

**MODEL OF TRAINING TRANSFER TO SUPPORT STRATEGIC  
ALIGNMENT IN THE SALES FUNCTION: CASE STUDY OF AN  
INTERNATIONAL OIL COMPANY AND THAI DISTRIBUTORS  
IN THE LUBRICANTS BUSINESS**

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**ABSTRACT**

This article explores the linkage between training transfer and strategic alignment. Many studies have supported the idea that strategic alignment can be achieved through the successful transfer of training. Subsequently, many organizations have focused more attention on training transfer due to the large investment spend on employees that do not get transferred to the job. Some of the most commonly examined factors that are believed to influence training transfer are individual, motivational, and environmental. Based on this framework of the transfer process, an adaptation of a conceptual model was used to test training transfers between an International Oil Company and their Thai Distributors in the Lubricants business. Operating in several markets worldwide, the International Oil Company has created efficiencies in some markets through their local business partners which require a strong strategic alignment with the corporate headquarters to achieve consistency in operational excellence. The findings helped to suggest that there is a strong basis for strategic alignment through training. The important factors that can inhibit training transfer are (1) trainee educational backgrounds and the desire to learn (2) the suitability of the training material (3) and the organizational support.

**KEY WORDS: TRAINING TRANSFER / STRATEGIC ALIGNMENT / TRAINEE  
CHARACTERISTICS / TRAINING DESIGN / WORK  
ENVIRONMENT**

64 pages

การถ่ายโอนการเรียนรู้ในการฝึกอบรมเพื่อส่งเสริมความสอดคล้องทางกลยุทธ์ในฝ่ายขาย:  
กรณีศึกษาของบริษัทน้ำมันข้ามชาติกับผู้จัดจำหน่ายไทยในธุรกิจน้ำมันหล่อลื่น

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บทคัดย่อ

บทความชิ้นนี้เป็นการศึกษาถึงความเชื่อมโยงระหว่างการถ่ายโอนการเรียนรู้ในการฝึกอบรมและความสอดคล้องทางกลยุทธ์ มีงานวิจัยจำนวนมากที่สนับสนุนว่าความสำเร็จจากการฝึกอบรมสามารถเพิ่มประสิทธิภาพความสอดคล้องทางกลยุทธ์ ในทางเดียวกันหลายองค์กรก็เพิ่มความสำคัญเรื่องการถ่ายโอนการเรียนรู้เนื่องจากเห็นว่าการลงทุนในด้านการฝึกอบรมให้แก่ลูกจ้างมักไม่ได้ถูกนำไปปฏิบัติใช้จริง ปัจจัยที่พบได้บ่อยและเชื่อว่ามีอิทธิพลต่อการถ่ายโอนการเรียนรู้ได้แก่ ปัจจัยด้านปัจเจกบุคคล แรงบันดาลใจ และ สภาพแวดล้อม จากกรอบแนวคิดเกี่ยวกับกระบวนการถ่ายโอนนี้ จึงได้มีการปรับรูปแบบกรอบแนวคิดเพื่อใช้ในการทดสอบการถ่ายโอนการเรียนรู้ระหว่างบริษัทน้ำมันข้ามชาติกับผู้แทนจำหน่ายไทยในธุรกิจน้ำมันหล่อลื่น ด้วยจำนวนสาขาที่อยู่ในหลายประเทศทั่วโลก จึงมีความจำเป็นอย่างยิ่งที่บริษัทน้ำมันข้ามชาติแห่งนี้ต้องพยายามสร้างความสอดคล้องทางกลยุทธ์กับผู้แทนจำหน่ายในท้องถิ่นเพื่อเพิ่มประสิทธิภาพการดำเนินงาน ผลการศึกษานี้พบว่าการฝึกอบรมเป็นพื้นฐานที่สำคัญของการเพิ่มประสิทธิภาพความสอดคล้องทางกลยุทธ์ และ ปัจจัยที่อาจเป็นอุปสรรคในการถ่ายโอนการเรียนรู้ได้แก่ (1) ภูมิหลังด้านการศึกษาและความต้องการในการเรียนรู้ (2) เครื่องมือและสื่อในการฝึกอบรมที่สามารถนำไปปฏิบัติใช้ได้จริง (3) การสนับสนุนจากองค์กร

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## **CHAPTER I**

### **INTRODUCTION**

As corporations grow larger and expand their businesses to other countries, strategic alignment between the operations of corporate headquarters and their foreign subsidiaries become important towards pursuing the overall goals and objectives in a consistent and efficient manner. Misalignment can lead to many negative consequences, most importantly affecting the control and growth of the business. To gain a better understanding of strategic alignment, it is important to understand the meaning and its importance, especially when corporations expand globally. Cobb, Samuels, and Sexton (1998:33) look at strategic alignment as an alignment of employees with the strategy to meet the goals of many change efforts. Drori, Rondinelli, and Rosen, (2001:407) further infer that during global expansion, “multinational corporations should seek alignment of and integration among business strategy, market expansion and penetration criteria, management processes, and organizational structure”. Business strategy and market penetration need to be fully aligned and pursued with a set of clear goals, objectives, and strategic direction. Management processes require synergy within the different functions and the organization structure to be best fitted with the diversity within each new market.

In order to achieve strategic alignment, corporations need to effectively rollout the strategy and ensure close alignment across the markets in which it operates. Many studies, including Al-Eisa, Alhemoud, and Furayyan (2009); Brinkerhoff and Montesino (1995); Montesino (2002); Sterling (2003) have supported that this can be achieved through successful transfer of training to employees. Montesino (2002:102) suggested through a research that there is positive correlation between training programs and a corporation’s strategic direction that has been clearly and explicitly communicated. A similar research on strategy management from Sterling (2003:27) further confirms, “Insufficient buy in of the strategy among those who need to implement it will cause failure”. Thus, examination of training transfer issues require a

clear understanding of what is meant by transfer and being able to identify the factors affecting it. Baldwin and Ford (1988) address this with a framework for understanding the transfer process. According to Baldwin and Ford (1988:64), “training-input factors include trainee characteristics, training design, and work environment”. Similarly, Brinkerhoff and Montesino (1995:265) states the main factors affecting the transfer are “the individual learner, the training program, the environment in which the trainee works, and the trainee’s immediate supervisor”. They further conclude that before and after training support by managers lead to greater transfer of training (Brinkerhoff & Montesino, 1995:271). Patterson (2009) also concurs this in a similar research that supervisory support is a key factor that affects training transfer. Finally, Montesino (2002:89) found that trainees that have high usage of the training perceived a significantly higher alignment of the training program with the strategic direction.

It can be inferred that effective training transfer play an important role towards strategic alignment. While the findings from Brinkerhoff and Montesino (1995) and Montesino (2002) were obtained from studies on a Fortune 200 company, the results were not meant to represent a definitive research on training transfer but rather a specific implication on the company where the study was conducted. The results do however suggest the need for stronger training transfer support systems at the operational level to better link training programs with the strategic direction.

## **1.1 Statement of the problem**

From the perspective of training transfer leading to strategic alignment, failure of such linkage can cost the corporation; whether from the perspective of the vast investment on training programs or more importantly, the inability to align employees with the strategy. Several studies on corporate training, including Al-Eisa et al. (2009); Brinkerhoff and Montesino (1995); Efendioglu and Murry (2007); Hutchins (2009); Montensino (2002); Noe (1986); Velada et al. (2007) have all indicated that many corporations spend large amounts of money on training. To provide some perspective, U.S. companies spend an estimate of more than \$100 billion on training expenditures each year (Hutchins, 2009:69). Baldwin and Ford (1988:63) have estimated however that no more than 10% of the expenditures on

training and development result in transfer to the job. Another study by Patterson (2009:5) also mentions that “more than 80% of the knowledge and skills gained in training [are] not being applied on the job”. Thus, the lack of training transfer inhibits organizations to grow according to the strategic direction. Although many studies have confirmed the linkage between training transfer and strategic alignment, it is not clear as to what extent does the transfer occur in typical organizations. For example, whether there are stark differences in training transfer between one company to another. Furthermore, there could be other important underlying factors that inhibit training transfer. These factors might include the business owners’ perception that the training has no value, limited knowledge and skills of the trainer, or the trainees’ lack of time to focus on the training compared to other day-to-day activities. As such, the examples indicate a degree of transfer problem, an area that if not addressed appropriately will limit the effectiveness of strategic alignment. Thus, further research will help to provide more information to organization leaders and business owners to help build a better understanding of training transfer, and the important link with strategic alignment. To study some of these transfer problem areas, an International Oil Company and its local business partners (referred to as “Distributors”) operating in Thailand were selected for the empirical analysis. The selected International Oil Company proved to be a good example of an expanding corporation, with a reputation as the largest global refiner, manufacturer of lube basestocks and supplier and marketer of petroleum products. Many of the facilities are located in major markets worldwide, thus a global functional organization facilitates business integration and operating efficiencies, consistent discipline of processes and execution, and long-term perspective of the business which includes continuing growth in emerging markets. This particular International Oil Company is based in Thailand and affiliated with its headquarters in the U.S. The company’s Lubricants business continue to focus on sales network efficiency enhancements where by leveraging on professional sales processes and adopting a benefit selling approach to improve business efficiency and effectiveness. In addition, particular products and services are provided through Distributors, thus requiring appointed Distributors to be closely aligned with the International Oil Company’s strategies.

## **1.2 Objective of the study**

1. Provide a qualitative analysis exploring factors that support training transfer and its connection with strategic alignment in the Sales function from one organization setting to another.
2. Explore the main factors that can inhibit training transfer and strategic alignment.

## **1.3 Limitations of the study**

With limited time and resources, the study focused specifically on the Sales function or one business segment of an International Oil Company operating in Thailand and its local business partners. Because of the limited generalizability of the study beyond the organizations where the study was conducted, the results therefore were not meant to represent a definitive research on training transfer nor have any implication to other International Oil Companies. Another important limitation was the reliance on the perceptions of respondents with different backgrounds and training experiences which depending on the spread could mislead or cause the findings to be bias. Nonetheless, the body of knowledge gained from the study is intended to support future academic work and provide real business applications relating to training and development for further consideration.

## **1.4 Benefits of the study**

Although there are already several published research on training transfer, relatively little is known on how well the transfer of strategy occurs from one organization setting to another through training. Through literature review and qualitative study, the research aims to provide guidance towards promoting more effective training transfer. With such information, managers/supervisors can more effectively align employees with the strategic direction. Additionally, corporations can also see higher returns on training investments by equipping employees with the new obtained skills to yield better results.

## **CHAPTER II**

### **LITERATURE REVIEW**

This chapter will present a review of related studies on training transfer, strategic alignment, and the connection between the two concepts. The aim is to build up understanding of both conceptual frameworks and the importance of its connection towards the study.

#### **2.1 Strategic alignment and training transfer**

What is strategic alignment? Some definitions have been provided to build upon initial understanding.

Strategic alignment is an alignment of employees with the strategy to meet the goals of many change efforts (Cobb et al., 1998:33).

Strategic alignment is “the state in which the goals and activities of the business are in harmony with the systems that support them” (Woolfe, 1993 as cited in Montesino, 2002:91).

Strategic alignment is the strategic fit (“the choices made for business decisions and organizational infrastructure strategy are consistent”) and functional integration (functional strategy that integrates external market positioning perspective with internal infrastructure perspective) of a firm (Henderson & Venkatraman, 1991:73).

Overall, the selected definitions for strategic alignment imply the intended goal of a firm is to consistently manage strategies and processes across the markets it operates. Thus, an important key factor to enable seamless connection is “the close linkage of functional operations and business strategy” (Drori et al., 2001:406).

Strategic alignment is the cornerstone of organizations in need of expanding business across national borders. All the critical parts that form the organization's structure and management processes "must be consistent and reinforcing" to "maintain competitiveness, develop flexibility, facilitate learning, legitimize diversity, management complexity, and build commitment" (Drori et al., 2001:406). Therefore, functional integration or shared understanding of organizational objectives plays an important role towards developing alignment.

Drori et al. (2001:406) suggests there are 4 theoretical sets of strategic components: (1) business strategy, (2) market penetration decisions, (3) management processes, (4) organizational structures, that all need to be continuously readjusted and realigned in support of the core strategy.

Business strategy and market penetration decisions need close alignment when expanding across borders. Fuchs et al. (2000:137-138) mentions the importance of formulating integrated strategies, or fitting pieces together into themes to better develop and align organizations. For example, the 10 strategic themes include leadership in areas such as: cost, innovation, quality, mass market, customer service, image and integration of strategic business unit (SBU), value chain, market place, geography.

