, I allowed the discussion.

Participants were asked the same questions regarding that experience as the participants in Stage I. More probing questions were added, depending on participants' initial descriptions for clarity or detail. However, it is important to acknowledge that, in accordance with what I have previously outlined in Stage I, the questions or prompts were very open and general in order to get the participants' viewpoints.

Table 2. Interview Probing Questions for Stage II

Interviewee Name	Interviewer Probing Questions
Cydney	<p>Tell me a little more about this—that they wouldn't open it up for discussion or leave time for you to talk to each?</p> <p>What were your feelings at that moment?</p> <p>Were you frustrated or angry?</p> <p>How did you continue to sit there and have a positive attitude?</p> <p>You mentioned that there wasn't a lot of interaction among the trainees, did the trainer do any activities?</p>
John	<p>What do you remember from the training about FCPA?</p> <p>When did you take that training? Have you had it in 2009, or was the last time 2008? You don't know if you had it in 2009?</p> <p>When you say elementary, you're saying the content is commonsense or the way they delivered the training was?</p> <p>What made them feel open, do you think?</p> <p>So when these decisions are made to do this, it was convenient in cost or learning?</p>
Marilyn	<p>They open it up for discussion and opportunities to learn from one another?</p> <p>So, the content was boring you?</p> <p>Are you assessed of your knowledge?</p>
Patricia	<p>Can you think of a time that you felt that a training program was effective for you and what made it effective?</p> <p>Do you like that type of training? Would you prefer online?</p>
Paul	<p>How does the face-to-face version of that training compare to the online version?</p> <p>Interaction with each other, the participants, the trainer, or both?</p> <p>You think there's a difference between being competent in the content and being a competent trainer?</p>
Whitney	<p>Can you give me an idea, a picture of how long this training is occurring before you actually have to set foot into the classroom?</p> <p>What was your attitude as you approached this?</p> <p>You are currently a full-time faculty member. Do you draw on what you learned in 4 days of training to be a TA now as a faculty member?</p>

Follow-up Conversation. I conducted the member check via telephone. I emailed the participants the transcripts of their interviews. I gave them a few days to review, then I called to verify the transcripts. At this time, I asked the participants in Stage II follow-up questions for clarification if needed.

Data Analysis Procedures

Merriam (1998) discussed that qualitative researchers should analyze data as they are collecting that data. I took notes while interviewing. In addition, I analyzed each interview after it was conducted. Then, I read through the transcripts again after all interviews had been collected. Identifying and categorizing qualitative data can be ambiguous (Merriam, 1998). Therefore, I applied the analytic steps recommended by Creswell (2007) and Moustakes (1994) in order to identify themes in all the interviews. The steps that Moustakes outlined gave me detail and guidance for analyzing the data. The following were the steps used in the analysis process.

1. Interviews were taped and transcribed.
2. I read the interview through and wrote down my initial impressions of the participant's experience. I summarized what they were saying in my own words. Numerous readings and listening to the tapes helped me to understand not only what I thought was significant, but what I felt was important to the interviewee to communicate.
3. Next, I looked at the interviews as a whole and identified common themes.

4. I read the interviews again in order to insure that I did not miss critical statements.
5. I reduced the interviews to significant statements or quotations.
6. Finally, I decided on common themes and contradictions (disagreements, challenges, or paradoxes) that were expressed in the interviews.
7. I color coded the themes. An example of this procedure can be seen in Appendix A (Lieblich, Tuval-Mashiach, & Zilber, 1998).
8. Then, using a code sheet (see appendix A), I began organizing significant statements and identifying specifically the themes that each statement illustrated.
9. I read through the code sheets again, eliminating redundant statements.
10. As I organized the redundant statements into themes, I looked for links in the themes. In addition, I found that the contradictions or challenges to comments said previously, led to an explanation of the themes or added to the meaning of the shared experience. I identified key words or phrases that were common to each theme.
11. I contacted the participants via email (Stage I) or phone (Stage II) informing them of the themes that I interpreted from the interviews. I asked for feedback regarding the themes and any clarification. In some cases, I asked the participants for additional explanations and examples of the themes. I told them they could think about their responses to ensure thought and clarity in their feedback.

12. Finally, I found that the themes were linked by “episodic narratives.” Please see the definition in Chapter I. Those narratives are explained and discussed in Chapter IV

Researcher’s Role

In Stage I, I shadowed a sales manager (interviewee) on his calls and discussed his job in depth for a day. In addition, I spent some time in the sales department at headquarters engaging in conversations with employees. The purpose of this interaction was to get a better understanding of the job and employees’ work needs. Finally, I attended training and introduced myself to the potential participants. My role was primarily to learn about the sales manager job so that I could better understand their training experience as they reported. I bracketed (Creswell, 2007; Moustakas, 1994) my experience from the initial review and analysis of the interview data. In conclusion, I used my experience to interpret the findings during the analysis process.

In Stage II, I personally knew the participants from the manufacturing company. I have a family member who is affiliated with this company and, therefore, I have a great deal of background knowledge about the organization. I had conducted a pilot study in this company for my qualitative research course. In addition to my personal relationships with some of the participants, one of the participants reported a training experience that I personally had experienced on the job. I had previously worked at one of the places where Whitney had worked and, during my time there, I experienced one of the training sessions to which she referred. Having had a similar experience as a former employee, I

had to be especially mindful to bracket or set aside my training experience during analysis. Finally, I interviewed an attorney about her mediation training. Though I did not experience the same training as the attorney I interviewed, I have previously had mediation training elsewhere. This participant presented her experience as an attorney-mediator; my experience had been only as a mediator. This is important to note because she brought in her knowledge of law and her mediation experience as a lawyer to describe her experience.

Trustworthiness and Credibility

I followed the guidelines set forth by Riessman (1993). Those guidelines including explaining the concepts of persuasiveness, correspondence, coherence, and pragmatic use. I acknowledge that my interpretations are my own, and that other researchers could apply their own interpretations of my data. I have presented a detailed description of how I arrived at my interpretations (Riessman, 1993) and a visible diagram of my process. I made data available for participants' member check. Please see specifics under the heading "Email Questionnaire" in Stage I.

In Stage II of this study, I provided the transcripts for the participants to review. After they reviewed the transcripts, I visited with them regarding their perception of the transcribed accuracy of what they said. I asked any follow-up questions at the time that I confirmed their transcript. The member check and the follow-up questions all occurred via telephone.

Finally, my research is useful to the researcher, the trainer, and the organization. Below is a detailed list of how I worked to establish trustworthiness and credibility with the participants.

1. I met my participants prior to asking for their participation. I introduced myself and visited with them concerning their job and job-related experiences.
2. I made sure that I “bracketed” out my experiences regarding training and what I thought about the training that I observed. This ensured that I interpreted the actual perception and descriptions of the participants.
3. I conducted member checks with the participants about my interpretations. I first asked them for feedback or clarification on the emerging themes. Finally, I asked them to comment on a draft of my findings that included their quotations in Stage I. In the Stage II member-check process, I had the participants review their transcripts prior to discussing the themes with me.
4. I asked for further explanation on what I found in the initial interviews.
5. During the interview process, I paraphrased as I understood the participants’ response and this helped ensure that I reported their intended message.
6. I discussed my findings with colleagues to get other perspectives on the interviewees’ message.

Limitations of Study Design

Limitations to this study included common methodology concerns (i.e., no generalizability, small sample size) and timeline constraints with the participants. Also,

the use of convenient sampling is a limitation of this study. My values and assumptions as the researcher may have limited the findings of this study, which is why I have to explain adequately my analysis procedures. There were challenges in “bracketing” my own training experiences from my interpretation of the informants’ “shared” experiences. In addition, I used a small sample and not a large, “generalizable” sample size, and I used a research process not designed to formulate generalizable findings. Furthermore, I addressed concerns of the “halo effect” by establishing rapport with the participants and the trainer. I developed rapport with one participant by shadowing and socializing with him and with another participant purely on a social and friendly level. We did not discuss my study. I got to know them as individuals and discussed the stresses and joys of their jobs at their organization. I engaged in conversation with the training participants during coffee breaks and lunches.

Also, I had limited face-to-face access with the participants. Though we did have face-to-face communication during my learning engagements at the company and one training, the formal interviews were conducted on the telephone. This was done because of the location of participants and numerous personal demands on the researcher. Three of the 10 interviews were conducted in person. My interpretations of their nonverbal communication during the interview could have added to the interpretation of the findings or lead to more probing questions. In hindsight, an alternative approach would have been to conduct a focus group to identify key areas of emphasis and to conduct in-depth interviews based on the focus groups. Other options would have been to conduct a phenomenological study, include a series of interviews (3 or 5 rounds), or to conduct an

ethnographical study of Stage I utilizing interviews, observations, and a number of visits to the organization.

Finally, the timeline posed (during Stage I) constraints to collecting and analyzing data that could possibly have added to the outcome of the study. By timeline, I am referring to the time it was convenient to interview and the training calendar and when trainings would be offered at the company's headquarters and not overseas. Though the timeline does not "limit" the findings of the study, it did affect the study's outcomes.

Summary of Methodology

This chapter has explained the theoretical approaches to this study, the research questions, the data collection procedures, data analysis, and researcher's credibility. I described how qualitative exploration best met my research goals. Finally, two stages of data collection were clearly outlined and the significance of the two procedures defined.

In sum, my participants met general criteria; however, the interviews were also fast and convenient. I conducted telephone and face-to-face interviews in both stages of this study. In Stage I, I received clarification and member check via email. However, in Stage II, I conducted the member check via telephone before the data interpretation. At this time, I asked the participants in Stage II follow-up questions, if needed. Again, I let the participants talk about what they wanted to talk about as long as it was related to their perceptions of their training experience. So, if they wanted to discuss their experience in relation to other training experiences, I allowed the discussion.

Probing questions were added depending on participants' initial descriptions for clarity or detail. However, it is important to acknowledge that, in accordance with what I have previously outlined, the questions or prompts were very open and general in order to get the participants' views. These questions or prompts ensured that I did not guide the participants to respond in accordance with my assumptions or my experience.

Finally, after the first interviews (Stage I) were transcribed and analyzed, the participants were contacted again to revisit the identified themes via email. By sending them the questions via email, I allowed them to take their time to think about the questions and call or respond via email with their response.

I collected six additional interviews in Stage II. The interviews were collected with a convenience sample. I interviewed people immediate to me who were willing to discuss their training experiences. Finally, I emailed the participants (Stage II) the transcripts of their interviews to verify the content before analysis. Then, I called all six and asked if they had anything further to add to the descriptions of the experiences.

In conclusion, research questions, data collection, and data analysis procedures were discussed. Data analysis steps were outlined and the steps that ensure trustworthiness were listed in detail. Finally, this chapter explains the limitations of the research design and the manner in which the study was conducted. Overall, this chapter elaborated upon the design approach that I felt would best answer my research questions. The design included general qualitative exploration. In the next chapter, I present study findings resulting from the analysis procedures as outlined above.

CHAPTER IV

FINDINGS

This chapter presents findings gathered from 10 study participants, all of whom had experiences as trainees in employer-sponsored training. First, the participants are described in detail. Next, themes are discussed in the first section of the findings. Then, I discuss how the themes work together to form the necessary learning relationship using LMX. Finally, I summarize the chapter.

Study Participants

This section introduces the study participants. The study included 10 employees from a variety of companies, professions, and training experiences. I have given the participants the following pseudonyms; Christopher, Cydney, John, Kimberly, Marilyn, Mike, Patricia, Patrick, Paul, and Whitney. I knew these study participants from a variety of contexts. I met three participants during the progress of this study. I met three participants in graduate school during my master's program. One participant helped me in a pilot study during my graduate course work. Finally, I know three of the participants on a personal level.

I included Patrick because he is an SME (subject matter expert) on effective training. He provided elaboration on his perception of his experience as a trainee based on his experience as a trainer. Another participant, Christopher, had training experience with another airline company. His career experiences provided him with unique points of comparison. As I mentioned in Chapter III, he allowed me to shadow him on the job and

we had informal conversations concerning his training experience that led me to ask him if he would consent to being interviewed. Mike and Kimberly expressed interest in participating prior to recruitment of interviewees. They each had been with the company for over 30 years.

Finally, I know John, Paul, and Patricia personally. I had prior knowledge that they had experienced both effective training and frustrations with their training experience. Particularly, they reported frustrations with online training. I also know Cydney, Whitney, and Marilyn on a very personal level and thought that their training experiences outside the corporate working environment would add a layer necessary for this exploratory study. It is important to add that both Cydney and Whitney have additional expertise regarding training because both teach at the higher education level and both have been responsible for training colleagues. I think they provided depth and description of their training experience informed by their work experience, something that other participants might have found hard to articulate.

Given the increasing use of technology in the delivery of employee training, description and elaboration from participants who have had both face-to-face and online training were determined to be helpful in this exploratory examination of trainee experiences. The experiences of these participants provided an alternative view that gave more description and depth to those employees from the airline who were interviewed. A short description of each participant's professional and demographic information is provided in Chapter III, including age, education, number of years with the organization, prior work experience, and previous/current jobs. Some participants chose to share more

information than did others; however, all shared basic demographic information that is outlined in Chapter III. Perceptions from these participants regarding training in the workplace are detailed below. Four themes that emerged from the 10 interviews are discussed. In addition, the themes are supported by interviewee quotations.

Participant Training Experiences

The participants had positive and negative attitudes toward their training experiences. I allowed each participant to guide the interview as long as the discussion was related to the central research question. Therefore, if the participants wanted to focus on one training experience or provide contrast for clarification, comparison, and further elaboration, I supported the discussion. The participants in this study provided clear descriptions of what they attributed to their perceptions of their training experiences.

