

# **AN ASSESSMENT OF LEARNING AND DEVELOPMENT AND CHANGE ON EMPLOYEE ENGAGEMENT**

By

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# **AN ASSESSMENT OF LEARNING AND DEVELOPMENT AND CHANGE ON EMPLOYEE ENGAGEMENT**

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2017



## Declaration of authenticity

I declare that the research project, *An assessment of learning and development and change on employee engagement*, is my own work and that each source of information used has been acknowledged by means of a complete reference. This dissertation has not been submitted before for any other research project, degree or examination at any university.

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## **Acknowledgements**

I would like to thank my family first and foremost for the constant support and powerful motivation they gave me to complete this dissertation. I would like to thank God for always pointing me in the right direction even when I had lost all hope that this was an achievable task. Lastly I would like to acknowledge the assistance received from my academic supervisor, Roland Mbeba for providing me with the support and structure needed to reach the goalpost.

## **Dedication**

I would like to dedicate this dissertation to my late dad, Derrick Pavaday. Without your guidance and the amazing example you set for me while growing up I would never have had the courage to pursue this goal of mine. Seeing you spend late nights to complete your masters made me realise that nothing is impossible if you put your mind to it.

I would like to further dedicate this to my husband, Mitesh and my 2 sons Taishaan and Shayaan, who I know will be so proud of the final achievement of completing my dissertation. We had to sacrifice together and we finally reached the finish line.

## Abstract

This study sought to understand whether change, learning and development affected the levels of employee engagement in a private bank that underwent restructuring. The aim of the study was to establish the immediate feeling of engagement, change, learning and development followed by an organisational restructure (cycle 1). After implementing a learning intervention, the feelings of change, learning and development and employee engagement were reassessed (cycle 2).

Investigating employees' feelings of dissatisfaction, and methods for improvement, led to the recognition that learning and development, structured to address the gaps left by a lack of change management efforts, was critical in improving low levels of employee engagement.

The research adopted a mixed methods approach, incorporating both quantitative and qualitative analysis. The researcher interviewed selected employees within the private banking business unit, who completed a survey. To measure job engagement, the researcher used the five-point Likert scale and adapted the questionnaire from multiple sources. The research focused on, and strongly supported, the impact of change and learning on employee engagement levels both pre- and post-intervention. The results of the survey indicated that only half of the respondents were engaged and that they strongly emphasised learning and development, and having a core understanding of what was required from them after an organisational change. Opportunities for development were therefore critical to improved engagement. Having both downward and upward communication between leadership and employees also improved engagement levels in the team.

In the researcher's opinion there is no specific methodology that will fit every organisation or every changing situation. An organisation needs to make a cohesive effort within its change management team to understand the basic principles of change management. It is then the responsibility of the change agents to fully understand each change and adapt a flexible framework that encompasses the key principles to successfully implement the changes.

According to evolutionary theories introduced by Charles Darwin and Jean-Baptiste Lamarck, survival in a permanently modified environment takes place through adaptation. The same is true today in the private banking industry. Whether it is through circumstantial mutation, embodied by young start-ups, or through the transformation of existing institutions, only the ones who are willing to accept change and adapt shall prosper. This fundamental law of nature is more relevant than ever for the financial services industry and particularly for private banking, (Kearney, 2014).

Future research could focus on measuring how engagement affects operational efficiency. In this study, the researcher came across multiple suggestions that overall performance was affected following a change. Although statistically this was not examined, it may be a crucial topic to explore in the future. This will, in turn, give organisations a view and measurement of just how important engagement practices are.

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# CHAPTER 1

## Introduction and background

### 1.1. Background and context

This study unpacked the antecedents and consequences of the impact of change, learning and development on employee engagement. Employee engagement can be viewed as the extent to which employees display determination in their efforts at work (Frank, et al., 2004). The concept of engagement has expanded academic and practitioner interest (Shuck & Wollard, 2010). A study by Towers Perrin (2003) indicates that highly engaged people do outperform others. There are clear associations between employees' levels of engagement, their focus on customer satisfaction and service, and aspects of their organisation's financial and operational performance across a number of areas. A review of the literature shows that change, and learning and development are two contributors to engagement (Aon, 2013; Lombardo, 2012).

Key aspects identified by Towers Perrin (2003) were things that take time and commitment such as strong leadership, accountability, autonomy, a sense of control over one's environment, a sense of shared destiny, and opportunities for development and advancement. Some of the benefits of having a more engaged workforce identified in numerous studies include increased productivity, improved job satisfaction and a substantial decrease in turnover (Saks, 2006). Although these benefits have resulted in organisations and human resource (HR) practitioners worldwide adopting strategies to improve engagement, recent studies indicate that efforts may not be as successful as predicted when devising generic solutions (Gallup Consulting, 2010; Towers Perrin, 2008).

In a continuously changing economic environment, organisations remain committed to organisational learning and development (L&D). Andy Lancaster head of learning and development (L&D) at the Chartered Institute of Personnel and Development CIPD, stated, (CIPD, 2014):

There is much good and even great practice in learning and development. However, it can still be difficult for organisations to gain clarity on what their most effective activities and approaches to learning and development are, what gaps they have, and how best to address these gaps. Some of the biggest challenges businesses and economies face right now involve skills shortages, and the consequent need to develop and better utilise skills in the workplace. The pace of change and scale of global competition today means significant and ongoing changes are needed in the way we approach learning and development.

An organisation's L&D strategy, when effectively designed and implemented, can deliver the capabilities, competencies and skills required to support sustainable business success. Increasingly there is a need for innovation in delivering skills and knowledge to support organisational change, particularly in challenging economic circumstances. Learning professionals need to be prepared to be innovative and implement flexible L&D interventions, from design through to delivery and assessment. By considering strategic business objectives at every turn, the challenges and opportunities for the L&D function to support change management and sustainable performance levels across the organisation can be met with vigour and purpose (CIPD, 2014).

Andrew Fowler, HR director for global clients and sectors at Taylor Nelson Sofres TNS, noted (Wain, 2008):

Organisational learning has to be linked to organisational design, how the company is (or should be) structured, how it operates, what its key competencies are, the culture it wants to create. All of which need to be constantly reviewed to ensure the operation continues to work as a whole to achieve organisational learning.

For Fowler, while a learning organisation may be largely aspirational, '... supporting organisational learning eventually helps to create something approaching it,' (Wain, 2008).

Learning, unlike training, is an inherently natural activity or function. It is actually very difficult, if not impossible, for a human being to avoid or stop doing it. The trick for the organisation employing that human being is to encourage, focus and capture the learning for its own ends, while ensuring that everyone feels that they have won a division of the spoils.

This study was conducted at a private banking institution. At the time of this study, the organisation had had three new chief executive officers (CEOs) within a five-year period. Each change in leadership was accompanied by a change in strategy and structure. The way in which clients were serviced changed drastically. The focus, which was product-centric, became client-centric. While roles and remuneration also changed, one thing remained constant. The level of L&D remained as it was five years ago.

The researcher played a part in formulating and implementing a number of initiatives that drove change in the business to accommodate the changing strategies and leadership styles. This influenced the researcher's view of the impact of change on employees. Although some innovative initiatives arose from the changes, the organisation experienced a lot of resistance from employees in adapting to these changes. This, in turn, led to a very high staff turnover, loss of key skills and a lack of buy-in to the change, to name a few. Employees claimed that they felt disengaged, and their ability to keep up was jeopardised by the informal L&D strategy that did not address enhancing their skills based on the multiple changes that the organisation underwent.

The researcher tried, from a development perspective, to understand the way that employees saw themselves in the new structure going forward. Assessing employees' level of engagement also took into account the various changes that had taken place. The assessment reviewed pre- and post-engagement levels when an L&D initiative was implemented. It further took into account the impact that the organisational change had on the employees' levels of engagement. An additional objective of this research was to propose an L&D framework based on the principals of engagement, and taking into account the change experienced, to explain the association between employee engagement, change and L&D at the organisational level.

## **1.2. Statement of the problem**

Organisations recognise the importance of coaching and training to improve employee productivity and client-facing skills, but struggle to create programmes that deliver tangible results. These organisations face three challenges around coaching and training: identifying and coaching to bankers' individual skill gaps, creating programmes that employees find valuable, and ensuring programme accountability and impact.

One of the most interesting aspects of organisations seems to be their development over time. Do they grow or do they change qualitatively? Are they capable of adapting to dynamic environmental conditions such as changing structures and leadership? Could they reflect on these changes and are they able to learn how to improve their performance in different situations? Organisations need to successfully deal with the challenge of managing, working with and adapting to the unstable environmental variables that they have little control over, but need to adapt or conform to, to remain viable (Macredie & Sandom, 1999).

A key focus of this study was to run two surveys at two points in time to determine how valued and engaged employees felt. The study attempted to understand and assess the impact that change and L&D had on employee engagement. The major theme was to investigate the impact that adding a specific learning initiative, which catered to the specific needs of these employees following an organisational change, would have on engagement. The ability of the organisation to realise and exceed various strategic objectives possibly lay in further unravelling the effects that improved employee engagement may have had on improved performance. There was a need to form links between active employee engagement, change and L&D. Oxford professor, Whittington (Wain, 2008), defined strategy as '... choosing new games to play and playing existing games better.' An organisation therefore needs to equip its people with the skills and knowledge to play, choose and indeed create those games, and to continually improve how they do so' (Wain, 2008).

### **1.3. Aims and objectives of this study**

- To establish whether organisational change initiatives influence and have an impact on employee engagement
- To establish whether L&D within a changing environment influences and has an impact on employee engagement
- To develop a structured L&D framework to drive employee engagement.

### **1.4. Hypothesis**

#### **1.4.1. Hypothesis 1**

H0: Change is not significantly correlated to employee engagement.

H1: Change is significantly correlated to employee engagement.

#### **1.4.2. Hypothesis 2**

H0: L&D is not significantly correlated to employee engagement.

H1: L&D is significantly correlated to employee engagement.

### **1.5. Significance of the study**

This study will ideally contribute to the existing theory and knowledge within the change, L&D and employee engagement fields, providing a more balanced view on the process of organisational change and L&D, and the impact that they have on employee engagement. A substantial body of work already exists to deal with the concept of employee engagement. These form the basis for the discussion in this study. However, the further interrogation of the influence of change and L&D will contribute to this knowledge base.

This study augments the existing understanding of change and L&D, and determines whether these are significantly related to employee engagement. Change and L&D are also central to the lifecycle of any organisation and therefore need to be further unpacked. The study developed a structured framework for the organisation concerned that could be replicated in other organisations experiencing similar challenges.

## **1.6. Assumptions**

- The organisation changed its leadership, which in turn changed the organisation's strategy and structure. The company also made organisational changes in answer to its leadership's need to meet the changing strategy.
- Leadership did not consult with business when changes were made. The strategy drove the need to change the organisation.
- The constant changes were not planned. It was not the organisation's intention to change leaders within such a short space of time.
- The L&D framework was not well structured, which led to employees not feeling engaged within the organisation.
- Developing a structured L&D framework would mitigate many of the people issues. Consistency in mapping a development journey would aid the organisation to achieve strategic success.
- A key strategy for the organisation is to be the best private bank in the country. This strategy drove the need for change and drives the need to develop employees.

# CHAPTER 2

## Literature review

### 2.1. Chapter overview

This chapter aims to unpack and synthesise the change, learning and development (L&D) and employee engagement literature. It focuses on the gaps acknowledged within the literature, the conceptual models derived from these gaps and the research hypotheses directing the research. The major sections presented in this chapter are illustrated in Figure 2.1.

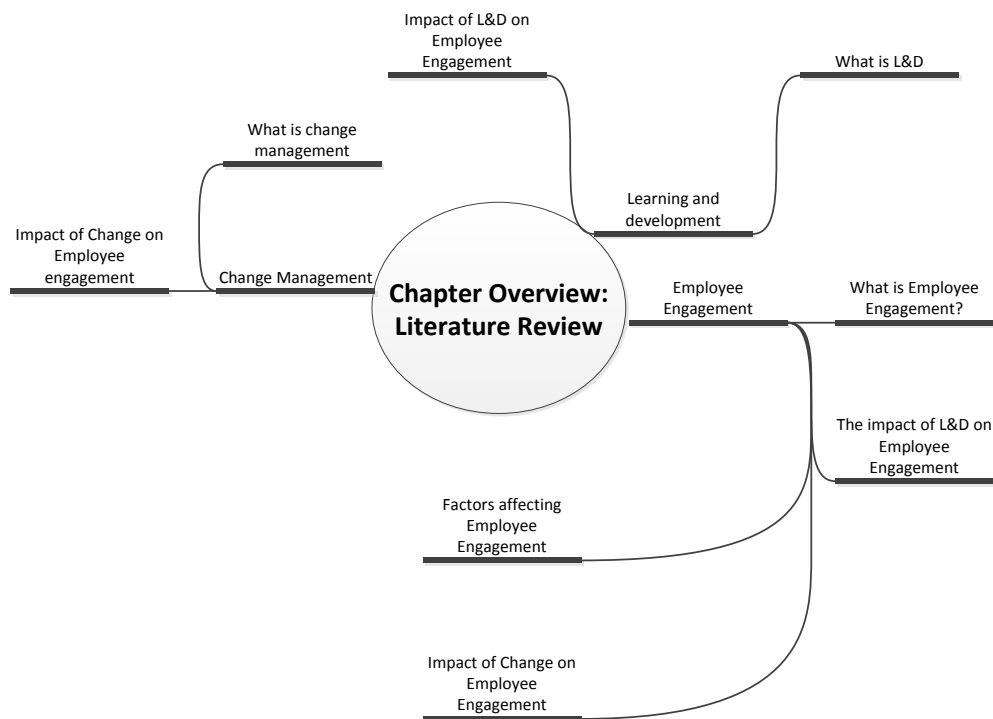


Figure 2.1: Chapter overview

### 2.2. Theoretical framework

The key aim of any theory is to understand and explain certain occurrences and to challenge existing knowledge within the limitations of the critical bounding assumptions. As cited on the University of California Website:

The theoretical framework is the structure that can hold or support a theory of a research study. The theoretical framework introduces and

describes the theory which explains why the research problem under study exists (UCLA, 2014).

The theoretical framework integrates various concepts that ultimately guide the research journey. It assists to determine the measurable and statistical relationships that the researcher will need to look out for. Theoretical studies are very important in exploratory studies where there is very little knowledge about the existing problems being researched and where the researcher would like to learn more (Borgatti, 1998).

There are fundamental beliefs regarding human nature that can affect the way that the researcher views a situation. In a sense, the researcher is always guided by their own theoretical framework without being fully aware of it. The framework assists in identifying the obvious aspects of an organisation and ignoring the aspects that are not easily noticed by the researcher. An explicit framework helps the researcher to deliberately consider other frameworks and tries to position the organisation through different eyes (Borgatti, 1998).

This chapter explains the qualitative research design chosen for the study and why this fits the context of the researcher's topic. The chapter further describes the design and methodology used in this study, which includes a description of the participants and the researcher's role, and touches on some ethical concerns. A breakdown of various tools proposed for gathering information is described.

### ***2.2.1. The link between Work Systems theory (WST) and Participatory Action Research (PAR)***

This section discusses the link between Work Systems theory (WST) and Participatory Action Research (PAR) and the way that the researcher aims to deliver the research findings using WST tools and PAR as a method of data collection.

The modern workplace requires systems thinking because it's a complex whole that exhibits emergence and it is also in urgent need of expert guidance and knowledge that enables its inhabitants to become more productive and efficient. ... action research can both teach and enable practitioners to incorporate systems thinking in their workplace (Simon-Solomon, 2009).

Since its inception, action research has been closely linked to systems theory (Susman & Roger, 1978). A characteristic of action research is that it uses system development as a key goal. It identifies that human action is systematic and that action researchers are intervening in social systems (Baskerville, 1999).

As described by Simon-Solomon, (2009), the most carefully documented and discussed methodological example of action research and systems thinking is soft systems methodology (SSM). SSM is usually a seven stage process as listed below:

- Emergence of a problem situation with which actors involved feel uncomfortable and feel the need to make improvements.
- The problem situation is expressed taking care to avoid structuring the situation as it would close down original thinking and hence the learning process.
- Stage 3 recommends systemic thinking about the situation. Root definitions of the relevant systems are defined in this stage. Human Activity systems are named that might offer insight into the problem situation, and may generate debate leading to action for improvement. Human activity systems are systemic models of the activities that people undertake in order to pursue a particular purpose.
- Stage 4 elaborates on root definitions by drawing up conceptual models. Conceptual models are the minimum set of verbs necessary to describe the actions of the human activity systems. The verbs are ordered systemically, drawing out the feedback loops that describe the interactions of the human activity systems.
- In stage 5, the conceptual models, which are the results of systemic thinking about the real world, are taken into the real world and are compared to the problem situation expressed in stage 2.
- In stage 6, the change proposals are thought through in two ways – first, the desirability of the human activity system captured in the systems model is discussed and secondly, the issue of feasibility is explored in the context of the problem situation, attitudes and the political interactions are that involved.
- Stage 7 seeks to explore possible accommodation between contrasting opinions and interests that surface in the process of SSM. Implementation of agreed upon change proposals gives rise to another problem situation and so the process of SSM continues (Flood, 2007).

The researcher used the design below (tables 2 and 3) to begin the investigation. The researcher used an action reflection cycle design to begin the research and identify critical areas that needed to be addressed. By answering these questions, the researcher was able to clearly identify the critical aims and objectives and keep sight of the methods to be employed during the research journey.