In aligning management processes, it is important that different functions synergize their activities, and management practices are adjusted to meet cultural characteristics (Drori et al., 2001:409). Alignment of functions e.g. marketing, operations, sales, human resources, and information technology therefore becomes critical in ensuring consistency and shared business purpose. Understanding differences in cultures can create better adaptability; be in a better position to effectively manage processes in the different market conditions.

Similarly, firms embarking in new markets have to adapt their organization structure and management practices with the "diverse cultures, political systems, social environments, and business traditions" of that market (Drori et al., 2001:413).

As mentioned by Cobb et al. (1998:33), strategic alignment is an alignment of employees with the strategy to meet the goals of many change efforts. Such requires effective implementation from employees; the ability to align business

strategies, management practices, market penetration, and organization structures, with different markets. Thus, the implication of a connection between training and strategic direction is implied. Though there have been few studies quantitatively on the linkage, this study aims to take a qualitative look at the significance of training transfer towards strategic alignment.

## **2.2 Concepts on training transfer**

### **2.2.1 Definition of training and training transfer**

Training is defined as “a planned learning experience designed to bring about permanent change in an individual’s knowledge, attitudes, or skills” (Campbell et al., 1970 as cited in Noe, 1986).

Training is “an internal service not usually seen as central to the core business [and] an attempt to influence human performance” (Clark, 1992:3).

Training transfer is defined as “the degree which trainees effectively apply the knowledge, skills, and attitudes gained in a training context to the job...and maintained over a period of time on the job” (Baldwin & Ford, 1988:41).

Training transfer is implied as “the need to create conditions in which [trainees] can apply the learning they acquire from [courses] to their work situations” (Huczynski & Lewis, 1980:227).

Transfer of training is defined as the “ability of the trainee to apply the behavior, knowledge, and skills acquired in one learning situation to another” (Business Dictionary.com, 2010).

Overall, the selected definitions for training and training transfer implies the focus on training outcome, which has received increasing attention from organizations, especially due to the large expenditures on human capital investments each year to improve the effectiveness of employees. In other words, it is important that training efforts are being fully realized and support desired outcomes to enhance work performance. Research has shown that training efforts are unlikely to enhance job performance if not transferred to the job environment (Baldwin & Ford, 1988; Montesino, 2002; Velada et al., 2007). As a result, much effort has been given towards

increasing understanding of the training transfer process and the development of an optimal training model that will greatly support such a successful transfer to occur.

### 2.2.2 Categorizing training transfer studies

Research studies on training transfer have attracted attention from scholars and practitioners, most notably in the field of HRD (Human Resource Development), psychology, and management studies over the decades. Cheng and Ho (2001:103) through their review of training transfer studies conducted between 1989-1998 identified the most commonly examined factors believed to influence training transfer are nine independent and three dependent variables, categorized in table 2.1.

**Table 2.1** Training transfer factors from recent transfer studies

<b>Variables</b>	<b>Factors</b>
<b>Individual</b>	<ul style="list-style-type: none"> <li>▪ Locus of control</li> <li>▪ Self-efficacy</li> </ul>
<b>Motivational</b>	<ul style="list-style-type: none"> <li>▪ Career/job attitudes</li> <li>▪ Organizational commitment</li> <li>▪ Decision/reaction to training</li> <li>▪ Post-training interventions</li> </ul>
<b>Environmental</b>	<ul style="list-style-type: none"> <li>▪ Supports in organization</li> <li>▪ Continuous-learning culture</li> <li>▪ Task constraints</li> </ul>
<b>Dependent</b>	<ul style="list-style-type: none"> <li>▪ Learning</li> <li>▪ Training performance</li> <li>▪ Transfer outcome</li> </ul>

**Source:** Adapted from Cheng and Ho (2001:106)

Research on these factors in the past decades has confirmed its positive influence on training transfer (Hutchins, 2009:71). Thus, the following section will present more details of individual, motivational, and environmental factors.

### 2.2.2.1 Individual factors

The individual factors, or in other words a trainee's characteristics towards acquiring new learning, is well established in learning literature (Hutchins, 2009:71). Many characteristics have been tested and studied over the years, including locus of control and self-efficacy. Locus of control was earlier defined by Rotter (1966) as "a generalized expectancy that organizational outcomes in terms of rewards and reinforcements in life are controlled by an individual's own actions (internally) or by other forces (externally) (as cited in Cheng & Ho, 2001:106). Locus of control is mentioned by Noe (1986:739) to be "a stable personality trait that is likely to affect individual motivation and ability to learn". Thus, individuals with the belief that job performance is under personal control and determines career expectations will most likely take training more seriously. Such expectations could be job promotions, salary increases, and recognition. With self-efficacy, some studies have strongly related it to both learning and training transfer, supporting the ability to perform better on the job (Velada et al., 2007:285). Trainees who believe they can effectively apply the skills and abilities acquired from training are more likely to apply the new learning's quicker (Hutchins, 2009:72).

Baldwin and Ford (1988) used ability, personality, and motivation as the main trainee characteristics for their transfer process model. Thus, empirical testing of these characteristics was not prominent in early transfer studies, but increased during the 1980s (Cheng & Ho, 2001:106). A trainee's ability and motivation has been found to positively influence training performance (Hutchins, 2009:72). Another research found that people with an internal locus of control, the belief that "job performance and events that occur in the work setting are contingent on their own behavior" would stimulate application of new knowledge to the job (Noe, 1986:739).

### 2.2.2.2 Motivational factors

Motivation is closely linked to training transfer due to its direct impact on learning and training performance. Thus, the major variables that have been tested can be grouped into four dimensions: career and job attitudes, organizational commitment, decision and reaction to training, and post-training interventions.

Career and job attitudes refer to the mental process of “psychological identification with one’s career and job” (Cheng & Ho, 2001:107). Career is defined as an “individual’s perceived sequence of attitudes and behaviors associated with work related experiences and activities over the span of a person’s life” (Hall, 1976 as cited in Noe, 1986:741). Thus, individuals who engage in exploratory behavior and self-developmental activities such as career planning will exert a higher level of motivation towards training programs. As a result, positive training transfer propels an individual to meet their career goals.

Job involvement relates to the commitment, acceptance, and involvement one has towards the organization. Closely linked to career and job attitudes, trainees with a high level of organizational commitment will more likely perceive training as a useful tool to enhance the performance of themselves and the organization. Furthermore, Cheng and Ho (2001:108) indicate that trainees with a high level of organizational commitment were more optimistic towards organizational change.

Trainees given the flexibility in training decisions were more likely to exert higher pre-training motivation due to the perception that it is useful for their jobs (Cheng & Ho, 2001:108). Consequently, individuals “highly involved with their jobs are more likely to be motivated to learn new skills because participation in training activities can increase skill level, improve job performance, and elevate feelings of self-worth” (Noe, 1986:742).

Finally, post training interventions e.g. practice and feedback has been found to closely link with positive training transfer. Noe (1986:742) mentions that positive or negative reactions towards information on the strengths and weaknesses are “likely determinants of motivation to improve skills in a training program”. A study on training transfer by Velada et al. (2007:292) involving 182 employees in a large grocery organization found results that reinforces Baldwin and Ford’s (1998) work by demonstrating that feedback on post-training performance supports training transfer because the training content is retained over time. Hutchins (2009:73) also found practice and feedback to be critical aspects of training design and influences training performance.

### 2.2.2.3 Environmental factors

Many studies have indicated there has been little research on environmental factors (Baldwin & Ford, 1988; Cheng & Ho, 2001; Nijman et al., 2006; Velada et al., 2007). Thus, Hutchins (2009:74) has inferred its growing influence over the decades on training transfer to the work setting. Some important variables on training environment that have been studied include supports in organization, continuous learning culture, and task constraints.

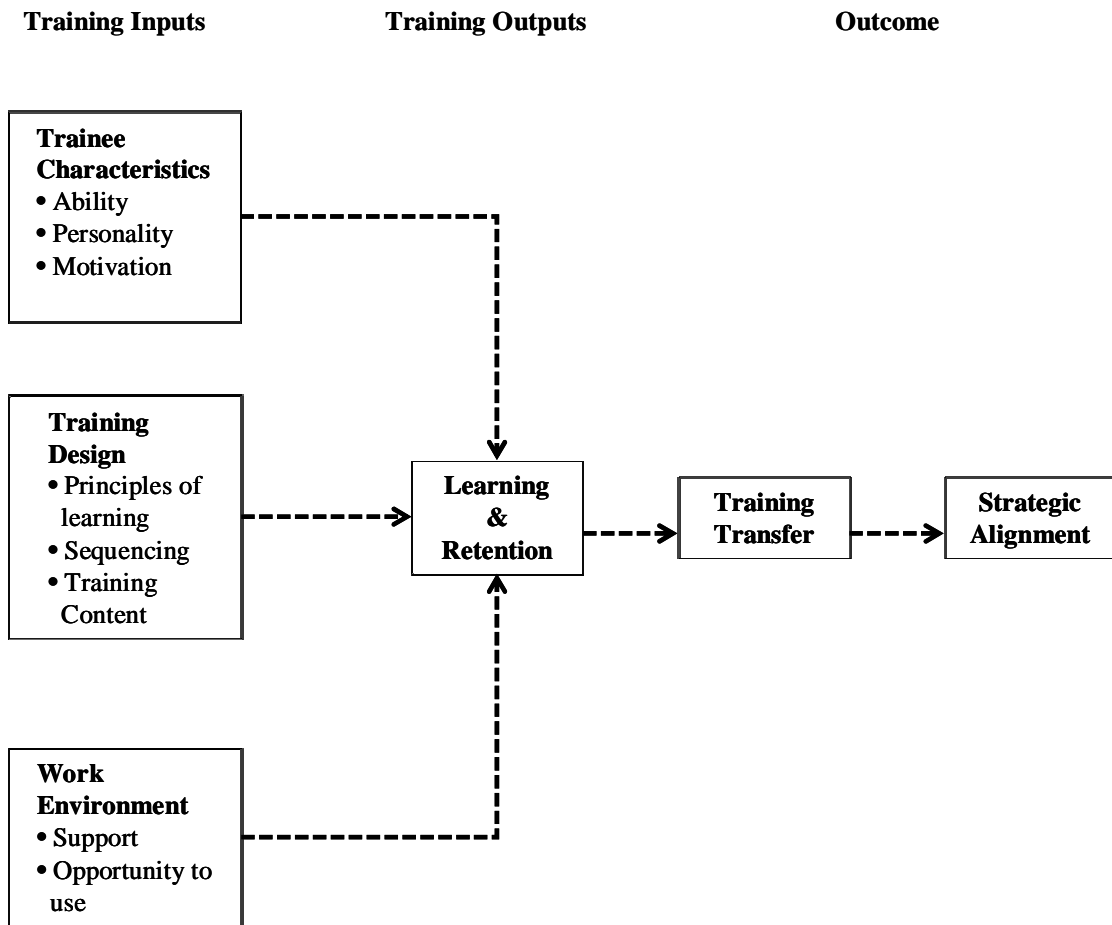
Supports in organization refer to supporting clients in an organization e.g. supervisors, peers that facilitate opportunities for skill and knowledge practice in a work setting (Cheng & Ho, 2001:109). Hutchins (2009:74) also supports the notion that “managers and peers are two of the more long-standing findings concerning the role of work context and training transfer”. Brinkerhoff and Montesino (1995) explored the impact of management interventions through an experimental study on trainees in a Fortune 200 company in Michigan. The findings found that “support provided by managers before and after training leads to greater transfer of training” (Brinkerhoff & Montesino, 1995:263). However, results of a study conducted by Velada et al. (2007:291) involving 182 employees in a large grocery organization do not support that supervisory support is a key element to training transfer but suggests the topic warrants future research due to possible gaps in previous literature. Peer support has also been indicated to affect training transfer as regarded to be closely linked to trainees’ motivation (Noe, 1986). A qualitative study by Hawley and Barnard (2005) found that networking and sharing ideas with peers about the course after six months promoted positive training transfer (as cited in Hutchins, 2009:74).

Continuous-learning culture is the state where employees “share the perceptions and expectations that learning is essential and associated with work” (Cheng & Ho, 2001:109). Thus, it has been inferred to have significant impact on post-training behaviors (Velada et al., 2007:285). Continuous learning can be achieved when employees perceive the organizational climate to be supportive, meaning “characteristics of the work environment that may facilitate or inhibit the use of trained skills” (Nijman et al., 2006:535).