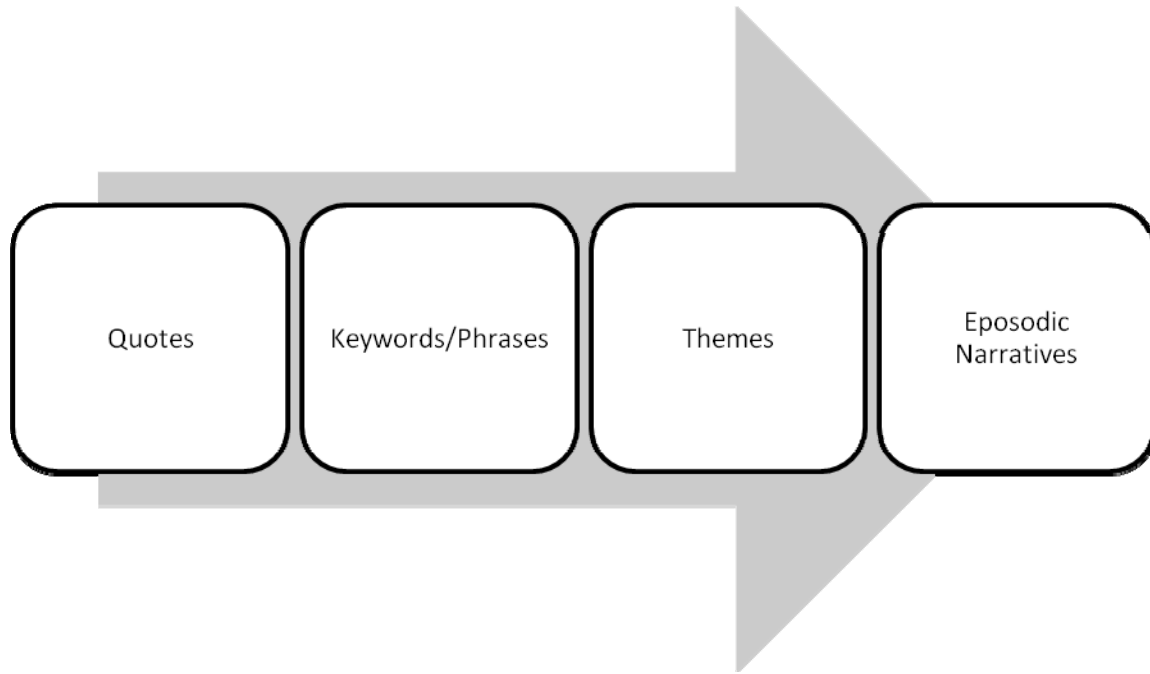
Table 3 provides a summary the themes that emerged and the cluster of phrases that are associated with the emerging meaning or narratives of those themes. This provides a “snapshot” into what sort of phrases were said or written down that I associated with the various themes. Table 3 shows further how I associated the themes with two shared or common narratives. For example, Whitney said,

As trivial as it sounds, but I liked him [a trainer] more than I liked her [another trainer]. I don't know how to explain what that meant for me in my training. I hope that it doesn't color how much I learned in her training – the fact that I didn't like her [the trainer] that much or she rubbed me the wrong way. She wasn't approachable. She [the trainer] didn't seem very happy to be there.

As illustrated in Table 3, I indicated that the quote represented the third theme, immediacy. This is nonverbal communication that creates a sense of comfort. Table 3 shows how I associate the theme of immediacy with the episodic narrative of caring. Finally, Figure 2 provides a visual for the process that led to this study's findings.

Table 3. The Process: A Picture of the Findings

Quotes	Themes	Episodic Narratives
<p>“Well, waste of company assets, waste of time and that the message – that particular message, that particular training session overreached its boundaries and someone made the decision that all managers need to go to it,...They should have used more of a rifle telescope or scope on a rifle to determine who their target audience was, but instead they used a wide shotgun blast ... you sort of blame it back on the HR, employee development.”</p>	<p>Theme 1: Relevance and Applicability. This theme reveals shared messages concerning what constitutes “future usefulness,” “worth,” and “relation to trainees’ experiences.” (Mottet, Richmond, & McCroskey, 2006).</p>	<p>Time and consideration are needed to adapt to the needs of the trainee. It is worth the time and effort because then the content is retained. During this exchange, I see that mutual respect is developed if it is made relevant and applicable, but if it isn’t, the trainees feel as if the session was a waste of valuable time.</p>
<p>“One of the things that probably, in the long run, they might want to be able to do, is do an online training program, instead of forcing us all to come into Houston. ... Now, there’s – that’s a two-edged sword. On the one hand, you could probably get a lot of people who would take more training because it would be offered in that mode. On the other hand, I think there’s a sacrifice that takes place as a result of that. And that is the networking and the camaraderie that comes by being in a class with the other co-workers... .”</p>	<p>Theme 2: Attitudes and Preferences. This theme represents shared messages that revealed the participants standpoint or view and choices concerning their training.</p>	<p>Theme 2 contributes to the “worth my time” narrative. The participants described attitudes and preferences concerning training that impacts the narrative regarding whether or not the training was “worth their time.” In addition, this theme influences “if you (they) don’t care, then I don’t care.” This theme reveals that it is hard to have a positive attitude or thoughts on training if the trainer and fellow trainees do not care about the training.</p>
<p>“As trivial as it sounds, but I liked him more than I liked her. I don’t know how to explain what that meant for me in my training. I hope that it doesn’t color how much I learned in her training – the fact that I didn’t like her that much or she rubbed me the wrong way. She wasn’t approachable. She didn’t seem very happy to be there.”</p>	<p>Theme 3: Immediacy (Mehrabian, 1971). Immediacy behaviors “are those behaviors that communicate liking and engender feelings of pleasure.” (Beebe, Mottet, & Roach, 2004, p. 199). This theme shows shared meanings concerned with feelings of comfort and liking.</p>	<p>The trainer and trainees communicate with one another to establish comfort and a relaxed learning environment because again they care enough about each other to communicate immediacy. These types of messages work to establish trust among participants. That trust leads to their asking questions and seeking clarification. The trainee can sense if anyone else values what is occurring. That influences the story that they tell about the experience. “If they care, then I care.”</p>
<p>“People tend to go places together during breaks or lunch, and out-of-town trainees commonly go out together afterwards. If our Houston-based trainers train out of town, it is very common for a large number of trainees, perhaps the entire class, to go out for dinner with the trainer afterwards. We are very relationship based.”</p>	<p>Theme 4: Relational Learning. This theme illustrates directly the significance of relationships in the training process. However, it also shows how the other themes work to develop vital relationships.</p>	<p>As the trainer and trainees work to develop relationships vital to learning and performance, they establish loyalty to one another. This is when they can work to influence each other. When relationships are formed in learning/training, there is that sense of caring or mutual influence.</p>

Figure 3. Thematic Analysis

Themes

Qualitative data analysis of participant interviews produced four distinct themes. First, participants described how learning occurred when content was relevant and how retention occurred with real-life application. Second, participant attitudes revealed that participants preferred face-to-face training when learning occurred as a result of relational immediacy. Participants described how trainers worked to create a comfortable, relaxed, and “good” learning environment through immediacy (see Chapter II for the difference in immediacy and attitudes). Finally, relational learning is critical to the overall process of learning (see Chapter II). I learned from both positive and negative perceptions about the training experiences and related perceptions shared by

interviewees. Regardless of their job, education, gender, or industry, many of the study participants' frustrations and effective learning experiences were similar. Oftentimes the participant could recall an ineffective training experience quickly. For example, Paul said,

What's interesting is that you don't necessarily remember all the great ones, that you have – but you tend to remember the bad ones. You don't remember all the phenomenal meals that you've had when you go out to special dinners, but if the food was really horrible, you remember those....No question about it. If you have two or three bad training experiences under your belt, and [then] you get the email or the memo or the notification that the next training session is coming up. It's scheduled in three weeks. There's a negative connotation to it because you've just had a spoonful of bad experiences. So, I think that...you walk into that scenario almost jaundiced.

Paul went on to say how trainers can begin training negatively.

I've heard trainers apologize for the material...I've heard them do that...They really put themselves in the big pickle when they do that. They shouldn't. The good ones would never do that...They say, "Golly, man. Everybody in here wants to shoot the messenger." They say, "Don't shoot the messenger. I didn't write this, but we've got to cover it." And everybody – then how do you embrace that? That's when you pull your *Sports Illustrated* out....

Along the same lines, Cydney, an assistant professor, when asked to describe what other professors can expect during training, added the following: "I said, 'I hope this doesn't sound too cynical, but I might tell them to take some grading....' I'd tell them to go hungry because the lunches are pretty good."

Though the previous quotes introduce the idea that their training experience was negative, the participants also had positive descriptions of training experiences.

Patricia, employed by the same company as Paul and John for over 20 years, shared her perception that organization-sponsored training was effective.

Well, we've had it pretty good – my experience here – I've been here 21 years.... We usually have a pretty good system when it comes to training our new employees. Especially now, with our HR department, which has expanded tremendously....When you're hired, you go to an orientation and then they get you on board to go to the computer classes. So, we really do have a good system here for training our employees.

Employees want to learn, and they want to be proficient and appear to be competent to their colleagues and clients. They depend on their employers or training departments to provide those necessary learning experiences. Whitney discussed the challenges she felt early in her career with new employee training: "I feel like it [the training] was just kind of bad....They told me the survival needs [knowledge and skills needed to survive on-the-job], but [the information provided] didn't go any higher than that."

Recalling another training experience with different employer, and the importance that she develop proficiency and credibility, Whitney continued:

Whereas, in four days, John gave us survival needs and then moved all the way up.... My experience [in pharmaceutical sales] was [that doctors] want to know if I know [about the products you're selling]. So, they'd ask me and I'd be like, well, I try to give them the standard spiel that pharmaceuticals sales reps give – that our marketing department tells us to say about our drug. And they'd be – "That's not what I asked." I'd be stumped. And it was embarrassing...I've never taught biology or anatomy or pharmacology, but I wonder if there's a way that you can make pharmacology relatable.

So far, I have attempted to give you a brief overview of the descriptions that Chapter IV will include. First, Paul discussed ineffective training and teaching strategies. Then, Cydney describes her discontent with her experience by suggesting that colleagues take grading with them to training. Next, Patricia provided us with a positive description of training. To summarize, Whitney provides examples of training where she had both a

negative and positive perception of the experience. Though there were various descriptions, there were common themes. The next section will introduce Theme 1.

Finally, John said, “I think the training that we have is overarching broad concepts.” Theme 1, relevance and applicability, provided quotes to support the importance of relevance and application to trainee learning. In this section of Theme 1, study participants provided examples of how some trainers can make the training more relevant. Furthermore, interviewees elaborated upon the level of frustration and resentment they felt when training content was not perceived to be pertinent.

The themes, developed from analysis of interview data gathered from 10 study participants, are elaborated upon below. First, participants described how learning occurred when content was relevant and retention occurred with real-life application. Second, participants described how trainers worked to create a comfortable, relaxed, and, thus, “good” learning environment. Third, relational learning was critical to the overall training process. Finally, participant attitudes revealed that they preferred face-to-face training when learning occurred as a result of immediacy. Although distinctive, each theme is interrelated.

Chapter II discussed how trainees expected for training to be relevant to their needs and their jobs (Magiuka, & Loher, 1991; Yamnill & McLean, 2001). Studies in higher education classrooms reported that teachers’ ability to communicate relevance impacted student motivation and learning (Frymier & Shulman, 1995; Witt & Wheelless, 2001). This exploratory study supported that relevance was important to trainees in the workplace.

Theme 1: Training Relevance and Applicability

Participants provided description of what was perceived to be effective and/or ineffective communication (by the trainer) of relevance and application to interviewees' jobs. These 10 interviewees indicated that retention and learning were increased when training content was clearly pertinent and germane to their workplace contexts. Theme 1, relevance and applicability, is a vital finding to the concept of relevance. Chapter II outlined future directions for research. Chesebro and Wanzer (2005) suggested investigating effective strategies for communicating relevance, and they recommended exploring learning strategies that may help students appreciate content relevance. Trainer communication and responsibility for relevance are central to Theme 1, thus this finding may extend understanding regarding the relevance of instructional communication, particularly organizational training.

Participants in this study described their best training experience as having been relevant, applicable, and useful. Participants felt as if they should be able to see the relevance of their training, and they should have been given the opportunity to apply what they were learning instantly. For example, a participant reported, “if they’re not seeing why it’s relevant to them in their daily lives, then they’re not going to take it seriously.” Some of the key words or phrases from the participants’ narrative that shaped Theme 1 included (1) use it or lose it, (2) helpful, (3) examples, (4) it’s worth the time, (5) big piece of time, (6) waste of time and money, (7) means absolutely zero, (8) relevant, (9) confidence, (10) aligned with challenges, (11) current, and (12) weed out. For example, Mike said, “The retention factor on stuff like that is only as good as often as you use it. If you don’t use it, then you’re going to lose it.” Other participants discussed how application was important in seeing the relevance. Table 4 shows examples of all the key words or phrases identified in Theme 1. The following excerpts describe some or all of these key words that led me to identify the first theme.

Table 4. Key Words/Phrases for Theme 1, Relevance and Applicability

Key words/phrases	Examples from interviews
1) use it or lose it	“The retention factor on stuff like that is only as good as often as you use it. If you don’t use it, then you’re going to lose it.”
2) helpful	“I was excited about that training as well because I was going to need to learn about medicine. ..I don’t know that these guys know anything.” (Whitney) “So, I try to take classes that’s helpful to me.” (Kimberly)
3) examples	“...her examples, asking us to give examples and then giving us feedback.”
4) it’s worth the time	The key is to make them feel like it’s worth it.”
5) big piece of time	“...and I think the biggest thing too for everyone who attends training, in their minds, they’re giving up a big piece of their time.”
6) waste of time and money	“Well, waste of company assets, waste of time...” (Paul) “It really was a waste of time and money” (Patricia)
7) means absolutely zero	“We got absolutely nothing out of it.”
8) relevant	“...and if you keep them relevant.”
9) confidence	“I just felt more confident in the system on where I was going, what I was looking at and what I needed to look at. I would definitely say, more confidence...”
10) aligned with challenges	“Yeah, and I mean, keeping it aligned with the challenges of the industry”
11) current	“I think if you keep them current...”
12) weed out	“...don’t actively seek them (relevant training) out.” “And yet every student is going to weed out what is practical for them and what is not practical for them.”

