

TRAINING AND DEVELOPMENT: A LIVE CASE PROJECT

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ABSTRACT

This paper describes a live case project that was used in two sections of a training and development course. The project is explained along with lessons learned from the professor's perspective. In-depth insights from a former student are included, and feedback from client organizations will be shared at the conference.

INTRODUCTION

Training and development is an important, albeit expensive, activity in all types of businesses. Following their 34th annual survey of US companies with 100+ employees, Training Magazine reported that approximately \$70.6 billion was spent on training and development in 2015 (Training Magazine, 2015). Further complicating the value of training and development, experts have reached a consensus that the amount of training that actually transfers back to performance on the job is around 10%, which is the basis of a Harvard Business School working paper entitled "The Great Training Robbery" (Beer, Finnstrom, & Schrader, 2016). Thus, human resource management (HRM) professionals are continually challenged to demonstrate a return on the heavy financial investment in training and development programs. Management and HRM professors must help students gain the knowledge and skills necessary to address these training and development challenges.

The Society for Human Resource Management (SHRM) has included the training and development of employees as a core HRM topic for decades and now refers to it as organizational and employee development. Additionally, SHRM includes training and development as a required topic in their curriculum guidebook, a tool for helping academic programs align content with the HRM profession. A substantial number of universities offer baccalaureate and masters degree programs in training and development, human resource development, organizational development or some other variation (e.g., North Carolina State University, Texas Tech University). The management program at the authors' university includes training and development as a substantial portion of an upper-division HRM course that students may take either as an elective or toward completion of a HRM certificate.

In order to provide students with realistic and practical training and development skills and experiences, a live case project was incorporated in the course design. The live case methodology is a fairly well known form of experiential learning where students learn by doing in the context of a real organization. Live cases have been used in a variety of courses since the 1970s (e.g. Hoover, 1977), but publications on the use of live cases in HRM are uncommon (see exceptions Kaupins &

McCale, 2010, and Abston, 2014). A brief search of the literature found live cases used in advertising (Cannon & Alex, 1990), business policy (Markulis, 1985), ethics (McWilliams & Nahavandi, 2006), hospitality (Green & Erdem, 2016), marketing (Camarero, Rodriguez-Pinto, & San Jose, 2010; Elam & Spotts, 2005; Lincoln, 2015), marketing research (Gundala, Singh, & Baldwin, 2014; Richardson & Raveed, 1980), and MBA capstone (Rashford & Neiva de Figueiredo, 2011), among others (see Burns, 1990).

The purpose of this paper is to describe how we successfully deployed a live case project in a training and development course. In-depth insights from a former undergraduate who is now a MBA student are presented. Feedback from former clients will be shared at the conference.

THE COURSE, THE LIVE CASE PROJECT, AND ONE EXAMPLE

Approximately 45 students complete this 3-credit hour HRM course every spring. The course is dual listed, so the total may include up to five graduate students who complete additional work to earn graduate credit. The training and development portion of the course begins around week 7 in a traditional 15-week semester. A live case project has been used in this course for two semesters now with approximately six local and/or regional organizations in the area participating each time. Prior to implementing a live case project in this course, student teams created a training program on a management topic of their choice without a target audience in mind. The live case clients have included two non-profits, a restaurant, an expert witness service provider, a car dealership, a health clinic, an accounting firm, a car rental company, and a convenience store chain. The organizations ranged in size from 10 to 5,000 employees.

The clients identify a management topic of interest that can be covered in 4-8 hours of training. Students develop the training program in teams of 4-5. During the first iteration of the course, there were five graduate students who worked together on one team. In the second iteration, only one graduate student enrolled. That student had to work on a team with four undergraduate students. Other than those constraints, the students select their own teams. They select a team name and generate norms and a mission statement within a couple of weeks of forming.

The ADDIE model for instructional design, a process created at Florida State for the U.S. Army in the 1970s (Neal, 2011), is used to structure the project. The students research how to conduct a needs assessment and create a plan for the client, but they do not actually complete that analysis for the sake of time. Instead, the information provided by the client is presumed to be accurate and complete. Students may contact

their client up to once per week with questions, and they sign a confidentiality/non-disclosure agreement to protect the clients' information.

The first real work on the project is completion of the training objectives, which must be approved by the professor. Teams then create a lesson plan and outline that includes the approved objectives, an instructor's guide that includes exercises, visual aids, etc., and the training evaluation. They deliver a demonstration of 20-25 minutes of the program in class with the client present. The teams must provide the training program to the client in whatever media the client prefers (i.e., hard copy, electronic copy). During these two iterations of the course, the training program topics included bullying and harassment, conducting stay interviews, customer service, disciplining problem employees, new employee orientation, performance management, social media presence, and teamwork.

The teams must meet with the professor for a consultation about two weeks before the project is due. Individual students are required to complete a peer evaluation regarding team project contributions. This evaluation can result in a penalty of up to 5% on the final course grade. The student learning outcome for the course that this project assessed was "Design and develop a training program." Unless the team provides evidence that a student contributed nothing, every student gets the same team grade on the training project. A grading rubric is shared with the students as part of the project instructions. This rubric removes some of the subjectivity of the grading, which helps avoid confirmation bias by the professor. The project grades for these two iterations ranged from 74-97 with the average being 84. One student who stopped attending class received a zero.