Lastly, task constraints or negative consequences from not using the new knowledge and skills to the job after training have been mentioned to be slightly related to training motivation. An example of a negative consequence is being over-looked on job promotions and salary increases. Nijman et al. (2006:536) has indicated that research on negative consequences is limited but has shown to increase trainees' motivation to transfer training.

### **2.3 Conceptual model**

To provide a framework for exploring training transfer, the study adapted Baldwin and Ford's (1988:65) model of the transfer process (Figure 2.1). According to the model, training inputs such as trainee characteristics, training design, and work environment are viewed to directly affect training outcomes (Baldwin & Ford, 1988:65). There has been no implication the training inputs have to be in a particular order, thus undertones the significance of all three input factors towards achieving a desirable output from the training. Hence, as Hutchins (2009:71) infers, subsequent studies of Baldwin and Ford's (1988) work on transfer factors have confirmed that such training inputs "have a positive influence on training transfer". Therefore, development of positive learning and retention can lead to successful training transfer. As indicated earlier in the study, many studies have also supported that strategic alignment can be achieved through successful transfer of training. Another way to look at this implication is if learning and retention of training material directly affect training input factors, training transfer and strategic alignment can also be inhibited.



**Figure 2.1:** Model of the Transfer Process

**Source:** adapted from Baldwin and Ford (1988:65)

## **CHAPTER III**

### **RESEARCH METHODOLOGY**

This chapter will present an overview of the research design – unit of analysis and target population, operational definitions, and research process employed in the study.

#### **3.1 Unit of Analysis and Target Population**

This is a qualitative research based on the study of training transfer and its impact on strategic alignment. In particular, an International Oil Company and its local business partners (referred to as “Distributors”) operating in Thailand were selected for the empirical analysis.

Due to time and resource limitations, the scope of the analysis will specifically pertain to only the sales function of both entities. In order to gain the most current data available for more accurate recall of training experiences, interviewee selection was based on employees that had been with the company from 2009 up to the present. This limited other impacts that could mislead interpretation of the findings such as job moves and employee turnover. The research focused primarily on an informant’s perspective on training and strategic alignment; recall of training experiences at a point in time and how training had enhanced strategic alignment and development up to the present.

Interviews were conducted with both Thai and international respondents, which the main volume of the discussion with Distributors was highly concentrated on the Thai side context, but the International Oil Company side a mixture of Thai-international context. In conducting the research, the target population comprised a number of key informants involved in the day-to-day operations of the business.

### 3.2 Operational Definitions

Operational definition is the description of the measurement used in the empirical study. The operational definitions used are presented below in Table 3.1.

**Table 3.1** Operational Definitions - Transfer Process Model

Variables	Operational Definitions
<p><b>Training Inputs</b></p>	<p><b>Trainee characteristics</b></p> <ul style="list-style-type: none"> <li>▪ <b>Ability</b> <ul style="list-style-type: none"> <li>○ Cognitive ability or the intelligence of an individual</li> </ul> </li> <li>▪ <b>Personality</b> <ul style="list-style-type: none"> <li>○ Locus of control – expectancy of outcomes are controlled by own actions or by other forces</li> <li>○ Self-efficacy – strong belief in own ability to perform</li> </ul> </li> <li>▪ <b>Motivation</b> <ul style="list-style-type: none"> <li>○ Career/job attitudes, organizational commitment</li> </ul> </li> </ul> <p><b>Training design</b></p> <p>Training materials and content related to the work setting to positively influence training effectiveness and maximize ability to perform better on the job. Major training design factors include:</p> <ul style="list-style-type: none"> <li>▪ <b>Principles of Learning</b> <ul style="list-style-type: none"> <li>○ Incorporation of learning principles i.e. not only applicable skills but also the theoretical principles and general rules of a training content</li> </ul> </li> <li>▪ <b>Sequencing</b> <ul style="list-style-type: none"> <li>○ Sequencing of training material i.e. specific design issues including massed vs. distributed</li> </ul> </li> </ul>

	<p>training, whole vs. part training, and feedback vs. over learning</p> <ul style="list-style-type: none"> <li>▪ <b>Training Content</b> <ul style="list-style-type: none"> <li>○ Job relevancy of training material i.e. identical stimulus and response elements (training conditions match work environment)</li> </ul> </li> </ul> <p><b>Work environment</b></p> <ul style="list-style-type: none"> <li>▪ <b>Support</b> <ul style="list-style-type: none"> <li>○ Supervisory and peer support</li> </ul> </li> <li>▪ <b>Opportunity to Use</b> <ul style="list-style-type: none"> <li>○ Constraints and opportunities to perform learned behaviors on the job</li> </ul> </li> </ul>
<b>Training Outputs</b>	<p><b>Learning &amp; retention</b></p> <ul style="list-style-type: none"> <li>▪ Learning is the amount of learning occurred during the training, retention is how much of the learning was retained after program completion</li> </ul>
<b>Outcome</b>	<p><b>Training Transfer</b></p> <p><b>Strategic Alignment</b></p>

### 3.3 Research Process

This study employed four steps in the research process – (1) interviewee selection and interview questions design, (2) data collection and interview conduct, (3) analysis strategy, (4) development of conclusions, recommendations and implications based on the evidence. These steps are described below.

#### 3.3.1 Interviewee selection and interview questions design

This research employed the key informant technique approach and conducted in-depth interviews. The key informant technique is “an ethnographic research method which was originally used in the field of cultural anthropology” where “key informants, as a result of their personal skills, or position within a society, are able to provide more information and a deeper insight into what is going on around

them”(Marshall, 1996:92). Interviewee selection for data collection is therefore essential. In this research, the key informants were selected based on a prominent actor status quo; involved in the day-to-day operations of business.

**Table 3.2** Groups and number of interviewees - Distributor

<b>Entity</b>	<b>Distributor Principle (DP)</b>	<b>Distributor Sales Manager (DSM)</b>	<b>Distributor Sales Representative (DSR)</b>
Distributor 1 (Bangkok - Central)	1	1	1
Distributor 2 (Bangkok-East)	1	1	1
Distributor 3 (Bangkok-South)	1	1	1
Distributor 4 (East)	1	1	1
Distributor 5 (Northeast)	1	1	1
Distributor 6 (Upper North)	1	1	1
Distributor 7 (Lower North)	1	1	1
Distributor 8 (Upper South)	1	1	1
Distributor 9 (Lower South)	1	1	1

**Table 3.3** Groups and number of interviewees – International Oil Company

<b>Entity</b>	<b>Cluster Sales Manager (CSM)</b>	<b>Line of Business Manager (LOB)</b>	<b>Territory Manager (TM)</b>
International Oil Company	1	2	3

**Table 3.4** Terms & Definitions - Distributor

<b>Term</b>	<b>Definition</b>
<b>Distributor</b>	“An Entity that buys non-competing products or product-lines, warehouses them, and resells them to retailers or direct to the end users or customers”.
<b>Distributor Principle</b>	A person that possesses the exclusive right to hold, use, benefit-from, enjoy, convey, transfer, and otherwise dispose of an asset or property.
<b>Distributor Sales Manager</b>	“A person in the first-line management who monitors and regulates employees in their performance of assigned or delegated tasks”.
<b>Distributor Sales Representative</b>	“Salesperson or agent authorized to solicit business for a firm, and compensated usually through a commission or salary, or a combination of both”.

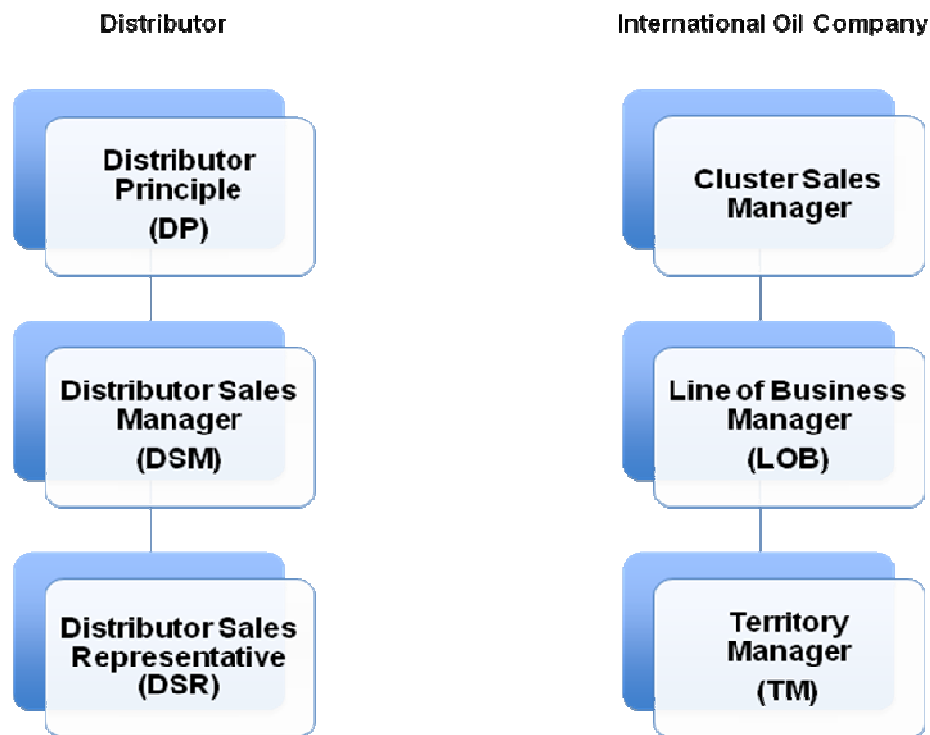
**Source:** adapted from Business Dictionary.com (2009).

**Table 3.5** Terms & Definitions - International Oil Company

<b>Term</b>	<b>Definition</b>
<b>Cluster Sales Manager</b>	Person who has managerial responsibilities extending to more than one country.
<b>Line of Business Manager</b>	Person who heads a specific product line and is responsible for achieving the organization’s main objectives by executing functions such as policy making, target setting, decision making.
<b>Territory Manager</b>	“Salesperson or agent authorized to solicit business for a firm, and compensated through salary”.

**Source:** adapted from Business Dictionary.com (2009).

**Table 3.6** Organization structure - International Oil Company vs. Distributor



In parallel to interviewee selection, a draft of the interview questions was prepared prior to data collection. There were three different group of interviewees based on the relationship in terms of training expectations:

**Training expectation**

***International Oil Company***

Group 1 Cluster Mgr/LOB Mgr/TM : Strategic alignment

***Distributor***

Group 2 DP/DSM : Employee development

Group 3 DSR : Job effectiveness / enhancement

Semi-structured interview questions rather than structured questions were developed in order to allow for the free flow of communication. Such approach enabled the researcher to ask unconditioned questions and the informants to narrate their stories or express their views in a natural and relax manner. The interview questions were based on the conceptual model but specific to each of the three different groups of interviewees.

### **3.3.2 Data collection and interview conduct**

The field research for the study was conducted over a 3-month period from May- July 2010 where a total of 33 informants participated which was higher than the minimum sample size set at 30 informants (3 informants per Distributor and at least 1 informant for each of the 3 positions from the International Oil Company).

### **3.3.3 Analysis strategy**

After data collection, the researcher conducted rounds and rounds of processing, using a user-friendly data management system to manage the data and a Mind Map program called MindNode Pro (Version 1.5.3, Markus Muller, 2008-2010) to help identify patterns and specific understanding within the research. The program is an easy to use mind mapping application for the Macintosh with access to plenty of customization features that enabled the researcher to work more efficiently. As the interview questions were based on each variable of the conceptual model, Mind Mapping out the findings for each variable effectively helped to reduce the complexity of the mass database by enabling the ability to group key words/topics into a hierarchical construction of patterns branching off from the variables that later transpired into the development of specific themes. For data validation, the study employed the data triangulation technique where the data was compared from different qualitative methods such as observation, interview, and documents. Moreover, incorporating the thick description method complemented the understanding of the context and behavior of those groups during the set period of time.

### **3.3.4 Development of conclusions, recommendations and implications based on the evidence**

The researcher used the naturalistic observation method in order to better observe the subjects in their natural setting e.g. conducted interviews at their offices. Thus, the type of observation used was an open observation with the researcher's involvement as a direct observer. However, as the subjects are aware of the researcher's position in the International Oil Company and may act or respond differently as a result, the researcher fully utilized the Participant Information Sheet to make sure all concerns about the interview session were clarified and well understood

to create as much ease as possible for the subject to feel safe to open up and hence limit manipulation to the data.

## CHAPTER IV RESULTS

Summary of the interviews can be found in table 4.1. Using a Mind Map (figure 4.1), the researcher was able to identify specific patterns from the points of view of the International Oil Company and Distributors pertaining to the conceptual model (table 4.2). Thus, further using the data triangulation technique and thick description method to analyze the data, specific themes could be developed which will be described in detail in the next chapter.