Participants in this study described their best training experience as having been relevant, applicable, and useful. Interviewees felt they should easily understand training relevance and should be given the opportunity to apply what they are learning instantly. For example, a participant reported, "...if they're not seeing why it's relevant to them in their daily lives, then they're not going to take it seriously." Whitney, a college lecturer, said, "Yeah. It was required for us to go. It was a condition of our employment for us to go. I think at least after Day 1, we were all like – This is good. This is good. I want to be here."

However, Paul, the director of corporate real estate for a manufacturing company, recalled a training that he was required to attend that was not relevant to his job or success in the company, and that affected his perception of the importance of training. Paul's keywords were "waste of time and money" and "relevant."

...we were changing the accounting systems to JD Edwards. I was not – I had no business being in that meeting because it's something that I don't do anyway. I don't have any access to JD Edwards. Wouldn't know how to get on it if I had to. But I was required to go. What I can remember was the amount of horsepower in that room – and I'm not so certain that – I remember doing this in my head, looking around at the horsepower in that room and thinking – what it must cost this company to have all these people sitting in here for 3 hours... Well, waste of company assets, waste of time and that the message – that particular message, that particular training session overreached its boundaries and someone made the decision that all managers need to go to it, when in fact it should have been all managers of the operating company should have gone to it. Or all of the accounting people. They should have used more of a rifle telescope or scope on a rifle to determine who their target audience was, but instead they used a wide shotgun blast and incorporated people that shouldn't have been there... you sort of blame it back on the HR, employee development.

Paul's perception, illustrated by the "shotgun" analogy, is that those in charge of training and/or management took the easy and fast way of deciding who should attend the

training. He received the notice to attend, and once he got to the training he determined that this absolutely was not relevant to his job. Paul shut down. He did not take any notes, he did not retain the information discussed because his perception was that the training was not relevant to someone in corporate real estate.

Patricia said that the same company sent her to a training that was not what she needed. She provided depth to this theme as someone in a completely different field within the same manufacturing company. Though she had fun on the trip required to attend the training, she was not quite sure how she was supposed to tell her supervisor that they spent what they did, yet nothing relevant was learned! Patricia's insights suggest why trainees may not report irrelevant training to their supervisors. This particular quote illustrates "means absolutely zero" and "relevant." Also, I would argue that Patricia did not tell her supervisor this because of the obvious "waste of time and money."

Actually, it was really cool in the sense that the training was done in Washington, DC, for a week. So the trip was really cool. We did a lot of sightseeing in the evenings and at noon. But the training was geared more towards people who had programming knowledge. It was Sarah Jones and myself. Neither one of us had any programming, writing actual – I don't even know what you call it – but, programming. So just for that whole week, we had these big binders full of information that they were going through. We were like – This means absolutely zero to us. Nothing. We got absolutely nothing out of it. But it was a cool trip. ..it really was a waste of time and money... We had to use the program, but we could not write the programs. The IT folks – we had to call and tell the IT folks – We need a report that does this. That was a real problem too because they're IT people. They really had no understanding.

When it comes to relevance, there can be a number of areas to consider. Is management, the trainer, the trainee, or a combination responsible for the training being perceived as relevant? Trainees expect training to be relevant to their needs and their

jobs (Yamhill & McLean, 2001). It is frustrating for trainees to be pulled away from a pile of work that is never ending to experience training that does not meet their goals and expectations.

Instructional communication research has previously explored the role that trainers/instructors have in emphasizing relevance. However, this study elaborates upon, through a social constructivist lens, the key role that other trainees have in assessing and communicating relevance. Also, the participants discussed their responsibility for creating relevance. This study's participants had input concerning the trainees and the trainers responsible for relevance regarding mandatory and quasi-required training.

Who's Responsible for Relevance?

The study participants from Stage I of the data collection felt that the responsibility rested on both the trainer to show and communicate relevance/application and the trainee to seek pertinent learning situations. When participants discuss "seeking" training, these participants have choices in regard to meeting departmental training requirements. The excerpts under this subheading show the key words "helpful," "relevant," and "big piece of time, " to name a few. Some trainees (Stage I) have the power to seek relevant training because they have a say in what courses they take and when they take them. According to Patrick, it is reported that trainees "don't actively seek them [relevant training experiences] out.... And yet every student is going to weed out what is practical for them and what is not practical for them." Patrick concluded, "I try to take classes that's helpful to me." Relevant learning gives trainees "confidence." On the other hand, other study participants discussed attending mandatory training that is

not “topical” or relevant to their jobs. Those participants tend to have negative perceptions related to their training experience. John said,

One, it’s got to be topical. It’s got to be something that I have an interest in training about. Two, I would like it to be conversational, so that – I think people learn more in a conversation than they do – I think a lecture format is better than a lot of things, but I think conversational – Yeah, interaction. It’s more of a dialogue.

Cydney added,

and I think the biggest thing, too, for everyone who attends training, in their minds, they’re giving up a big piece of their time, and it better be worth it because they have 50 other things that they could be doing with those two hours. The key is to make them feel like it’s worth it.

On the other hand, many trainees do not have choices when it comes to their training and desire to describe their frustrations at being required to attend an irrelevant training.

Cydney was describing a training that had the potential to be extremely relevant. Though other participants described trainings that were not topical or training that could have assessed the trainees’ needs better, Cydney was describing a clear concern with the way the instructor communicated or interacted with the trainees.

Available literature reveals that students in higher education classrooms who perceived their instructors to have communicated content relevance were more motivated to study (Frymier & Shulman, 1995). Trainers are similarly capable of communicating relevance to trainees. Participants in this study described how they saw relevance communicated.

Communicating Relevance

Some of the key words/phrases used by interviewees when discussing the communication of the relevance of training content were “aligned with challenges,” “current,” and “helpful.” Whitney provided a narrative to describe her frustration when she experienced a training that was not adapted to her needs. She said her questions or concerns were dismissed, almost as though she was not on topic. Whitney left the training not feeling comfortable going into the field. Subsequent situations on-the-job highlighted for Whitney that she did not get what she wanted and needed from her mandatory training. She elaborated,

I was excited about that training as well because I was going to need to learn about medicine...But as soon as we got in to the training, and a few days in, it was like – I don’t know that these guys know anything. I would immediately start thinking – my experience with them was that they had a difficult time communicating that information to a group of trainees so that we could learn. So, they were able to talk to doctors about it, but my experience was that they weren’t very good teachers. They were excellent sales reps in the field. Then the next step to move up in the company was to go be a trainer. So, my thoughts after I left that training were – Maybe you should stay in the field...I left after 30 days just knowing that Lexapro is this selective serotonin reuptake inhibitor. But then when I got into the field and doctors asked me tough questions, I was like – Well I don’t know what that is. So afterwards I was very frustrated.

Whitney was just beginning as a pharmaceutical sales representative and needed to learn information and strategies that would be helpful on the job. She left feeling frustrated and anxious, because she had not acquired what she needed to be productive on the job.

Like Whitney, Patrick sought out or attended training that, on the surface, appeared to be relevant to his job. He provided more detail regarding failure of trainers to adapt content to trainees’ needs and/or to communicate relevance. Patrick (Stage I) identified ways that the behavioral training (sales skills training) could improve and be

as useful as the technology training in which he participated previously. He said that responsibility rested on the trainees to seek valuable courses and to understand the importance of refreshers. Remember that Patrick and his colleagues have choices when meeting training obligations, “but they don’t actively seek them out. Either that or they’re not recognizing the fact that they need them...[Employees’] recognition of the need [is an important element], as opposed to the requirement, to take two courses.” If the trainers keep the programs “relevant” and “current,” then trainees will see just how important the training is to their job performance and learning.

In order for sales trainees to sense alignment between training content and their current situations, the trainer must have current situational understanding of the job assignments and roles played by training participants. Often, trainers do not have control of the material they are given to train. However, the trainees in Stage I knew that their trainers had some freedom when it came to relevance and adaptation. Nevertheless, it is important to know that trainers in some organizations feel frustration with not having the freedom to communicate their concerns and needs for training. Trainer awareness could include elements such as current trends and concerns in the fields in which participants are employed or with stakeholder or customer-related issues that trainees encounter. If that happens, then trainees do not mind taking the same type of training throughout their careers, then the redundant training objectives can be adapted to fit current issues in the profession and, therefore, despite covering similar topics, would not be experienced by trainees as the “same” training.

I think if you keep them current, and if you keep them relevant. Because if you’re using an out of the box program, that can get stale real quick, especially if you’ve

already done it once. And I don't think they [trainees] see it as recurrent, which in a lot of cases it is or could be. They [trainees] see it [training] more as – We did it. Now we're done. Whereas, I think in a lot of cases, the material that's offered would be good on that recurrent basis....Keeping it [training] aligned with the challenges of the industry and the problems that we're facing and stuff like that....Because if they're not seeing why it's relevant to them in their daily lives, then they're not going to take it seriously.

Of course, it is possible that attending a particular training only once might limit what the trainee actually learns. Kimberly also noted that her company offers many opportunities for employees to learn what they need. She welcomes employees to take the same non-mandatory training more than once because, Kimberly reported, questions arise on the job. Every time Kimberly repeats the same training, she is entering with a heightened knowledge level as well as schemas that may not have existed before.

So if I didn't think it's worth the time [to elect to come to the training program], I wouldn't go – only because I go so far and usually it'd take me extra days because I come from Hawaii. So, I try to take classes that are helpful to me.

Though Kimberly brings up critical issues to consider, such as choosing the right courses and taking courses again, it is still important to adapt and communicate relevance during the training. I mentioned in Chapter II that some of these themes (immediacy and communicating relevance) and research supporting these themes have been well established in traditional or adult education settings where the experience is a one-time opportunity.

Some of the participants were allowed annually to select courses from a number of available organization-sponsored training programs. Based on the fact that they were able to make their own course selections, a few of the participants indicated that they took “obviously relevant” training. Below, Mike explains why he preferred technology

training over behavioral training, both of which he has participated in. Mike's comments suggest that often the trainer may need to work at explicitly communicating relevance when the trainees are not selecting their own training courses. Mike compared the technology training to behavioral training in the sales department and indicated that the instructional models used to teach behavior or soft skills are not relevant to their specific needs. The trainer or another colleague does not have to communicate the training course's relevance, the skills being taught are clearly identified by the trainee as relevant skills.

Let's just say it [the training] gives them skills on being able to research data and be somewhat effective in their sales calls because they have information. [A key training message is that] information is power. And as a result of that information, they could be much more effective with the customers. Because the technology class is really state of the art. In the past, we usually had to wing it. If a customer would tell us – "Boy I've been giving you a lot of money." We had to take them at their word. Now today, the technology of tracking through Sales Insights, can see whether they're blowing smoke or if they actually did in fact give us quite a bit of money. So, I would say that the people that take that course are people who clearly can use that information. And it's very valuable to them....Because I think it comes back to what I said earlier about retention. So, I found it very good. There were some things in there that I learned that I found really exciting. One particular item was the idea of locating the number of accounts that might be in a city by all having to do is just type in the city. I thought you needed the actual name of the agency. But you can actually pull up just the city and it will give you a complete list of all the agencies that are there. I thought that was extremely helpful.

Practitioners and scholars may not realize that trainees recognize when relevance is communicated in the training programs. Trainees listen for the trainer to illustrate or communicate the relevance of their course. Throughout the training process, trainees determine the extent to which the trainer has adapted the training to their needs. The next subsection provides examples of how trainees acknowledge trainers' efforts to enhance

effective adaptation in the training process for relevance and applicability. This subtheme also adds to the direction for future research that Chesebro and Wanzer (2005) outlined, finding the most effective ways to make content relevance.

Trainees' Abilities to Recognize Effective Adaptation

During a training session, training participants not only identify that which is relevant and not relevant to their job, they also identify when the instructor is attempting to adapt to them. According to the study participants, the trainer should be aware of strategies that draw the trainees into the training. Key words that are seen in this section are “weed out,” “helpful,” and “examples.” Mike elaborated:

...her examples, asking us to give examples and then giving us feedback. Or thinking that she's had in the fact that takes the material and makes it practical, makes it useful to us. Sometimes material can be very clinical, you know. But I think the fact that we spend a lot of time in [training] surfing the site and the tools that are available to us there, I think are extremely helpful...The biggest problem you have with something like that [technology-based training content] a teacher, I think, is very cognizant of, and that is the retention factor. The retention factor on stuff like that is only as good as often as you use it. If you don't use it, then you're going to lose it. I think Kathy is forceful in understanding that. But overall, I think that Kathy's mannerisms...[and] her personality, speaks well at creating a good learning environment.

Trainees recognize the distinction between dry, uninteresting presentations of content and trainers who communicate in a caring, clear, relevant, and immediate manner. In other words, the participants can see that the trainer makes an effort to include what trainees need, such as interaction and games in which they can apply what they are learning.

More than one participant emphasized the importance of interaction with the trainer and other trainees and/or peers. Along these same lines of what Mike said

previously, Christopher emphasized that he learns from interaction with others when applying what he is learning. He stated:

After each kind of session that we'd learn, we'd go through and then we'd have to utilize what we learned in a game of some sort. You know, trying to – what data – you know where is this data? How did we find it? How can I run it? How do I get to the end result? It was interactive and it was fun...I learn better from interaction and doing, rather than seeing...The interaction kind of forces you to kind of work on it. Then you may find out that you had questions that you didn't think of before by doing. Or, it [interaction] may lead to another question.

This is very similar to what Kimberly said about repeating training courses. Christopher felt “confident” and assured after training. “I just felt more confident in the system on where I was going, what I was looking at and what I needed to look at. I would definitely say, more confidence....” Whitney, a former pharmaceutical sales representative and current college lecturer, also reinforced the significance of effective training building confidence on the job, just as Christopher had noted. Whitney recalled:

And it stuck with me so much so that when a student would approach me with a question about why a policy is a certain way or why I'm teaching in the way that I am, I could say – This is why. Or, why they missed a particular test question or why the test question was written in that way. I can say – Well, this is why. For me, that gave me a sense of confidence, as a teacher, that I did not have when I was a sales rep....I don't feel competent enough to stand in front of doctors.