<b>1. What is my concern?</b>
<ul style="list-style-type: none"> <li>• The current L&amp;D initiatives do not cater for the needs and calibre of employee within the private banking space</li> </ul>
<ul style="list-style-type: none"> <li>• There is not enough information in the business around employee engagement and the impact it has on the organisation as a whole, and on the productivity of employees</li> </ul>
<ul style="list-style-type: none"> <li>• The key principal of the organisation is to be the 'best' private bank with the 'best</li> </ul>

private bankers' – understand how this message filters down to the strategy, leadership and employees
<ul style="list-style-type: none"> <li>• Are there too many changes in the organisation? How do these changes affect engagement and productivity?</li> </ul>
<b>2. Why am I concerned?</b>
<ul style="list-style-type: none"> <li>• High employee turnover</li> </ul>
<ul style="list-style-type: none"> <li>• Lack of engagement</li> </ul>
<ul style="list-style-type: none"> <li>• Unable to effectively manage change and gain buy-in to strategy</li> </ul>
<b>3. How do I gather data to show the situation as it is?</b>
<ul style="list-style-type: none"> <li>• Interviews with bankers</li> </ul>
<ul style="list-style-type: none"> <li>• Interviews with management</li> </ul>
<ul style="list-style-type: none"> <li>• Examine existing documentation, e.g. people pillar survey and results, processes within the L&amp;D space, change management documentation, PowerPoint presentations, meeting notes, current learning frameworks and curriculums</li> </ul>
<ul style="list-style-type: none"> <li>• Role requirements and growth paths</li> </ul>
<ul style="list-style-type: none"> <li>• HR turnover</li> </ul>
<ul style="list-style-type: none"> <li>• Sales/product numbers – bottom line figures</li> </ul>
<b>4. How do I show the situation as it develops?</b>
<ul style="list-style-type: none"> <li>• Action reflection cycles</li> </ul>
<ul style="list-style-type: none"> <li>• As-is state vs to-be state</li> </ul>
<ul style="list-style-type: none"> <li>• Case study to present findings</li> </ul>
<ul style="list-style-type: none"> <li>• Interviews and focus groups will be used to understand how the problem is improving and the initiatives that the business believes can improve the problem</li> </ul>
<b>5. What can I do about it?</b>
<ul style="list-style-type: none"> <li>• Understand the current problem</li> </ul>
<ul style="list-style-type: none"> <li>• Research solutions based on business feedback</li> </ul>
<ul style="list-style-type: none"> <li>• Possible implement various cycles of proposed changes and monitor success</li> </ul>
<ul style="list-style-type: none"> <li>• Measure success – bankers interviews, management interviews and feedback, comparative analysis of results before and after research is applied</li> </ul>
<b>6. How do I generate evidence from data</b>
<ul style="list-style-type: none"> <li>• Case study generation</li> </ul>

• Graphs and data collection
• Literature reviews
• Qualitative methods for data collection, i.e. interviews, focus groups, data analysis
• Structured development of processes for action cycles using work systems theory tools
<b>7. How do I show that I am influencing learning?</b>
• Action reflection cycles
• Presenting final dissertation and findings to management
<b>8. How do I show that any conclusions I come to are fair and accurate?</b>
• Admit that there will always be bias when research is qualitative
• Understand the limitations of the methods used to conduct the study
• Ensure that as far as possible all data collected is logged and feedback provided to participants to validate that outcome of certain data gathering techniques
<b>9. How do I explain the significance of what I am doing?</b>
• Understand the impact that the suggested changes will have on the business
• Elaborate on the fact the issues identified are critical concerns of the organisation
• Understand the social impact of delivering the research and possibly improving the way that business is conducted – note that this is if the changes are applied and measured successfully

Table 2.1: An action reflection cycle (based on research topic)

<b>Event</b>	<b>Diagnosing</b>	<b>Action planning</b>	<b>Action taking</b>	<b>Evaluation</b>	<b>Specifying learning</b>
<b>Period 1: Organisational focus</b>					
<b>Period 2: Organisational Changes</b>					

Table 2.2: The researcher's templates to log the two cycles of research

In addition, the researcher used the work systems theory to guide research.

Systems theory is a way of elaborating increasingly complex systems across a continuum that encompasses the person-in environment

(Anderson, et al, 1999). Systems theory also enables us to understand the components and dynamics of client systems in order to interpret problems and develop balanced intervention strategies, with the goal of enhancing the 'goodness of fit' between individuals and their environments. Systems theory does not specify particular theoretical frameworks for understanding problems, and it does not direct the social worker to specific intervention strategies. Rather, it serves as an organizing conceptual framework or metatheory for understanding (Meyer, 1983).

Work systems theory can be used to understand systems in organisations. These systems are not necessarily IT systems, but have human or mechanical participants that perform work, i.e. processes and activities that are enabled by information, technology and products for specific internal or external customers. Understanding the entire perspective on work systems needs both a static view of a system during a period of no change and stability, as well as a view of how the system changes over time (Alter, 2013).

The stability of a work system may be depicted using the work systems framework (figure 2.2). It underpins the basic understanding of the work systems form, function and environment.

The elements of the work system are (Alter, 2013):

- Customers - people who use and receive direct benefits from the products and services produced by the work system. Customers may be external or internal to the organisation.
- Products and services - the combination of tangible and intangible things that the work system outputs for the consumption of its customers.
- Business process - a set of correctly sequenced work steps or activities.
- Participants - people that perform tasks within the system.
- Information - used by the participants to complete their tasks.
- Technology - hardware, software or any other tools and equipment used by the participants to complete their work.
- Context - the organisational, competitive, technical and regulatory realm.
- Infrastructure - the shared human and technical resource that the work system relies on, although these resources exist outside of the system itself. This includes support staff such as training and maintenance staff.

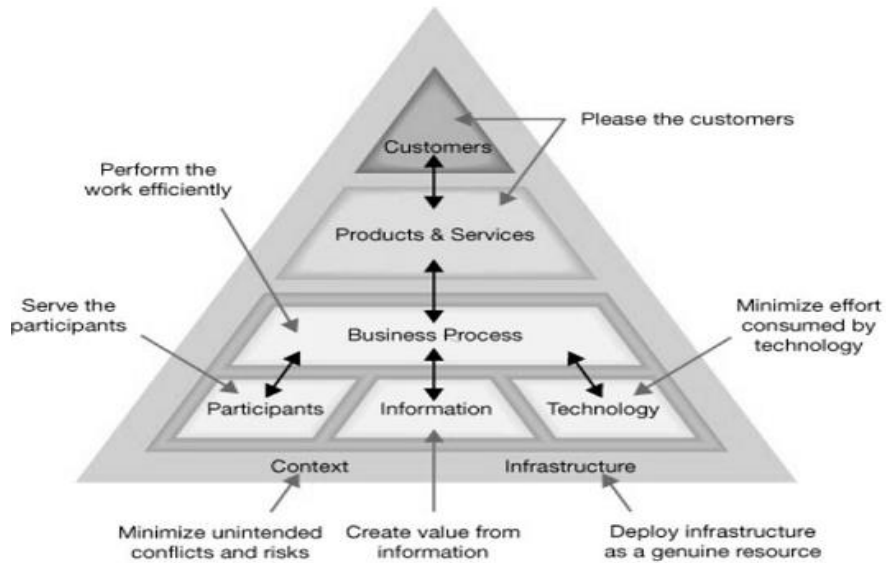


Figure 2.2 : The work systems framework

The work systems lifecycle model (figure 2.3) represents the iterative process of change experienced in that work system over time.

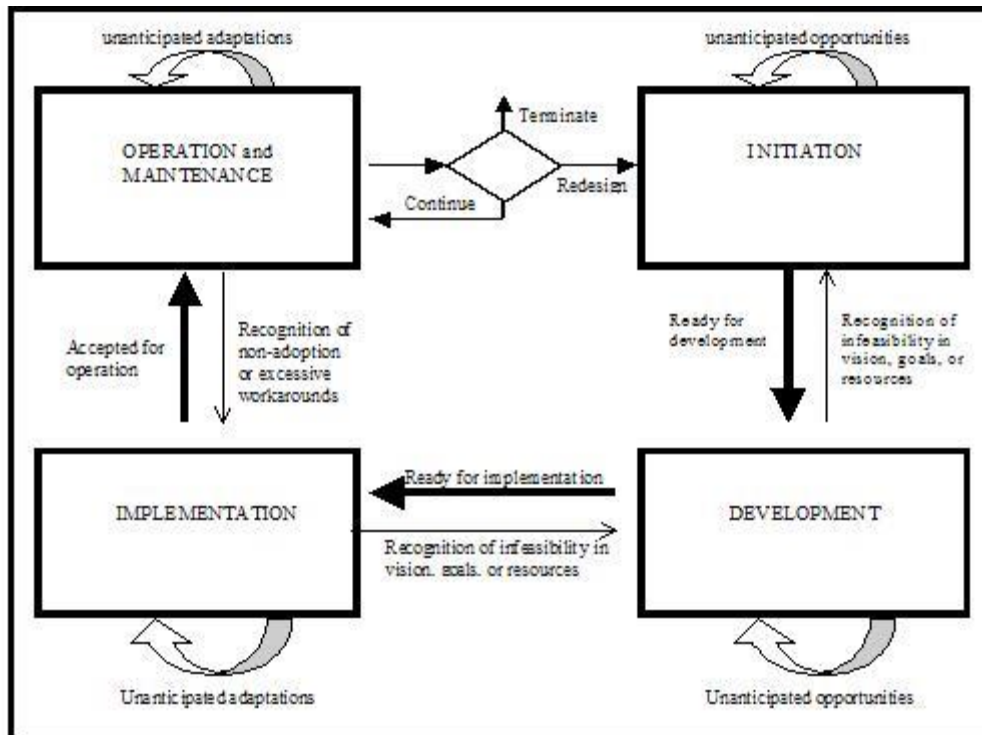


Figure 2.3: Work systems lifecycle model (Alter, 2013)

In the organisation used for this study, recent organisational change would have a definite impact on the way that L&D would be implemented. These changes, however, were still in the pipeline, resulting in no formalised changes within the L&D arena at that point. As such, the researcher used the work systems framework to analyse and understand the way that the L&D team worked, with a core focus on developing and growing employees.

After setting the landscape, the researcher used the work systems lifecycle model to understand and depict how small changes to the existing world of L&D would have an impact on the organisation and employees from a retention and development perspective.

### **2.3. Employee engagement**

Employees today have increased bargaining power, the job market is highly transparent, and attracting top-skilled workers is a highly competitive activity. Companies are now investing in analytics tools to figure out why people leave, and the topics of purpose, engagement, and culture weigh on the minds of business leaders everywhere, (Bersin, 2015).

The term employee engagement had become increasingly popular as organisations experienced extraordinary changes over the past few years and attempted to maintain their competitive advantage within the various segments. A number of HR practitioners position employee engagement as a primary objective in drafting a talent strategy (Aon Hewitt, 2015). There are numerous definitions within the literature regarding employee engagement and what it actually means. In their research, MacLeod and Clarke (2009) identified a range of approximately 50 explanations of employee engagement.

Employee engagement research advanced from studies focused on work motivation, leadership, organisational culture, empowerment and high performing teams (Maslow, 1943; Deci, 1971; Ambrose & Kulik, 1999; Ramlall, 2004)) to include commitment of an employee, enthusiasm, involvement, and employee satisfaction (Paradise, 2008; Harter, et al, 2002).

The concept of employee engagement has been a key emphasis for both business and theoretical studies (Shuck & Wollard, 2010). It has been associated with outcomes such as positive organisational performance and effectiveness (Saks, 2006). There seems to be a substantial amount of empirical evidence; however, much of what has been written stems from consulting firms where it originates from practice as opposed to theory. The results of these consultancy firms' research depicts a decrease in the number of engaged employees (Saks, 2006). A study by Towers Perrin (2008) revealed that 21% of employees were engaged in their work while 38% were moderately to fully

disengaged from their work. Gallup Consulting's (2010) research also found that 11% of employees were engaged worldwide and 62% felt disengaged.

Sundaray describes employee engagement as the level of commitment and involvement experienced by an employee towards the organisation and its values (Sundaray, 2011). An engaged employee is described as one who is conscious of the organisational and business objectives, works alongside their colleagues to achieve them. Sarah Cook (2008) describes engagement as the willingness and ability of an employee to contribute to a sustained effort to help their organisation succeed. It has an agreeably constructed representation that explains the key fundamentals of engagement in a very ordered and rational manner.

Bakker and Schaufeli (2008) defines the term employee engagement as '... a positive, fulfilling, work-related state of mind that is characterised by vigour, dedication and absorption.' Vigour refers to energy levels that an employee is willing to contribute to their work to achieve organisational objectives; dedicated describes the employee's ability to feel proud, enthusiastic, challenged and inspired about their job; and absorption refers to the employee feeling satisfied with their job.

Similarities can be seen across the various definitions provided regarding the fundamental building blocks that govern employee engagement. There is a clear link to employees having a positive state of mind towards their deliverables and work environment, which in turn contributes to their value and passion for their work, an increased commitment and a positive effect on productivity and performance.

Disengagement is described as '... the uncoupling of selves from work roles; in disengagement, people withdraw themselves physically, cognitively, or emotionally during role performances,' (Kahn, 1990). This demonstrates employees' detachment from work and their disinclination to exert themselves in their daily jobs, i.e. an employee does only what is required from them and no more; they arrive and leave on time, never volunteer for working overtime, apply minimal effort and speak badly about the organisation. 'When employees are not engaged in their organisation it will affect levels of performance, through higher absenteeism, higher turnover, lower productivity, and a higher recruitment and training cost,' (AbuKhalief & Mat Som, 2013).

Organisations regularly use surveys to assess employee engagement. Key prerequisites for these being effective measurements are the ability of the organisation to perform reliable and valid surveys (Aon Hewitt, 2015).

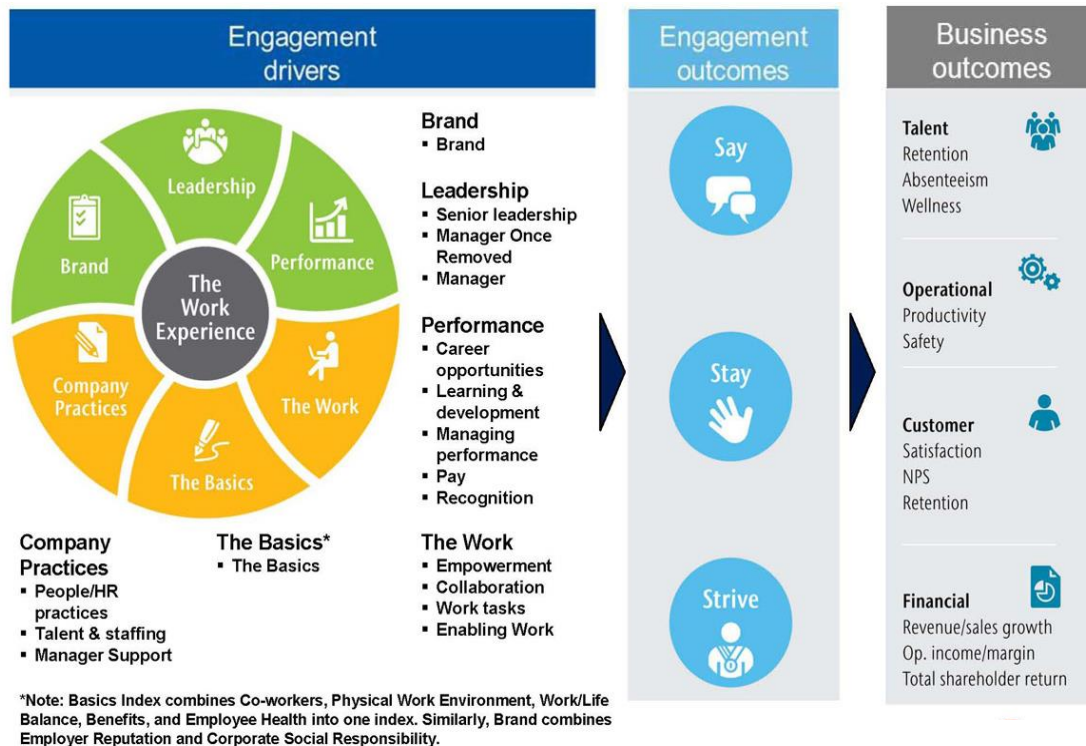


Figure 2.4: Hewitt engagement model (Aon Hewitt, 2015)

The Hewitt engagement model describes the drivers of engagement as well as the engagement outcomes that can be illustrated as 'say', 'stay' and 'strive'. Say refers to the employee speaking positively about their organisation and colleagues. It indicates a level of job satisfaction and can assist in promoting the organisation's brand. Stay refers to employees' level of commitment to ensuring that they are available. This greatly benefits the employer as it assists to reduce high staff turnover, which reduces the costs associated with recruiting and selecting new employees. Strive refers to employees' high energy levels to achieve the best work that they can. They are committed to their contribution to a successful organisation (Aon Hewitt, 2015).

In an attempt to improve levels of engagement, there are a number of factors that must be considered. An article published by CollierBroderick (2015), indicated that a review of the research by Ruyle, et al (2003), recognised 11 key factors that influence employee engagement. The table below describes these factors:

<b>1. Strategic alignment</b>	Employees' work is in line with where the business is going and how it is going to get there
<b>2. Trust in senior leadership</b>	Employees believe in, trust and follow senior leaders
<b>3. Immediate manager working relationship</b>	The quality of the management team directly impacts the performance and retention of employees
<b>4. Peer culture</b>	Effective peer relationships leads to highly engaged,

	productive employees and drives organisation performance
<b>5. Personal influence recognised</b>	Employees feel that they can strive to seek better ways of doing things, to innovate new ideas and that their efforts (be they successful or not) will be recognised
<b>6. Nature of my career</b>	Providing employees with meaningful career paths, that will inspire and provide them with a variety of opportunities to grow and develop and lead to their goals
<b>7. Career support</b>	Providing employees with the opportunity to develop through assignments or key jobs
<b>8. Nature of the job</b>	Providing employees with jobs that are designed to challenge them and that are a good fit with employees' skills, qualifications and experience
<b>9. Development opportunities</b>	Providing employees not only with formal learning programmes but also with the opportunity to practice their newly acquired skills and knowledge on the job and to learn from others outside formal learning programmes
<b>10. Employee recognition and rewards</b>	Recognising in a sincere and timely manner employee contributions and incremental improvements

Table 2.3: 11 Key factors that influence employee engagement (CollierBroderick, 2015)

The new organisation is driven by a new model of management and leaders that build empowered teams. There is a keen focus within organisations to understand and create a shared culture and an environment that engages its employees via this new leadership model and career development. Digital technology is being embraced as it focuses on driving innovation and diversity, in the belief that the new learning culture will lead to organisational success. Organisations are increasingly being pressurised to simplify their processes to manage the flood of information experienced at work, and to build this culture of collaboration, empowerment and innovation (Bersin, et al, 2016)

Organisational design seems to have multiple forces of disruption and drivers that need to be considered by organisations. Millennials seek a rewarding and purposeful work experience accompanied by a constant stream of L&D initiatives and opportunities. They want dynamic career progression. Globalisation has also led to an increased need for shared beliefs and for organisations to have the ability to tie people together (Bersin, et al, 2016)

Digital technology has begun disrupting multiple business models as it seeks to radically change the way that work is done. There is a need to be more innovative and to simplify and improve the work experience by using tools such as design and systems thinking. The pace of organisational change has rapidly accelerated. This has resulted in

business models needing to innovate and change further. Organisations need to respond to external pressure and reposition themselves accordingly. There are major changes in the relationship between employee and employer as well. Younger employees seek a fulfilling experience at every stage of their career growth. There is an expectation of a flexible and compelling workplace and a need to have a sensible mission of purpose in the work that is being delivered (Bersin, et al, 2016).