**Table 4.1** Interview Summary

<b>Interview questions group</b>	<b>Interviewee group 1: IOC</b>	<b>Interviewee group 2: DP, DSM</b>	<b>Interviewee group 3: DSR</b>
<b>Introduction</b>	<ul style="list-style-type: none"> <li>▪ Have 3-9 years experience. (TM 1,2,3)</li> <li>▪ As managers, more indirectly, visit and provide feedback &amp; advice to Distributors as they progress in their model. (CSM 1, LOBM 1,2)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Employees have taken Benefit Selling courses e.g. DPSPS, DELTA 1/2, Lubrication Fundamentals. (Distr. 1-9)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Have taken Benefit Selling courses e.g. DPSPS, DELTA 1/2, Lubrication Fundamentals. (Distr. 1-9)</li> </ul>
<b>1. Trainee Characteristics</b>			
1.1 Ability			
Pattern identified: <b>Education background &amp; specific</b>	<ul style="list-style-type: none"> <li>▪ Have to adjust method of training according to the skill level</li> </ul>	<ul style="list-style-type: none"> <li>▪ Having a background on the topic (e.g. trainees with an</li> </ul>	<ul style="list-style-type: none"> <li>▪ Skill in technology to stimulate learning motivation is</li> </ul>

<p><b>qualifications</b></p>	<p>of the trainee group. (TM 1)</p> <ul style="list-style-type: none"> <li>▪ Depends on the specific course. For example, management courses may require people with a BA degree and analytical / logic skills but product training may only require people with at least a vocational degree but not require specific skills. However, having a mechanical / technical background will be an advantage. People with high school diplomas are harder to train. (TM 2)</li> <li>▪ DSRs have an average to low learning capability due to educational background, primarily vocational diploma level. The company's courses are more structured towards at least BA degree graduates who have more tendency of learning transfer. (LOBM 1)</li> </ul>	<p>engineering background) has the tendency to understand industrial lubricant applications better. (Distr. 1)</p> <ul style="list-style-type: none"> <li>▪ Shortfall of people with English ability is a function that needs to be overcome within the organization in terms of the people hired. Understanding the limitations that may not be able to get over it, especially with the lower level group. (Distr. 2)</li> <li>▪ Need to look at the qualifications and experience of the employee and identify what skill sets are lacking / needed for further enhancement. (Distr. 4)</li> <li>▪ Training should enhance the development of the employee. (Distr. 3)</li> <li>▪ Selection of employees is based on work experience, channel of responsibility, job</li> </ul>	<p>required. (Distr. 1)</p> <ul style="list-style-type: none"> <li>▪ Having English capability will enable the learner to better understand the course material, supplements, and other materials in the website. (Distr. 3)</li> <li>▪ Having the ability to apply the theory in the field. (Distr. 4)</li> <li>▪ A mix between technical knowledge and selling skills. (Distr. 5)</li> </ul>
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<p>Pattern identified: <b>Desire to learn</b></p>	<ul style="list-style-type: none"> <li>▪ Some Distributors hire according to their budget. Thus, are the people attending the courses the right people who can learn? (TM 3)</li> <li>▪ The desire to learn is most important e.g. open to learning, changing views on how to approach things. (LOBM 2)</li> </ul>	<p>description. (Distr. 6)</p>	<ul style="list-style-type: none"> <li>▪ The drive to improve own skill sets and the company. (Distr. 6)</li> <li>▪ Have to have a background or interest on the topic and appreciate the benefits of the training course. (Distr. 2)</li> </ul>
<p>Other</p>	<ul style="list-style-type: none"> <li>▪ The market has a lot to do with it; infancy level for emerging markets while growth and mature markets see the competencies develop. Supply issue with skill talent; emerging markets see a lot of companies competing for skilled workforce, hence see a lot of attrition. However, very difficult to improve the competency of</li> </ul>	<ul style="list-style-type: none"> <li>▪ Any new employee should go through the basic courses. Think most of the courses offered are not strategic / higher level courses yet except for some courses offered to field engineers which is more job specific. (Distr. 5)</li> <li>▪ Not at stage where put the requirements against the set of training modules due to gaps</li> </ul>	<ul style="list-style-type: none"> <li>▪ Interaction with the trainer and training group helped to gain new perspectives. (Distr. 8)</li> <li>▪ Need to capture main points and listen tentatively. (Distr. 9)</li> </ul>

	<p>Distributors in the short-term as it is a long-term process e.g. employees with &gt; 3 yrs experience with the company will see the benefit of training and hence the development of the Distributor. (CSM 1)</p>	<p>between such modules and the capability level of employees. (Distr. 7)</p> <ul style="list-style-type: none"> <li>▪ Requirements which are both typical of a Sales person should be aggressive (go getters) and assertive. (Distr. 8)</li> <li>▪ Have to interview the employee to make sure the courses match their line of work. (Distr. 9)</li> </ul>	
<p>1.2 Personality</p> <p>Pattern identified: <b>Desire to learn</b></p>	<ul style="list-style-type: none"> <li>▪ Depends on the training topic / training title and interest level of participants or essentially the desire to learn. (TM 1)</li> <li>▪ Most DSRs appreciated the opportunity but some also felt forced to take the course. (TM 2)</li> <li>▪ Depends on whether the topic is interesting, how the course is conducted, and the course material (e.g. visuals,</li> </ul>	<ul style="list-style-type: none"> <li>▪ Having an interest on the subject is key. (Distr. 1)</li> <li>▪ Show willingness / alertness when given new learning opportunities. (Distr. 2)</li> <li>▪ Some employees even self-nominate to attend certain courses they feel their skill sets are lacking. (Distr. 5)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Try to understand the course description to be better prepared before the training course. (Distr. 1)</li> <li>▪ Looking at the pre-course materials helped to gain a better understanding of the course. Distr. 4)</li> <li>▪ Having confidence coupled with the motivation to gain new knowledge. (Distr. 5)</li> <li>▪ Felt nervous with courses that</li> </ul>

<p>Pattern indentified: <b>Match course with capability</b></p>	<p>animations, real examples). (CSM 1)</p> <ul style="list-style-type: none"> <li>▪ Does the course match the requirement of the trainee? (TM 3)</li> <li>▪ The trainees were nervous because the perception is the course may be too academic. Therefore, they may not participate much or stay quiet. (LOBM 1)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Would not send someone to attend a course if feel the person is not capable of going through it. Most reluctance has been with the online/CD courses that have not been translated to Thai causing fair level of discomfort. (Distr. 4)</li> <li>▪ Key to putting someone through a course is don't send someone to a course that he is not ready for. (Distr. 7)</li> <li>▪ Have basic selling skills because the courses all relate</li> </ul>	<p>required role-playing. (Distr. 6)</p> <ul style="list-style-type: none"> <li>▪ Tried to think about the course in advance and how it will be. (Distr. 7)</li> <li>▪ Prepared myself both physically and mentally. (Distr. 8)</li> <li>▪ Think positive about the new learning opportunities. (Distr. 9)</li> <li>▪ Ensure first the course is relevant to the job and learning capability. (Distr. 2)</li> </ul>
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<p>Other</p>	<ul style="list-style-type: none"> <li>▪ Trainees have a high expectation of the training material due to the reputation of the company. (LOBM 2)</li> </ul>	<p>with sales applications. (Distr. 9)</p> <ul style="list-style-type: none"> <li>▪ At an MNC level would be looked differently vs. a Distributor level in terms of career. (Distr. 3)</li> <li>▪ Main requirement in the short-medium term perspective is to do their job as effective as possible. Not yet looking at developing people for their career. (Distr. 6)</li> <li>▪ Not at the stage now to develop people up the organization because the size and capability are still at the very early level. (Distr. 8)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Training increases the confidence on the job. (Distr. 3)</li> </ul>
<p>1.3 Motivation</p> <p>Pattern identified: <b>Desire to learn</b></p>	<ul style="list-style-type: none"> <li>▪ Motivation is created only after a trainee buy-in or understands the material. (TM 1)</li> <li>▪ Win-win situation where both have mutual interests e.g. growth, alignment, and direction. (TM 2)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sales / Supervisor level (not managers) don't have to buy in to the strategy, even explaining it does not necessarily support it more / contribute to it more (mute point: maybe not enough high</li> </ul>	<ul style="list-style-type: none"> <li>▪ Training courses are proof that an employee has developed an understanding of the subject matter. (Distr. 1)</li> <li>▪ Have an opportunity to learn the perspective /</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Building on experience and new learned skills will enable career growth. (TM 3)</li> <li>▪ Important that the course is conducted in such a way that supports application in real situations. (LOBM 1)</li> <li>▪ Ensure the direction is clear and processes in place. (LOBM 2)</li> </ul>	<p>opinion of those people). (Distr. 1)</p> <ul style="list-style-type: none"> <li>▪ Get them to follow through with incentives. For example, if one of the opportunities is selling to fleets, have to find the right person / change the person to get a higher caliber person for the job and give the right award. (Distr. 2)</li> <li>▪ The right people, training technique, and incentive pushes in the right direction. (Distr. 3)</li> <li>▪ Incentives help to keep employees on course. (4)</li> <li>▪ New knowledge helps to elevate their potential. (Distr. 5)</li> <li>▪ An employee's interest in the job is important as with the training course that can help improve their job performance, which can impact their decision to stay or move on to another company. (Distr.</li> </ul>	<p>strategies of an international company. (Distr. 2)</p> <ul style="list-style-type: none"> <li>▪ Depends on how much value you gain from the training and apply to advancing your career. (Distr. 3)</li> <li>▪ Company establishes a cultural belief that working with the best processes, products, and people will enable a successful career. (Distr. 4)</li> <li>▪ New information that you don't have to find yourself. (Distr. 5)</li> <li>▪ New knowledge will certainly improve capabilities as a salesman. (Distr. 7)</li> </ul>
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<p>Other</p>	<ul style="list-style-type: none"> <li>▪ IOC tends to look at things longer term. Distributor short-term where making money today is worth more now than later. (CSM 1)</li> </ul>	<p>7)</p> <ul style="list-style-type: none"> <li>▪ New knowledge will increase an employee's perception that the company has career growth opportunities. (Distr. 8)</li> <li>▪ Expanding the knowledge of product lines and technical details that cannot be found in own company e.g. Synthetics. (Distr. 6)</li> <li>▪ The alignment of mission, vision, and company culture with the mother company. Employees will be able to better adapt. (Distr. 9)</li> </ul>	<ul style="list-style-type: none"> <li>▪ More depends on the company's long-term vision of doing business and stability. (6)</li> <li>▪ A clear company policy and direction is important. (Distr. 8)</li> <li>▪ When faced with obstacles, the company needs to be able to help employees overcome the obstacles. (Distr. 9)</li> </ul>
<p><b>2. Training Design</b></p>			
<p>2.1 Principles of learning</p> <p>Pattern identified: <b>Demonstration of learning principles</b></p>	<ul style="list-style-type: none"> <li>▪ Depends on what the training is: "need to know" material helps with the day-to-day job. Softer skills help with personal life and career. (CSM 1)</li> </ul>	<ul style="list-style-type: none"> <li>▪ The balance of the "whys" &amp; "hows" are inherently built in the training courses. (Distr. 1)</li> <li>▪ Need more evaluation and tracking after the</li> </ul>	<ul style="list-style-type: none"> <li>▪ Training that has workshops and activities help with hands on learning and problem solving. Gives a chance for real application related to the job.</li> </ul>