All the trainees from Stage I of this study agreed that the sales training does not come across as being as relevant as did other trainings. Patrick noted how using real-life examples or asking the class how they use something helps them to see how the training is relevant. He said:

Often the class declares the relevancy before the trainer ever needs to. This is harder in basic sales classes, where veterans think they know it all already and don't need a refresher...our trainers could use some work in establishing relevancy in this case.

Research has established that trainees expect that training be relevant to their needs and their jobs (Magiuka, & Loher, 1991; Yamnill & McLean, 2001). Studies in higher education classrooms reported that the teacher's ability to communicate relevance impacted student motivation and learning (Frymier & Shulman; 1995; Witt & Wheelless, 2001). This exploratory study provides detailed descriptions of how relevance is important to trainees. In addition, this study provides some insight into (1) responsibility for training relevance, (2) communicating training relevance, and (3) trainees' recognizing the trainers' adaptation. Study participants had opinions and examples of relevance--who's responsible, how it's communicated--and the trainees could easily recognize efforts to adapt course content to their needs. In addition to relevance, interviewees shared judgments regarding their preferences and attitudes when it came to training courses, the training format, and design.

Theme 2: Attitudes and Preferences

Theme 2 discusses the trainees' attitudes and preferences. Trainees' training format preferences and attitudes regarding face-to-face versus online training color the other themes.

When positive relationships are created in the training room, optimistic attitudes about face-to-face training are formed and reinforced. I found it interesting, and contradictory to my original thoughts, that the 10 participants in this study did not care for online training.

Some of the key words and phrases from the participant narratives that shaped Theme 2 were (1) get it done, (2) that's good, (3) double-edge sword, (4) not bad, (5) not effective, (6) very effective, (7) more important, and (8) willing and happy to go. For example, the following quote illustrates the keywords "get it done": "Yeah, sometimes it is a case of let's just get it done." Though many of the quotes revealed the actual words, other quotes shared the same meaning: "That might be something they could consider – online courses. Now, there's – that's a two-edged sword." In other words, John discussed the benefits and drawbacks of online training, and I consider that to fall under the cue, "double-edged sword." Refer to Table 5 for a summary of how I identified these key words/phrases.

Table 5. Key Words/Phrases for Theme 2, Attitudes and Preferences

Key words/Phrases	Examples from interviews
1) get it done	“Yeah, sometimes it is a case of let’s just get it done.”
2) that’s good	“So I always feel like it’s good to learn something or refresh myself on the technical side and the other side – the behavioral or personality side.”
3) double edge-sword	“That might be something they could consider – online courses. Now, there’s – that’s a two-edged sword.”
4) not bad	“and again, the online training stuff is not bad, but I’m not sure it’s as effective as if you could do it face to face...”
5) very effective	“Okay. I know when we went on board with Lexis/Nexus – our research tool – we went to Houston and they showed us all the ends outs and that was real effective for me, in that you knew exactly what you were going to use it for.”
6) more important	“I think, as a manufacturing company, I think we do a much better job in our manufacturing facilities than we do at our corporate functions. Corporate functions are seen as more specialty type jobs and people are just expected to know what to do.... We’ve won a lot of awards for safety in our company. So I think there’s a lot – I would highly, highly suspect that training is a much more important role there.”
7) willing and happy to go	“It makes it easier for you, as someone who’s attending the training to go through it as well. As opposed to someone at your table that is really “bleh” about being there. That can be contagious....”

John discussed the benefits and drawbacks of online training, and I considered his statements to fall under the cue “double-edged sword.” Refer to Table 3 for a summary of how I identified these keywords and key phrases. The sales managers in Stage I typically traveled to headquarters for their training. Patrick acknowledged how fellow trainees can influence your perception.

Patrick discussed how some trainees can have “bleh” attitudes. This quote includes the keywords “get it done.”

It makes it easier for you, as someone who’s attending the training to go through it as well. As opposed to someone at your table that is really “bleh” about being there. That [negative attitude] can be contagious....Consider we have so many people working out in the field, for them to come into a training course...sometimes it is a case of let’s just get it done.

Though one trainee mentioned that online training might be utilized more prominently in the future, he was concerned that the art of networking and social learning would be lost, thus creating a “double-edged sword.” Mike stated:

One of the things that probably, in the long run, they might want to be able to do, is do an online training program, instead of forcing us all to come into Houston. That might be something they could consider – online courses....That’s a two-edged sword. On the one hand, you could probably get a lot of people who would take more training because it would be offered in that mode. On the other hand, I think there’s a sacrifice that takes place as a result of that [choice to use online versus in-person course delivery]. And that is the networking and the camaraderie that comes by being in a class with the other co-workers. That’s important. You’re developing contacts. You’re developing a working relationship with your counterparts. And in that sense, I think that that’s good.

Mike had a positive attitude about training and valued face-to-face training experiences because he developed relationships that impacted his learning and

development. John and Paul discussed why their company has moved to online training predominately, but why they think that face-to-face might still be needed. John said,

We've clearly moved to online training...that is [likely happening] for a couple of reasons – (1) people can do it at their convenience, (2) it's probably more cost effective. I think those would be the primary reasons why people would go to – and again, the online training stuff is not bad, but I'm not sure it's as effective as if you could do it face to face...We've also done a limited amount of face to face training. The online training are subjects that are really relates to either (1) not really applicable to my job, or (2) they're pretty elementary in nature. So, I haven't found them particularly something that I saw that the training was available and thought that this is particularly something that I wanted to do, but because of my job function, it's training that I have to take.

John's quote included the keywords “not bad,” “double-edged sword,” and “get it done.” Paul said, “In my mind, the face to face was better because it was interactive and there were questions and answers and things that came up outside of the text that were helpful.” Patricia, who has been with this same manufacturing company, did recall an effective face-to-face training for her job; however, it was an external training she attended. She said it was “very effective.” Additionally, Patricia stated:

I know when we went on board with Lexis/Nexus – our research tool – we went to Houston and they showed us all the ins and outs and that was real effective for me, in that you knew exactly what you were going to use it for. So, there wasn't that – how am I going to apply this when I get back to the office, to my specific needs. It was researching cases or statutes or whatever it is you're looking for on Lexis/Nexus. That to me was very effective. I already knew how I was going to use the system and it wasn't that I had to take what they gave me and then bring it back and try to apply it to our specific needs.

Though John and Paul have both highlighted weaknesses of their training experiences,

John clarified that some training is “more important” than others. John elaborated:

...as a manufacturing company, I think we do a much better job in our manufacturing facilities than we do at our corporate functions. Corporate functions are seen as more specialty type jobs and people are just expected to know what to do. Know your job and understand your job, to do your job.

Whereas, I think that – I know this to be true in more of in the mills and in our box plants and sawmills and the like, there’s considerably more training because they work around heavy equipment. Safety is a huge focus for our company. We’ve won a lot of awards for safety in our company. So, I think there’s a lot – I would highly, highly suspect that training is a much more important role there. Whereas in our company – or in the corporate group – it’s more about knowing your job.

The trainers at the airline have been known to take “road trips” and present training usually presented in Houston in hub cities such as Cleveland and New York. I mention this so that the reader understands that though one company does not offer online training, it does address distance education or adapting for convenience. Others mention the benefits of training in a face-to-face context. They discussed whom they had met from other states and countries. Kimberly elaborated:

So it was kind of good. Get to meet *somebody* different, or somebody from a different place. Well, I know one of my counterparts – it seems like it’s such a chore to go to a training class for him. To me, when I go to a training class, I’m very willing and happy to go because I get to choose what [class] I want to go to.

The trainees mentioned how far they must travel for training, yet they felt that the time and distance were worth the effort because of how much they learned. Adults like to talk to each other. They do not want to work on worksheets by themselves. These quotes include “happy and willing to go” and “that’s good” keywords or phrases. In addition, Christopher saw the different yet critical need for all the training courses in sales. He stated:

I think that’s two different sides that we use as sales managers. So, there’s a technical side and then there’s a behavioral or personality side, as far as present speaking and interaction with customers and people. So, I always feel like it’s good to learn something or refresh myself on the technical side and the other side – the behavioral or personality side. That’s why I thought – well, advanced selling skills will help me learn a few more selling techniques or help me answer

tough questions and how to answer them properly and how to identify needs and listen to customers.

Participants recalled positive experiences even though their negative experiences appeared, at times, to outweigh their positive training experience. As I mentioned in the introduction, regardless of gender, job, industry, or education, all the participants generally described experiences that influenced the other participant themes. Paul summed it up when he said:

When determining what cross-section of the company they're going to go train, or the purpose of their training – whatever that is – do research on the people, the targets – the target audience and make sure that...it's necessary for them to do that training. It might be that they need to go to those people or their supervisors and get a better understanding. Tell me what you do. Tell me what your department does...One example just pops into mind. I went to a training class about a year ago regarding interaction with customers. I thought about people that buy boxes. I had no interaction with customers. I am a corporate – I'm in a corporate structure. I'm not an outside sales guy...So, I would say for the trainer, I'd tell him if they ask me – Make sure you understand who your audience is and make sure that they're the right target audience for the message.

In sum, trainers can work to establish relevance, application, immediacy, relationships, and positive attitudes regarding the training experience. Now that we have discussed the power of attitudes and preferences, we must examine a theme that reveals what is present or missing in their training experience that contributed to their attitude and/or preferences, Theme 3, immediacy.

Theme 3: Immediacy

In addition to relevance and applicability and trainee attitudes and preferences, participants recognized immediacy and instructor and/or class interaction to be critical elements that shape their perceptions of the training experience. Chapter II highlighted immediacy as a communication concept that explains how certain verbal and nonverbal communication behaviors reduce tension and psychological distance (Mehrabian, 1971). Immediacy behaviors “are those behaviors that communicate liking and engender feelings of pleasure. Immediacy behaviors develop a positive relationship between trainer and trainee” (Beebe, Mottet, & Roach, 2004, p. 199). For example, when Whitney recalled not liking one of her trainers and perceived the trainer to be unapproachable, Whitney’s description suggested that the trainer may have been displaying nonimmediate behaviors or messages. Immediacy has been explored in traditional classroom learning (Christophel, 1990) and in distance education (Conway, Easton, & Schmit, 2005). Studies have been nonconclusive in distance education, immediacy, and learning (Conway, Easton, & Schmit, 2005; Rupp, Gibbons & Snyder, 2008; Shepherd & Martz, 2006; Stephens & Mottet, 2008).

Participants in this study discussed immediacy and how it shaped their training experiences. Participants provided descriptions that supported exploring immediacy in face-to-face training classrooms and online training modules. The third theme included descriptions regarding how immediacy is or is not established in various training experiences. Immediacy could be established by what trainers said to the trainees or how trainers were perceived to address trainees early on during the training session.

Immediacy is the feeling that you get from the environment, and how it is created. It is how the module is designed online or how conversations transpire via the internet (Daft, Lengel, & Tevino, 1987; Rupp, Gibbons, & Snyder, 2008; Shepherd & Martz, 2006).

This section will describe what participants' said about verbal and nonverbal immediacy. Some of the key words or phrases from the participants' narrative that shaped Theme 3 were (1) they always say, (2) lot of interaction, (3) mixed well with others, (4) easy to communicate with others, (5) didn't like her, and (6) comfortable. Table 4 shows examples of how I identified key words within quotes. Finally, Theme 3 discusses the participants' perceptions of the learning environment. The next section highlights what was said verbally by the trainer or fellow trainees that helped them to feel comfortable and relaxed.

Table 6. Key Words/Phrases for Theme 3, Immediacy

Key words/phrases	Examples from interviews
1) they always say	“They always stop and ask if there’s any questions or what didn’t you get or if they need to go over something again...keep telling you – You’re here to learn and what you don’t understand, just ask.”
2) lot of interaction	“There is a lot of interaction over the course of the day. People tend to trickle in slowly in the morning, so the trainer may have upwards of an hour to catch up with trainees. Most people know one another, so there’s plenty of conversation.”
3) mixed well with others	“She’s mixed well with the employees, those of us that have the responsibility that we do.”
4) easy to communicate with others	“I think as a general – our company just made it very easy for all of us to communicate with each other...maybe somebody is a little bit more shy and they may not want to ask the question that may make them sound stupid, but there’s no stupid question.”
5) didn’t like her	“As trivial as it sounds, but I liked him more than I liked her. I don’t know how to explain what that meant for me in my training. I hope that it doesn’t color how much I learned in her training – the fact that I didn’t like her that much or she rubbed me the wrong way.”
6) comfortable.	“It was like an inviting business setting. It was very inviting. Joe put out plants and we had a breakfast buffet that consisted of yogurt and muffins – very Joe like. And he had plants on the table that were there just for welcoming.”

Verbal

From the perspective of study participants, effective trainers continue to ask for feedback and questions from the trainees. They communicate in a way that constructs a “relaxed,” “comfortable,” and “laid-back” atmosphere. This section provides an overview of the key words -- what they “always say”-- and the impact of “lots of interaction” on how the participants feel in training. Christopher said:

They always stop and ask if there’s any questions, or what didn’t you get, or if they need to go over something again. They just create an environment that’s very laid back as far – you know, they always have throwing out little prizes or have candy and things – just they aren’t critical of anything. They just basically...keep telling you – You’re here to learn and what you don’t understand, just ask.

Kimberly also said a number of times that the trainer constantly asked for input and questions. Immediacy allows for students to feel more comfortable, so that discussions and questions can occur. Patrick said:

There is a lot of interaction over the course of the day. People tend to trickle in slowly in the morning, so the trainer may have upwards of an hour to catch up with trainees. Most people know one another, so there’s plenty of conversation. More importantly, most people know the trainer, so there’s plenty to talk about there. Most of the training is interactive, with different scenarios or trainee feedback situations where the trainee gets to discuss aloud their perspective and experience.