Organisations strive to be more customer-focused and agile in their approach. Structures have shifted from being traditional and functional models to interconnected and flexible teams. Teams that work as a network are now being tasked with focusing on specific business projects and challenges, which leads to empowering the teams involved. This empowerment forces the leadership development initiative to become stronger and more structured, improves performance management, and adapts L&D and career progression. Learning opportunities is the largest driver of employee engagement and a positive work culture. The ability to adopt new technologies and embrace new learning models is key for positive engagement initiatives within an organisation (Bersin, et al, 2016).

'Culture describes the way things work around here while engagement describes how people feel about the way things work around here,' (Bersin, et al, 2016). Companies are required to align their values with their culture. This assists in motivating people and, in turn, leads to building a meaningful and compelling work environment that affects engagement. Annual engagement surveys are being replaced by tools and techniques such as pulse surveys, anonymous social tools and regular feedback check-ins with managers, giving rise to 'employee listening' (Bersin, 2015).

Furthermore, relationships play an important role in defining a work environment (Gersick, et al, 2000). Crucial aspects of the employees' work life centres around the relationships experienced in the organisation (Gersick, et al, 2000). The effect on the employee can be either negative or positive depending on variables such as value, support and recognition experienced (Gersick, et al, 2000). A dominant theoretical paradigm that is commonly used to describe these workplace relationships is the social exchange theory (Blau, 1964; Cropanzano & Mitchell, 2005).

Workplace relationships rank high on the radar of exploring the social exchange theory (Cropanzano & Mitchell, 2005). There are a number of mutually dependent associations that can be found in the workplace. These are called social exchange relationships (Cropanzano, et al, 2001). Social exchanges comprise a categorisation of relations between two parties that yield personal obligations, appreciation, and trust (Blau, 1964). The most significant characteristic of social exchange seems to be reciprocity where a positive relationship and fair exchange between two parties leads to favourable behaviour and attitudes (Cropanzano & Mitchell, 2005). These relationships, in turn, have behavioural, cognitive and emotional implications whereby an employee will reciprocate the socioemotional benefits they experience (Blau, 1964; Cropanzano & Mitchell, 2005).

## 2.4. Change management

In a rapidly changing world managers need to increase their skills at diagnosing resistance to change and at choosing the appropriate methods for overcoming it (Kotter & Schlesinger, 1979). According to Kotter & Schlesinger (1979), change is definite for organisations irrespective of whether it brings about fear in people. The challenge is for leadership to implement the changes and overcome this associated fear. Fear of change is understandable, but because the environment changes rapidly, and it has been doing so increasingly, organisations cannot afford not to change (Kotter & Schlesinger, 1979). Kotter & Schlesinger, (1979) reference a number of causes for resistance to change. They outline ways of successfully dealing with this resistance such as education, participation, facilitation and support. Each of these efforts has its positives and drawbacks. Ideally however, it is a question of applying the theoretical base for change management to an organisation and finding the correct mix of solutions to implement a change.

Organisations need to successfully deal with the challenge of managing, working with and adapting to the unstable environmental variables that they have little control over, but need to adapt or conform to, to remain viable (Macredie & Sandom, 1999).

Organisational change efforts that are based on inconsistent strategies tend to run into predictable problems. For example, efforts that are not clearly planned in advance and yet implemented quickly tend to become bogged down owing to unanticipated problems. Efforts that involve a large number of people, but are implemented quickly, usually become either stalled or less participative, (Kotter & Schlesinger, 1979).

According to an article by Jones, et al, (2004), the goal of organisations just over a decade ago was to aim for stability. It was all about giving shareholders the ability to earn predictably. Leaders could deliver on this as the markets were less developed then they are now and strategic changes were very modest. 'Prices stayed in check; people stayed in their jobs; life was good,' (Jones, et al., 2004). This scenario has changed drastically over the years and, due to an increase in the demand for market transparency, capital flows that are global and the need for constant and immediate communication, the comfort of minimal change is a thing of the past.

Changing an organisation's culture has been described as one of the most difficult leadership challenges since the culture comprises an interlocking set of goals, roles, processes, values, communication practices, attitudes and assumptions (Denning, 2011).

Table 2.4 describes the three main challenges experienced at the private bank being studied.

<p>Motivating employees</p>	<p>Leadership plays an important role in guaranteeing that employees are motivated. Since there has been a shortage of motivation within the organisation, employees have shown disinterest in the organisation’s vision and tend not to be very productive. Standard issues involve the lack of communication and understanding about the strategy. A review of the relevant literature shows that this lack of motivation can lead to employees undermining the efforts and authority of leadership (Cyprus, 2003).</p> <p>For the organisation to move forward, motivating the employees is imperative. The fix may be as easy as communicating the strategy and having sessions with the wider teams to inform them of the ‘why’. In other instances, leadership may need to work closely with demotivated employees to reconsider remuneration. A lot of worker motivation has to do with workplace psychology. The happier and more valued employees feel, the more likely it is that they will give the company their best efforts (Cyprus, 2003). Investing in employee happiness sometimes seems contradictory, but ignoring corporate culture is often seen as a serious fault.</p>
<p>Cultivating leadership experience</p>	<p>A huge challenge within the organisation was ensuring that new leaders were proficient and skilled enough to lead the business effectively. ‘The skills needed to head up a cause or execute specific goals are not usually intuitive, and they cannot always be learned in a classroom,’ (Cyprus, 2003). Although there were many development opportunities for leaders, they were not always able to identify their weak areas. A unique L&amp;D plan aimed at senior leadership, which covers the basic requirements of leadership and how to become ‘better’ leaders, was therefore beneficial.</p>
<p>Creating team unity and facilitating open communication</p>	<p>Leadership and management are accountable for creating a form of togetherness between employees. Generally, if a team does not work well collectively they will find it very tricky to deliver on projects/work. This requires trusting relationships that will increase development and grow teams. Trust stems from leadership first, who need to set up a structure and environment that promotes this type of interface.</p> <p>Another key factor is communication. Leadership within the organisation needs to maintain certain levels of authority; however, they need to become approachable for employees. ‘Effective teamwork depends on a culture of open communication, where superiors and subordinates can freely discuss progress and problems. Employees who feel that their bosses are distant or somehow “off limits” have a tendency to make mistakes that could have been avoided had the parties felt more comfortable talking to each other,’ (Cyprus, 2003).</p>

Table 2.4: Three main challenges experienced in the workplace (Makan, 2014)

In general, the most fruitful success strategy is to begin with leadership tools, including a vision or story of the future, cement the change in place with management tools, such as role definitions, measurement and control systems, and use the pure power tools of coercion and punishments as a last resort, when all else fails (Denning, 2011).

In the researcher's opinion, there seems to be no specific methodology that will fit every organisation or every changing situation. There needs to be a cohesive effort within the change management discipline of an organisation to understand the basic principles of change management that are widely published by the many change management professionals and academics. It is the responsibility of the change agents to fully understand each change that is being proposed in isolation, and then adapt a framework that is flexible and encompasses the key principles and more to successfully implement the changes at hand.

This is similar to the way a dance is about listening to the music, feeling the rhythm and making up the moves as you go along. There needs to be harmony. There will be times when we need to dance the rumba and follow the specific steps, but the final execution of the rumba in a dance competition is never the same for all contestants. Each person will make up their own steps and use music that they believe drives the rhythm to deliver the best dance that they can. In change management, change agents need to understand the impact of change, know the specific steps that can be taken and then customise the final outcome to best suit the situation at hand. Leaders need to be flexible in their approach to change management. The one-size-fits-all approach does not work well, especially when one considers that to be successful in change the key buy-in sits with human beings, whose approach to any change is never constant. By developing a comprehensive and flexible framework, leadership may be able to understand what to expect and learn how to manage their personal change, which will in turn filter throughout the organisation and the change management processes.

CEOs involved in transformation often say they are concerned about how the work force will react, how they can get their team to work together, and how they will be able to lead their people. They also worry about retaining their company's unique values and sense of identity and about creating a culture of commitment and performance. Leadership teams that fail to plan for the human side of change often find themselves wondering why their best-laid plans have gone away, (Jones, et al., 2004).

According to evolutionary theories introduced by Charles Darwin and Jean-Baptiste Lamarck, survival in a permanently modified environment takes place through adaptation. The same is true today in the private banking industry. Whether it is through circumstantial mutation, embodied by young start-ups, or through the transformation of existing institutions, only the ones who are willing to accept change

and adapt shall prosper. This fundamental law of nature is more relevant than ever for the financial services industry and particularly for private banking, (Kearney, 2014).

Wikipedia defines the culture of a company as the 'behaviour of humans within an organization and the meaning that people attach to those behaviours.' It lists factors such as vision, norms, values, beliefs and habits that contribute to the so-called 'culture' (Craig, 2014).

The organisation saw that the most important factors to drive change management were:

1.	Employee engagement	Engagement may be seen as two-pronged. It measures how well employees fulfil their jobs and questions whether there are any distractions in the company that hinder their results and outputs. When employees don't feel a sense of empowerment to fulfil their positions confidently, there is a problem with engagement (Craig, 2014).
2.	Trusting environment	'Trust is absolutely critical in the workplace. We've all had jobs where we thought twice before leaving personal effects unattended in the break room, or where we couldn't necessarily count on co-workers to pull their weight. Sure, you can hire people who seem trustworthy, but making trust a company value – with zero exceptions – falls squarely to you as a business owner,' (Craig, 2014).
3.	Learning and development	By taking ownership of learning and employee development, the organisation equips its employees with the power to successfully fulfil their positions. A learning culture helps enforce growth and, in turn, a culture of adaptation evolves. As a private bank, we need to provide employees with the right tools to take pride in what they can deliver on.
4.	Purpose	'This one is deceptively simple. It's not enough for you to merely prescribe a purpose for your employees; they also have to buy into it. They have to feel that what they do matters, and has a measurable impact on the success of the company,' (Craig, 2014).

Table 2.4: Drivers for change (Craig, 2014)

Many employees don't have the luxury of choosing their employers by culture. If a job is offered, they will take it. Very rarely, employees are lucky enough to find a position in a company that is compatible with their own values and beliefs and that ties in with their own goals for development and growth.

Resistance to change is a normal human trait brought about by people having different personalities and perceiving the outcome of that change in various ways. According to Kotter & Schlesinger (2008), stakeholder resistance can threaten to derail even the most positive change effort. There are four primary reasons that people resist change. Knowing these types of reasons will leave a change agent better equipped to spot change resistance in their organisation (Jacoby, 1998).

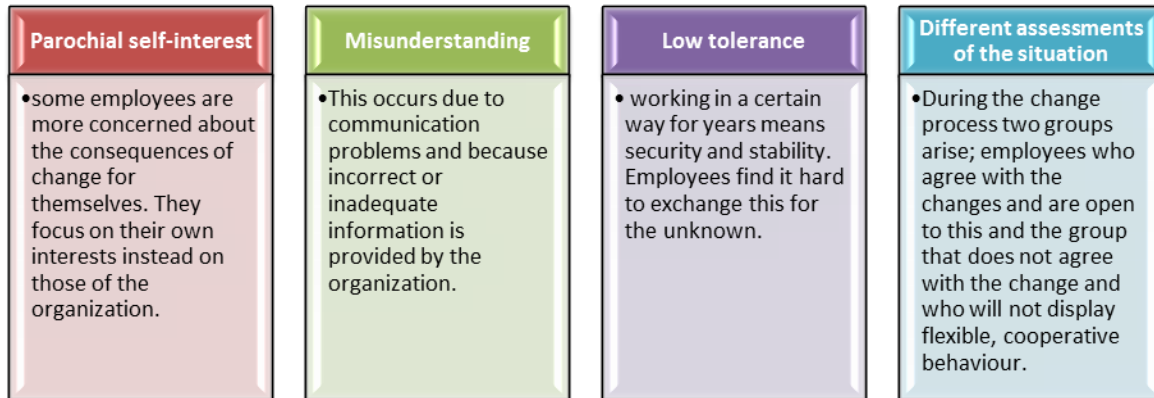


Figure 2.5: Four reasons for resistance (Kotter & Schlesinger, 2008)

Approach	Description	Action Plan
Education & communication	'One of the best ways to overcome resistance to change is to educate people about the change effort beforehand. Up-front communication and education helps employees see the logic in the change effort. This reduces unfounded and incorrect rumours concerning the effects of change in the organisation,' (Kotter & Schlesinger, 2008)	Ensure that all stakeholders are involved in the change from the beginning. There must be a formalised communication plan drafted explaining the details of the change and how it will affect the teams and organisation as a whole
Participation & involvement:	'When employees are involved in the change effort they are more likely to buy into change rather than resist it. This approach is likely to lower resistance more so than merely hoping people will acquiesce to change,' (Kotter & Schlesinger, 2008).	Sessions must be set up with all employees to workshop their ideas regarding the culture and the goals etc. The ideas must be formally collated from all the session and the summary communicated to the business. The final outcome of the sessions must then be communicated to all with an explanation as to why these ideas

		were chosen and how they fit into the goals of the organisation.
Facilitation & support:	'Managers can head-off potential resistance by being supportive of employees during difficult times. Managerial support helps employees deal with fear and anxiety during a transition period. This approach is concerned with provision of special training, counselling, time off work,' (Kotter & Schlesinger, 2008)	Have an open door policy and lead by example – there must be agreement from all leaders and managers that they will assist in being change managers for this change. There will be resistance, but they need to be willing to be open with their teams, discuss how people are feeling and take in suggestions to make the process better. Management should have weekly meetings with their direct reports to check in and provide feedback on all the issues identified
Negotiation & agreement:	'Managers can combat resistance by offering incentives to employees not to resist change. This can be done by allowing change resisters to veto elements of change that are threatening, or change resisters can be offered incentives to go elsewhere in the company in order to avoid having to experience the change effort. This approach will be appropriate where those resisting change are in a position of power,' (Kotter & Schlesinger, 2008)	Where leadership is not on board with the change, it may be best to first have sessions with all senior leaders to confirm where they stand and how they plan to take this forward. Although negotiating may not be the easiest thing to do, it may be necessary to convince leaders that the change will benefit all. Those that are still resistant will need extra initiatives in their teams and must be managed closely to avoid team resistance
Manipulation & Co-optation:	“Co-optation” (no it's not misspelled) involves the patronizing gesture of bringing a person into a change management planning group for the sake of appearances rather than their substantive contribution. This often involves selecting leaders of the resisters to participate in the change effort. These leaders can be given a symbolic role in decision making without threatening the change effort,' (Kotter & Schlesinger, 2008)	If this scenario happens to take place, again it's about getting everyone involved and keeping the strongest resisters very close. There is no guarantee that they will be convinced to change, but again may feel as though they contributed enough not to be completely negative

Explicit & implicit coercion:	'Managers can explicitly or implicitly force employees into accepting change by making clear that resisting to change can lead to losing jobs, firing, or not promoting employees,' (Kotter & Schlesinger, 2008)	It is not part of the organisation's culture to force any specific type of thinking. Although there may be resistance, in my past experience, if done correctly we may never get to the point of having people that are so resistant that we need to force them by threatening them. I would say in this specific scenario, each has freedom of choice and beliefs. We as management must just be ready for the possibility that if we cannot successfully convince all team members of the change, we will lose some employees in the process. We will not discriminate against employees and the pre- and post-reviews will give us an indication of how people feel after implementation. It may be a suggestion that if there is still heavy resistance, an audit is done to understand why and maybe fix loopholes in the actual implementation that may be causing conflicting ideas
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Table 2.5: Six change approaches to deal with change resistance (Kotter & Schlesinger, 2008)

By assessing the environment and the people, multiple markers will be identified that can provide insight to the existing culture and the direction that an organisation needs to take in the future. The way that employees react to what an organisation is building is critical to its success. Tyler Durham, partner and president of Ketchum Change, the change management and employee engagement unit of global communications firm Ketchum, noted:

Dynamic business environments and a culture of continuous change is the new normal for large organizations, and it's only going to accelerate. Employees don't have time to adapt to one change before the next one is upon them. The challenge for leaders is to drive change in ways that energize and empower people and ensure their organizations are prepared both culturally and operationally to embrace change as opportunity, (HR Review, 2015)

## **2.5. Organisational learning and development**

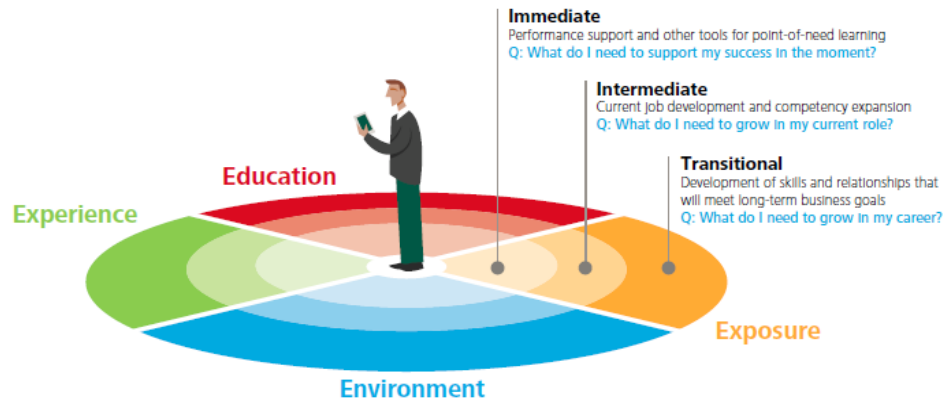
In a continuously changing economic environment, organisations remain committed to organisational L&D. An organisation's L&D strategy, when effectively designed and implemented, can deliver the capabilities, competencies and skills required to support sustainable business success. Increasingly there is a need for innovation in delivering skills and knowledge to support organisational change, particularly in challenging economic circumstances. Learning professionals need to prepare innovative and flexible L&D interventions through design, delivery and assessment. By considering strategic business objectives at every turn, the challenges and opportunities for the L&D function in supporting change management and sustainable performance levels across the organisation can be met with vigour and purpose (CIPD, 2014).

Learning, unlike training, is an inherently natural activity or function. It is actually very difficult, if not impossible, for a human being to avoid or stop doing it. The trick for the organisation employing that human being is to encourage, focus and capture the learning for its own ends, while ensuring that the employees feel that they have won a division of the spoils.

Today's business environment demands that learning be used as a tool to engage employees and retain top talent. According to a report compiled by Deloitte (Bersin, 2015), companies are reporting that the skills developed are not aligned to the fast pace of change within their organisations. Companies that do not continuously advance their skills and rapidly build leaders will find themselves on the back foot when it comes to executing company strategy and business plans.