	<ul style="list-style-type: none"> <li>▪ Scope / principles are already established but need to relate them to real work life examples for better understanding. (TM 1)</li> <li>▪ A lot of courses are very theoretical and it's the ability to put in more application related. Hands open approach really spices up the training. (LOBM 1)</li> <li>▪ Demonstration of the theory and principles. (TM 2)</li> <li>▪ Quizzes and tests after particular modules help to test the knowledge before moving to next stage. (TM 3)</li> <li>▪ Depends on the nature of the course e.g. if very technical should be spread out, softer things can be compressed. Technical need to remember, soft skills are more take what you like. (LOBM 2)</li> </ul>	<p>training course e.g. after taking a Synthetics course, follow up to see whether the new learned skills are being practiced in the field. Should also provide opportunities for feedback to help with the development of such skills. (Distr. 2)</p> <ul style="list-style-type: none"> <li>▪ Balance of theory + case studies + training modules designed around application. (Distr. 3)</li> <li>▪ Training should not be too academic; bore trainees with too much theory. Hands-on practice is more practical. (Distr. 4)</li> <li>▪ A lot of the Sales force are not equipped with good academic background so thus require more basic form of hands-on learning to increase their learning effectiveness. (Distr. 7)</li> <li>▪ Proven theory is a good testament that it works</li> </ul>	<p>(Distr. 2)</p> <ul style="list-style-type: none"> <li>▪ Conducting tests after the course and feedback helps to crosscheck understanding. (Distr. 3)</li> <li>▪ Theory not essential but rather knowing how to apply the skills. (Distr. 4)</li> <li>▪ Having a clear understanding of the theory and opportunity to practice it during the course. (Distr. 5)</li> <li>▪ Theoretical principles have not been helpful because some are not applicable in real life situations. (Distr. 6)</li> <li>▪ Most times learn from observing others in the field. (Distr. 7)</li> <li>▪ Practicing new skills require a good trainer to convey how to apply in real life situations. (Distr. 9)</li> </ul>
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<p>Other</p>		<p>coupled with clear structured examples to help convey the learning. (Distr. 8)</p> <ul style="list-style-type: none"> <li>▪ Theory is more academic related, hands on practice is more appropriate for field jobs. (Distr. 9)</li> <li>▪ Go by personal biases that rather have the employee have the full picture rather than half the picture so they have an idea of what it's all about. Essentially learn by understanding. (Distr. 5)</li> <li>▪ 2-way communication is key. Ask lots of questions and listen tentatively. (Distr. 6)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sometimes get distracted from boss following up on work while attending the courses. (Distr. 1)</li> <li>▪ Theory is hard to understand because sometimes too technical. (Distr. 8)</li> </ul>
<p>2.2 Sequencing</p> <p>Pattern identified: <b>Demonstration of learning principles</b></p>	<ul style="list-style-type: none"> <li>▪ Need to focus on quality. Don't rush it. Give overview then dig down on each detail. (CSM 1)</li> <li>▪ Should not move on until trainees</li> </ul>	<ul style="list-style-type: none"> <li>▪ Wrong way to run a course is where people are bored out of their minds or in other words the pace is too slow or too fast where they don't understand what's</li> </ul>	<ul style="list-style-type: none"> <li>▪ Role-plays and feedback sessions have greatly enhanced the learning experience. (Distr. 4)</li> <li>▪ Prefer training</li> </ul>

	<p>fully understand each of the details. (TM 2)</p> <ul style="list-style-type: none"> <li>▪ Dividing up the training into parts and giving constructive feedback is key. (TM 3)</li> <li>▪ Generally massed because of limited time given to conduct the training. Thus, the trainers do a good job of demonstrating how to apply the new skills. (LOBM 1)</li> <li>▪ Since it is more essential that trainees understand how to use the skills rather than just knowing the theory, should not rush it but make sure learning is transferred through practice. (LOBM 2)</li> </ul>	<p>going on. Boils down to how well the trainer knows the students. (Distr. 1)</p> <ul style="list-style-type: none"> <li>▪ No right way or wrong. Depends on the training course, group of students, level of understanding the people have going into the course, and topic appearance. (Distr. 2)</li> <li>▪ Depends on the capabilities of the Trainer to transfer the knowledge more than the sequence of the material. (Distr. 3)</li> <li>▪ The trainers should adjust the teaching method based on the skill level of the participants. (Distr. 4)</li> <li>▪ Feedback from the trainer is important because they can help to evaluate how well the trainee understands how to apply the new skills. (Distr. 5)</li> <li>▪ Due to time and travel constraints, preference is mass</li> </ul>	<p>sessions that are either 2 or 3 days because can spend more time to understand and practice the materials. (Distr. 5)</p> <ul style="list-style-type: none"> <li>▪ Some trainers do a good job. Whether the materials are divided or massed together, they demonstrate it well for others to learn by doing. (Distr. 6)</li> <li>▪ Generally find the training materials to be massed but role-plays have greatly helped with the learning. (Distr. 7)</li> <li>▪ Some courses are too overwhelming to be conducted in 1 day. Should be distributed out and have more hands on practice exercises. (Distr. 9)</li> </ul>
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<p>Other</p>	<ul style="list-style-type: none"> <li>▪ Complete self-learning or Computer Based Training (CBT) module before attending the classroom training will help with understanding. (TM 1)</li> </ul>	<p>learning. Half day courses not preferred because not worth the cost. (Distr.6)</p> <ul style="list-style-type: none"> <li>▪ Feedback is especially important for new employees so they have a good guidance from the very beginning. (Distr. 8)</li> <li>▪ Lumping the materials together in a 1-day course is not an effective way to sequence a course. (Distr. 7)</li> <li>▪ Sequencing is not as important as how good the trainer is. (Distr. 9)</li> </ul>	<ul style="list-style-type: none"> <li>▪ It depends on the subject matter, topic and objective for usage e.g. solving problems for analysis. (Distr. 1)</li> <li>▪ Dividing up the learning material is more effective than lumping it all together. (Distr. 2)</li> <li>▪ Forcing too many objectives and rushing the training does not help learn anything. (Distr. 3)</li> <li>▪ Trainer should cover the basics and utilize case studies. (Distr. 8)</li> </ul>
<p>2.3 Training content</p> <p>Pattern identified:</p>	<ul style="list-style-type: none"> <li>▪ The training</li> </ul>	<ul style="list-style-type: none"> <li>▪ The strategy</li> </ul>	<ul style="list-style-type: none"> <li>▪ Understand the</li> </ul>

<p><b>Strategic implication</b></p>	<p>focuses people on a million things but really boils down to what are you trying to strategically achieve. If you know what you are trying to achieve with that organization then you will be able to customize something to fit. (CSM 1)</p> <ul style="list-style-type: none"> <li>▪ All training materials are designed to fit with the strategy. There are a number of training materials available. (TM 2)</li> <li>▪ The company sets the main strategic direction which is linked with the training. (TM 3)</li> <li>▪ All training materials are scoped around what the company expects of Distributors. (LOBM 1)</li> <li>▪ The training materials are the strategies to implement to Distributors. (LOBM 2)</li> </ul>	<p>works once a company is aligned and bought into the direction. Doesn't work to get the company aligned. (Distr. 1)</p> <ul style="list-style-type: none"> <li>▪ Have to be aligned with IOC because of business partnership. (Distr. 2)</li> <li>▪ The courses are aligned with the strategic direction of the company because they are designed / tailored according to the specific strategy. (Distr. 3)</li> <li>▪ It is difficult to teach strategic alignment. (Distr. 4)</li> <li>▪ It is hard to get strategic alignment out of a training course if meaning that a Distributor has got to be more technical, sell based on product attributes, or giving benefits to the ultimate customer rather than selling on basis of price. If that's the strategic differentiation</li> </ul>	<p>training course is related to the strategic direction and what the company expects employees to grasp. (Distr. 1)</p> <ul style="list-style-type: none"> <li>▪ Training materials has helped to better understand professional selling. (Distr. 3)</li> <li>▪ Enables the ability to approach problems with multiple solutions. (Distr. 4)</li> <li>▪ Through training has allowed the opportunity to learn from others, whether agree with or not. (Distr. 7)</li> </ul>
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<p>Other</p>	<ul style="list-style-type: none"> <li>▪ People driving the training must be very motivated and have a positive attitude and effort. (TM 1)</li> </ul>	<p>between one company's products vs. another then there is a basis for training. But just by offering training doesn't mean the Distributor will be aligned. (Distr. 5)</p> <ul style="list-style-type: none"> <li>▪ Relevant because the company sets the strategic direction for Distributors to follow. (Distr. 7)</li> <li>▪ Understanding is that the courses are structured to align Distributors with the strategic path. (Distr. 8)</li> <li>▪ It is related to the strategic direction but requires time to grasp and practice. (Distr. 9)</li> <li>▪ Employees are required to share what they've learned to the group. (Distr. 6)</li> </ul>	
<p><b>3. Work Environment</b></p> <p>Pattern identified: <b>Continuous development</b></p>	<ul style="list-style-type: none"> <li>▪ Measure training effectiveness by crosscheck understanding with follow up</li> </ul>	<ul style="list-style-type: none"> <li>▪ Need to follow up more to make sure people are putting to practice what they're</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sharing of knowledge with colleagues and gaining other perspectives</li> </ul>

<p>Other</p>	<p>homework and assignments. (CSM 1)</p> <ul style="list-style-type: none"> <li>▪ Measure competency through the results. (TM 1)</li> <li>▪ Courses such as DPSPS can be followed up through the effectiveness of using tools e.g. Start Tool. (TM 2)</li> <li>▪ On the job training works well to crosscheck that the learning has been transferred. (TM 3)</li> <li>▪ Trainees have to first do a self-assessment in order for Supervisors to better understand the gaps. (LOBM 1)</li> <li>▪ The performance of Distributors also reflects how well the training has been transferred. (LOBM 2)</li> </ul>	<p>learning. (Distr. 1)</p> <ul style="list-style-type: none"> <li>▪ Go with DSRs on the job to see and assess what they are supposed to be doing. (Distr. 2)</li> <li>▪ Have to review / follow up with employees. (Distr. 3)</li> <li>▪ Need to give constructive feedback when on the job. (Distr. 4)</li> <li>▪ Need to have Sales Managers follow up more. (Distr. 5)</li> <li>▪ Need a more structured approach to follow up training effectiveness of employees. (Distr. 8)</li> <li>▪ More training programs should be offered for continuous development of the employee. (Distr. 9)</li> <li>▪ As business develops,</li> </ul>	<p>helped to broaden the knowledge base. (Distr. 1)</p> <ul style="list-style-type: none"> <li>▪ Everyone can help contribute different ideas to approaching a problem. (Distr. 2)</li> <li>▪ Feedback and analysis by a Supervisor after on the job training greatly enhanced the skills. (Distr. 3)</li> <li>▪ Shared experiences from colleagues helped to broaden the perspective. (Distr. 4)</li> <li>▪ Encourage sharing the knowledge within the organization. (Distr. 6)</li> <li>▪ Supervisor periodically crosschecks through on the job training. (Distr. 7)</li> <li>▪ Supervisor gives challenging assignments after attending the training courses. (Distr. 8)</li> <li>▪ Sometimes the training material</li> </ul>
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		<p>Training Manager is required on board. (Distr. 6)</p> <ul style="list-style-type: none"> <li>▪ Should be sharing knowledge within the organization. Work as one team. (Distr. 7)</li> </ul>	<p>does not work well with the current market situation. (Distr. 5)</p> <ul style="list-style-type: none"> <li>▪ Sometimes the training is not followed up so forget to utilize the skills over time. (Distr. 9)</li> </ul>
<p><b>4. Learning &amp; Retention</b></p> <p>Pattern identified: <b>Management engagement</b></p>	<ul style="list-style-type: none"> <li>▪ DP plays a pivotal role e.g. include training as part of the company's policy, give time for employees to train, invest in resources to support training programs. (CSM 1)</li> <li>▪ If DSM becomes an advocate for training, subordinates will follow his / her footsteps. (TM 1)</li> <li>▪ Competitiveness among colleagues will stimulate learning effectiveness. (TM 2)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Have to follow up to make sure people are performing their jobs because the training was suppose to help them with their jobs. (Distr. 1)</li> <li>▪ Have shown signs of improvement though require Supervisors to consistently follow up the development through more on the job coaching type sessions. (Distr. 6)</li> <li>▪ Important that Supervisors are fully engaged with the follow up. Otherwise, DSRs will not think the skills are critical towards their development.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Benefit selling training has helped to better understand customers' needs &amp; wants and how to win them over. Constructive feedback by Supervisors from time to time will better help guide the development process. (Distr. 1)</li> <li>▪ On the job training with IOC sales and own Supervisor has helped to better utilize the skills from the training. (Distr. 2)</li> <li>▪ On the job training with Supervisor has helped to improve the confidence level when approaching difficult</li> </ul>