Sometimes trainers can say something that reduces the immediacy in the training experience. According to Paul:

I’ve heard trainers apologize for the material that was either omitted, that they should have been involved and they should have been included in the training session...But from time to time, you’ll hear this – Don’t blame me. I didn’t write this. This is not my work. Don’t shoot the messenger. I’ve heard them say that. They say – “Golly, man. Everybody in here wants to shoot the messenger.” They say – “Don’t shoot the messenger. I didn’t write this, but we’ve got to cover it.”

In addition, Whitney had an example of when the trainer had not created verbal immediacy.

I can specifically remember trying to have a conversation about the differences between serotonin, norepinephrine, dopamine. And they're like – “You don't really need to know. You won't need to know that.” I specifically remember one female telling me – “You won't need to know that. Just know that Lexapro works with serotonin. And Effexor, which is a competitor – it works with serotonin and norepinephrine.” I wanted to know – what does serotonin and norepinephrine do for the brain that increases, or that decreases someone's depressive symptoms? They didn't articulate that to me. Their response to me was – “You just won't need to know that.”

Sometimes the trainer or trainees do not say anything, yet everyone still feels comfortable and/or a sense of liking for those in the training. The next section reveals participants' descriptions of comfort and affinity for either the trainer or fellow trainees.

Nonverbal

Trainees recognized what the trainer does to help them feel comfortable and relaxed. However, they recognized that behaviors and communication occur that also creates a unique learning experience among the trainees. The trainees do recognize how trainers communicate with the class. Mike said that Kathy has a way of making the class feel “comfortable.” Mike detailed:

I'm sensitive to teacher skills – their communication skills, their class organizational skills – things of that nature. And Kathy does an outstanding job in that area. And I think it's because Kathy has longevity. She's been with the company a long time. She's mixed well with the employees, those of us that have the responsibility that we do. I think she fully understands our job. And so, therefore, I think she makes the material come alive... I've never been bored in Kathy's class. I think that speaks well of her. I would suspect the rest of them, the others would feel the same way. I would think you'd get a general consensus on that.

Overall, Kimberly's entire interview revealed how important it is that the trainer intentionally work to create an environment of comfort and friendliness. Her quote provided an example of the keywords "mixed well with others" and "easy to communicate."

[E]veryone in class are always very friendly and give you opportunity to really meet people from other areas that you never, never, never had the opportunity to do that. So, I always think it's a great thing...I think as a general rule – our company just made it very easy for all of us to communicate with each other...maybe somebody is a little bit more shy and they may not want to ask the question that may make them sound stupid, but there's no stupid question. To me, if I don't understand something, maybe somebody else doesn't understand it. But then, if I'm the only one, that's okay, because then I'll get my answer and I'll know it – how to use the application better. And, not just Kathy, but I think overall within the company and within the training department, they will never laugh at you for asking any question or stupid question. So, it's just the way XYZ is.

Moreover, Kimberly viewed the trainer as central to the building of a situation where trainees can create relationships with one another. Whitney and Cydney illustrated what nonimmediacy looked like. Sometimes the women could be explicit about what contributed to their interpretation and other times they just had a feeling. Whitney's quote represents the key phrase or idea "didn't like her/him." Cydney provides an example of how she felt when her trainer wasn't "easy to communicate with," she "didn't like her," and she did not feel "comfortable." Whitney recalled:

But I needed to know more. As trivial as it sounds, but I liked him more than I liked her. I don't know how to explain what that meant for me in my training. I hope that it doesn't color how much I learned in her training – the fact that I didn't like her that much or she rubbed me the wrong way. She wasn't approachable. She didn't seem very happy to be there. So, I hope I didn't allow that to color, that I learned less because I didn't like her. I know that that wasn't just my experience. I know that I was in that room with 30 other people and we all talked every day and we were all like – I'm not learning anything. Then I called them after training and I was like – The doctor asked me this question.

Have you been asked that question? They were like – Yeah. I didn't know the answer. Yeah, I didn't either. I think that there's something to be said for that – there needs to be a likeable element there to the trainer.

Cydney said she knew that she was being ignored or dismissed by the trainer. The trainer created an unwelcoming or distant feeling that negatively impacted Cydney's learning.

Yeah. And it was one of those where the woman made eye contact with me, so I knew she saw me. But, she just chose not to call on me. Just kept talking. This specific instance – and this was actually a training that we had to attend on Saturday, as part of the program. I was there at 8:00 in the morning and this woman was ignoring me. And my in-laws were in town at my house. I was thinking – Why am I even here? They're not even going to answer my questions. I thought that she didn't – I think that she was afraid of what my question was....the topic was about teaching, and about something that I've done a lot of reading about – about kind of instructional practices. And, I thought she was ignoring a point. More like not addressing [me], I was going to try to show her – Well, what about -- let's look at the flip side of this. She wanted to keep going because she was like pressed for time. She didn't want anyone to question her that she was right. This was a dog and pony show, and she didn't want me or anyone else to interrupt the flow of it.

The final subsection of Theme 3 shows how the participants described the training environment and how it had an impact on how they felt in training. Often the trainee needs an environment that will involve “lots of interaction” and be “comfortable” or “easy to communicate with others.”

Environment

In addition to learning, study participants can identify that the environment can enhance or distract from learning. It is important to mention that there is more to shaping a perception than just the explicit words spoken. Paul discussed what he thinks about the importance of the environment to learning and overall perception.

In my mind, the environment does influence the training experience. I think the classroom environment, the size of the room, the lighting, if there's exterior

windows, if there's audio/visual capabilities, charts, whiteboards – I think, and actually, [Our company] does a good job of housing those training sessions in training rooms. We actually have training rooms that were designed for that. Well-lit and right-sized rooms for right-sized crowds. You don't want them to be overcrowded. You don't necessarily want to train three people in an auditorium. I think the room – the setting – is as important as the message, in some cases. Or it certainly is a big ingredient in getting the message across. Now that I'm starting to think about that and connect the dots – What are the ingredients of a well-run training program? I think it's the setting, I think it's the instructor, the trainer, and then the message, the topic. They've all got to be engaging.

The following quotation from Patrick illustrates how adaptation helps to make the environment comfortable.

Most of our training is out of the box, so I know both *the trainers* take these generic situations and customize them to their class..., for example, went through and changed all of the names in one class to Latin names for a training class held in Panama City, Panama. Most examples are catered to real sales situations, and they often use the names of real members of the sales force. In Sales Insight training, they walk through the accounts of someone in the class for real-life application. I think they do a good job, but could still stand some improvement in terms of really getting to understand what the class wants. For example, we offer SHARES class, which is a green screen ticketing and reservations program. There's a lot to learn and find out, but many in the class are very interested in short cuts and tricks that you can do, as these are things they're doing every day and they want to save time. So, while the bigger picture is important, sometimes focusing on small items keeps the trainees from walking out with a burning question remaining, no matter how insignificant.

Whitney adds a descriptive recall of what she saw when she walked into the training classroom. She discussed how it made her feel. The environment said that this will be a “comfortable” experience.

It was like an inviting business setting. It was very inviting. Joe put out plants and we had a breakfast buffet that consisted of yogurt and muffins – very Joe-like. And he had plants on the table that were there just for welcoming. Once we began, the plants were removed from the table. When you walked in, there was music playing. On Day 1, it was somewhat subdued, something that everyone would like. Then Day 2 it was – after he'd gotten to know us, it was very – again Joe-esque kind of music. Mariah Carey, Janet Jackson. But it was still an inviting

environment – come in, have a seat. So there were some kind of aspects of the room that were that way, but then you looked on the table and every single seat had a binder, a notepad, a pen, a folder and they were all assembled the exact same way. You had your nametag out there. That meant – Come in. This is going to be a nice environment, but we're going to work. You've got an entire binder full of information that we're going to cover in four days. That means that we're going to move. There's going to be a lot. In terms of the context of the training, it was inviting, but you also got the sense that he meant business. But also, you kind of got excited about teaching because he had these teaching quotes that he would play. So, the music's playing but then he had a PPT of teaching quotes on the board. So, I'm a part of something here. I'm a part of something that is big. It means something to be a teacher. You read these quotes and they're inspiring or motivating. And you're like – It means something to be a teacher.

However, Cydney provided a description that illustrated how the environment sets expectations. Whitney indicated that when the environment paints a picture that is not the case, the trainee can become resentful. Cydney was excited to meet other new faculty members. She walked into the room and saw, "I would say the round tables were like eight-ten people at each table...." She thought she was going to get to interact with the other participants; however, she said the training was always delivered in lecture format. She expressed disappointment. "I kind of catch myself wanting there to be more interaction." Cydney's interpretation of the ideal training environment was that there should be "lots of interaction." The training context she envisioned should feature a space that was designed to help trainees to feel "comfortable" and that would support participants in "communicating with others." In the experience she described, Cydney's expectations were violated. She stated that "[she expected more interaction with] my colleagues or with more applied examples or with more realistic settings or – I guess I'm always wanting it to be a little bit more like audience centered."

“The sales training department works really hard to create a ‘safe’ and ‘good’ learning environment.” According to Christopher and Patrick, they have small classes and work hard to establish learning relationships. Christopher was determined to emphasize how the trainers and trainees worked to establish an inviting learning atmosphere. “Well, I don’t think the classes are too large. I think they’re good sized classes, with a little bit more interpersonal. And then they give a relaxed setting.”

When trainers work to adapt to their trainees’ needs and communicate an inviting surrounding, trainers reduce initial tension or uncertainty that a trainee may feel and begin to establish relationships with their trainees. Immediacy leads to liking and relational development. Relationships and influence have played a significant role in traditional K-12 and higher education learning, as well as organizational performance. Theme 4 will discuss how trainees find relationships vital to the training process.

Theme 4: Relational Learning

Relational learning is critical to the overall training process. Effectively establishing relevance, adapting to the trainees’ needs, and creating an immediate learning environment fosters a vital learning relationship in organizational training.

Theme 4 is crucial because it provides an explanation for why Stephens and Mottet (2008) did not find that interaction positively impacted learning and satisfaction. The relationships are important to the trainees, and the trainee revealed that the relationships are vital to the experience. Some of the key words/phrases from the participants' narrative that shaped Theme 4, relational learning, were (1) people persons, (2) open, (3) welcomes interaction, (4) networking, (5) included, and (6) understanding. Table 5 details evidence of the key words/phrases for Theme 4. Christopher said, "I think as a sales manager, most of us are more people type--people persons. So I think part of us probably lean--we kind of like that more human interaction and talking and--because that's the majority of what we do as sales managers." Moreover, the relevant learning and immediacy behaviors result in meaningful relationships among the trainers and the trainees.

Table 7. Key Words/Phrases for Theme 4, Relational Learning

Key words/phrases	Examples from interviews
1) people persons	“More importantly, most people know the trainer, so there’s plenty to talk about there. Most of the training is interactive, with different scenarios or trainee feedback situations where the trainee gets to discuss aloud their perspective and experience.”
2) open	“I think Kathy’s always open to suggestions and if she doesn’t know, she just flat out tells you – I don’t know, but I’ll find out answers for you. So, you know, being honest is great.”
3) welcomes interaction	“A couple of years ago we had a training where the head of our training department showed some clips from the movie, <i>A Few Good Men</i> ...it was very interactive and people asked questions...I think it was with people that generally were comfortable around each other. They were relatively small groups.”
4) networking	“People tend to go places together during breaks or lunch, and out-of-town trainees commonly go out together afterwards. If our Houston based trainers train out of town, it is very common for a large number of trainees, perhaps the entire class, to go out for dinner with the trainer afterwards.”
5) included	“I think regardless of where you work or what organization you’re with, or what kind of training you’re attending, most people, most employees appreciate when they are included in a training lesson...”
6) understanding	This was demonstrated in the general sense of many quotes. One trainer ensured that all the participants had Latin names when she went to one of the latin countries to teach. Another participant said he could tell when a lot of work had been put into his training. “You could tell that a lot of work went into it...And also, if something was coming up, we were going to do a presentation, all the materials are already available, laid out ready to go.”

Therefore, relationships would be critical to sales managers' training experience. The livelihood of their careers is based on their ability to develop and manage relationships.

Patrick discussed the importance of relationships and interaction in the training classroom. He compared the trainers in the sales department with other trainers in the organization. He said he can tell when a lot of work goes into the preparation in the sales training. Furthermore, he said that there are only two trainers in the sales department and the trainees or sales managers really get to know them well. Trainers have a genuine interest in trainees. Prior to training, and during breaks, they engage in conversations about their families and personal lives. It was clear that the sales participants "welcomed interaction." The nature of the sales profession made them "people persons" and relational. Mike found that his technology training really helped him answer clients' questions and prepare arguments and presentations to new and sustained clients.

You could tell that a lot of work went into it.... And also, if something was coming up, we were going to do a presentation, all the materials are already available, laid out ready to go. And you could tell, especially for a course like that where you're talking about time management, it wasn't – what am I trying to say – it was an exercise and a practice. She talked about it, but she also followed it. a break at ten. We had a break a ten. That kind of thing. This exercise was supposed to last 20, it lasted 20.

Mike compared his sales training to other training courses he had received at XYZ. He made an observation about trainer communication with trainees that created anxiety and discomfort. Mike recalled that trainers will call on trainees to read or participate in training. He became sensitive to this when he saw a co-worker from Latin America who looked a bit perplexed about reading and role playing with a script that

was in his second language. A trainer can accomplish class participation differently.

Mike elaborated:

A teacher can get that done, but I think before the class starts, they [pause] scope out a couple of people and say – John, would you be willing to read out loud in the class some of the curriculum? That type of thing. Some would say – Yes, I would be fine with it. No, I’m really uncomfortable reading out in public. That way you take the edge off. That’s something that I think some trainers need to be a little bit more cognizant of.

This participant is highlighting ways a trainer does or does not work to promote a learning relationship with his/her trainees through “understanding.”