One memorable example was a team that completed a training program on how to use a large car rental company's five-step process for communicating effectively with dissatisfied customers. Immediately after introducing themselves and their client, the team pretended to have a realistic conflict about who or what was supposed to be presented next. The conflict lasted about 20 seconds, and their classmates were completely stunned – every eye was on the team, and there was complete silence. Thankfully, the team warned the professor in advance that their introduction was a little unconventional! This team successfully hooked the audience and grabbed their attention for the duration of their training demonstration by showing everyone how easily conflicts arise. They then used their simulated conflict example to introduce each of the five steps.

One of the authors is a recent graduate and current MBA student who complete this course last spring. The next section provides his insights from completing the live case project.

STUDENT INSIGHTS

From the student perspective, this project was not an ordinary research and present project. Rather, this project required an understanding of the course material before even beginning the research. A 100-page maximum research project that included a 20-25 minute training demonstration entails issues that many students have never encountered.

ASPECTS OF THE PROJECT

With such a large project, many students are faced with team difficulties such as team direction and procrastination. Creating a training program from scratch is a very open project where teams can go in many different directions to achieve their goals. Some teams will face leadership issues from such an open project that leads them down the wrong direction. For instance, the project was overwhelming at the start because a clear direction was not achieved, which resulted in many hours of wasted effort. The wasted effort demotivated the group and led them to procrastinate their job duties. With the deadline looming, procrastination resulted in groupthink because there was no time to consider alternatives.

Besides team difficulties, the live case presented teams with some client issues that generally affected the pace the teams could work. Communication with clients was a major issue for teams because we were limited to one email a week, but clients were not required to have a response deadline. Depending on a client's schedule, some clients were just too busy to respond in a timely manner or would not respond outside of regular work hours. Furthermore, some clients seemed uninformed or had misguided perceptions about the project. Teams that requested additional information for project clarification purposes were sometimes given irrelevant information. For example, a team asking about the client's preferred training methods received a job design task reply.

Even with these project difficulties, the training demonstrations were very beneficial to students. Demonstrating a project is much more demanding than explaining and summarizing a project. Students gained valuable teaching experiences from demonstrating an excerpt of their training program. The demonstration required the students to present the project as trainers, which allowed students to experience a new method of presenting – role play simulations. For this project, role play simulations were necessary to provide clarity to the audience regarding the information that was presented. Furthermore, role play simulations increased the audience reaction and participation, which helped ease the presenters' nerves.

LEARNING OUTCOMES

The live case training project reflects actual processes used to create training programs. Students are gaining experience in using training and development methods and teaching the content they created to their clients. This type of project increases understanding of the course material while simultaneously improving students' soft skills, such as oral communication, conflict resolution, and leadership skills. From a student's perspective, soft skills are the hardest skills to master because they cannot simply be taught. Gaining soft skills experience in course projects is highly valuable.

FUTURE CONSIDERATIONS

For future considerations, professors must understand that most students have been coddled in their school life. Students only know one path or one way to do any specific task. The openness of live case projects brings out both freedom and fear in students. Professors who intend to implement such projects into their courses should consider giving more feedback opportunities to lessen students' worries. However, professors should not shy away from such projects because the added benefits of gaining soft skills experience are vital for students.

PROFESSOR'S REFLECTIONS

TIME, ENERGY, and Control

As other scholars using live cases have noted (e.g., Elam & Spotts, 2004), the time investment in using real clients is heavy. Clients must be actively recruited before the semester starts or at the very beginning, which includes providing the entire project description so that the client understands the expectations. Once they agree, clients should be reminded of the components and the timeline. They should also be given several reminders at various milestones during the semester. Emails in conjunction with phone calls and/or in-person meetings are recommended to ensure that these communications are effective. Using traditional cases or projects that do not involve busy external stakeholders would certainly consume less time.

The clients used for these two iterations of the project were secured for the students using the local chamber of commerce and HRM association with one exception. One student requested that his employer be used for the project as they were a small non-profit that would benefit greatly from an organized volunteer orientation program. The service-learning aspect was valuable and worthy of future consideration. However, that client did not comply with the requirement of attending the end of course presentation, so there was a tradeoff associated with using a student's employer.

Clients can be unpredictable, which is a risk the professor must consider. Their engagement in the project is a key to success, but they can be unreliable in terms of meeting with students, responding to communications in a timely manner, and providing the necessary information. The clients may also be unpredictable in the knowledge they try to impart to students, such as guiding students in the wrong direction on the project or providing misinformation, or in how they respond during the training demonstration, such as grilling students or providing harsh criticism. An upper manager from one client openly criticized a team's PowerPoint presentation as being too flashy, stating that he preferred black text on a white background. That client's HR manager, also in attendance, stated that she liked the colors and graphics, which created a humorous yet awkward moment. The students were surprised by the critique and unsure of how to respond to the feedback. The "real world" critique was valuable, but the unexpected delivery of the feedback was a bit challenging. These concerns may be alleviated by (1) setting clear expectations in the beginning about the project requirements, frequency of student contact, appropriate sharing of information, and feedback mechanisms and (2) communicating these expectations to the client using multiple communication channels (email, phone calls, meetings, etc.).