<p>Pattern identified: <b>Continuous development</b></p>	<ul style="list-style-type: none"> <li>▪ Own company’s training for internal employees have a clear assessment of where the skill sets are. Main thing is for individuals to assess what area he / she feel need to improve on. (TM 3)</li> <li>▪ Supervisor review / provide insight with employee; joint approach to the person’s development plan. (LOBM 1)</li> <li>▪ Having an employee able to self assess his / her competencies and identify with a Supervisor on learning opportunities add real value to the development of that employee’s career. (LOBM 2)</li> </ul>	<p>(Distr. 7)</p> <ul style="list-style-type: none"> <li>▪ On the job opportunities with Supervisors will help employees use the skills and apply the training. It can also help to evaluate whether the employee can perform the tasks in the field. (Distr. 2)</li> <li>▪ Noticeable improvement in the confidence level of the employee after the course. (Distr. 3)</li> <li>▪ Confidence level has gone up but need continuous practice to master the skills. (Distr. 5)</li> <li>▪ Some DSRs have found it hard to implement the skills and quickly go back to their comfort zone of what they were use to doing. (Distr. 8)</li> <li>▪ More practice is needed to boost confidence. (Distr. 9)</li> </ul>	<p>customers. (Distr. 5)</p> <ul style="list-style-type: none"> <li>▪ Still need to improve more on the new learnt skills because not use to using a systematic sales technique. (Distr. 6)</li> <li>▪ Helped to explore new knowledge and utilize in real life through practice. (Distr. 8)</li> <li>▪ Practicing the skills has helped to increase the confidence level that has led to better sales performance. (Distr. 9)</li> </ul>
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<p>Other</p>		<ul style="list-style-type: none"> <li>▪ Leadership training only seen for large companies and not apparent for Distributor companies because they are still at the ground level. (Distr. 4)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Has helped to approach problems using multiple approaches. (Distr. 7)</li> <li>▪ Training has helped to work systematically e.g. analytical thinking, sequencing work tasks / steps towards achieving the goal. (Distr. 3)</li> <li>▪ Helped to build work confidence e.g. equipped with Lubrication knowledge helped with presenting proposals. (Distr. 4)</li> </ul>
<p><b>Questions on Strategic Alignment</b></p>	<ul style="list-style-type: none"> <li>▪ Learning is a continuous development process. (CSM 1)</li> <li>▪ Training is the heart of creating understanding of the strategy. (LOBM 1)</li> <li>▪ Training is a means or one of the tools to achieve alignment. (LOBM 2)</li> <li>▪ Training is a committed knowledge transfer. Has to</li> </ul>	<ul style="list-style-type: none"> <li>▪ Most of the training courses so far are at the basic level. The next level is identifying the gaps within certain people / sales force and offer a matrix of training to bridge those gaps. (Distr. 1)</li> <li>▪ Don't believe in a "check in the box" type of training where courses follow in steps e.g. Benefit Selling 1, 2, 3. Through</li> </ul>	<ul style="list-style-type: none"> <li>▪ Training courses help to better understand the strategic direction better and the tools to achieve that alignment. (Distr. 1)</li> <li>▪ The selected courses from the IOC are the foundation for the structure of how the company wants to shape the employee. (Distr. 2)</li> <li>▪ Enables the ability to build on essential skills to</li> </ul>

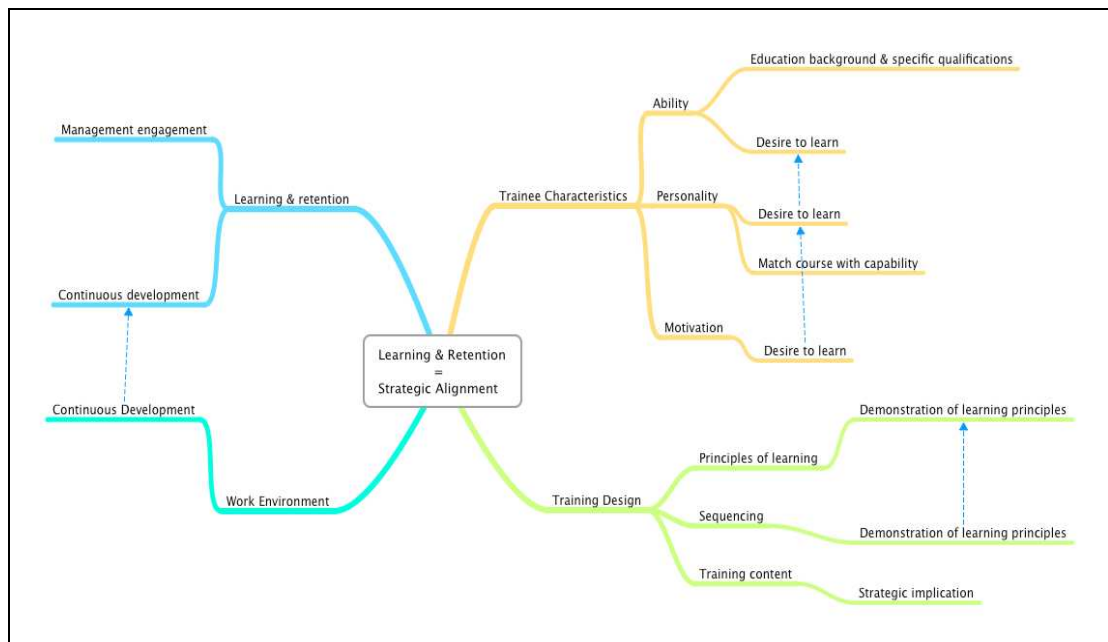
	<p>come with a certain process and tools to connect with the training. (TM 1)</p> <ul style="list-style-type: none"> <li>▪ No point to give a mass of things then forget about it e.g. a person using a cheat sheet when meeting with a customer will help remind him what to do and reflect the time that he had the training and how he did it. (TM 2)</li> <li>▪ Training works because you design the learning process through training that supports the strategy. (TM 3)</li> </ul>	<p>understanding the requirements can better help match the right courses with employees. (Distr. 2)</p> <ul style="list-style-type: none"> <li>▪ Strategic alignment only works once a company is aligned or bought into it. It's a choice that Distributors have to make. No amount of training is going to change their mind. (Distr. 3)</li> <li>▪ Not prefer CBT (Computer Based Training) courses. Prefer on the job training because employees can benefit learning from an International company by building new perspectives. (Distr. 4)</li> <li>▪ All courses relate to the strategic direction because each specific course seems to be an enhancement of a particular area of focus. (Distr. 5)</li> <li>▪ Training helps to give the foundation of the</li> </ul>	<p>enhance work performance that may have been over-looked. (Distr. 3)</p> <ul style="list-style-type: none"> <li>▪ Training gives a good indication as to what the company expects of Distributors. (Distr. 4)</li> <li>▪ Training has helped to equip the right mind-set and attitude towards performing the job tasks. (Distr. 5)</li> <li>▪ Gives a good idea of the direction the company should be moving towards. (Distr. 6)</li> <li>▪ Know what skills are required if were to have a successful career with the company. (Distr. 7)</li> <li>▪ The training courses have helped to provide new techniques and tools to better close deals, which understand fits in with the overall strategy of the IOC. (Distr. 8)</li> <li>▪ The training</li> </ul>
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		<p>strategy. (Distr. 6)</p> <ul style="list-style-type: none"> <li>▪ Achieving strategic alignment through training is a continuous process that needs to be emphasized over and over again. (Distr. 7)</li> <li>▪ Training is a good way to ensure Distributors are doing the right things. (Distr. 8)</li> <li>▪ Strategic alignment can be achieved through training only if trainees understand and can utilize what they have learnt. (Distr. 9)</li> </ul>	<p>material is linked to the strategy and help guide trainees to perform their tasks according to the strategy. (Distr. 9)</p>
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**Table 4.2** Table summary of findings

<b>Themes</b>	<b>International Oil Company</b>	<b>Thai Distributors</b>
<b>Trainee’s education background and desire to learn</b>	<ul style="list-style-type: none"> <li>▪ Having appropriate level of education and specific qualifications are important aspects</li> <li>▪ Courses and capabilities need to match for effective learning</li> </ul>	<ul style="list-style-type: none"> <li>▪ Having specific qualifications and desire to learn increases learning motivation</li> <li>▪ Need English capability, technical knowledge, work experience</li> </ul>
<b>Suitability of training material</b>	<ul style="list-style-type: none"> <li>▪ Demonstration of learning principles</li> </ul>	<ul style="list-style-type: none"> <li>▪ Focused on applied learning through</li> </ul>

	<p>creates better understanding</p> <ul style="list-style-type: none"> <li>Ability of trainer / trainee relate to how well training is conducted / received</li> </ul>	<p>demonstration and hands-on practice</p> <ul style="list-style-type: none"> <li>Courses have relevancy towards strategic direction of Intl. Oil Company</li> </ul>
<b>Organization support</b>	<ul style="list-style-type: none"> <li>Distributor management are important advocates in supporting training and usage of training towards the job</li> </ul>	<ul style="list-style-type: none"> <li>Mentors are important towards following up the transfer of skills to the job environment</li> <li>Coaching and periodic self-assessment are important for continuous development</li> </ul>



**Figure 4.1** Mind Map of findings

**Source:** MindNode Pro, Version 1.5.3, Markus Muller, 2008-2010

## **CHAPTER V**

### **DISCUSSION**

This chapter begins by looking into the specific themes that were developed from patterns found in the data, namely (1) Trainee's education background and desire to learn influences training effectiveness (2) suitability of the training material increases learning and development (3) organization support is critical towards the transfer of training process. The chapter illustrates how these three themes interrelate with one another and also ties in with each of the three training inputs (trainee characteristics, training design, and work environment) from the conceptual model to suggest there is a basis for strategic alignment through training.

#### **5.1 Trainee's education background and desire to learn influences training effectiveness**

Results from the questions on trainee characteristics show some similarities for the International Oil Company and Distributor organizations pertaining to the capability of Distributor Sales Representatives to effectively learn the training courses. The International Oil Company group viewed that having an appropriate level of education and specific qualifications were important aspects as they relate to the skill level required to better understand the course materials.

*I feel that DSRs have an average to low learning capability due to their educational background which is primarily vocational diploma level. The company's courses however, are more structured towards at least BA degree graduates who have more tendency of learning transfer. (LOBM 1, 2010)*

*It depends on the specific course. For example, management courses may require people with a BA degree and analytical/logic skills but product training may only require people with at least a vocational degree but not require specific skills. However, having a mechanical/technical*

*background will be an advantage. People with high school diplomas are harder to train. (TM 2, 2010)*

The Distributor group also implied similar requirements, but more specifically on the qualifications viewed to greatly support training transfer. The qualifications mentioned were English capability, technical knowledge, and work experience relating to the job. Such qualifications are perceived to directly relate to prerequisites that will enhance learning of the course materials, which the materials are mostly in English and job family specific e.g. Sales.

*There is a shortfall of people with English ability which is a function that needs to be overcome within the organization in terms of the people hired. Understanding the limitations that may not be able to get over it, especially with the lower level group. (DP, DSM - Distr. 2, 2010)*

*Need to have a background on the topic. For example, trainees with an engineering background have a tendency to understand industrial lubricant applications better. (DP, DSM - Distr. 1, 2010)*

*Need to look at the qualifications and experience of the employee and identify what skill sets are lacking or are needed for further enhancement. (DP, DSM - Distr. 4, 2010)*

*Skills in technology to stimulate learning motivation is required. (DSR - Distr. 1, 2010)*

*Having English capability will enable the learner to better understand the course material, supplements, and other materials in the website (DSR - Distr. 3, 2010).*

The requirement for trainees with a certain education background could be indicative of the necessity for specific capabilities that have been viewed to enhance learning effectiveness. An individual can build up capabilities through progression in educational levels but the topic in this area requires a separate study altogether. What is more coherent from the interviews is the requirement for specific qualifications, both from management and trainee's view points to effectively learn the training material. Often, the training materials are academic in nature and related to the specific job families. For example, a Sales course on benefit selling with the International Oil Company will discuss in length about the seven selling steps of

professional selling as well as technical aspects of products and its applications. Thus, trainees with a Sales or Mechanical Engineering background will have the tendency to understand the materials easier. Baldwin and Ford (1988); Cheng and Ho (2001); Hutchins (2009); Noe (1986) has confirmed in their studies that trainee ability directly affects transfer of training. Furthermore, Velada et al., (2007:285) points out, “when a trainee feels confident in his or her ability to perform, the more likelihood he or she will transfer such knowledge and / or skill to the job”. As such, the desire to learn also needs to be present.

A trainee’s desire to learn the training program is also another important part of building up training effectiveness. Noe (1986:737) mentions that numerous training evaluation studies have supported that training effectiveness relates to the trainee’s desire towards the training program where the attitudes, interests, values, and expectations of trainees may either reduce or enhance the effectiveness of the training. Findings from Hutchins (2009:71) suggest individuals demonstrating willingness towards new learning opportunities may be able to persistently apply the skills in the work setting. Furthermore, a study by Hicks and Klimoski (1987) was able to show that the motivation to learn a managerial-skills training was influenced by the trainee’s perception of the choice to attend or not attend the course (as cited in Baldwin & Ford, 1988:69).