With the current digital age, it has become possible to learn anywhere and at any time. An employee can take online courses as they wish and use the web to improve on a specific skill at any point in time without leaving their desk, couch or coffee shop. This theme of consumer-centric learning has put the employee at the forefront of his own development. Employees are demanding access to dynamic learning constructs that fit their individual needs and schedules (Bersin, 2015).

Of the South African executives that were interviewed by Deloitte, 87% confirmed that learning is a primary driver of employee development and engagement (Bersin, 2015). Organisations that thrive at the forefront of the L&D phenomenon are those that have begun promoting a new culture of learning. They have begun to uproot the traditional learning models and transform the way their employees learn. Learning is seen as a continuous process and a companywide responsibility. The drive is to shy away from the boring traditional learning platforms and, instead, to enable employees to access content from a wide range of internal and external sources, thus creating individual learning programmes. Figure 2.6 explains the continuous learning cycle of the employee.



Source: David Mallon and Dani Johnson, *The learning architecture: Defining development and enabling continuous learning*, Bersin by Deloitte, 2014, <http://bersinone.bersin.com/resources/research?docid=17435>.

Graphic: Deloitte University Press | DUPress.com

Figure 2.6: The learning architecture (Mallon & Johnson, 2014)

To facilitate the effort to help employees ‘learn how to learn’, L&D teams are building internal knowledge-sharing programs, developing easy-to-use portals and video sharing systems, and promoting collaborative experiences at work that help people constantly learn and share knowledge, (Bersin, 2015)

The goal of learning has now begun to focus on the learning experience. As noted by Bersin (2015), ‘Corporate training departments must become “learning experience architects” (to use a term from design thinking), building a compelling and dynamic experience for employees and helping employees learn how to learn.’

Table 2.7 highlights the various attributes that contribute to the way L&D is seen today versus the shift in learning methodology. Learning is seen from a learner’s perspective as the daily experiences and career aspirations rather than a series of boring programmes that the L&D team needs to roll out.

Today	Tomorrow
Learning is a series of corporate programmes built around L&D-designed content and L&D-approved experts	Learning is an ‘environment’ and an ‘experience’, leveraging experts, content, and materials sourced and recommended by external communities as well as by other employees and internal experts (not just L&D).
The learning environment is managed by a corporate learning management system – essentially a large catalogue filled with courses	The learning environment feels like a consumer website that provides videos, courses, content and access to experts, as well as recommendation engines that help people find precisely what they need.

L&D, business and compliance experts push out training, identifying required courses to be completed by employees based on roles	Employees pull learning, navigating and accessing opportunities from inside and outside of the company.
The focus is on internal training sanctioned by the company	External training is available from any digital content source.
Learning professionals are generalists who do everything from design to development, logistics and measurement	Learning professionals are specialists who are excellent at the component they own.
Training follows a lecture-based model guided by an expert	Training is experiential, relying on simulations, case studies and flipped classrooms.
Employees learn specific skills through expert-guided instruction	Employees learn how to learn through facilitation and coaching.
Organisations create detailed, exhaustive, skills-based competencies that drive the learning agenda	Organisations create high-level frameworks that outline broad capabilities.
The learning organisation plays a lead role in what a person learns and focuses on delivering work experiences, interactions with others and formal training in the traditional 70-20-10 ratio	The learning organisation plays a supporting role in what a person learns, expanding the 10 to include 'inside' and 'outside' learning; shifting the 20 to include internal and external networks; and redefining the 70 to include corporate, community and social experiences.

Table 2.6: Learning, today and tomorrow (Bersin, 2015)

Bersin (2015) makes the following suggestions based on the research regarding areas in which companies can attempt to promote employee-centric learning initiatives.

- Employees must be viewed as customers that the employer is trying to attract when thinking about the learning experience. These learners must be driven by the offering made but still be in the driver's seat.
- Companies must give over control of learning to employees – this means handing over the reins for the learning content, schedules and platforms that must be explored.
- Learning should be less rigid and more flexible – a day-by-day and month-by-month approach.
- Technology should drive employee-centric learning.
- There must be alignment of the learning functions and the business objectives.

- Rethink what development and learning means for the organisation – communicate this vision.
- Enable employees to have access to the learning they require when they need it – support continuous learning.

## 2.6. Impact of change on employee engagement

Organisations are constantly planning initiatives and changes such as restructures or mergers and acquisitions. Irrespective of the nature of a change, the loss of status, uncertainty, lack of control and loss of familiarity is usually met with resistance from employees (Fried, et al, 1996). Research undertaken by Towers Watson (2015) investigates the impact that these changes have on the employee. They investigated the length of time taken for employees to move through the classic ‘change’ curve and found that, due to the inconsistent nature of the change and employees’ ability to process the change variably, defining the exact impact can be difficult. However, they picked up trends that the change curve does regularly occur.

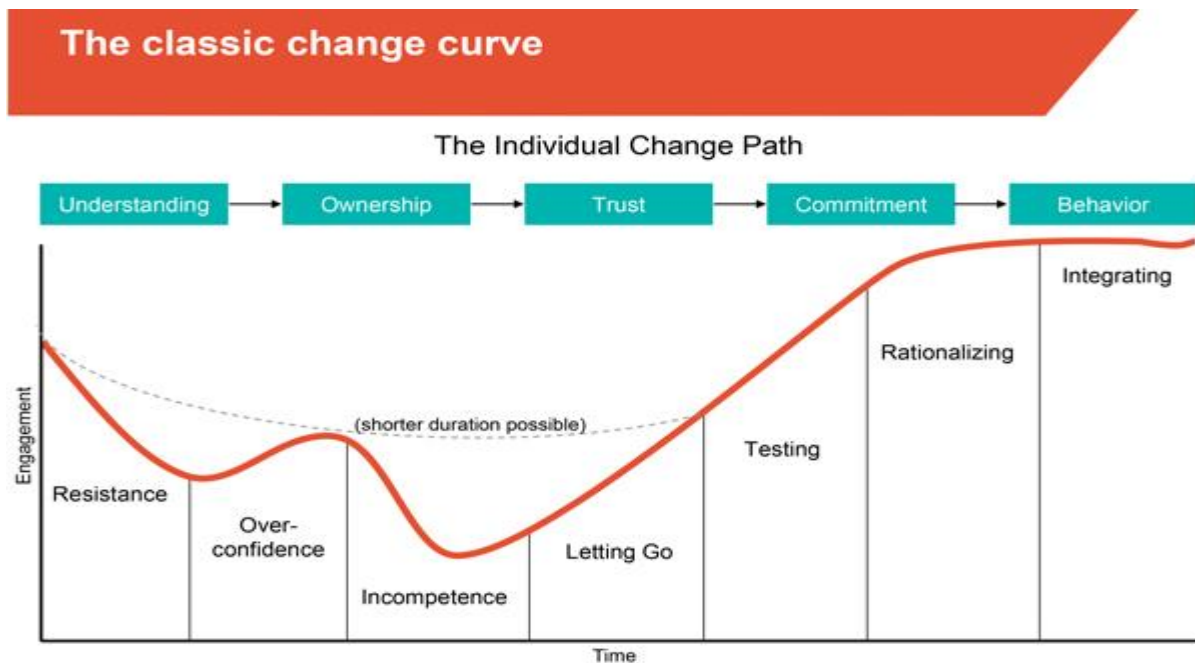


Figure 2.7: Classic change curve (Aon, 2013)

Their discovery revealed that opinion often declines at first, then improves, declines and finally fully recovers. They further explain how employees are different and each will experience the change curve at different times and at their own pace. What sometimes appears as a resistant employee is, in fact, just an employee taking their own time to process the change (Towers Watson, 2015).

Due to the associated uncertainty, employees may feel conflicted in their new roles. New or additional job expectations and processes may result in a delay in accomplishing goals, which may lead to an increase in turnover. Generally, during times of change it can be challenging for employees to keep their heads above the water and remain productive (Aon, 2013).

The next variable measured by Towers Watson (2015) was the size of the impact on an organisation with respect to employee engagement. The research revealed that although variable, a general decline in employee opinions can be seen during times of change, possibly due to increased uncertainty.

Finally Towers Watson (2015) set out to understand whether change can be influenced. They did this via statistical modelling and revealed the factors that have the biggest impact on employee engagement during a change (see figure 8).

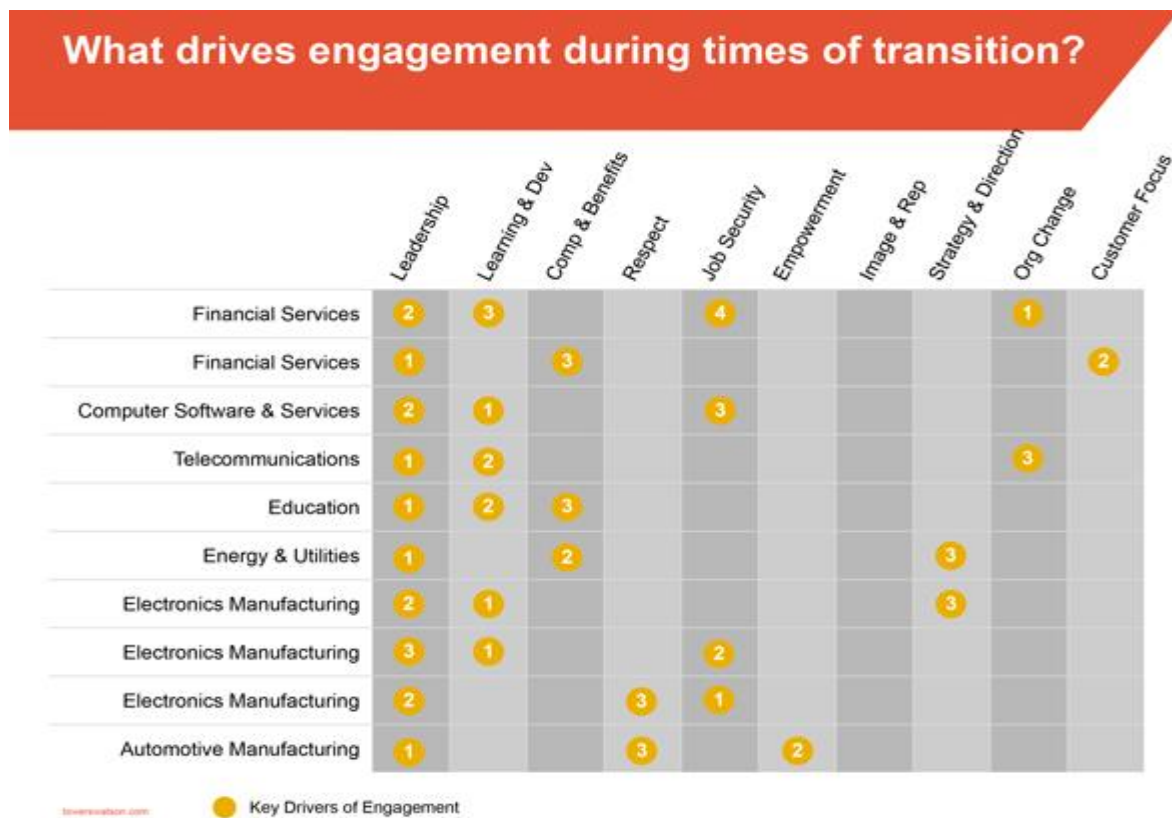


Figure 2.8: Key factors that affect employee engagement (Towers Watson, 2015)

Although leadership came out as the most popular driver at all companies surveyed, L&D followed very close behind. In financial services specifically, organisational change ranked as the greatest factor driving engagement with leadership and L&D following.

A study by Aon (2013) analysed a sample of employees during the economic crisis. Their analysis revealed that engagement is, in fact, influenced by organisational change.

The proportion of highly engaged employees does not change from the baseline due either to strategy transformation or restructuring. This may indicate that the most engaged employees remain resilient during these types of change. However, the percentage of actively disengaged employees increases substantially during these times, (Aon, 2013).

AON also measured drivers of change for employees that experienced change versus those that did not. This revealed that the drivers of employee engagement do, in fact, have different significances depending on the presence of change. It was further discovered that the top engagement drivers are influenced by various types of organisational change.

- Mergers and acquisitions – employees are highly affected by mergers and acquisitions. Unlike the other types of change, understanding a career path takes a back seat to having visible senior leadership. Employees take longer to recover and want to see leadership to understand the reason for the change and envision where the organisation is going and how the change influences their position. It also appears that employees value skills development during mergers and acquisitions. These skills and behaviours may be vital for the newly integrated business model (Aon, 2013).
- Restructuring – the effect on the employee is very personal as restructuring may result in jobs being eliminated. This causes fear in the remaining employees; however, job loads and skill sets need to be increased to make up for the jobs that are lost. The organisation and its leaders should constantly show their commitment to their employees' ongoing development when roles are combined and resources reduced. This could indicate career opportunities for the employees who remain (Aon, 2013).

In response to strategy formulations that may result in the need to let go of old behaviours and implement new ones to contend in new markets and drive business value in an altered way, Aon suggests the following:

Organizations can drive engagement during this type of transformation by maintaining open two-way communication. Employees want to feel as if they work in an environment that, despite the organization's modification of its core strategy, still values their input and enables good decision making. This is further accomplished by ensuring that employees receive necessary training and have the resources needed to do their (new) jobs, (Aon, 2013).

Towers Watson (2015) suggests the following be done by leadership during times of change:

First, they *inform*, meaning that they define a vision of what the future looks like and they share that vision, repeatedly, with employees in highly engaging ways, often through storytelling. And they communicate as many specifics as possible, transparently acknowledging what is not yet known. Second, they *engage*, meaning that they find opportunities to involve employees, generate energy around the change by personally modelling the future state, stay visible and accessible, and encourage dialogue, responding proactively to feedback received. Third, they *enable*, meaning they identify and address barriers to change, create opportunities to learn new skills that will be needed in the future state, and work to build an organizational culture that sustains change over time. Finally, they *build trust and influence others* through their own behaviour. By that we mean they are authentic with employees, which inspires confidence and respect.

AON Researchers found that the number of employees that feel engaged immediately after a change is higher due to the prospect of new directions and opportunities. However, this starts changing as the reality of the change comes with integration and restructuring, which causes a shift to feeling disengaged. They found that the percentage of highly engaged employees dips after a merger or acquisition. The recovery time for these disengaged employees can take two to three years. For an organisation trying to increase buy-in to a new business model or strategy, this can be problematic. Increased job demands and decreased control may intensify employee stress and fatigue. When employees start to familiarise themselves with the demands and controls of the job, their engagement levels recover over time (Aon, 2013).

The research indicates that there is a need for a clear career path as this consistently came up in the data analysed. Employees seek validation about their existing jobs versus their new jobs. An organisation may be at risk of losing critical talent for the future if these individuals are unclear of their career path with the organisation. Leaders must provide some clarity about career opportunities, L&D and process improvement initiatives for this future-critical talent. The employees need skill-building efforts and development to be a constant, especially during times of change.

If the change results in the same employees doing new things with old skills, an organization is at risk. Having a clear sense of skill gaps created by change events is the starting place for implementing an efficient development plan focused on what is required to deliver value in the new organization, (Bakker & Schaufeli, 2008).

## **2.7. Impact of learning and development on employee engagement**

Employee engagement researchers have discovered that organisations that exhibit high levels of employee engagement have improved financial performance (Illumine Training, 2015). Researchers further conclude that the L&D component of an organisation is critical in keeping employees committed to maintain a competitive advantage. Three factors come across as important to ensuring employees feel engaged:

- Direction and a larger context for work and goals
- Constructive criticism on performance outcomes
- The opportunity to improve existing skills and progress in career with the goal to be the best.

In providing the correct training, a company can greatly enhance employee engagement by nurturing talent and ensuring that employees learn new skills to enhance performance. In addition, training plays a key role in allowing employees to feel valued (Illumine Training, 2015). L&D provides a way to address basic needs and improve employee engagement. Employees being recruited view a favourable investment in L&D very positively, which influences their decision to remain at an organisation. If L&D is to make a huge impact on employee engagement, then staff must see its benefits. L&D needs to build on strengths rather than be generic, and address perceived gaps (Illumine Training, 2015).

A vast amount of research depicts L&D as having a real opportunity to influence the degree of employee engagement via its strategies and programmes (Lombardozi, 2012). It is critical that there is synergy between employee engagement and L&D efforts. The literature reiterates that employee engagement leads to better performance, increased quality of work, improved customer satisfaction and talent retention. However, the research also shows that the general consensus in business is that employee engagement is weak (Lombardozi, 2012). Furthermore, studies reveal that L&D contributes significantly as a key activity that positively influences engagement (Lombardozi, 2012). Research by Shuck, et al, (2014), indicates that 41% of variances in engagement are being driven by L&D activities. The research further indicates that 12% of the contributing factors to successful employee engagement is having access to L&D and career development activities. By focusing on the future needs of an organisation, employers that adopt systems to allow employees the ability to contribute to how they develop and advocate resources to learn will ensure the needs of the organisation are met and performance improves via increasing employee engagement. Shuck, et al, (2014) further advocates exploring the factors that leverage the organisation to improve employee engagement successfully. It is not a one-size-fits-all approach. Strategies must be customised for the organisation focusing on the L&D platform.

A business will thrive if its employees are happy. Organisations with engaged employees demonstrate a 22% higher profit (Engage Business Media, 2015). Engaged employees

are a crucial, multifaceted and deeply cultural effort. Research indicates that engaged employees feel empowered, involved, consulted, supported and valued (Engage Business Media, 2015). According to the Deloitte study (Bersin, 2015), L&D drivers are one of the largest influencers of employee engagement. If an organisation provides L&D opportunities to employees it indicates that they are willing to invest in that person. It is a strong tool for engagement on its own and, if done correctly, can boost performance immensely (Bersin, 2015).

Engage Business Media (2015) suggests the following, based on research, to assist with L&D driving employee engagement levels:

- Focusing L&D content around personalised behavioural-, value- or people-based outcomes.
- Defining a learning culture that is in line with the business values and other employee engagement tactics.
- Ensuring that technology is an enabler to drive meaningful design and L&D goals.
- Listening to what employees' need, when they need it and what they view as crucial to developing.
- Viewing learners as if they are consumers. The L&D package must suite the needs of the employee; it must filter, recommend, personalise and focus on the employee and his requirements.

'HR and L&D teams need to work together to consider the experience they can offer, embracing digital technologies as a key enabler of cultural change,' (Illumine Training, 2015).