Overall, Kimberly welcomed the interaction with the trainer and fellow trainees. She enjoyed the networking that occurred. She appreciated the relationships she built with the trainer and stated: “I think Kathy’s always open to suggestions and if she doesn’t know, she just flat out tells you – ‘I don’t know, but I’ll find out answers for you.’ So, you know, being honest is great.”

The trainees do not complain about the travel and time required for the face-to-face training. “They really – everybody takes good care of me, or a colleague ... I think as a general rule, our company just made it very easy for all of us to communicate with each other.... And not just Kathy, but I think overall within the company and within the training department....” The following trainee response discussed how important the relationships are to the learning process. The trainees would take their learning community to lunch and dinner. Patrick stated:

People tend to go places together during breaks or lunch, and out-of-town trainees commonly go out together afterwards. If our Houston based trainers train out of town, it is very common for a large number of trainees, perhaps the entire class, to go out for dinner with the trainer afterwards. We are very relationship based.

The relationships that are initiated and maintained directly impact the trainees' attitudes toward training, particularly face-to-face training. Patrick also said, "More importantly, most people know the trainer, so there's plenty to talk about there. Most of the training is interactive, with different scenarios or trainee feedback situations where the trainee gets to discuss aloud their perspective and experience."

Whitney recalled how excited she was to go to training because she knew the trainer and she knew the trainer was going to teach her a tremendous amount of useful information.

I was really excited about it. I was thinking that I needed to soak up every – I almost thought – Is four days going to be enough to tell me everything I need to know in order to teach these jokers? I was very excited about it. I was also excited about the opportunity to be in that role with the man that was training me. Our trainer was Joe Doe and I was excited, because I'd been his student before. Now I was going to be his TA, and I was excited about interacting with him in a different role. I wasn't able – it was just exciting for me to be able to have him instruct me again. Even now, I was in a different role, I was excited about him instructing me and training me.

Though this can be the case in other organizations and training experiences, many trainees like the learning community that occurs from a formal training experience. The trainer and the trainee share a role in this learning community; however, the trainer has to allow that to happen. John recalls,

A couple of years ago we had a training where the head of our training department showed some clips from the movie *A Few Good Men*...it was very interactive and people asked questions....I think it was with people that generally were comfortable around each other. They were relatively small groups.

Cydney declared,

In my opinion, I think regardless of where you work or what organization you're with, or what kind of training you're attending, most people, most employees

appreciate when they are included in a training lesson, when they can give their own feedback or when they can ask a question or when they give an example that helps the audience relate because they feel like it's then about them and not about the person running it. It becomes more like an applied ... context...and more like a community-oriented experience. I think that people become resentful when they feel like they're talked at and they're not able to participate in ways that they'd wished that they could.

An attorney remembered the mediation training she attended a few months ago.

Marilyn said, "I guess I would have said – for the most part it was interesting just to hear different people's viewpoints on different things, to see how different people did stuff.

You always learn from watching other people." I asked her what she learned from this training that she didn't learn from other trainings for her job. Marilyn reflected,

I took the basic mediation course in law school, with lawyers, and then when I took this other one, people would go off on these tangents of lawyer hating. The trainers were very good at describing what everybody's role was and why lawyers were the way they were. That was good. But if you just – it was very simplistic on what he thought the mediators should do....There were a couple kind of heated moments. You just don't think about that, I guess initially. But of course people don't like lawyers, and they think that you are an obstructionist instead of fulfilling a much needed role.

However, Marilyn did note that it only helped her to hear non-lawyer mediators reveal their perception of lawyers because it helped her to be mindful of how she communicated not only as a mediator, but when playing her professional role as a lawyer in mediation.

I want to stress the importance of Themes 1-3 in influencing Theme 4, relational learning. This chapter not only provides an argument for the importance of relational learning, it illustrates how relationships between trainer and trainee can be framed using leader-member exchange (LMX). For example, Patrick said:

I think if you keep them current, and if you keep them relevant....Yeah, and I

mean, keeping it aligned with the challenges of the industry and the problems that we're facing and stuff like that....Because if they're not seeing why it's relevant to them in their daily lives, then they're not going to take it seriously.

This quote gives a glimpse into how the trainer could communicate to establish respect with the trainees. Furthermore, Whitney explained how she did not like a trainer who facilitated a pharmaceutical sales session. Whitney interpreted the trainer's behavior and attitude to be an indication that the trainer did not even want to be there. She was not viewed to be approachable. Given Whitney's interpretation of this trainer's nonverbal communication, it was hard for Whitney to respect the trainer and to trust that the trainer was interested in trainee needs.

Table 8 illustrates how relationships are developed using the components of LMX theory. Table 8 lists the themes that this study identified, then it provides examples of participant quotations that illustrate the participant's respect, trust, and loyalty to the trainer. The table also highlights how Themes 1-3 influence Theme 4.

Table 8. Relational Development During Training Experience

Themes that lead to relational learning	Respect	Trust	Loyalty
<p>Theme 1: Relevance and applicability. This theme represents the messages that the study identified as key to this theme that participants felt were significant and functional</p>	<p>“I think if you keep them current, and if you keep them relevant ... Yeah, and I mean, keeping it aligned with the challenges of the industry and the problems that we’re facing and stuff like that...Because if they’re not seeing why it’s relevant to them in their daily lives, then they’re not going to take it seriously”</p>	<p>“her examples, asking us to give examples and then giving us feedback. Or thinking that she’s had in the fact that takes the material and makes it practical, makes it useful to us....”</p>	<p><i>Establishing worth and acknowledging trainees’ experience establishes respect and trust from the trainee to the trainer or for the training program. This in connection with a positive attitude and immediacy are what establishes loyalty.</i></p>
<p>Theme 2: Attitudes and preferences. This theme explains how the participants described why and how they express their liking and standpoint</p>	<p>“Yeah, yeah. Absolutely. And it makes it easier for you, as someone who’s attending the training to go through it as well. As opposed to someone at your tables that really “bleh” about being there. That can be contagious....Consider we have so many people working out in the field, for them to come into a training course. And we’re not – you could have somebody coming in from Argentina, flying in 10 hours and this and that. Yeah, sometimes it is a case of let’s just get it done.”</p>	<p><i>This trust is created primarily from communicating relevance, adapting, and creating an immediate environment.</i></p>	<p>“One of the things that probably in the long run, they might want to be able to do, is do an online training program, instead of forcing us all to come into Houston. That might be something they could consider – online courses. Now, there’s – that’s a two-edged sword. On the one hand, you could probably get a lot of people who would take more training because it would be offered in that mode. On the other hand, I think there’s a sacrifice that takes place as a result of that. And that is the networking and the camaraderie that comes by being in a class with the other co-workers.”</p>
<p>Theme 3: Immediacy Immediacy behaviors “are those behaviors that communicate liking and engender feelings of pleasure.” (Beebe, Mottet, & Roach, 2004, p. 199).</p>	<p>“[E]veryone in class is always very friendly and gives you opportunity to really meet people from other areas that you never, never, never had the opportunity to do that. So I always think it’s a great thing....”</p>	<p>“I’m sensitive to teacher skills – their communication skills, their class organizational skills – things of that nature. And Kathy does an outstanding job in that area. And I think it’s because Kathy has longevity. She’s been with the company a long time...I think that speaks well of her. I would suspect the rest of them, the others would feel the same way. I would think you’d get a general consensus on that.”</p>	<p>“I think as a general rule – our company just made it very easy for all of us to communicate with each other....And not just Kathy, but I think overall within the company and within the training department, they will never laugh at you for asking any question or a stupid question. So it’s just the way XYZ is.</p>

Relevance and immediacy build learning relationships in the perception of training experiences. Themes 1 and 3 show that the participants value trainers whom they like, who work to insure that they are comfortable, and who see that their needs are being met. The learning relationships and immediacy influence trainee attitudes about training. Mike discussed preferring face-to-face training, John and Paul admitted to not taking online training seriously. In light of participant attitudes and preferences, one can easily see how trainee views of their training experience would influence their respect for the trainer. Lack of respect influences the trainees' trust that those responsible for training actually care about participant learning. This illustrates a concern that training professionals need to take seriously. If you are not respected and trusted by trainees who are members of the organization, they may not be loyal to you. In sum, if the training is relevant, the instructors work to create comfortable and immediate learning climates, and the relationships that are developed affect participant attitudes.

Episodic Narratives

The previous section discussed the four themes of the training experience. These messages or themes combined to lead to narratives. "Stories (narratives) provide coherence and continuity to one's experience and have a central role in the communication with others" (Lieblich, Tuval-Mashiach, & Ziber, 1998, p. 7). It is important to discuss the narratives that are presented in terms of the participants' training experience because it is the narratives that crystallize and make sense of the experience. It is the narratives that keep the cycle of the perceptions alive.

There were two episodic narratives that emerged from the themes in this study. The re-occurring “scripts” from the participants were “Time is money-is this worth the time?” and “If you don’t care, I don’t care.” In this section, I will propose the resulting plot and characters that support these scripts as shared narratives.

Time Is Money - Is This Worth My Time?

The plots of the narratives are divided into the micro and the macro settings. The plot of this type is the respective training settings. The setting could be an actual training classroom or the computer where the trainees are completing a training module. The characters include the participants, the trainer, and their colleagues. Patrick recalled,

especially for a course like that where you’re talking about time management, it wasn’t – what am I trying to say – it was an exercise and a practice. She talked about it, but she also followed it. a break at ten. We had a break a ten...This exercise was supposed to last 20, it lasted 20.

Patrick later acknowledged the attitude of other colleagues, “Yeah, sometimes it is a case of let’s just get it done.” Cydney reiterated, “I think the biggest thing too for everyone who attends training, in their minds, they’re giving up a big piece of their time and it better be worth it because they have 50 other things that they could be doing with those two hours.” Patricia added to the narrative when she said, “...it really was a waste of time and money....We had to use the program, but we could not write the programs.”

Finally, Paul alleged that

what I can remember is looking around at the horsepower in that room and thinking what it must cost this company to have all these people sitting in here for three hours....Well, waste of company assets, waste of time, and that was the message.

More importantly, this narrative concerning training is a part of an overarching organizational narrative that time is precious. In our work culture, we value our time and those who can effectively and efficiently conduct business, negotiate, or just get the job done. Therefore, people in organizations value training that upholds the organizational narratives. Cydney said,

This specific instance – and this was actually a training that we had to attend on Saturday, as part of the program. I was there at 8:00 in the morning and this woman was ignoring me. And my in-laws were in town at my house. I was thinking – why am I even here?

She not only valued time, but appreciated a trainer who cared enough that she actually learned, and this quotation leads us the second narrative, “if you don’t care, I don’t care.”

If You Don’t Care, I Don’t Care.

The plot is the same in this narrative as in the narrative before. The characters are also the same. The organizational narrative presented is that we expect our trainers educators and fellow classmates to care and value their educational experience.

Particularly, we expect our teachers to care. We have always categorized those that do not care as those just “getting a paycheck.” “[T]he fact that I didn’t like her that much or she rubbed me the wrong way. She wasn’t approachable. She didn’t seem very happy to be there,” said Whitney. Then, Paul exclaimed,

They should have used more of a rifle telescope or scope on a rifle to determine who their target audience was, but instead they used a wide shotgun blast and incorporated people that shouldn’t have been there... you sort of blame it back on the HR, employee development.
Finally, Mike admired that

...she mixed well with the employees, those of us that have the responsibility that we do. I think she fully understands our job. And so therefore, I think she makes the material come alive. I don't – I've never been bored in Kathy's class. I think that speaks well of her. I would suspect the rest of them, the others would feel the same way. I would think you'd get a general consensus on that.

In conclusion, the participants of this study presented scripts that support the findings of these narratives, "Time is money- is this worth my time?" and "If you don't care, I don't care." Given that the participants belong to different organizations. Yet have shared themes and narratives, illustrates the 10 trainees' desire for effective training.

Desired Training

After identifying the themes and types from the interviews, I recognized that the themes represented a shared meaning to the community of trainees. The macro-plot for overarching narrative can be work, conferences, social events, and the media. For example, the vision of the desired training can occur among professionals at conferences or at social dinners or parties. The contrasting positions revealed were, check it off and get it done versus the value of education and development. When Patrick said, "Yeah, sometimes it is a case of let's just get it done," we must also acknowledge that Whitney, Patricia, Mike, Cydney, and Paul expressed disappointment in not receiving the knowledge or skills that they hoped to gain.

Though the 10 participants brought experiences from a variety of professions and organizations, they contributed to the shared understanding of the experience of training participation by providing a common desire. These participant accounts of their training

experiences revealed themes or unique messages within each story; nevertheless, their experiences juxtaposed one another concerning positive or negative expectations, experiences, attitudes, or relationships. For example, remember these observations from Whitney:

I was really excited about it. I was thinking that I needed to soak up every – I almost thought – Is four days going to be enough to tell me everything I need to know in order to teach these jokers? I was very excited about it. I was also excited about the opportunity to be in that role with the man that was training me.... Yeah. It was required for us to go. It was a condition of our employment for us to go. I think at least after Day 1, we were all like – This is good. This is good. I want to be here.

Though Whitney said she was excited about what she would learn in another training experience, it turned out to be something to check off her list.

I was excited about that training as well because I was going to need to learn about medicine. I knew I needed to get the cognitive under-knowledge about my drug and that's what the point of that training was. But as soon as we got in to the training and a few days in, it was like – I don't know that these guys know anything.... I left after 30 days just knowing that Lexapro is this selective serotonin reuptake inhibitor. But then when I got into the field and doctors asked me tough questions, I was like – Well I don't know what that is. So, afterwards I was very frustrated.

Trainee narratives revealed themes and narratives. The desire for effective training is comprised of a number of themes: (1) relevance and applicability, (2) attitudes and preferences, (3) immediacy, and (4) relational learning. Among the themes of relevance and applicability are these subthemes: (1) responsibility for relevance, (2) communicating relevance, and (3) trainees' recognition of trainers' adaptation efforts. It is the themes and narratives that help us to understand that all employees, regardless of

what they receive, desire training to reduce their uncertainty and be applicable to their jobs.