The responses from Distributor Sales Representatives for questions on trainee characteristics (Ability, Personality, Motivation) show an interesting linkage between having an interest in the topic (or similarly the drive to improve skill sets) and specific qualifications help to stimulate learning motivation. From observation, such a notion is especially true if the course or course materials are perceived high in standard and intellectually challenging.

*Have to have a background or interest on the topic and appreciate the benefits of the training course. (DSR - Distr. 2, 2010)*

*The drive to improve own skill sets and the company. (DSR - Distr. 6, 2010)*

*Having English capability will enable the learner to better understand the course material, supplements, and other materials in the website. (DSR -*

*Distr. 3, 2010)*

## **5.2 Suitability of the Training material increases learning and development**

The training courses in general were mentioned from the interviews to have relevancy towards the strategic direction of the International Oil Company. Thus the topic of training content and materials were not specifically discussed much in detail but rather the attention was focused on the need to understand and being able to apply the new learned skills to the job. Distributor Sales Representatives indicated the desire to understand how to effectively apply the skills to the job through demonstration of the learning principles and a chance for hands on practice during the course. The ability of the trainer and trainees going into the course and a follow up after the course to measure the effectiveness was also mentioned.

*Training that has workshop and activities help with hands on learning and problem solving. It gives a chance for real application related to the job. (DSR - Distr. 2, 2010)*

*Theory is not essential but rather knowing how to apply the skills. (DSR – Distr. 4, 2010)*

*Having a clear understanding of the theory and opportunity to practice it during the course. (DSR - Distr. 5, 2010)*

*Since it is more essential that trainees understand how to use the skills rather than just knowing the theory, should not rush it but make sure learning is transferred through practice. (LOBM 2, 2010)*

*Need more evaluation and tracking after the training course. For example, after taking a Synthetics course, need to follow up to see whether the new learned skills are being practiced in the field. Should also provide opportunities for feedback to help with the development of such skills. (DP, DSM - Distr. 2, 2010)*

*A lot of the Sales force is not equipped with good academic background so require more basic form of hands-on learning to increase their learning effectiveness. (DP, DSM - Distr. 7, 2010)*

Findings from a research by Montesino (2002:102) on strategic alignment of training found that a “group of trainees that self-reported very high usage of training perceived a significantly higher alignment of the training program with the strategic direction of the organization than did the group that self reported low to high usage of training”. Hutchins (2009:73) infers the design and facilitation of training exert a significant influence on learning, especially in a manner that is conducive to trainee needs and expectations. According to Velada et al. (2007:284-285), organizations should design training programs to include factors that increase the likelihood of transfer. They also go on to assert that when trainees have previous knowledge and practice of the new skills of which the training instructions are congruent with job requirements, there is increased likelihood that training transfer should exist. Noe (1986:746) further mentions that trainers ensuring tools, materials, and job related information are readily available prior to the training program are likely to influence motivation to learn.

The implication is that trainees have a tendency to be more motivated and in a better position to learn the course materials when in support of how it is conducted and the benefits to the job. In addition, the abilities of the trainer and trainee also play a critical role as it relates to how well the training was conducted and received. What has been lacking in respect to this has been the evaluation and tracking the effectiveness of each course, which requires further management engagement throughout the training transfer process.

### **5.3 Organization support is critical towards the transfer of training process**

Management engagement in transfer enhancing activities has been observed as another important factor towards the development of the Distributor organization. The International Oil Company suggests Distributor management need to be advocates in supporting training and the usage of training towards the job. Distributor management similarly implies the need for mentors to help follow up the transfer of skills to the job environment. Distributor Sales Representatives look to both

Supervisors and colleagues for continuous development supported through sharing of knowledge and constructive feedback sessions.

*The DP plays a pivotal role. For example, he needs to include training as part of the company's policy, give time for employees to train, and invest in resources to support training programs. (CSM 1, 2010)*

*If a DSM becomes an advocate for training, subordinates will follow his or her footsteps. (TM 1, 2010)*

*Have shown signs of improvement though require Supervisors to consistently follow up the development through more on the job coaching type sessions. (DP, DSM - Distr. 6, 2010)*

*It is important that Supervisors are fully engaged with the follow up. Otherwise, DSRs will not think the skills are critical towards their development. (DP, DSM – Distr. 7, 2010)*

*On the job opportunities with Supervisors will help employees use the skills and apply the training. It can also help to evaluate whether the employee can perform the tasks in the field. (DP, DSM - Distr. 2, 2010)*

*Constructive feedback by Supervisors from time to time will better help guide the development process. (DSR - Distr. 1, 2010)*

*On the job training with my Supervisor has helped to improve the confidence level when I approach difficult customers. (DSR - Distr. 5, 2010)*

Research by Baldwin and Ford (1988); Brinkerhoff and Montesino (1995); Nijman et al. (2006) have concluded that supervisory support does have an effect on the training transfer outcome of subordinates. Brinkerhoff and Montesino (1995:272) confirms the importance of work environment factors in hindering the transfer of training, indicating even a very brief informal intervention from Supervisors can have an impact on whether the trainees are likely to use the training. In other words, supervisory support indirectly enhances trainees' motivation to transfer by improving the transfer climate, but more by means of their motivation to transfer (Nijman et al., 2006:544).

Results from questions on Work Environment and Learning & Retention have similar implications that employees who are more focused on skills development

will tend to focus on self-assessing their own competencies and identifying with a Supervisor on learning opportunities and career development. This infers there is a positive relationship between management engagement and the employee's responsibility towards continuous self-development that can be measured through job performance results and improved confidence levels.

*Having an employee able to self assess his or her competencies and identify with a Supervisor on learning opportunities adds real value to the development of that employee's career. (LOBM 2, 2010)*

*On the job opportunities with Supervisors will help employees use the skills and apply the training. It can also help to evaluate whether the employee can perform the tasks in the field. (DP, DSM - Distr. 2, 2010)*

*Feedback and analysis by my Supervisor after on the job training greatly enhanced the skills. (DSR - Distr. 3, 2010)*

The consistency of follow up however remains a questionable obstacle with organization turnover issues and changing priorities. As Baldwin and Ford (1988:63) had emphasized, for effective training transfer to occur, trainees need to apply the knowledge, skills, attitudes gained from the training and maintained over a period of time on the job. Thus, training is a continuous process to develop strategic competencies.

## **CHAPTER VI**

### **CONCLUSIONS AND RECOMMENDATIONS**

The last chapter presents the conclusions and recommendations based on the findings of the study.

#### **6.1 Conclusion of the study**

This research has two major objectives: (1) provide a qualitative analysis exploring factors that support training transfer and its connection with strategic alignment in the Sales function from one organization setting to another; (2) Explore the main factors that can inhibit training transfer and strategic alignment. The following part concludes this research by addressing the objectives in detail.

As corporations grow larger and expand their businesses to other countries, strategic alignment becomes pivotal to ensure close alignment across the markets in which it operates. Many studies have supported that strategic alignment can be achieved through successful transfer of training to employees.

Over the decades, research studies on training transfer have attracted attention from scholars and practitioners, most notably in the field of HRD (Human Resource Development), psychology, and management studies. Transfer of training is not a trivial topic because it is the core element of training research and also provides grounds for other interdisciplinary research. Consequently, organizations have also increased more attention on training transfer due to the large investment spend on training for employees but don't get transferred to the job.

Some of the most commonly examined factors that are believed to influence training transfer are Individual, Motivational, and Environmental. Based on this conceptual framework and an adaptation from Baldwin and Ford's (1988) model of the transfer process, a conceptual model was developed to test training transfer where the implication is that successful training transfer leads to strategic alignment.

The field research for the study looked at specific implications between an International Oil Company and Thai Distributors in the Lubricants business. In depth interviews with informants from both groups coupled with academic literary reviews provided a rich source of information for the researcher to develop the findings. Even though the study had a relatively limited scope, the findings helped to suggest there is a basis for strategic alignment through training and that the important factors that inhibit training transfer directly relate to the common factors believed to influence training transfer (Individual, Motivational, Environmental). These factors were identified from patterns found in the data, namely (1) Trainee's education background and desire to learn influences training effectiveness (2) suitability of the training material increases learning and development (3) organization support is critical towards the transfer of training process. These three themes interrelate with one another and also ties in with each of the three training inputs (trainee characteristics, training design, and work environment) from the conceptual model to suggest there is a basis for strategic alignment through training.

## **6.2 Recommendations on training transfer**

This study confirms alongside academic studies on the subject of training transfer that training is an important method of transferring the strategy from one company to another to achieve strategic alignment. Such can be achieved effectively when factors that inhibit transfer are identified early and solutions applied timely to bridge the gaps. Because learning is a continuous process that takes time to develop, factors not addressed early in the developmental stage can result in the strategy not being executed effectively or taking more time for effective execution to take place. An analysis of the findings indicates the direct relationship between the trainee, training material, and support of the trainee throughout the transfer process. Essentially, strategic alignment begins with the trainee fully engaged and supported throughout the process, similarly compared to a student going through the stages of being educated in the different academic levels. Because of this importance, it is highly recommended that there is more focus on developing the trainee through means of using tracking tools and mentoring methods to follow up the learning progress.

Trainees will have different learning abilities that will require different levels of attention through the development. What is important is that these developmental opportunities are not overlooked but rather are mastered by the trainee over time for future growth. Clear communication of the strategy, objectives, and how to achieve desired results is also important. Communication is the process of cascading information through the organization whereby a workforce that shares the same common understanding of such information is developing towards effective alignment. Lastly, this research indicated that training materials from the International Oil Company were more than adequate for the trainees, which means there was a wealth of knowledge to be gained. Thus, having good training materials and follow up processes in place for the trainee will work well together to build the trainee towards a more effective transfer or training, hence strategic alignment with the strategy.

### **6.3 Recommendations for future research**

Because of the exploratory nature of this study, it is highly recommended for future research that learning evaluation is measured over a longer period of time to more effectively determine whether the training achieved the desired objective, hence the strategic implication the training was intended to develop and support usage of such learned skills for the trainee on the job. Monitoring training outcomes in a time series over an extended period will help provide a deeper understanding of the trainee's development process, effectiveness of the training program, and environmental factors supporting strategic alignment. Moreover, in addition to perspectives provided by trainers and trainees on the variables studied here, researchers should make every effort to also include the reach to customers to assess skill application of the trainees and impacts on business results.

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## **APPENDIX**

## สำเนาหนังสือขอความอนุเคราะห์ในการเก็บข้อมูล

ศูนย์บัณฑิตศึกษา  
สายงานบริหารการศึกษา  
วิทยาลัยนานาชาติ โทร. 2441-5090

ที่ GC/

วันที่ 27 เมษายน 2553

เรื่อง ขอความอนุเคราะห์ในการเก็บข้อมูลวิจัยประกอบการทำวิทยานิพนธ์

เรียน ผู้จัดการทั่วไป

ด้วยนายก้องกิตติ์ พงศ์อุดม (เลขประจำตัว 5038673 ICMA/M) นักศึกษาระดับปริญญาโท หลักสูตรบริหารธุรกิจมหาบัณฑิต สาขาวิชาการวิเคราะห์และการสร้างตัวแบบธุรกิจ วิทยาลัยนานาชาติ มหาวิทยาลัยมหิดล มีความประสงค์จะดำเนินโครงการวิทยานิพนธ์ เรื่อง “A Model of Training Transfer to Support Strategic Alignment in the Sales Function: Case Study of an International Oil Company and Thai Distributors in the Lubricants Business”.