According to a study by Watt and Hargis (2010), employee engagement levels are reduced by a job that is boring and monotonous. The type of tasks a job carries can have an impact on engagement levels. This can be improved by viewing L&D's relationship with employee engagement within the organisation.

If an employee understands their role and works better than expected, they are more likely to be engaged. If L&D is transparent, meets the needs of the employee and aligns to business goals, enhanced engagement can be demonstrated. By focusing in on L&D, the employee's self-actualization needs are fulfilled and they are provided opportunities to reach their full potential. This in turn results in maximum effort and improved performance (Paracha, et al., 2013). 'More energy and commitment from the employees on their jobs are required by almost every organization which can be achieved through proper training,' (Davidhizar & Shearer, 1998).

The studies by Paradise (2008) strongly advocate that L&D is a critical driver of Engagement. The research found:

Respondents reported on the impact of the learning function on employee engagement when asked about the factors that influenced engagement in their organizations. Quality of workplace learning opportunities ranked first among respondents from all organizations. Learning through stretch assignments and frequency and breadth of learning opportunities also were highly rated factors influencing engagement. The results of the survey also reveal the relative importance of learning processes that organizations currently use, as well as ones that have the potential to improve engagement. Many of the executives who responded indicated that they rely on workplace learning and performance opportunities to drive engagement. In addition, many of the organizations surveyed design learning programs with engagement in mind. Providing supervisors with training on how to coach and engage employees were recommended as learning processes that should be in place if they are not already implemented. (Paradise, 2008)

## **2.8. Conclusion**

There has been no formally accepted definition of employee engagement. From my reading, however, it is clear that there is some consensus among the various academics and authors that have identified inter-related concepts that reflect the interdependency between employees and employers when it comes to engagement. Research on engagement is still in its early days and is on a path to clearly defining the term. According to a paper by Sridevi and Markos (2010):

Most studies demonstrate that feeling valued by management, two-way communication between management and employees, management's interest in employees' well-being and giving more opportunities for employees to grow are the top drivers of employee engagement.

Sridevi and Markos (2010) conclude that literature points to employee engagement being closely linked with organisational performance outcomes. They observed that companies with engaged employees have superior productivity, profitability, growth, customer satisfaction and employee retention as a consequence of a decreased staff turnover and reduced intention to leave the company (Sridevi & Markos, 2010). They further acknowledge:

companies with disengaged employees suffer from waste of effort and bleed talent, earn less commitment from the employees, face increased absenteeism and have less customer orientation, less productivity, and reduced operating margins and net profit margins (Sridevi & Markos, 2010).

Associated costs should also assist in measuring employee engagement. Further studies need to be undertaken to quantify the cost associated with employees feeling disengaged and to identify the tell-tale markers to address issues before they affect the bottom line. Again, much of the research completed is done by survey houses and consultants. There is a need for more academics to get involved in the investigation to define the dimensions and meaning of employee engagement, its measures and an overall justification of its success in organisations.

According to Sridevi and Markos (2010), ten critical strategies have been identified by researchers across the board to keep employees engaged. Employee engagement is thought to begin at a management level. From the inception of recruiting a new employee, aspects such as effective recruitment and orientation will initiate the driver for how that employee feels towards the organisation.

Communication and effective training are critical to the success of the employee and the organisation alike. They assist to build knowledge and skill that the organisation must recognise as part of an appropriately set up remuneration and rewards programme. This, in turn, assists in setting a culture of encouragement to work hard and drive success and innovation, which develops strong performance and accountability within the workplace. By default, employees are happy, flexibility is welcome and employees reduce turnover and maintain or improve the bottom line of the organisational performance (Sridevi & Markos, 2010).

## CHAPTER 3

### Research methodology

#### 3.1. Introduction

The research methodology can be defined as the way in which a research problem is solved systematically. It describes the various steps adopted by the researcher in studying a particular phenomenon and describes the logic behind them (Lingaya's Institute of Management and Technology, 2008)

The researcher used a case study to present the results of the research. Participatory action research methods were used to guide the data. Quantitative strategies were used in the data collection and analysis process. The researcher used an iterative process whereby the data collected in one phase (pre-intervention) contributed to the data collected in the next (post-intervention). The aim of the data analysis in these data collection methods was to provide insight into whether the information collected in these designs could provide enough detail to generalise findings by verifying and augmenting study results from members of a defined population (Creswell & Plano Clark, 2007).

The researcher made use of both descriptive and inferential statistics to analyse the results of questionnaires. The researcher used tests including Spearman's rank correlation, the t-test, linear regression analysis and the Mann Whitney test. These tests were used to prove the hypothesis. The iterative cycles needed in action research facilitated learning as and when various instances of the research findings were applied. Tools within the work systems theory framework were used to ensure that the action cycles delivered were structured. It also ensured that all aspects of the problem were investigated, such as the system, people and processes. A key focus of the research, however, was on the aims and objectives set out in chapter 1. The study design was quantitative and descriptive in nature.

The researcher is employed by the organisation being studied. It was therefore critical that no predetermined notions or ideas were held when research commenced as this would be evident when using an inductive approach (Collis & Hussey, 2009). The deductive approach enables the researcher to collect and use data for analysis, which is then used to test the research objectives. Following a deductive approach is usually accompanied by a quantitative research design and is, according to Quinlan (2011), a structured means of data collection. The inductive approach is more appropriate to qualitative research where data is non-numerical (Collis & Hussey, 2009). Due to the positivist philosophy described in the research philosophy section of this study, the researcher adopted a deductive approach, which allowed for data collection that permitted the research objectives and hypothesis posed in this study to be analysed quantitatively.

Research approaches	Objectivism	Subjectivism
Action research		Strictly interpretivist
Case studies	Have scope to be either	Have scope to be either
Ethnographic		Strictly interpretivist
Field experiments	Have scope to be either	Have scope to be either
Focus groups		Mostly interpretivist
Forecasting research	Strictly positivistic with some room for interpretation	
Futures research	Have scope to be either	
Game or role playing		Strictly interpretivist
In-depth surveys		Mostly interpretivist
Laboratory experiments	Strictly positivistic with some room for interpretation	
Large-scale surveys	Strictly positivistic with some room for interpretation	
Participant-observer		Strictly interpretivist
Scenario research		Mostly interpretivist
Simulation and stochastic modelling	Strictly positivistic with some room for interpretation	

Figure 3.9: Research tactics and their philosophical bases (Remenyi, et al., 1998)

The researcher used action research and a case study. Using two action research cycles, the researcher defined the impact that incremental changes to the learning and development (L&D) business unit would have on delivering customised training initiatives to the business and viewed how these incremental changes would affect the organisation and business from a growth and development perspective.

The advantage of action research is that it provides an opportunity to learn from a cycle and to use the findings in a subsequent test cycle until a problem is resolved (Olivier, 2009). Action research also supports the improvisational model for change, which views change as a constant dynamic and the implementation of information technology as creating a continuous process of change. This views change as a continuous improvisation process consisting of accommodations, adaptations and alterations (Orlikowski & Hoffman, 1997).

Action research involves enhancing a work environment by conducting systematic enquiries into existing practices. This, in turn, improves the experience of the environment – for clients and the organisation as a whole. The ability to bring about change in specific contexts is the key purpose of undertaking action research (Koshy, et al, 2010)

Susman and Evered's canonical action research method consists of the following five phases (Lindgren, et al, 2004):

- Diagnosing focuses on the identification of a problem as a definition of a hypothesis.
- Action planning entails the specification of the different actions that will solve the problem.
- Action taking is about implementing the planned actions.
- Evaluation entails the measurement and assessment of the actions.
- Specifying learning is the documentation of the results to create a learning outcome as well as an input for the next action research cycle.

### 3.2. Research philosophy

Figure 10 describes the basic framework used to understand the philosophical view of research. A societal view can be either radical or regulatory in its approach. The regulatory view supports the subjectivist philosophy and radical view supports the objectivist philosophy. The diagram simplifies the links to, and direction followed, for each philosophy (Holden & Lynch, 2004).

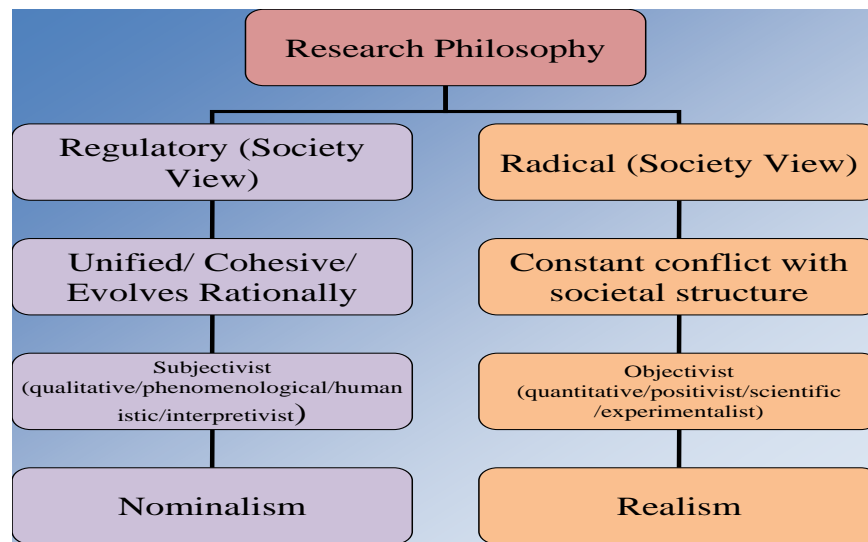


Figure 3.10: Research philosophy: adapted from (Holden & Lynch, 2004).

A review of philosophy is a vital aspect of the research process as it opens the researcher's mind to other possibilities, which can both enrich their research skills and enhance their confidence that the methodology being used is appropriate (Holden & Lynch, 2004). Developing a philosophical perspective required the researcher to make several core assumptions concerning two dimensions: the nature of society and the

nature of science (Burrell & Morgan, 1979). Objectivism and subjectivism have been described as a continuum's polar opposites with varying philosophical positions aligned between them. The objectivist approach to social research developed from the natural sciences, where social science researchers decided to employ the highly successful methods of the natural sciences to investigate social science phenomena (Holden & Lynch, 2004).

Subjectivists such as Weber, Hanson, Kuhn and Feyerabend argue that researchers cannot distance themselves from:

- (1) what is being observed,
- (2) the study's subject matter, or
- (3) the methods of study.

In other words, the researcher is value-laden with inherent biasness reflected by their background, status, interests, beliefs, skills, values and resources (Hunt, 1993).

Subjectivists argue that the involvement of the researcher should be actively encouraged: 'phenomenologists attempt to minimise the distance between the researcher and that which is being researched,' (Hussey & Hussey, 1997). In contrast to the objectivists, subjectivists focus on the meaning of social phenomena rather than its measurement. Their goal is to understand and to explain a problem in its contextual setting; they do not perceive it as a question of causality, but rather as a question of the meaning individuals attach to a given situation (Easterby-Smith, et al, 1991; Hughes & Sharrock, 1997). The researcher believes that the phenomenology described in this study is constantly evolving and will therefore, through investigation, try to understand the problem in its entirety.

### **3.3. Research design**

The primary method of research was quantitative and descriptive in nature. The research design consisted of a general planning phase to connect the conceptual research problem to the achievable empirical research. It conveyed the data required, the methods that would be used to gather this data, the way that the data would be analysed and how all this would fit together to answer the final research hypothesis. According to Van Wyk (2013), different research design types can be used, depending on the type of study chosen. The research design also indicates the purpose of the inquiry, which can be described as one or more of the following: exploration, description, explanation, prediction, evaluation and history (Van Wyk, 2013).

Based on the aims and objectives described in chapter 1, this study applied both an explanatory and descriptively designed case study, incorporating quantitative methods of

analysis. The researcher also used the work systems model and action research to underpin and analyse multiple facets of the problem.

The organisation in question had relied solely on a generic method of delivering learning to its employees. It had constantly developed training and learning initiatives from a very objective point of view, not taking into account the possibility of specialised and customised learning initiatives based on learners' current skills and growth aspirations.

### **3.4. Scope of research**

#### **3.4.1. Limitations (as described by University of Southern California, 2014)**

##### *3.4.1.1. Possible methodological limitations*

- **Sample size** – Ideally the study aimed to obtain a sample size of at least 10 private bankers and three senior managers. This represented a 30% population size.
- **Lack of available and/or reliable data** – The study assumed that it would have access to specific reports and data, e.g. the People Pillar Survey (PPS) survey and results. However, as this information is highly sensitive, it may not be freely distributed. The research findings would then be limited to the type of information available for data analysis. In most instances though, the data was used to validate feedback from employees and managers on a specific topic.
- **Measure used to collect the data** – It is possible that the researcher's suggested methods for data collection may not have sufficiently surveyed a particular issue. In that case, the researcher would have acknowledged the deficiency in the results and suggested that any further research may need to revise the existing methods.
- **Self-reported data** – Since the researcher gathered information independently, the feedback provided cannot be verified and would thus need to be taken at face value. There were also various biases in the data collection methods that need to be noted, i.e. selective memory, not accurately recalling events and timings, and various exaggerations.

##### *3.4.1.2. Possible limitations of the researcher*

- **Access** – Access to data, people and organisational processes may have been limited. This would, in turn, have affected the possible outcome of the research. Although the researcher had various objectives that needed to be analysed using the above resources, it should be made clear that the researcher attempted to get as much accurate information as possible to validate results.

- **Time constraints** – the research required time from the researcher to effectively cover the aims and objectives. As far as possible, the study developed a high-level plan to ensure that timelines were met. This, however, could not be guaranteed as the researcher has a permanent job and research is an add-on to daily work. This being said, the researcher also relied on the organisation and sample resources to provide time and information.

#### *3.4.1.3. Delimitations*

- The results of the study may be limited to the a) private bankers and analysts in b) the financial industry (wealth management), in c) Johannesburg.
- The philosophical framework chosen created boundaries in the way the data was gathered and in reporting the results.

#### **3.4.2. Limitations of the research**

The research had the following limitations:

- The scope of the research was confined to the private banking division of a South African financial service organisation.
- The focus was only on L&D in the organisation and its impact on the employees and the organisation as a whole in achieving their strategy.
- The action research only focused on the framework design of L&D in the growth and development of initiatives for employees.

This study adopted a quantitative research approach that used a structured interview survey as its primary method. It involved a preliminary descriptive examination of the perceptions and experiences of employees. The study was limited to no more than 30 subjects at the organisation because of the time constraints involved in interviewing and subsequent data analysis.

### **3.5. Explanatory research**

Explanatory research is used to identify the nature and degree of cause and effect relationships. It assesses the impacts of certain variations on existing norms and processes, analyses a situation or problem and identifies possible patterns between the variables and cases (Van Wyk, 2013).

### **3.5.1. Advantages of explanatory research (Van Wyk, 2013)**

- Causal studies can play a role in categorising the explanations behind a wide range of procedures, as well as measuring the influences of changes on existing standards and processes.
- Causal studies are easily replicable.
- There are large levels of validity due to subjects being internally selected.

### **3.5.2. Disadvantages of explanatory research (Van Wyk, 2013)**

- There may be confusion between a coincidence and an actual cause and effect relationship.
- Causality may be inferred; however, it can be very difficult to prove that this is based on certainty due to a wide range of influencing and variable factors within a social environment.
- Correlation may be established in most cases, but there is no certainty in identifying the variable responsible for each cause and impact respectively.

## **3.6. Descriptive research**

Descriptive research aims to provide an accurate description of the observations of a phenomenon. The data collected is used to accurately describe basic information about a selected population at a point in time. The objective of most descriptive research is to map the terrain of a specific phenomenon (Van Wyk, 2013).

A study of this type could start with questions such as: 'What similarities or contrasts exist between A and B?' Where A and B are different departments in the same organisation, different regional operations of the same firm, or different companies in the same industry. Such descriptive comparison scan produces useful insights and lead to hypothesis-formation (Harvard University, 2012).

Again, based on some of the objectives described in chapter 1, the researcher used the descriptive design to guide the phenomena being researched, specifically understanding the links between engagement, L&D and change.

## **3.7. Variables and cases**

According to Borgatti, (1998):

Cases are objects whose behavior or characteristics we study. Usually, the cases are persons. But they can also be groups, departments, organizations, etc. They can also be more esoteric things like events (e.g. meetings), utterances, pairs of people, etc. Variables are characteristics of cases. They are attributes. Qualities of the cases that we measure or record.

For the purposes of this research, figure 3.11 represents the various cases and variables that were referenced. The variables were identified using the aims and objectives that the researcher set out to meet.

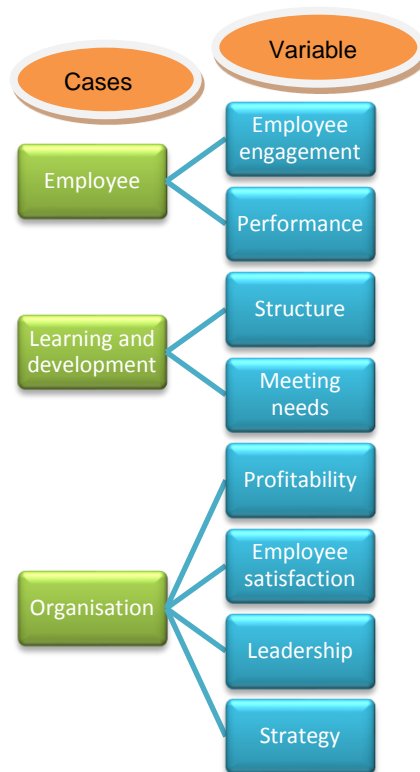


Figure 3.11: Figure depicting cases and variables for the study (researchers own)

### 3.8. Case studies

A case study is one of many methods of conducting research, whether related to social science or even socially related, since it aims to understand human beings in a social context by interpreting their actions as a single group, community or a single event (Yin, 2003). According to (Hartley, 2004), case study research ‘... consists of a detailed investigation, often with data collected over a period of time, of phenomena, within their context,’ with the aim being ‘... to provide an analysis of the context and processes which illuminate the theoretical issues being studied, (p.323). It is also useful to establish

whether the case study will be exploratory, descriptive or explanatory. A key decision is whether the research will be based on a single case study or on multiple cases (Hartley, 2004).

There are six sources of evidence for case studies: documents, archival records, interviews, direct observation, participant observation, and physical artefacts (Yin, 2003). There is no prescription for the type of evidence that can be used in a case study: whether qualitative, quantitative or both (Eisenhardt, 1989). However, while quantitative data may frequently appear in case studies, qualitative data usually dominates (Patton & Appelbaum, 2003). This study will use the quantitative research method to develop the case study.