When training violates trainee expectations, trainees form negative expectations. It is common to attribute negative perceptions of training to the person or the trainee, but it becomes personal to our field when we must attribute their training perceptions to their lived training experiences. However, most employees embrace development initiatives that will make them a more productive employee or aid them at their jobs and/or professions. It is critical for HRD scholarship to examine the narratives and desires of the trainees concerning their experiences.

Summary of Findings

Ten interviewees identified shared experiences that shaped four themes: (1) relevance and applicability, (2) attitudes and preferences, (3) immediacy, and (4) relational learning. These themes combine to create shared narratives concerning the 10 participants' training experience. The narratives revealed a unified desire for effective training as perceived by trainees. The results provided a narrative that illustrates a collective narrative that represents the perception and essence of training. Future directions and conclusions will be discussed in the next chapter.

CHAPTER V

SUMMARY, DISCUSSION, AND CONCLUSIONS

Summary

A rationale was presented in Chapter I for a qualitative study investigating the participants' training experiences in organization-sponsored training and development (T&D). Based on a review of selected human resource development (HRD) and T&D literature, the researcher concluded that trainee experiences of organization-sponsored training have been understudied. Furthermore, it was established that this study attempted to answer a research question that is valuable for HRD practice and scholarship. A review of the literature supported the conclusion that additional research on trainees' perceptions of the training experience would benefit HRD practitioners. Although HRD definitions have expanded to include the investigation of T&D, This study has the potential to contribute to HRD research and applications. Moreover, Hanscome and Cervero (2003) and Bunch (2007) found that trainers have a unique role in shaping the organization's culture and in influencing trainee perceptions of training and development. The organizational culture and perceptions of training can drastically impact the perception of HRD as a field (Bunch, 2007). In addition to culture, Egan (2008) suggested that subcultures are vital to motivation to transfer learning, including learning transfer from training to on-the-job contexts. Finally, Hong Kong, Singapore, Taiwan, and Korea have invested significantly into education, and statistics have shown that their economic growth has benefited from this investment (Olaniyan &

Okemakinde, 2008). Therefore, this dissertation established a theoretical framework for exploratory qualitative research.

Researchers had not explored trainee experiences using qualitative approaches, and, therefore, had not addressed the meaning or interpretation trainees assign to training processes, procedures and experiences. This study addressed this problem. The purpose of this study was to address practice and scholarship questions. Furthermore, this study specifically addressed how theoretical contributions tackle practice concerns. Finally, the purpose of this study was to illustrate that interdisciplinary research in the fields of communication and human resource development has significance to scholarship. The following questions drove this study and will be discussed later in this chapter.

What was the essence of the trainee experiences of their training programs?

What were trainee perceptions of their training experience?

How did the trainee describe the context of the training experience?

What were the ways in which the instructor was perceived by trainees?

How did the manner in which trainees perceived the instructor impact their training experience?

How did the “experience” evolve as the trainee experiences opportunities to apply or recall their training experience?

In addition to the study’s rationale, Chapter II revealed a scholarship gap in the literature. Social capital theory, social learning theory, and social constructivism provided a framework for understanding a variety of workers’ training experiences. Moreover, leader-member exchange literature and relational power and instructional

influence literature explained why interaction and relationships in training needed exploration. Furthermore, Chapter II found a gap in relevance, application, immediacy, attitudes, preference, and learning. These areas needed more qualitative research to gain trainees' descriptions. Neither HRD nor communication research has explored any of the above constructs. There is a gap in qualitative research within HRD describing the employees' experience in training.

Chapter III explained the theoretical approaches to this study, my research questions, the procedures, data analysis, and my credibility as a researcher. I established that this study was conducted from an interpretivist/constructivist perspective. I presented the research questions, and I described how data were collected and analyzed to best answer the study's questions. The following questions drove this study and will be discussed later in this chapter. What was the essence of the trainee experiences of their training programs?

What were trainee perceptions of their training experience?

How did the trainee describe the context of the training experience?

What were the ways in which the instructor was perceived by trainees?

How did the manner in which trainees perceived the instructor impact their training experience?

How did the "experience" evolve as the trainee experiences opportunities to apply or recall their training experiences?

The steps that I took to analyze the data and ensure trustworthiness are listed in detail in Chapter III. Finally, this chapter explains limitations and challenges of the study's research design.

In Chapter IV, the study participants—whom I called by the pseudonyms Patrick, Mike, Chris, John, Paul, Kimberly, Patricia, Cydney, Whitney, and Marilyn--identified shared experiences that shaped four themes: (1) relevance and applicability, (2) attitudes and preferences, (3) immediacy, and (4) relational learning. Within the first theme, there were three subthemes: (1) responsibility for relevance and application, (2) communicating relevance, and (3) trainees' recognition of relevance and application. Theme 2, immediacy, consisted of three subthemes as well. Immediacy was explained by trainees as verbal, nonverbal, and environmental.

Themes or messages among all 10 participants are presented. Then, the themes are organized into the narratives "Time is money--Is this worth my time?" and "If you don't care, then I don't care." Finally, the narratives reveal a desire for effective training. The results provided a narrative that illustrates a collective desire for effective training that represents the perception and essence of training.

It is clear that interpretivist and constructivist qualitative scholarship led to critical findings for HRD practice and scholarship. Though there were limitations to this study, this dissertation has a number of implications for future research, the training profession, and perhaps other HRD professionals. From the practice standpoint, trainers need to be aware of how they communicate relevance, adaptation, and immediacy. Trainers and instructional designers should be aware of what trainees think of face-to-

face and online training. Given that the literature reveals that immediate learning environments have an impact on motivation, learning, and transfer of learning, it is important that trainers be mindful of how immediacy and environments are created in their classrooms. Trainers' efforts to build relationships with trainees and their ability to facilitate relationships among trainees could impact many outcomes in their training efforts. Trainers face external challenges to developing and maintaining relationships in the training classroom that should be considered. For this reason, trainers and/or instructional designers should explore the use of communication and technology theories to develop training modules.

This study has introduced the four themes and narratives that contribute to the perception formation within organizational training and provided further directions for research. Also, scholars should conduct more qualitative studies exploring perceptions in online organizational training. This study reveals an area that instructional communication has not explored: how out-of-the classroom communication among trainees influences trainees' perceptions of formal training and/or other HRD initiatives? For example, conversations occur during coffee breaks, before training, during lunch, and after training. It would be interesting to see how this communication with fellow trainees impacts or influences learning and perception of those learning initiatives?

Discussion

In this section, I relay interpretations of the findings and literature from Chapter II to provide foundation to the research questions' answers. Furthermore, this section will synthesize how I used literature, others experiences, and my own in order to interpret the essence of the training experience.

What Is the Essence of the Trainee Experiences of Their Training Programs?

As revealed by the findings of this study, the trainees' experiences shaped their perception of the training experience. Even if some trainees reported an overall negative experience in this study, they still held onto the expectation of the desired training experience. The overall essence of the trainees' experience is that they desire relational learning. Trainees desire training in which the trainer and fellow trainees work together to learn and adapt in order to establish relevance and immediate learning environments. In addition, how they define the learning relationship informs the overall essence or meaning of the experience. We already know from the review of literature that organizations that invest in social relationships and interactions among their employees will see an R.O.I. in the market (Akdere, 2005; Cohen & Prusak, 2001; Shea, 2003). Akdere (2005) argued that HRD scholars should explore social capital theory (SCT) in our context. In other words, SCT is a sociology theory that makes sense in HRD, but has not been thoroughly explored. Social capital improves organizational performance. It is crucial to explore the trust and shared comprehension, standards, and actions that connect networks and learning communities (Cohen & Prusak, 2001). Shea (2003) said

that people reach self-actualization through a caring person in their life, and people seek relationships with those who have more knowledge (Vygotsky, 1978). Therefore, if relationships are critical to the trainees' perception of the training experience, relational development in learning within organizations is a key area to understand.

Akdere and Roberts (2008) discussed the importance of exploring social capital theory in HRD. In Stage I of this study, the participants' organization invested in face-to-face training opportunities for employees working all over the world. The findings, in regards to relational learning and training preferences, indicated that the investment in face-to-face training was worth it. Relationships established reinforcement and motivation for the learning process. Akdere (2005) found, and this study's findings supported that some implications of social capital for HRD are as follows:

- Social interactions and relationships are important in organizations;
- Phenomenon explanation affects how organizations function;
- Trust in each other and the organization are critical to HRD; finally,
- Work teams are important in HRD practice and are beneficial ONLY if the members work well together.

In conclusion, trainees appreciate and aspire to the expectation and/or desire of relevant and immediate training. The participants expressed a difference in their experience in regards to relationships. Finally, the trainees had clear attitudes and preferences as a result of their training experiences. These findings answered the research questions that framed this exploratory qualitative study.

What Are the Trainees' Perceptions of Their Training Experience?

I conclude that all 10 participants shared the perceptions that training was important to their development and performance; however, the participants had positive or negative perceptions rooted clearly in their own training experiences. The 10 participants' perceptions included that "Time is money -- Is this worth my time?" and "If you don't care, I don't care." In other words, the 10 participants desire for their training to be effective and productive, and they expect those who implement the training to care and value the learning process. If the training is not effective or they feel that the trainer does not care about them or the learning process, those sentiments impact the learning relationship and the trainees' attitudes.

They seemed to have a shared desire to learn and ask questions. Trainees' perceptions influence their training attitudes. We know that trainee attitudes are critical to training effectiveness (Noe, 1986; Noe & Schmitt, 1986). Chih, Liu, and Lee (2008) found that trainees' positive attitudes are imperative if one is to expect trainees to attend training and increase learning. This study found that trainees' attitudes are critical to the other trainees' sustained attitudes. For example, trainees realized that, though they might be motivated and encouraged at initiation of a training class, an environment that contradicts their feelings can result in an emotional contagion that then impacts the learning of the whole community. Knowing that Tannenbaum et al. (1991) found that a positive attitude increases motivation and an increase in motivation increases a trainee's transfer of learning, it is important for organizations to do what they can to motivate trainees and build positive learning attitudes.

Participants in this study had positive and negative perceptions of training. The results indicated that a contradiction of experiences emerged. Those who had negative experiences desired the positive. They expressed a need for relevance, immediate environments, and relationships. They had negative attitudes concerning training and preferred a positive experience. Those who had a positive experience received relevant training. The environment and relationships in the learning process were immediate. As a result, their attitudes and preferences were apparent and obvious.

As I said in the rationale, trainees expect for training to be relevant to their needs and their jobs (Yamhill & McLean, 2001). This qualitative study not only supports these findings, but it provides descriptions on how trainers adapt and communicate in order to build relevance. It also provides descriptions from trainees on what relevance and adaptation look and sound like. Trainers and trainees self-disclose experiences and examples to provide clarification of the course content in order to build relevance and increase learning (Witt & Wheelless, 2001). Baldwin, Magiuka, and Loher (1991) found that simple perceptions such as empowering the trainee and the perceived relevance of the training content can dramatically increase motivation. The participants, in Stage I, appreciated the opportunity to choose their training.

How Does the Trainee Describe the Context of the Training Experience?

The third research questions sought to establish how the trainees described the context of the training experience. This question is answered under Theme 3, immediacy, and subtheme of environment. As the findings of this study show, the study

participants who had positive experiences described the context as a warm and inviting learning environment. It appeared that trainees who had a positive experience did not dwell on the context of training as much as they talked about the content. On the other hand, they did mention that the environment of our economy impacted the need to ensure that they were developed to the best of their abilities.

On the other hand, the participants who discussed negative experiences discussed the context and environment of the experience in detail. They discussed how the training occurred as a result of an event that might have applied to a manager, so all management had to attend training. Also, one participant described how the environment nonverbally indicated that discussion and interaction were going to occur, and she was extremely disappointed when her expectation was violated. The context of that training was new employee orientation (new faculty orientation), and she felt that sort of training and the context surrounding it called for interaction and expression of needs.

The results indicated that when employees are content with the context, they do not give it much consideration, for the most part. Cydney did discuss dissatisfaction with the environment of her training experience. However, when the context of the training or environment contradicts expectations, trainees will discuss the context in detail. The participants with positive experiences spent more time on the content of the training, and those with negative perceptions spent more time discussing the context.

What Are the Ways in Which the Instructor Was Perceived by Trainees? How Did the Manner in Which Trainees Perceived the Instructor Impact Their Training Experience?

Participants in Stage I received training from one of two trainers. They had established relationships with both trainers. They perceived the trainer to sincerely care about their needs and their learning. They appreciated the fact that she stayed in touch beyond training and worked to update the intranet site in order to answer skill questions on a regular basis. Literature in social relationships and instructional relationships supports that people/students respond to the efforts of leaders or teachers to meet their (people/students) needs (French & Raven, 1959; Graen & Uhl-Bien, 1995; Kelman, 1958, 1961; Mottet, Frymier, & Beebe, 2005). These participants truly felt that the trainer cared and prepared in order to facilitate the training. Therefore, I felt that their admiration and affinity for the trainer influenced their perception of the training effectiveness. They perceived the trainer to be immediate and diligent about creating an inviting and open environment. In that effort, and because the trainees saw work and preparation by the trainer, they were willing to go “above and beyond” to meet their training needs.

However, participants in Stage II reported that the trainer did the opposite if their experiences were perceived as negative. Participants explained how they felt when their questions or attempts to ask questions were dismissed. They also described how trainers failed to take the time to learn about them, their jobs, or their needs.

In sum, this research question can be answered by the theme of immediacy and the theme of relational learning. Trainees need to respect and trust the trainer in order for the trainer to have influence or loyalty from the trainee. The trainees also respect and trust the trainers who allow learning relationships to develop among the trainees.

How Do the Opportunities to Apply or Recall Their Training Experience Post-Training Influence the Trainees' Perception About Training?

The recall and need for what the trainee was learning were immediate and did not come as a “revelation” or “epiphany” as the days passed on the job. The sales managers either registered for this course knowing that they would need what they learned or the trainer illustrated immediately to the trainees how they would use what they were learning. The trainees were given opportunities to log onto their accounts and actually apply what they were learning. This helped retention as well. In addition to the research questions, I would like to address essential issues or events associated with the organization in Stage I that influenced their perceptions.