The time spent addressing concerns students have about their clients or that clients have about their teams can be substantial. For example, during the last 3-4 weeks of the projects, one or two student teams routinely spent 30-60 minutes during office hours asking for clarification about something the client said or did, verifying the requirements for their deliverables, etc. These in-person meetings also served to reassure the students that they were on the right track.

ACCREDITATION IMPLICATIONS

One assessment-related justification for investing the necessary time and energy in live cases stems from the Association to Advance Collegiate Schools of Business

(AACSB). Business programs that are AACSB accredited must be concerned with impact and engagement, and live cases can be a strategic component in a program's portfolio:

"For any teaching and learning model employed, the school provides a portfolio of experiential learning opportunities for business students, through either formal coursework or extracurricular activities, which allow them to engage with faculty and active business leaders. These experiential learning activities provide exposure to business and management in both local and global contexts" (AACSB, 2016:25)

Thus, professors may be able to use the live case methodology to support continuous improvement efforts in teaching that will be recognized at the department and college levels. However, objective methods, such as those associated with action research and participatory action research (e.g., Eden & Huxham, 1996), should be utilized to assess achievement of learning outcomes and continuous improvement.

DESIGN IMPLICATIONS AND LIMITATIONS

Keeping the teams at just the right size and monitoring them closely are especially important strategies in a live case project because more is at stake than just failed learning. The professor's reputation can be tarnished, and the university can be put in a bad light if the students behave poorly or if the quality of the student work is subpar. To minimize these risks in the training and development course, each client is typically assigned to two or more teams. As the former student suggested, teams often get off to a slow start, which leaves room for procrastination to take hold and damage the end product. One approach that might address this issue is breaking the project into sections that are due at different times, which should help the teams focus on one chunk of the project at a time, potentially creating an end result that is better overall. However, this compromise is less organic and may reduce the realism of the project. Professors are challenged with providing just enough structure to keep the students from feeling too overwhelmed but not so much structure that the students do not actually experience the "real world" challenges of creating a training program from scratch. Additionally, this approach would create more work for the professor as each portion of the project must be graded and returned for the teams to move forward with the next step. As the former student mentioned, providing more feedback opportunities can be key to student success.

Mandatory consultations during class time with the professor help with procrastination and fine-tuning of projects. Yet, even with objectives being due early, project consultations being required, and a graded peer evaluation being used, some students still manage to be social loafers on this project. During the next semester or two, some trusted students voluntarily shared that one or two members of their teams completed the majority of the work. As such, future iterations of this project will utilize smaller teams (2-3 instead of 4-5), and more individually-assessed components will be incorporated. Smaller teams will also require more time and energy on the professor's part because the students who tend to disengage have no choice but to be involved or be exposed, and the clients will likely have to spend more time answering questions.

A significant limitation of this paper is the use of one student's perspective as nothing can be generalized from a single data point. The purpose of this paper was not to describe

our experiences with a live case project in a training and development course so that others could learn from our insights and reflections. The student co-author was selected by faculty as the top student in his graduating class, and he has an interest in the successful design and implementation of this project as he will now be responsible for some of the grading. The professor's reflections are sincere and transparent in hopes that others can learn from her successes and mistakes to become more effective (1) in their own implementation of live case projects and (2) in developing competent human resource practitioners among their own students.

FUTURE CONSIDERATIONS

As the project is a team project, it cannot be used for AACSB assessment purposes. However, our department uses this project for SACSCOC assessment of the HRM certificate program. The only data currently collected from the project is student grades, student evaluations of the entire course, and anecdotal feedback from the client and the students. While all students participate to some degree in designing and developing a training program, meeting the student learning outcome, participatory action research could be used to validate the project and to quantify the extent to which important goals are achieved for all stakeholders – clients, professor (and the university), and students.

CONCLUSIONS

Live case projects can add value in HRM courses just as they have in other business disciplines. Scholars have long supported the use of this experiential learning methodology as being more motivating and realistic (Burns, 1990; Markulis, 1985). However, using a live case is a substantial investment and risk on the professor's part. As one reviewer commented, "Live cases are not for the faint of heart." Finding willing clients with relevant "problems" and coordinating the interactions for the projects can be very time consuming, and the student teams may find the project so overwhelming that they are unable to do their best work. We propose that live cases are worthwhile, especially in a training and development course.

A former student indicated that the live case training project was a good way to learn the course content and stated that gaining experience in development of soft skills was also beneficial. Client feedback will be shared at the conference. We expect that the clients were pleased overall with the quality of the products, but we are unsure of the extent to which clients are implementing the training programs that students created for them. Clients continue to show their support of the live case methodology by agreeing to participate in the projects, so we are optimistic that they are realizing some measurable benefit.

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