The benefits of these six sources can be maximised if three principles are followed (Yin, 2003):

- using multiple sources of evidence
- creating a case study database
- maintaining a chain of evidence.

The case study will provide a multi-dimensional perspective that may be used to create a shared view of the situation being studied (Remenyi, et al, 1998); therefore, case studies offer the ‘... opportunity for a holistic view of a process.’

### **3.9. Data collection**

According to the Harvard reference guide for research, (Harvard University, 2012), data collection can be classified into qualitative and quantitative methods.

The two methods can be distinguished by viewing qualitative methods as providing data in the form of words (or visually), and quantitative methods as generating numerical data. However, it is a mistake to assume that there must be a strict black and white dichotomy.

Quantitative and qualitative methods of data collection are often employed in support of each other on the one research project. The qualitative researcher may use historical numerical data to support a particular finding, for example. Similarly, qualitative data can provide rich information about the social processes in specific settings, (Harvard University, 2012).

According to (Saunders, et al., 2009), Biggam (2008) describes the process of quantitative analysis as being a research strategy that answers the ‘how’ questions whereas qualitative analysis answers the ‘why’ questions by using conceptualisation.

Quantitative analysis can be used as a substitute for a data collection technique whereby a questionnaire, statistics or graphs and diagrams are used (Saunders, et al., 2009).

### **3.9.1. Survey questionnaire**

The questionnaire adapted by the researcher incorporated multiple engagement questionnaires that had previously been developed. Key examples were the Survey Monkey engagement questionnaire (Survey Monkey, 2013), the Gallup engagement survey (Gallup Consulting, 2010) and the Towers Perrin engagement survey (Towers Perrin, 2008). The adapted questionnaire was an assimilation of these engagement questionnaires. The Likert scale was used, rating employee satisfaction from 1-5, where 5 means extremely satisfied and 1 means extremely dissatisfied.

The researcher arranged meetings with all respondents to complete the survey. It was self-administered and respondents were asked to complete a non-disclosure agreement with a covering letter to the prospective respondents. In this way, the researcher was able to extract additional information from the employees while completing the survey. The researcher used convenient sampling techniques and specifically chose a sample including 30 bankers and analysts. As the total sample approached was 40, 75% of the sample participated in the research.

The researcher had a dual cycle of meetings with the interviewees. The first cycle was pre-intervention (December 2014 – January 2015). The second cycle was post-intervention (September 2015 – October 2015).

The researcher chose this approach to determine whether an intervention/project within the L&D space would have an impact on employee engagement.

### **3.9.2. Use of work systems model and framework**

The researcher used the work systems framework to analyse and understand the current problem described, with a core focus on engagement, development and the growth of employees. When the landscape was set, the researcher used the work systems lifecycle model to understand and depict how small changes to the existing L&D had an impact on the organisation and employees from a retention and development perspective.

## **3.10. Quantitative data analysis**

The data collection process involved the researcher obtaining permission from the head of the specified business unit to select employees to include in the sample and to distribute the questionnaire to. The same group of people were then observed and all artefacts gathered were managed and structured to track feedback. A confidentiality

agreement was signed with each respondent to ensure that the researcher could gather as much information as possible.

Sequential mixed methods data analysis strategies were used in the data collection and analysis process. The researcher used an iterative process whereby the data collected in one phase (pre-intervention) contributed to the data collected in the next (post-intervention). The aim of the data analysis in these data collection methods was to provide more insight into whether the information collected using these designs could provide enough detail to generalise findings by verifying and augmenting the study results from members of a defined population (Creswell & Plano Clark, 2007).

The researcher made use of both descriptive and inferential statistics to analyse the results of the questionnaires. Tests that the researcher used included the Spearman's rank correlation, t-test, linear regression analysis and Mann Whitney. These tests were used to prove the hypothesis.

The researcher presented the findings observed, using the survey results to obtain both descriptive and inferential statistics to confirm the outcomes of the research. The researcher used Sofa statistics, which is a tool that allows for statistical analysis on raw data. Data was analysed both pre- and post-intervention to understand whether any significant relationships existed.

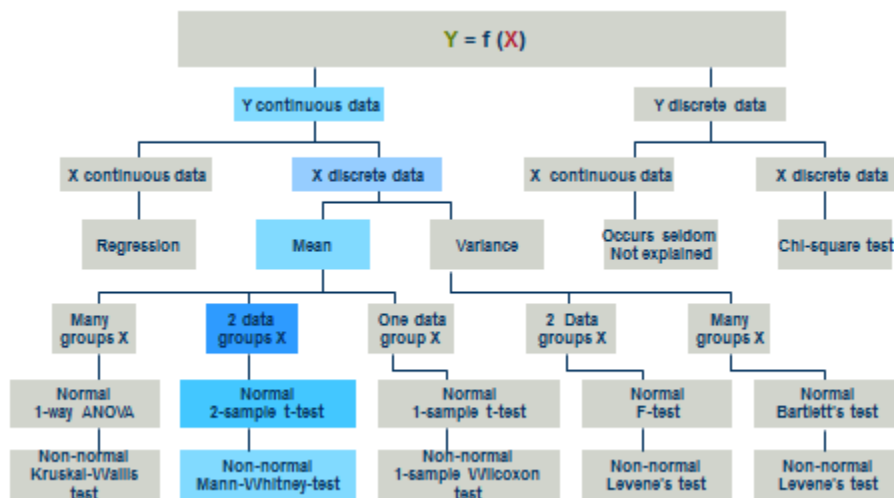


Figure 3.12: Linde hypothesis testing framework (Linde, 2008)

### 3.10.1. Descriptive statistics

Descriptive statistics were used to define the uncomplicated structures of the data in the study. The researcher used simple summaries about the sample and the measures alongside a simple analysis of graphs to form the basis of the quantitative analysis of the results (William, 2006). 'Descriptive statistics provide a powerful summary that may enable comparisons across people or other units,' (William , 2006). The researcher used

univariate techniques to analyse the distribution, the central tendency and the dispersion.

### **3.10.2. Inferential statistics**

Using inferential statistics allowed the researcher to gain insights beyond just the data provided to reach various conclusions. According to William (2006), inferential statistics can provide an indication to assist the researcher in judging the probabilities of an observed difference between variables and to understand their impact and the reason for the specified result. Descriptive statistics allows the researcher to describe what is happening in the data, whereas inferential statistics allows the researcher to make inferences about the data for more generic outcomes.

### **3.10.3. Test for normality (Sofa statistics Skewness-Kurtosis test for normality)**

One the tests usually used to measure normality is the Skewness-Kurtosis test for normality. In a sample, the normal distribution has a skewness of zero and kurtosis of three (Asghar & Saleh, 2012). Failing the normality test tolerates the researcher stating, with 95% confidence, that the data does not fit the normal distribution. However, data passing the normality test only tolerates the researcher stating that no significant departure from normality was found.

According to Asghar and Saleh (2012):

statistical errors are common in scientific literature and about 50% of the published articles have at least one error. The assumption of normality needs to be checked for many statistical procedures, namely parametric tests, because their validity depends on it. The frequency distribution (histogram) ... are used for checking normality visually, (Asghar & Saleh, 2012)

The researcher measured the normality of the sample using the normality test in the Sofa statistics software, which is based on the K-S normality test. This was done to determine the additional statistical tests required to prove statistical relationships and significance correctly.

The researcher provided normality checks on all the variables being tested, i.e. change, L&D and employee engagement.

### **3.10.4. Mann Whitney**

The result of this test guided the next test needed. The Mann Whitney U-test allows researchers to induce various conclusions about data depending on the assumptions made concerning the data's distribution (Asghar & Saleh, 2012). 'It is a nonparametric test of the null hypothesis meaning that it is equally likely that a randomly selected value from one sample will be less than or greater than a randomly

selected value,' (Patton, 1980). The researcher made use of the Mann Whitney U-test to understand whether the descriptive statistics used post intervention differed based on a not so normal distribution. The Mann Whitney was performed on three of the demographic statistics, i.e. gender, qualification and title against the variables to understand whether they had an impact on the three variables of change, L&D and engagement.

### **3.10.5. Paired t-test**

The researcher made use of the paired sample t-test, which is a statistical method that compares two populations' means to understand whether they are correlated. The test is used in before and after studies (Statistics Solutions, 2010). The paired sample t-test has two opposing hypotheses, the null hypothesis and the alternative hypothesis. The null hypothesis accepts that the true mean difference between the paired samples is zero (Statistics Solutions, 2010). This was the main test used to understand whether a correlation between change, L&D and employee engagement existed pre- and post-intervention.

### **3.10.6. Spearman's rank correlation**

The researcher used the Spearman's rank correlation to statistically determine whether a relationship between change, L&D and employee engagement exists. The correlation provided the researcher with a view of the degree of relationship between two variables. 'Pearson's correlation coefficient (r) is a measure of the strength of the association between the two variables,' (UWE, 2016). Since data was ranked, the researcher applied Spearman's rank correlation coefficient (rs), which provided a measure of how closely two sets of rankings agree with each other.

## **3.11. Sampling and sampling procedure**

As part of the design phase, the researcher must decide on a sample design. The sample design is the plan, determined before any data is collected, for obtaining a sample from a given population (Lingaya's Institute of Management and Technology, 2008).

Samples can be classified as either probability or non-probability samples.

- Probability samples – each element has a known chance of being a part of a sample. They are based on simple random sampling, systematic sampling, stratified sampling and cluster/area sampling.
- Non-probability samples – the researcher cannot determine the chance of an element being chosen as part of a sample. Non-probability samples are those

based on convenience sampling, judgment sampling and quota sampling techniques.

The researcher made use of deliberate sampling in this research. As described in the handbook *Research Methodology: An Introduction*:

... deliberate sampling is also known as purposive or non-probability sampling. This sampling method involves purposive or deliberate selection of particular units of the universe for constituting a sample which represents the universe (Lingaya's Institute of Management and Technology, 2008).

Purposeful sampling occurs when the researcher selects a sample from which they believe the most can be learned (Merriam, 1998). The benefit of purposeful sampling is:

Any common patterns that emerge from great variation are of particular interest and value in capturing the core experience and central, shared dimensions of a setting or phenomenon, (Patton, 2002).

The researcher chose participants based on their shared experience within the private banking space. The deliberate sampling methodology will play a part as the participants chosen were all from the private banking sales team, i.e. private bankers, their managers and the L&D teams that service the private bankers. The researcher also included a sample of private bankers and leadership representatives to help answer the research questions that played a part in representing the organisation as a whole.

The sample used for this study was  $N = 30$ . The total population size of all bankers and banking analysts was  $N = 40$ . This meant that the researcher was able to obtain a sample size of 75% of the actual population being sampled.

### **3.12. Demographics of participants**

The survey population was 30 employees, a sub group of a business unit of 40 employees and a segment count of 100 employees in total (not all of whom were selected to take part in the survey as the focus was specifically on the customer facing team of bankers, analysts and their managers). The survey response rate was 75%.

#### **3.12.1. Age:**

The age distribution of the participants can be viewed in the figure below. The modal of the respondents was 28 years ( $n = 5$ ). The average age was calculated at 29.9 years. The minimum age was 24 and the maximum age 41 years. The majority of the respondents were in the 26 to 29 year age group (47%) ( $n = 14$ ) with 13% ( $n = 4$ ) in the 20-25 year age

category, and 20% each in the 30-34 year (n = 6) and 35-41 year (n = 6) age groups respectively.

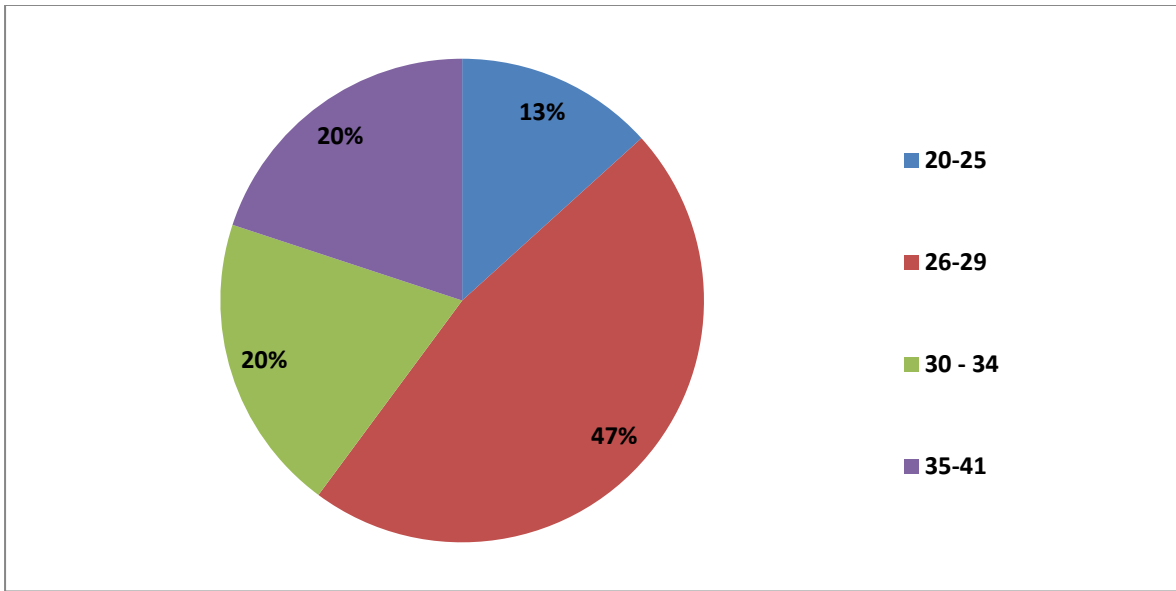


Figure 3.13: Respondents according to age group

**3.12.2. Gender:**

The gender analysis of the respondents was Male = 18 (40%) and Female = 12 (60%).

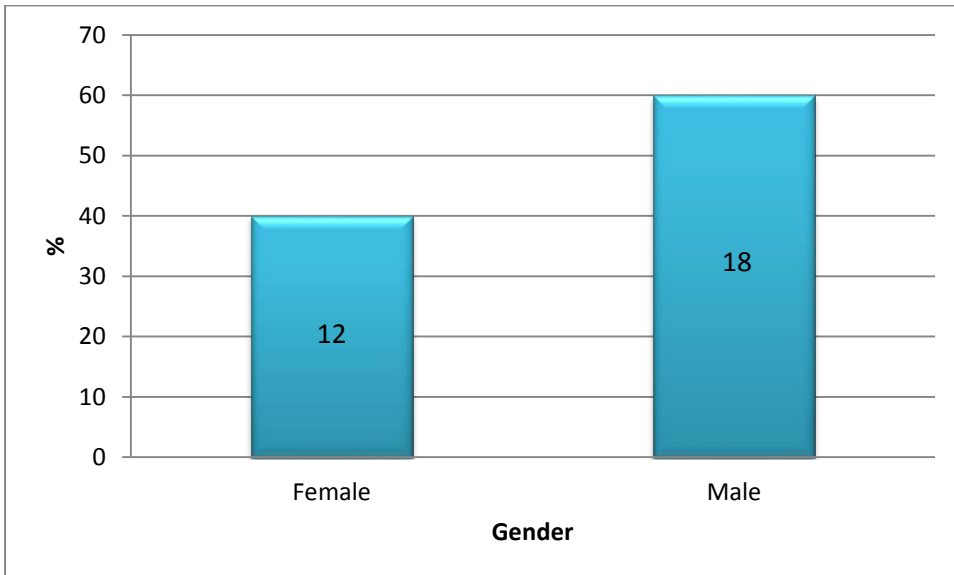


Figure 3.14: Respondents according to gender

### 3.12.3. Race

Figure 3.15 indicates the race distribution of the sample. Black (27%; n = 8), Coloured (17% n = 5), Indian (23% n = 7) and White (33% n = 10).

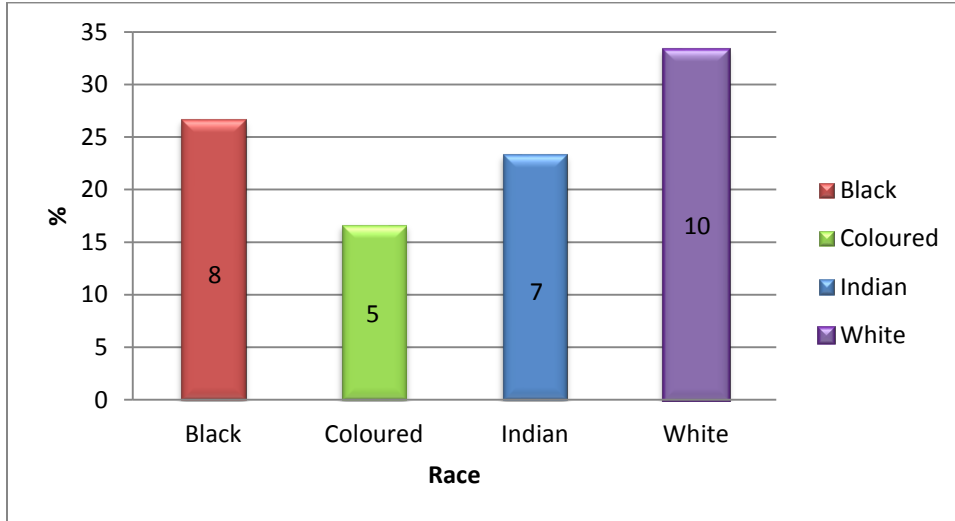


Figure 3.15: Respondents according to race

### 3.12.4. Qualification

Figure 3.16 provides a breakdown of the respondents' qualifications. It depicts that 43.3% of the respondents do not have a qualification, 46.7% have a bachelor's degree and 3% have an honours degree.