Limitations

Chapter III discussed the limitations and challenges of this study's design. However, it is also critical to understand that this study, primarily the collection of data process, occurred during challenging economic times. The U.S. market was going through the worse financial period since the stock market crash of 1929 and the Great Depression. The climate was tense in any publicly traded U.S.-based company. Because

six of the participants worked in publicly traded companies, the status of the market did influence their responses. In addition, one participant was an associate in a law firm whose business was directly impacted by the external economic environment. Finally, two of the participants were probably indirectly affected on the job by the economic climate.

The sales employees from Stage I, were helpful in providing information and answers to questions; yet, these employees made money for the company and made their mark in the company by being out in their respective regions making sales calls and follow-up meetings. The idea of talking to me or attending training of two or more days was a true time sacrifice for these employees. Furthermore, the day I started in Stage I to build rapport, the company had reported a significant quarterly loss. The company had just had one round of layoffs and had experienced the crash of one of its planes during the follow-up and member check process. In conclusion, it is imperative for qualitative researchers within HRD to understand what is occurring in the climate and culture of the organization they study. Financial, market, and organizational emotions dramatically influence the outcome of essence studies.

Finally, there was the design limitations mentioned in Chapter III. For the purpose of review, I used of convenient sampling is a limitation of this study. My values and assumptions as the researcher may have limited the findings of this study, which is why I have to explain adequately my analysis procedures. Furthermore, I addressed concerns of the “halo effect” by establishing rapport with the participants and the trainer. I developed rapport with one participant by shadowing and socializing with him and

with another participant purely on a social and friendly level. I engaged in conversation with the training participants during coffee breaks and lunches. I had limited face-to-face access with the participants during the interview process. Reflecting, an alternative approach would have been to conduct a focus group to identify key areas of emphasis and to conduct in-depth interviews based on the focus groups. Other options would have been to conduct a phenomenological study, include a series of interviews (3 or 5 rounds), or to conduct an ethnographical study of Stage I utilizing interviews, observations, and a number of visits to the organization.

As a result of this study, we have support to further explore a number of communication, leadership, organizational, and learning theories as they relate to human resource development. For example, researchers can further explore leader-member exchange and relational power and instructional influence in relation to social capital theory and social constructivism within training and other HRD initiatives (Akdere & Roberts, 2008; Akdere, 2005; Cohen & Prusak, 2001; Graen & Uhl-Bien, 1995; Shea, 2003; Vygotsky, 1978). Schriesheim, Castro, Zhou, and Yammarino (2001) found that most studies had not tested LMX on the dyadic level, though the theory was originally called vertical dyad linkage. This study provides a rationale to explore that dyad in training or other HRD programs because this study has raised questions of the importance of establishing relationships in training. Finally, this study provided support for behaviors and messages that contribute to trust and loyalty and understanding how those same behaviors and messages distinguish expert and referent influence (French & Raven, 1959; Mottet, Frymier, & Beebe, 2005; Raven, 1993) Given the study's findings,

there are implications for HRD practice and HRD research. The last two sections outline specific concerns and questions for practice and continued research.

Directions for Practice

This study provided four directions for practice. The directions are listed below along with the literature to support the directions. Though this study is not generalizable to trainers, the facilitators of training may be more mindful of their interaction and/or communication with trainees and how they facilitate communication among others.

1. Trainers should be aware of how they may communicate relevance, adaptation, and immediacy. Trainers could see how these findings transfer to their own environment, and they can be mindful of how they communicate with trainees.
2. Trainers' efforts to build relationships with trainees could impact many outcomes in their training efforts. Also, external trainers should be mindful of how they establish rapport or initiate the learning relationship.
3. Trainers and/or instructional designers should explore the use of communication and technology theories to develop training modules. Online training is a popular choice for many large organizations. The context of online courses is critical to training and development context as well. However, in a 2005 study, learner-to-learner immediacy (created in online discussion rooms/boards) did not influence course outcomes or the interactivity of the course in the online course context (Conway, Easton, & Schmit, 2005). Distance education findings continue to be nonconclusive; however, a study conducted in 2006 supports further exploration

of media richness theory's role in the satisfaction and interaction in distance education environments (Daft, Lengel, & Tevino, 1987; Rupp, Gibbons, & Snyder, 2008). Githens (2007) argued that interpersonal interaction is critical to professional development course participants, and he argued that the role of the instructor is crucial to developing and facilitating those relationships. Because the findings have been supported in the traditional face-to-face learning environment, it would be worth exploring if immediacy is mentioned in the same training context.

4. Informal learning occurs as a result of formal learning. During formal learning, training, and other HRD formal programs, relationships are developed that lead to informal learning throughout the work experience. Participants share and brainstorm during coffee breaks, breakfast, lunch, dinner, or happy hour.

Finally, these directions for practice also lead to directions or guidance for scholarship.

Directions for Research in Training and HRD

This section provides four research directions for scholars in HRD to explore. More qualitative research, studies exploring interaction among trainees, studies exploring out-of-class communication regarding training, and research examining communication and technology models to design online training are all described in detail below.

1. More qualitative studies exploring perceptions in online organizational training are needed. We can learn about improving or stabilizing what is working if we

continue to talk to those who are impacted most by the delivery and design of our training and other HRD programs.

2. Communication and interaction among trainees seemed to be as instrumental in the meaning of the learning experience as the relationship between the trainer and trainees. Therefore, how does the communication between students and trainees influence their learning and perception of that learning experience? Qualitative and quantitative questions can be developed to further explore the significance of inter-trainee communication.
3. How does out-of-the class communication (i.e., lunch, coffee breaks, dinner, happy hour, taxi rides to the airport, etc.) influence trainees' perceptions of formal training and/or other HRD initiatives?
4. Finally, researchers need to explore the use of technology and communication theories/models in regard to instructional design.

In conclusion, Patrick, Mike, Chris, John, Paul, Kimberly, Patricia, Cydney, Whitney, and Marilyn identified shared experiences that shaped four themes: 1) relevance and applicability; 2) attitudes and preferences; 3) immediacy; and, 4) relational learning. Then, the themes were organized into two episodic narratives. The results provided a narrative that illustrates a collective desire for effective training that represents the perception and essence of training. This study contributes to HRD research and applications; furthermore, this dissertation provided ground work for essential qualitative research regarding perceptions in HRD.

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APPENDIX A

CONSENT FORM

Introduction

The purpose of this form is to provide information that may affect your decision as to whether or not to participate in this research study. If you decide to participate in this study, this form will also be used to record your consent.

You have been asked to participate in a research project studying employees' perceptions of their training experience. The purpose of this study is to understand how employees' perceive their training and the meaning they assign to their training experience. You were selected to be a possible participant because you are participating in the applied sales insight training.

What will I be asked to do?

If you agree to participate in this study, you will be asked to participate in two interviews. The first interview will last no more than 1 hour and 30 minutes. The first interview will occur after the training experience and the second will occur approximately 6 weeks after the training experience. This interview will probably be shorter in time, because it is just a follow-up interview.

Your participation may be audio recorded. However, in lieu of audio recording I can take notes.

What are the risks involved in this study?

The risks associated in this study are minimal and are not greater than risks ordinarily encountered in daily life.

What are the possible benefits of this study?

The possible benefits of participation are improved training procedures and training that directly addresses your work needs.

Do I have to participate?

No. Your participation is voluntary. You may decide not to participate or to withdraw at any time without your current or future relations with Texas A&M University or Continental Airlines being affected.

Who will know about my participation in this research study?

This study is confidential. Your identity will be protected, and co-workers (including supervisors) will not be aware of who did or did not participate. Also, you may indicate where you wish to be interviewed, and if you prefer in-person or telephone interviews. The records of this study will be kept private. No identifiers linking you to this study will be included in any sort of report that might be published. Research records will be

stored securely. I will be the only one who will know your identity. I will subscribe a code to your interview transcript.

If you choose to participate in this study, you may choose to be audio recorded. Any audio recordings will be stored securely and only the researcher, Robin Smith Mathis, will have access to the recordings. Any recordings will be kept until I earn my degree and then erased.

Whom do I contact with questions about the research?

If you have questions regarding this study, you may contact Robin Smith Mathis at (512) 970-3895 or rsmathis@yahoo.com.

Whom do I contact about my rights as a research participant?

This research study has been reviewed by the Human Subjects' Protection Program and/or the Institutional Review Board at Texas A&M University. For research-related problems or questions regarding your rights as a research participant, you can contact these offices at (979)458-4067 or irb@tamu.edu.

Signature

Please be sure you have read the above information, asked questions, and received answers to your satisfaction. You will be given a copy of the consent form for your records. By signing this document, you consent to participate in this study.

_____ I agree to be audio recorded.

_____ I do not want to be audio recorded.

Signature of Participant: _____

Date: _____

Printed Name: _____

Signature of Person Obtaining Consent: _____

Date: _____

Printed Name: _____

APPENDIX B
STUDY LETTER OF EXPLANATION

November 17, 2008

Dear XXXX,

Thank you for your help and participation in my dissertation study on the training and development experience. I value your experience, help, and clarification you can provide me in order to better understand employees' learning perceptions and training experiences. This purpose of this letter is to explain this study in writing and secure your signature on the participant consent form that is attached.

Through your help, I hope to better understand the core meaning of the trainees' training and development experience. The study will consist of a series of interviews. You will be asked to describe your training experience. You will need to recall specific situations, dialogue, and activities that you experienced. I am seeking a coherent, precise, and thorough picture of what this experience was like for you: thoughts, feelings, as well as any behaviors, events, or people associated with your experience. These interviews may be audio-taped; however, you may indicate that you prefer that I take notes if that is more comfortable for you.

I value your feedback and thank you for your time and commitment to improve scholarship and to insure successful training at XXXXX. If you have any further questions, I can be reached at (512) 970-3895 or rsmathis@yahoo.com.

With great appreciation,

Robin Smith Mathis, M.A.
Doctoral Student, Texas A&M University

RSM/s

APPENDIX C

CONTACT SUMMARY & INFORMATION SHEET

Date: _____ Site: _____

Coder: _____ Date Coded: _____

Sex: Male or Female

Race: _____

Age: 20-25 26-30 31-35 36-40 41-45 46-50 51-55 56-60 61-65

Job Title or Occupation: _____

Level of Education:

- High School Diploma or GED
- Some College
- Associate's Degree
- Bachelor's Degree
- Graduate Degree _____ (please specify)

Quotes/Excerpts	Themes	Page #

APPENDIX D

EMAIL-STAGE I

Hi, XXXX,

Thank you again for your willingness and patience helping me during my dissertation process. You provided some extremely helpful information. There were some common themes in all the interviews.

Building Relationships

1. interaction with trainees and trainer
2. adapting curriculum to your needs

Learning

1. relevance of content
2. application of content

Given these emerging themes, I have a few more follow-up questions for you. This will be it, I promise ;-) You may choose to answer one to all questions.

- How would you describe how interaction occurs in the sales training classroom in order to build and maintain working/teaching/trainee relationships?
- How would you describe how the trainer adapts the curriculum or instruction to your needs, or what suggestions do you have for the trainer adapt better to your needs?
- How does the trainer communicate that the training is “relevant” to you/your job?
- Explain why application of what you are learning during the training is so critical to your positive perception.

APPENDIX E

EXAMPLE OF THEME ANALYSIS AND CODING FOR ONE INTERVIEW

Coder: Mathis and Code# 1

Site: Telephone

Alias (Interviewee): Patrick

Document: BM

Date rec: 12/11/08

Quotes/Excerpts	Meaning/ Themes	Page #
It's – there's a lot of interaction, a lot of activity, stuff like that. So I'm always a fan of that.	Application Interaction and activities get my attention.	1
You get asked to do different exercises and programs and then come up with a bunch of examples about taking the training material and then applying it in real life – where do you see this, where do you use that? That kind of stuff.	Application Asking trainees to think gets them to buy into the training program. They become a partner in the learning process.	1
So your colleagues or co-trainees, their attitudes kind of impact your attitude a little bit? Yeah, yeah. Absolutely. And it makes it easier for you, as someone who's attending the training to go through it as well. As opposed to someone at your tables that really "bleh" about being there. That can be contagious.	Colleague behavior/attitude We feed off of each other's feelings and it helps for colleagues to have positive attitudes.	3
Robin: Okay. And do you think that that had any impact on the trainer's success or do you think the trainer just kind of started off on the wrong foot? You could tell she was getting flustered. Oh yeah. People on their PDAs and stuff like that and not trying to hide it.	Relationship-interaction The trainer could be seen as unapproachable and not interested in her trainees, but they are sending her nonverbal signs such as checking their PDAs that could be linked to her lack of enthusiasm as well	4
Yeah. And even if I don't learn anything new, I'm okay with sitting there if I'm getting a new perspective or maybe some more efficient ways of doing things, or stuff like that.	Relevance/ Refreshing is learning	2

VITA

Robin Smith Mathis received her Bachelor of Arts degree in communication studies from Texas Tech University in 1999. She received her Master of Arts degree in communication studies from Texas State University in 2004. Robin earned her Ph.D. in educational human resource development from Texas A&M University in 2010.

She taught in the public school system during 2000-2003. During this time, her titles included classroom teacher, Lincoln-Douglas debate coach at Diboll High School, one-act play director at Diboll High School and Lufkin Middle School, and director of UIL for Lufkin Middle School. Robin has taught communication courses at the undergraduate and graduate levels in the School of Management and Business at St. Edward's University. Also, she has taught as an adjunct professor for Angelina College, Austin Community College, and Texas State University in the liberal arts setting. In addition, she has facilitated and designed training modules and workshops. In October of 2000, Robin married Christopher (Chris) Mathis. They have a son, Patrick Thomas. Robin can be reached at St. Edward's University; School of Management and Business; 3001 South Congress Avenue; Austin, Texas 78704; robinsm@stedwards.edu.