ในการนี้ นักศึกษาจำเป็นต้องรวบรวมข้อมูลวิจัยเพื่อประกอบการจัดทำและเรียบเรียงวิทยานิพนธ์ จึงใคร่ขอความอนุเคราะห์ในการเก็บข้อมูลเกี่ยวกับประสบการณ์ความคิดเห็นเรื่องการฝึกอบรมและการสอดคล้องทางกลยุทธ์จากบุคลากรในหน่วยงานของท่าน จำนวน 4-5 คน โดยใช้แบบสอบถามและการสัมภาษณ์

ทั้งนี้ ทางหลักสูตรฯ ได้มอบหมายให้คุณกัญญาลักษณ์ อภิรักษ์ธราธร หมายเลขโทรศัพท์ 02-679-5053 เป็นผู้ประสานงานในรายละเอียดกับท่าน หรือท่านสามารถติดต่อนักศึกษาโดยตรงได้ที่หมายเลขโทรศัพท์ 081-874-3694

จึงเรียนมาเพื่อโปรดพิจารณาอนุเคราะห์ จักเป็นพระคุณยิ่ง

ขอแสดงความนับถือ

(ผู้ช่วยศาสตราจารย์ ดร. ยິงยศ เจียรวุฑฒิ)  
ประธานหลักสูตรบริหารธุรกิจมหาบัณฑิต

## แบบสัมภาษณ์

### เรื่อง

การถ่ายโอนการเรียนรู้ในการฝึกอบรมเพื่อส่งเสริมความสอดคล้องทางกลยุทธ์ในฝ่ายขาย:  
กรณีศึกษาของบริษัทน้ำมันข้ามชาติกับผู้จัดจำหน่ายไทยในธุรกิจน้ำมันหล่อลื่น

## Interviewee Group 1: Employees from International Oil Company

### Introduction question

- What kind of experience have you had with training Distributors?  
คุณมีประสบการณ์ในการอบรมผู้แทนจำหน่ายอย่างไร

### Questions relating to Model of the Training Transfer Process

#### 1. Trainee Characteristics

##### 1.1 Ability

- From experience, how would you describe the skill level of the Distributor participants in the training?  
จากประสบการณ์ คุณคิดว่าทักษะของผู้เข้าร่วมอบรมเป็นอย่างไร
- What abilities do you think an individual should possess when taking a training program?  
ในความคิดของคุณ ผู้เข้าร่วมอบรมควรมีทักษะทางด้านใดบ้าง

##### 1.2 Personality

- What was the trainee's reaction prior to the training?  
การตอบสนองของผู้เข้าร่วมการอบรมก่อนที่จะเริ่มอบรมเป็นอย่างไร

##### 1.3 Motivation

- How is the training designed to benefit a trainee's career?  
การอบรมถูกออกแบบให้เป็นประโยชน์ต่อความก้าวหน้าในหน้าที่การงานของผู้เข้าร่วมอบรมอย่างไร
- How do you keep Distributors committed to your organization and the strategic direction of the company?  
คุณใช้วิธีอะไรให้ตัวแทนจำหน่ายมีความเชื่อมั่นต่อองค์กรและมุ่งมั่นที่จะดำเนินตามแนวทาง กลยุทธ์ขององค์กร

#### 2. Training Design

##### 2.1 Principles of learning

- What are some of the learning principles given in the training? (For example, teaching through general rules of the training content or theoretical principles, not just applicable skills)

เนื้อหาหลักสูตรอบรมควรมีองค์ประกอบอะไรบ้าง เช่น มีการสอนกฎเกณฑ์ทั่วไปของเนื้อหา ที่เรียนหรือทฤษฎีพื้นฐาน ไม่ใช่แค่สอนการนำไปใช้อย่างเดียว

## 2.2 Sequencing

- How is the training material sequenced? (For example, is it massed or distributed training, whole or part training, feedback or over learning)

มีการลำดับเนื้อหาของหลักสูตรอบรมอย่างไร เช่น มีการรวมเนื้อหาทั้งหมดเข้าไว้ด้วยกันหรือแบ่งเป็นส่วนๆ มีการฝึกเนื้อหาทั้งหมดพร้อมกันหรือแบ่งเป็นส่วนๆ มีการบอกผลแก่ผู้ฝึกอบรมเป็นระยะ หรือให้ผู้ฝึกอบรมฝึกเกินกว่าที่คาดหวังไว้

## 2.3 Training content

- How relevant is the training material towards the strategic direction of the company?

เนื้อหาของหลักสูตรอบรมมีความสอดคล้องกับแนวทางกลยุทธ์ของบริษัทอย่างไร

## 3. Work Environment

- How do you support the use of the training to the trainees on the job?

คุณมีการสนับสนุนให้ผู้เข้าร่วมอบรมนำความรู้ไปใช้ในงานอย่างไร

- What are some of the roles you think peers and supervisors can play to enhance the training transfer process?

คุณคิดว่าเพื่อนร่วมงานและผู้บังคับบัญชาของผู้เข้าร่วมอบรมมีบทบาทอย่างไรที่จะทำให้เกิดการเรียนรู้ได้มากขึ้น

## 4. Learning & Retention

- How do you think training can benefit the job performance of employees over time?

คุณคิดว่าการอบรมจะมีประโยชน์ต่อประสิทธิภาพการทำงานของพนักงานในอนาคดอย่างไร

## Questions on Strategic Alignment

- How important is training?

การอบรมมีความสำคัญอย่างไร

- How would you associate training transfer with strategic alignment, and did it/does it work?

คุณคิดว่าการอบรมนำไปสู่ความสอดคล้องกับกลยุทธ์ขององค์กรอย่างไรและได้ผลหรือไม่

**Interviewee Group 2: Distributor Principle (DP)**  
**Distributor Sales Manager (DSM)**

**Introduction question**

- What kind of training has your employees taken with the International Oil Company?  
 พนักงานของคุณมีโอกาสเข้าร่วมการอบรมที่จัด โดยบริษัทน้ำมันข้ามชาติอะไรบ้าง

**Questions relating to Model of the Training Transfer Process**

**1. Trainee Characteristics**

**1.1 Ability**

- How do you / would you select your employees for a training program?  
 คุณมีการคัดสรรผู้เข้าร่วมการอบรมอย่างไร
- What abilities do you think is important for your employees to possess when participating in a training program?  
 คุณคิดว่าพนักงานควรมีทักษะสำคัญอะไรบ้างเมื่อเข้าอบรม

**1.2 Personality**

- How much confidence do you think the trainees have towards the learning material?  
 คุณคิดว่าผู้เข้าร่วมอบรมมีความเชื่อมั่นกับเนื้อหาในการอบรมอย่างไร

**1.3 Motivation**

- How do you think the training will benefit the career of your employees?  
 การอบรมเป็นประโยชน์ต่อความก้าวหน้าในหน้าที่การงานของพนักงานอย่างไร
- How do you keep employees committed to your organization and the strategic direction?  
 คุณใช้วิธีอะไรให้พนักงานมีความเชื่อมั่นต่อองค์กรและมุ่งมั่นที่จะดำเนินตามแนวทางกลยุทธ์ขององค์กร

**2. Training Design**

**2.1 Principles of learning**

- In your view, how are the learning principles important towards the effectiveness of the training program? (For example, teaching through general rules of the training content or theoretical principles, not just applicable skills)  
 ในความคิดของคุณ เนื้อหาหลักสูตรอบรมมีความสำคัญต่อประสิทธิภาพของการอบรมอย่างไร เช่น มีการสอนกฎเกณฑ์ทั่วไปของเนื้อหาที่เรียนหรือทฤษฎีพื้นฐาน ไม่ใช่แค่สอนการนำไปใช้ อย่างเดียว

## 2.2 Sequencing

- In your view, how important is the sequencing of training material? (For example, is it massed or distributed training, whole or part training, feedback or over learning)

ในความคิดของคุณ การลำดับเนื้อหาของหลักสูตรอบรมสำคัญอย่างไร เช่น มีการรวมเนื้อหาทั้งหมดเข้าไว้ด้วยกันหรือแบ่งเป็นส่วนๆ มีการฝึกเนื้อหาทั้งหมดพร้อมกันหรือแบ่งเป็นส่วนๆ มีการบอกผลแก่ผู้ฝึกอบรมเป็นระยะหรือให้ผู้ฝึกอบรมฝึกเกินกว่าที่คาดหวังไว้

## 2.3 Training content

- How relevant do you find the training material to be towards the strategic direction of your company?

เนื้อหาของหลักสูตรอบรมมีความสอดคล้องกับแนวทางกลยุทธ์ของบริษัทอย่างไร

## 3. Work Environment

- How do you support your employees to use the training on the job?

คุณสนับสนุนให้พนักงานนำความรู้ที่ได้จากการอบรมไปใช้ในการทำงานอย่างไร

- What are some of the roles you think peers and supervisors can play to enhance the training transfer process?

คุณคิดว่าเพื่อนร่วมงานและผู้บังคับบัญชามีบทบาทอย่างไรที่จะทำให้เกิดการเรียนรู้ได้มากขึ้น

## 4. Learning & Retention

- How effective on the job has your employees been after taking the training?

พนักงานคุณมีประสิทธิภาพการทำงานอย่างไรหลังเข้ารับการอบรม

## Questions on Strategic Alignment

- How important is training?

การอบรมมีความสำคัญอย่างไร

- How would you associate training towards aligning your employees with the strategic direction of the company?

คุณคิดว่าการอบรมนำไปสู่ความสอดคล้องกับกลยุทธ์ขององค์กรอย่างไรและได้ผลหรือไม่

### **Interviewee Group 3: Distributor Sales Representative (DSR)**

#### **Introduction question**

- What kind of training have you taken with the International Oil Company?  
คุณมีโอกาสเข้าร่วมการอบรมที่จัดโดยบริษัทน้ำมันข้ามชาติอะไรบ้าง

#### **Questions relating to Model of the Training Transfer Process**

### **1. Trainee Characteristics**

#### **1.1 Ability**

- What abilities helped you most with the training?  
ทักษะอะไรช่วยคุณในการฝึกอบรมมากที่สุด
- How do you think those abilities helped you with the training?  
คุณคิดว่าทักษะเหล่านั้นช่วยคุณในการอบรมอย่างไร
- What other abilities do you think would enhance your performance with the training?  
คุณคิดว่ามีทักษะอื่นๆ อะไรบ้างที่จะช่วยเพิ่มประสิทธิภาพในการฝึกอบรมได้ดียิ่งขึ้น

#### **1.2 Personality**

- How did you prepare yourself before the training?  
คุณมีการเตรียมตัวอย่างไรก่อนเข้าการอบรม
- How confident did you feel going into the training?  
คุณมีความเชื่อมั่นในตัวเองอย่างไรก่อนเข้าการอบรม

#### **1.3 Motivation**

- In what ways do you think the training will help with your career?  
คุณคิดว่ากรอบรมเป็นประโยชน์ต่อความก้าวหน้าในหน้าที่การงานของคุณอย่างไร
- How does the company you're working for support your commitment towards the organization and its strategic direction?  
บริษัทของคุณสนับสนุนให้คุณมีความเชื่อมั่นต่อองค์กรและมุ่งมั่นที่จะดำเนินการตามแนวทางกลยุทธ์ขององค์กรอย่างไร

### **2. Training Design**

#### **2.1 Principles of learning**

- What learning principles have you found to be effective towards your learning experience and why? (For example, teaching through general rules of the training content or theoretical principles, not just applicable skills)

เนื้อหาหลักสูตรอบรมอะไรที่คุณคิดว่ามีประสิทธิภาพต่อการเรียนรู้ของคุณ เช่น มีการสอนกฎเกณฑ์ทั่วไปของเนื้อหาที่เรียนหรือทฤษฎีพื้นฐานไม่ใช่แค่สอนการนำไปใช้อย่างเดียว

## 2.2 Sequencing

- How effective have you found the sequence of the training material to be? (For example, is it massed or distributed training, whole or part training, feedback or over learning)

คุณคิดว่าประสิทธิภาพการลำดับเนื้อหาของหลักสูตรอบรมเป็นอย่างไร เช่น มีการรวมเนื้อหาทั้งหมดเข้าไว้ด้วยกันหรือแบ่งเป็นส่วนๆ มีการฝึกเนื้อหา ทั้งหมดพร้อมกันหรือแบ่งเป็นส่วนๆ มีการบอกผลแก่ผู้ฝึกอบรมเป็นระยะ หรือให้ผู้ฝึกอบรมฝึกเกินกว่าที่คาดหวังไว้

## 2.3 Training content

- How relevant do you find the training material to be towards your current job?

เนื้อหาของหลักสูตรอบรมมีความสอดคล้องกับงานของคุณอย่างไร

## 3. Work Environment

- How did your supervisor and peers support the use of this training on the job?

ผู้บังคับบัญชาและเพื่อนร่วมงานมีส่วนสนับสนุนการนำความรู้ที่ได้จากการอบรมไปใช้ในการทำงานอย่างไร

- What are some limitations or opportunities you've had of using the training on the job?

มีข้อจำกัดหรือโอกาสอะไรบ้างในการนำความรู้ที่ได้จากการอบรมไปใช้ในการทำงาน

## 4. Learning & Retention

- Can you give some examples of how the training has helped with your job performance?

กรุณาให้ตัวอย่างว่าการอบรมช่วยประสิทธิภาพการทำงานของคุณอย่างไร

## Questions on Strategic Alignment

- How did the training help enhance your job performance?

การอบรมช่วยเพิ่มประสิทธิภาพการทำงานของคุณอย่างไร

- How has the training helped you better understand the strategic direction of the company?

การอบรมช่วยให้คุณเข้าใจแนวทางกลยุทธ์ขององค์กรอย่างไร

## BIOGRAPHY

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