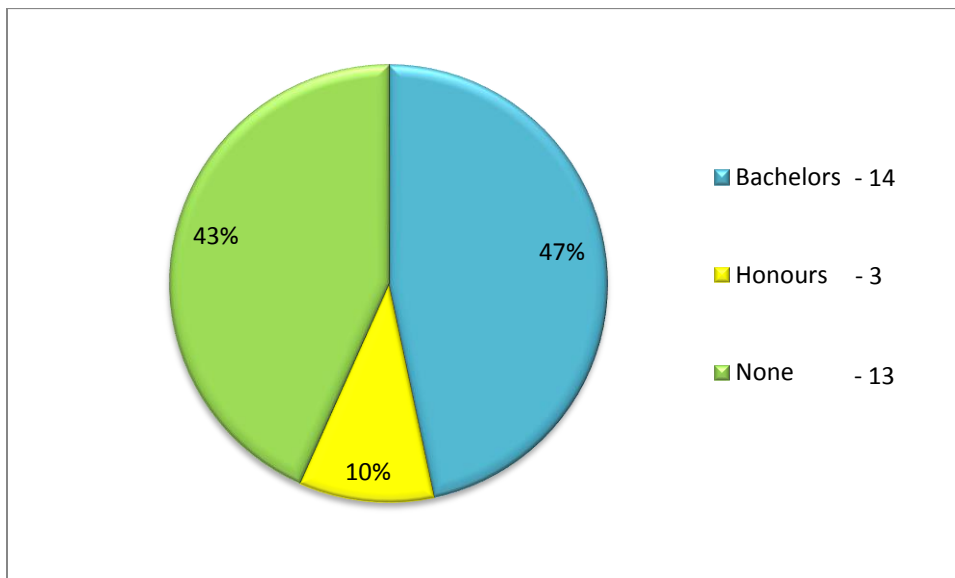


Figure 3.16: Respondents according to qualifications

### 3.12.5. Title/Role

Figure 3.17 depicts the role of the respondents. The specific roles identified are analyst (37%), manager (13%), team leader (17%) and private banker (33%).

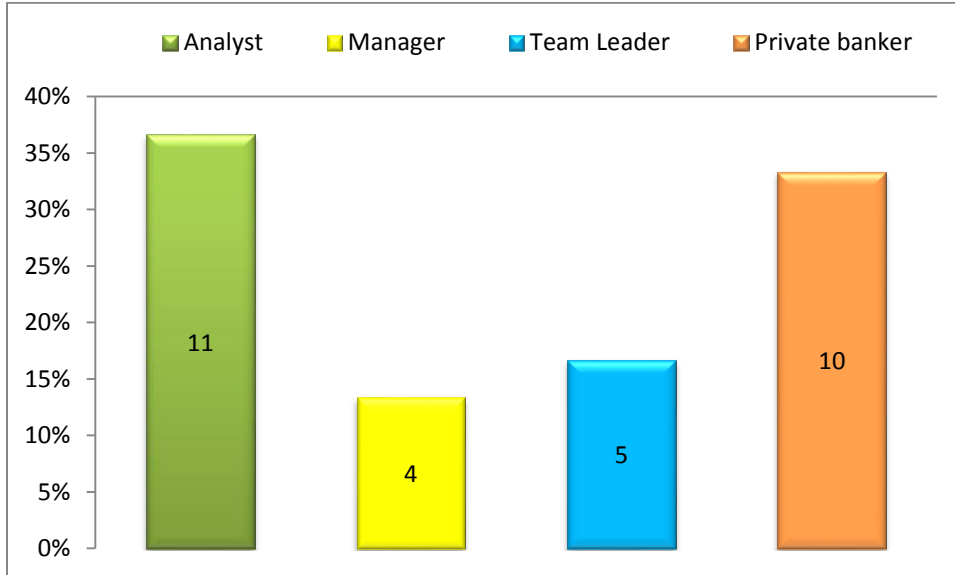


Figure 3.17: Respondents according to role

### 3.12.6. Years in role

Figure 3.18 provides a breakdown of the respondents' years of service in the specified role. It shows a range from 2–7 years that indicates that a majority of the respondents had been in their role for three years. The average amount of years spent in a role was 3.8 years.

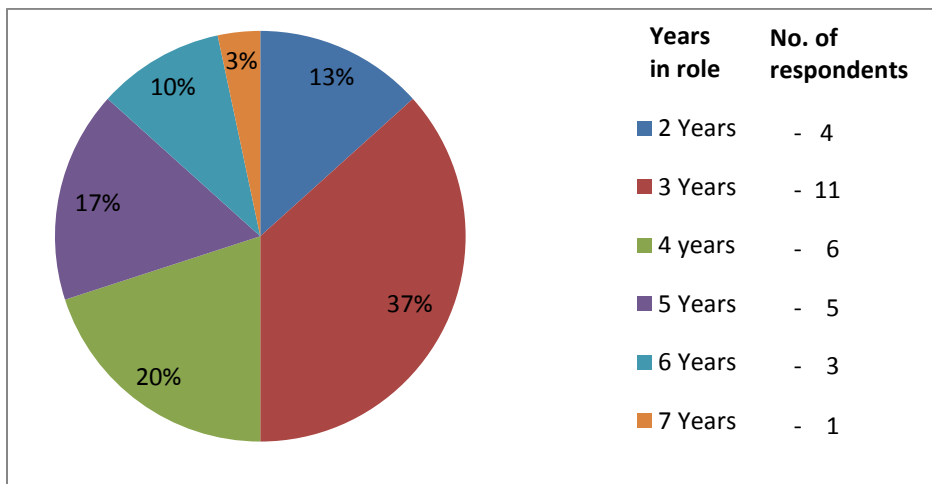


Figure 3.18: Years in role

### 3.12.7. Marital status

Figure 3.19 depicts the marital status of the respondents. It shows that the majority of the respondents, (57%) are married. Single respondents comprise 43% of the sample and there were no divorced respondents.

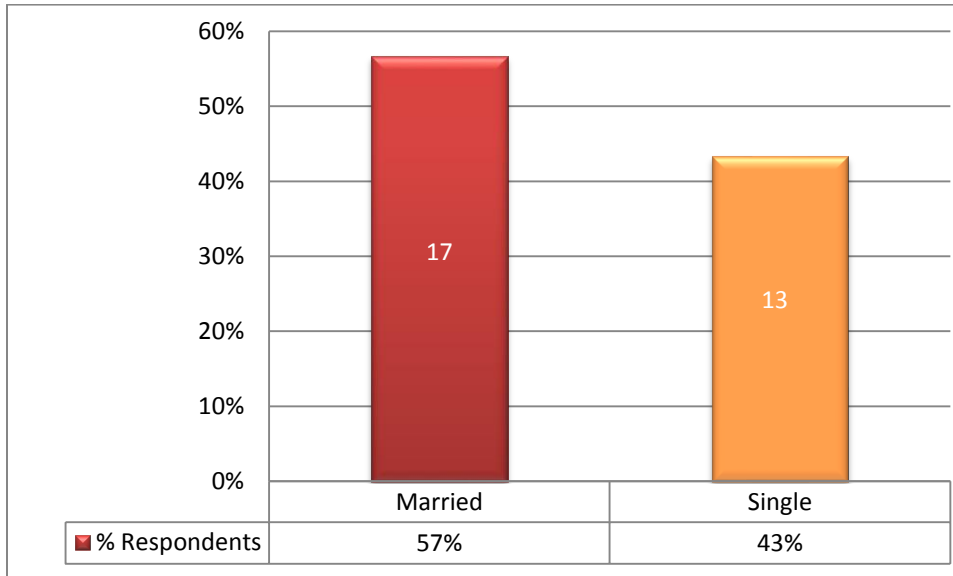


Figure 3.19: Respondents according to Marital status

### 3.13. Ethical considerations

Christians (2000) refers to four ethical guidelines for any research study, specifically:

- informed consent (whereby subjects must concur willingly to participate and this agreement must be based on full and open information)
- deception (where conscious twisting of information/data by the researcher is forbidden)
- privacy and confidentiality (chiefly by protecting against unwanted exposure; data can be made public only behind a screen of anonymity and no-one deserves harm or embarrassment as a result of insensitive research practices) and
- accuracy.

Dörnyie, (2007) points out that ethical issues using quantitative methods are more prevalent than when using qualitative methods since it '... often intrudes into the human private sphere: it is inherently interested in people's personal views and often targets sensitive or intimate matters.'

Data was gathered and used only with prior written consent. The objective of the data analysis component and interview questions was to measure the impact of changes in environmental variables and the different action research cycles.

The case study only referred to job descriptions, e.g. L&D manager, line manager and private banker. Interview notes contained only details of the role, division and/or region. No personal information (name, age, sex, race, qualification or work experience) was required. In addition, all interviews were on a one-on-one basis. To exclude intimidation efforts, managers were not interviewed with staff members, thus maintaining the integrity of the questions answered.

The analysis of interview transcripts will be based on an inductive approach aimed at identifying patterns. 'Inductive analysis means that the patterns, themes, and categories of analysis come from the data; they emerge out of the data rather than being imposed on them prior to data collection and analysis,' (Patton, 1980).

Studies based on the interpretive paradigm rely on trustworthiness as opposed to the conventional positivist criteria of internal and external validity, reliability and objectivity (Denzin & Lincoln, 1994). The traditional criteria used to pursue credibility of research data, i.e. objectivity, reliability and validity, are used in scientific and experimental studies as they are very often based on a standardised method that can be assessed in a straightforward manner. Qualitative studies, however, are usually not based on standardised instruments and often use smaller, non-random samples. Denzin and Lincoln (1994) suggest that four factors be considered in ascertaining the trustworthiness of findings: credibility, transferability, dependability, and conformability. These measures cannot be rigidly applied to the qualitative paradigm, especially when the researcher is concentrating on and questioning the meaning and interpretation of phenomena.

The researcher adopted Lincoln and Denzin's viewpoint with respect to trustworthiness as 'trustworthiness'. Trustworthiness substituted for validity and reliability and pioneered the conditions of credibility (truth of value), transferability (or applicability), dependability (or consistency), and conformability (neutrality of findings) (Denzin & Lincoln, 1994).

## CHAPTER 4

### Results

This chapter discusses the results of the study from the quantitative and qualitative data that was collected from respondents. The researcher used a mix of inferential and descriptive statistics to explain the outcomes of the results. Results were analysed using the Sofa statistics tool. These results assisted the researcher to prove or disprove the hypothesis set out at the beginning of the study. The results are presented under the following headings:

- 1 Cronbach's alpha coefficient
- 2 Test for normality
- 3 Mann Whitney test
- 4 Paired t-test
- 5 Spearman's rank correlation coefficient test

#### 4.1. Cronbach's alpha coefficient - reliability

Reliability is associated with the degree to which a measuring procedure produces the same results on recurring tests. The reliability of the variables' research measures was tested using Cronbach's alpha coefficient. For each driver, change, learning and development (L&D) and employee engagement, a Cronbach's alpha was calculated to determine how the variables measured using the same underlying construct. The Cronbach's alpha measuring scale ranges from -1 to +1. It is generally accepted that a Cronbach alpha value greater than 0.70 is adequate to conclude internal consistency and reliability between questionnaire and survey items (Borgatti, 1998).

The statistic Cronbach's alpha was used to ensure that the three variables, i.e. change, L&D and employee engagement measured the same latent concept. Cronbach's alpha coefficient for the change, L&D and employee engagement components used in the study are,  $\alpha = 0.83$   $\alpha = 0.76$  and  $\alpha = 0.88$  respectively. This is a good score for the reliability of the scale.

## 4.2. Test for normality – pre-intervention survey results

### 4.2.1. Change

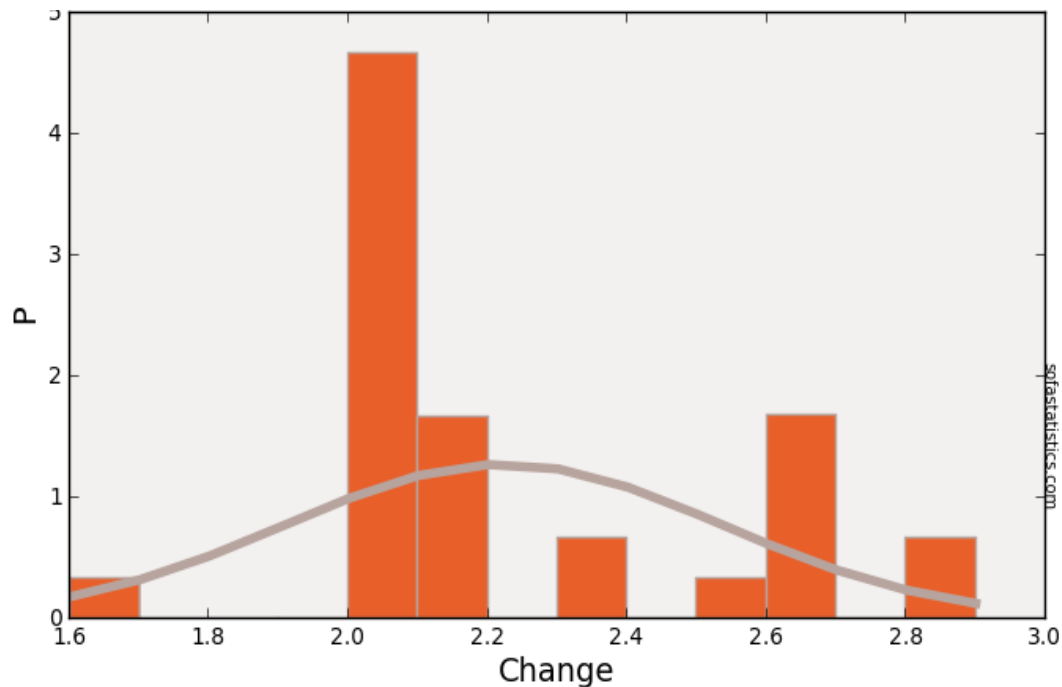


Figure 4.20: Histogram for change

Figure 4.20 indicates the results of the change variable on an individual histogram. The vertical axis represents the actual number of observations falling within the item and the horizontal axis represents the total scores from each of the statements.

Although the distribution of change was not perfectly 'normal', it may still be 'normal' enough for use. The researcher decided that this was not a completely normal distribution, which guided the tests that needed to be carried out for additional analysis.

Skew (lop-sidedness) is 0.675. Kurtosis (peakedness or flatness) is -0.751.

#### 4.2.2. Development

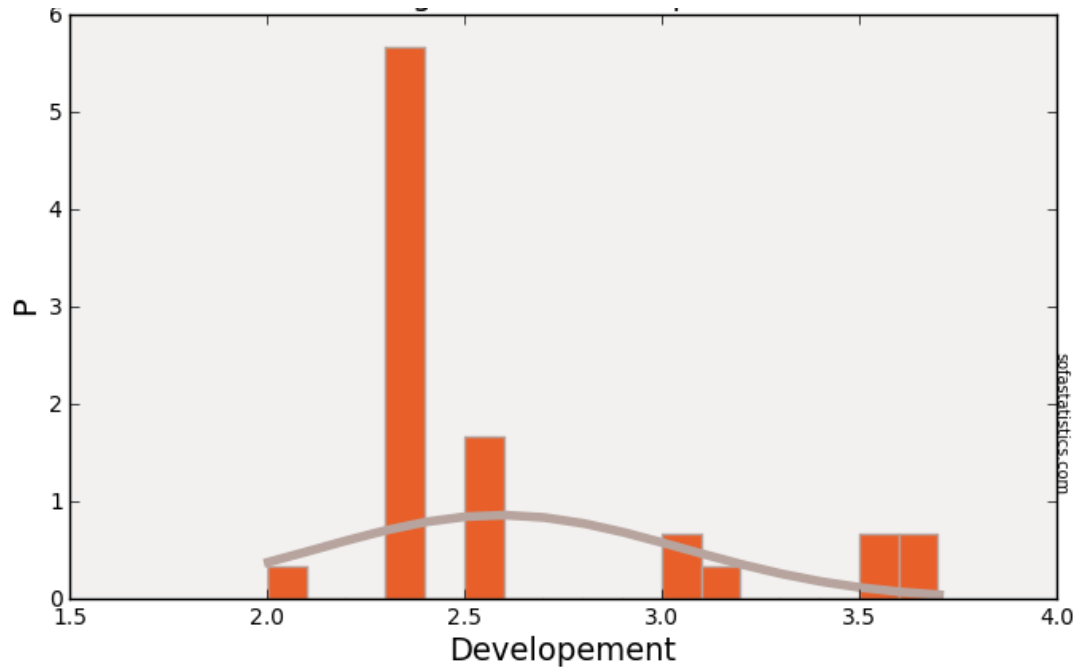


Figure 4.21: Histogram for development

Figure 4.21 indicates the results of the development variable on an individual histogram. The vertical axis represents the actual number of observations falling within the item and the horizontal axis represents the total scores from each of the statements.

The distribution of development passed one test for normality. The researcher rejected complete normality based on a visual inspection of the graph.

Skew (lop-sidedness) is 1.385 and Kurtosis (peakedness or flatness) is 0.518. Again the researcher decided that this is not a completely normal distribution based on the statistics, which guided the tests that needed to be carried out for additional analysis.

### 4.2.3. Employee engagement

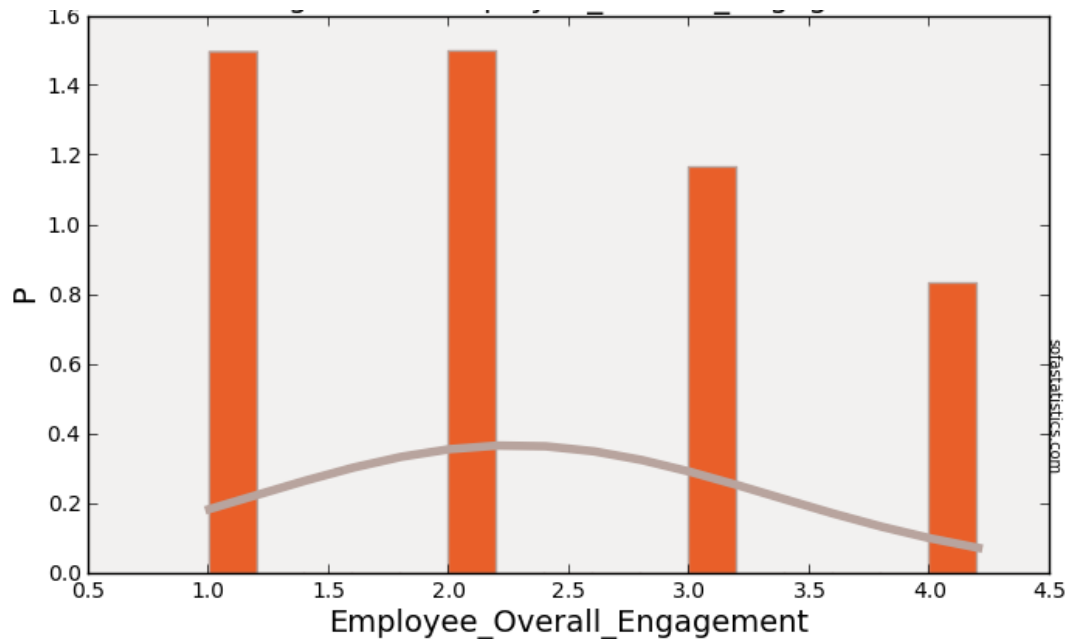


Figure 4.22: Histogram for employee engagement

Figure 4.22 indicates the results of the employee engagement variable on an individual histogram. The vertical axis represents the actual number of observations falling within the item and the horizontal axis represents the total scores from each of the statements.

Although the distribution of employee\_overall\_engagement was not perfectly 'normal', it may still be 'normal' enough for use.

Skew (lop-sidedness) is 0.287. Kurtosis (peakedness or flatness) is -1.159. The researcher decided that this is not a completely normal distribution based on the statistics, which guided the tests that needed to be carried out for the additional analysis.

### 4.3. Mann Whitney test – pre-intervention

The Mann Whitney U-test, which is nonparametric, tests for differences in mean rank. When performed by the researcher, it was found that the data distribution was not completely normal. The Mann Whitney U-test was performed on three of the demographic statistics against the variables to understand whether they did indeed have an impact on the three variables of change, L&D and engagement. The result of this guided the next test that needed to be performed.

The three demographic statistics used were gender, title and qualification.

**4.3.1. Results of Mann Whitney U-test of ‘change’ for gender ‘F’ vs ‘M’**

Two-tailed p value: 0.8616

U statistic: 104.0

z: 0.174

Group	N	Median	Avg Rank	Min	Max
F	12	2.167	15.167	1.66666666667	2.66666666667
M	18	2.0	15.722	2.0	2.83333333333

Table 4.7: Mann Whitney U-test of ‘change’ for gender

The two-tailed p value: 0.8616 was more than 0.01/0.001; hence the researcher could assume that the result is statistically insignificant. This means that the variable of gender does not affect the variable of change.

U is based on the results of matches between the ‘F’ and ‘M’ groups. In each match, the winner is the one with the highest ‘change’ (in a draw, each group gets half a point, which is why U can sometimes end in .5). The further the number is from an even result, i.e. half the number of possible matches (half of 12x18 in this case = 108) the more unlikely it is that the difference is by chance alone and the more statistically significant it is. In this instance, the results indicate that there was no statistical significance.

In summary, P = 0.8616 and U = 104.0. As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that gender has an influence on change.

**4.3.2. Results of Mann Whitney U-test of ‘employee\_overall\_engagement’ for gender ‘F’ vs ‘M’**

Two-tailed p value: 0.4127

U statistic: 89.0

z: 0.819

Group	N	Median	Avg Rank	Min	Max
F	12	2.0	13.917	1.0	4.0
M	18	2.0	16.556	1.0	4.0

Table 4.8: Mann Whitney U-test of ‘employee\_overall\_engagement’ for gender

The two-tailed p value: 0.4127 was more than 0.01/0.001; hence the researcher could assume that the result was statistically insignificant. This means that the variable of gender did not affect the variable of employee engagement.

In summary  $P = 0.8616$  and  $U = 89.0$ . As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that gender has an influence on employee engagement.

**4.3.3. Results of Mann Whitney U-test of ‘development’ for gender ‘F’ vs ‘M’**

Two-tailed p value: 0.4486

U statistic: 91.0

z: 0.758

Group	N	Median	Avg Rank	Min	Max
F	12	2.5	16.917	2.0	3.5
M	18	2.333	14.556	2.333333333333	3.66666666667

Table 4.9: Mann Whitney U-test of ‘development’ for gender

The two-tailed p value: 0.4486 was more than 0.01/0.001; hence the researcher could assume that the result was statistically insignificant. This means that the variable of gender did not affect the variable of development.

In summary  $P = 0.4486$  and  $U = 91.0$ . As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that gender has an influence on development.

**4.3.4. Results of Mann Whitney U-test of ‘development’ for qualification ‘bachelors’ vs ‘none’**

Two-tailed p value: 0.7023

U statistic: 83.5

z: 0.382

Group	N	Median	Avg Rank	Min	Max
Bachelors	14	2.333	13.464	2.333333333333	3.66666666667
None	13	2.333	14.577	2.0	3.66666666667

Table 4.10: Mann Whitney U-test of ‘development’ for qualification

The two-tailed p value: 0.7023 was more than 0.01/0.001; hence the researcher could assume that the result was statistically insignificant. This means that the variable of qualification did not affect the variable of development.

In summary P = 0.7023 and U = 85.3. As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that qualification has an influence on development.

**4.3.5. Results of Mann Whitney U-test of ‘change’ for qualification ‘bachelors’ vs ‘none’**

Two-tailed p value: 0.7275

U statistic: 84.0

z: 0.348

Group	N	Median	Avg Rank	Min	Max
Bachelors	14	2.167	14.5	2.0	2.83333333333
None	13	2.0	13.462	1.66666666667	2.83333333333

Table 4.11: Mann Whitney U-test of ‘change’ for qualification

The two-tailed p value: 0.725 was more than 0.01/0.001; hence the researcher could assume that the result was statistically insignificant. This means that the variable of qualification did not affect the variable of change.

In summary P = 0.7023 and U = 84.0. As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that qualification has an influence on change.

**4.3.6. Results of Mann Whitney U-test of ‘employee\_overall\_engagement’ for qualification ‘bachelors’ vs ‘none’**

Two-tailed p value: 0.6208

U statistic: 81.0

z: 0.495

Group	N	Median	Avg Rank	Min	Max
Bachelors	14	2.0	14.714	1.0	4.0
None	13	2.0	13.231	1.0	4.0

Table 4.12: Mann Whitney U-test of ‘employee\_overall\_engagement’ for qualification

The two-tailed p value: 0.6208 was more than 0.01/0.001; hence the researcher could assume that the result was statistically insignificant. This means that the variable of qualification did not affect the variable of employee engagement.

In summary  $P = 0.6208$  and  $U = 81.0$ . As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that qualification has an influence on employee engagement.

**4.3.7. Results of Mann Whitney U-test of ‘employee\_overall\_engagement’ for title ‘analyst’ vs ‘manager’**

Two-tailed p value: 0.7734

U statistic: 18.0

z: 0.288

Group	N	Median	Avg Rank	Min	Max
Analyst	10	2.5	7.3	1.0	4.0
Manager	4	3.0	8.0	1.0	4.0

Table 4.13: Mann Whitney U-test of ‘employee\_overall\_engagement’ for title

The two-tailed p value: 0.7734 was more than 0.01/0.001; hence the researcher could assume that the result was statistically insignificant. This means that the variable of job title did not affect the variable of employee engagement.

In summary  $P = 0.7734$  and  $U = 18.0$ . As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that job title has an influence on employee engagement.

**4.3.8. Results of Mann Whitney U-test of ‘change’ for title ‘analyst’ vs ‘manager’**

Two-tailed p value: 0.3451

U statistic: 13.5

z: 0.944

Group	N	Median	Avg Rank	Min	Max
Analyst	10	2.417	8.15	2.0	2.833333333333
Manager	4	2.0	5.875	1.666666666667	2.833333333333

Table 4.14: Mann Whitney U-test of ‘change’ for title

The two-tailed p value: 0.3451 was more than 0.01/0.001; hence the researcher could assume that the result was statistically insignificant. This means that the variable of job title did not affect the variable of change.

In summary  $P = 0.3451$  and  $U = 13.5$ . As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that job title has an influence on change.

**4.3.9. Results of Mann Whitney U-test of ‘development’ for title ‘analyst’ vs ‘manager’**

Two-tailed p value: 0.2783

U statistic: 12.5

z: 1.084

Group	N	Median	Avg Rank	Min	Max
Analyst	10	2.333	6.75	2.333333333333	3.666666666667
Manager	4	3.5	9.375	2.0	3.666666666667

Table 4.15: Mann Whitney U-test of ‘development’ for title

The two-tailed p value: 0.2783 was more than 0.01/0.001; hence the researcher could assume that the result was statistically insignificant. This means that the variable of job title did not affect the variable of development.

In summary  $P = 0.2783$  and  $U = 12.5$ . As this result was greater than the significance level of 0.05, the conclusion was that there is insufficient evidence to suggest that job title has an influence on development.

**4.4. Paired t-test**

**4.4.1. Development: Results of paired samples t-test of ‘development’ vs ‘development post’**

p value:  $< 0.001$  ( $2.982e-5$ )

t statistic: -4.942

Degrees of freedom (df): 29

Group	N	Mean	CI 95%	Std dev	Min	Max
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Group	N	Mean	CI 95%	Std dev	Min	Max
Development	30	2.589	2.424 - 2.754	0.461	2.0	3.66666666667
Development_post	30	2.989	2.816 - 3.162	0.483	2.0	3.66666666667

Table 4.16: Results of paired samples t-test of 'development' vs 'development post'

There was a mean difference of 0.4 between the two results with a standard deviation of 0.022 (std dev.) and 95% confidence intervals of 0.33 to 0.346 (95% CI). The t-value (t) was -4.942, the degrees of freedom were 29 and the statistical significance (2-tailed p-value) of the paired t-test ( $\Pr(|T| > |t|)$  under  $H_0: \text{mean}(\text{diff}) \neq 0$ ), was (2.982e-5). As the p-value was less than 0.01 (i.e.  $p < .001/.01$ ), the conclusion was that a statistically significant difference existed between the two variable scores (development and development\_post). In other words, the difference between the two surveys is not equal to zero.

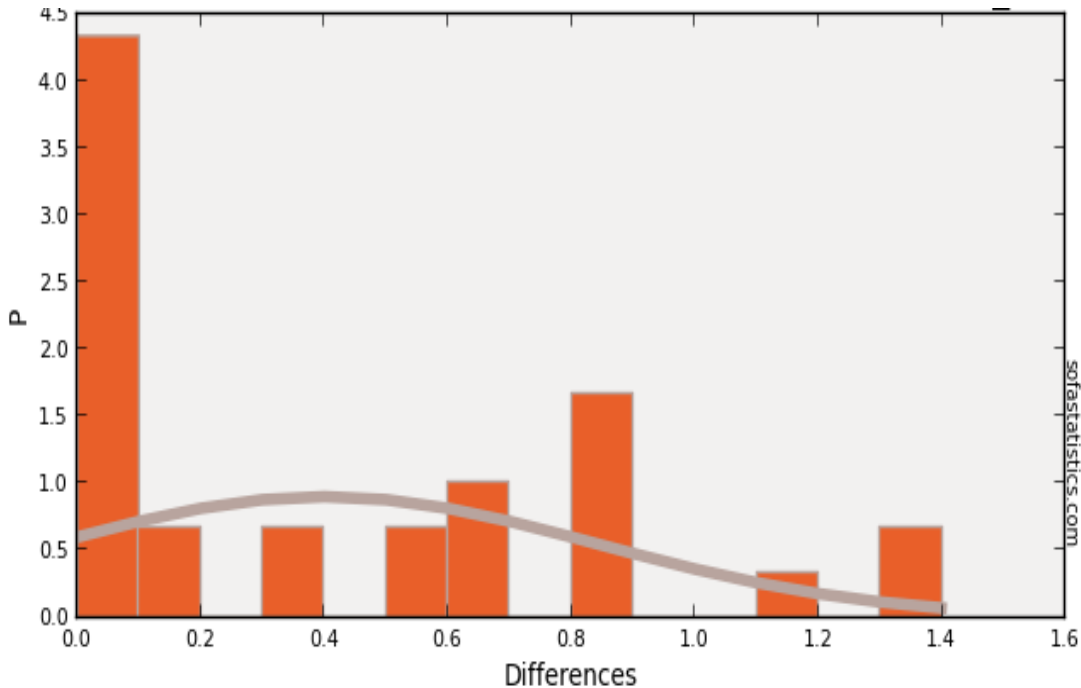


Figure 4.23: Difference between development and development post

**4.4.2. Employee engagement: Results of paired samples t-test of 'employee\_overall\_engagement' vs 'employee\_overall\_engagement\_post'**

p value: < 0.001 (4.001e-4)

t statistic: -4.0

Degrees of freedom (df): 29

Group	N	Mean	CI 95%	Std dev	Min	Max
Employee_overall_engagement	30	2.267	1.880 - 2.653	1.081	1.0	4.0
Employee_overall_engagement_Post	30	3.067	2.692 - 3.442	1.048	1.0	4.0

Table 4.17: Results of paired samples t-test of 'employee\_overall\_engagement' vs 'employee\_overall\_engagement\_post'

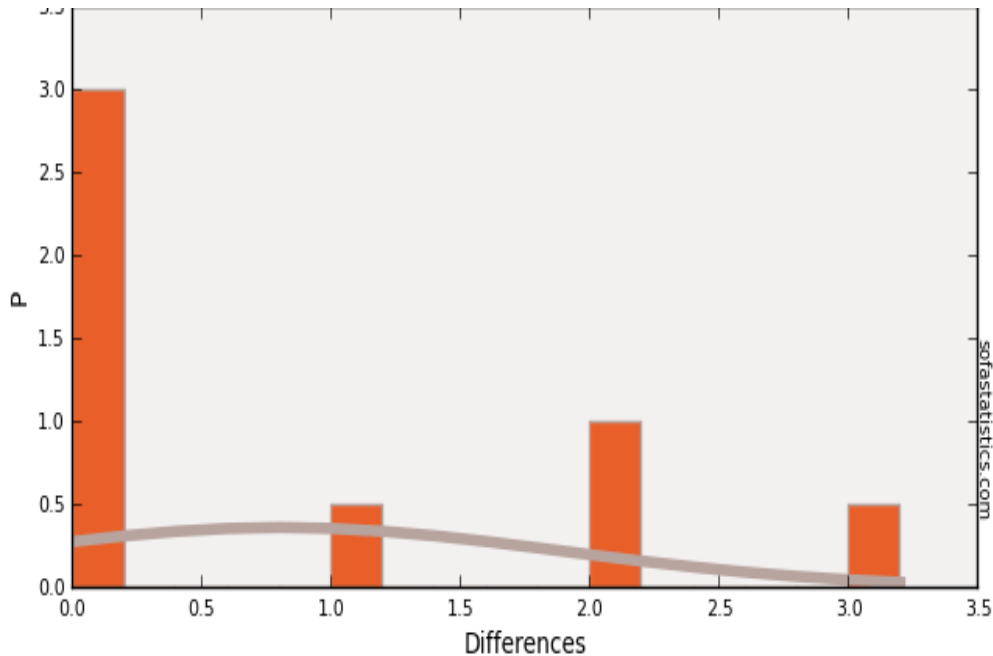


Figure 4.24: Differences between employee\_overall\_engagement and employee\_overall\_engagement\_post

There was a mean difference of 0.8 between the two results with a standard deviation of 0.023, and 95% confidence intervals of 1.081 to 1.048. The t-value (t) was -4.0, the degrees of freedom were 29 and the statistical significance (2-tailed p-value) of the paired t-test ( $\Pr(|T| > |t|)$  under  $H_0: \text{mean}(\text{diff}) \neq 0$ ) was  $(4.001e-4)$ . As the p-value was less than 0.01 (i.e.  $p < .001/.01$ ), the conclusion was that a statistically significant difference existed between the two variable scores (engagement\_pre and engagement\_post). In other words, the difference between the two surveys is not equal to zero.

**4.4.3. Change: Results of paired samples t-test of 'change' vs 'change\_post'**

p value: < 0.001 (2.005e-4) 1

t statistic: -4.253

Degrees of freedom (df): 29

Group	N	Mean	CI 95%	Std dev	Min	Max
Change	30	2.222	2.110 - 2.334	0.314	1.66666666667	2.83333333333
Change_post	30	2.467	2.349 - 2.584	0.329	1.66666666667	2.83333333333

Table 4.18: Results of paired samples t-test of 'change' vs 'change\_post'

There was a mean difference of 0.245 between the two results with a standard deviation of 0.015, and 95% confidence intervals of 0.224 to 0.235. The t-value (t) was -4.253, the degrees of freedom were 29 and the statistical significance (2-tailed p-value) of the paired t-test ( $\Pr(|T| > |t|)$  under  $H_0: \text{mean}(\text{diff}) \neq 0$ ) was (2.005e-4). As the p-value was less than 0.01 (i.e.,  $p < .001/.01$ ), the conclusion that a statistically significant difference existed between the two variable scores (change\_pre and change\_post). In other words, the difference between the two surveys is not equal to zero.

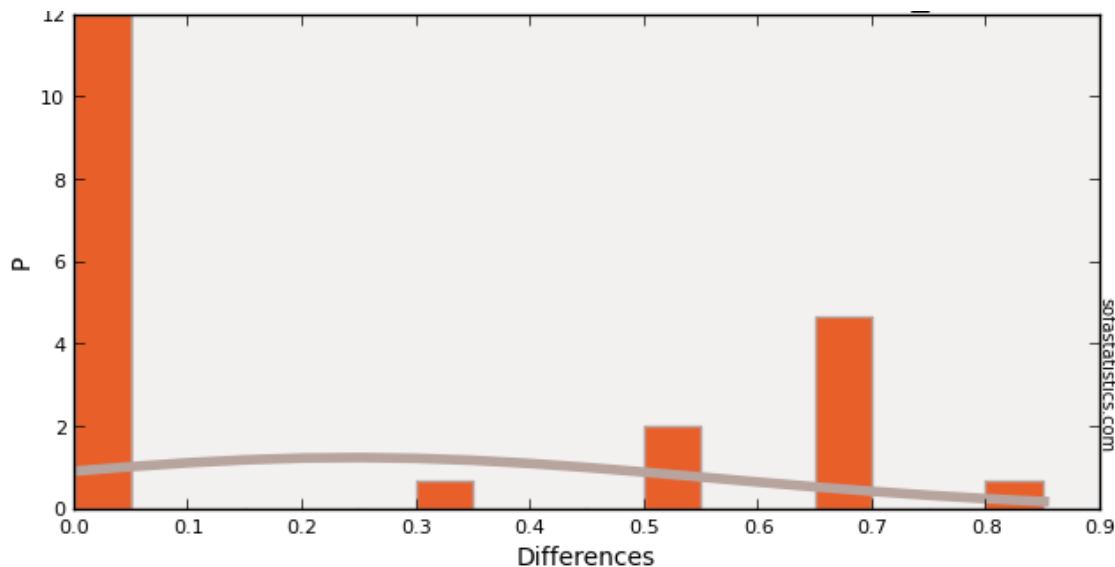


Figure 4.25: Differences between change and change\_post

#### 4.5. Spearman's rank correlation coefficient

##### 4.5.1. Results of Spearman's test of linear correlation for 'development\_post' vs 'employee\_overall\_engagement\_post'

<b>p value:</b>	< 0.001 (1.345e-6)
<b>Spearman's R statistic:</b>	0.756
<b>Degrees of freedom (df):</b>	28

<b>Linear regression details:</b>	
<i>Slope:</i>	1.627
<i>Intercept:</i>	-1.797

Table 4.19: Spearman's test of linear correlation for 'development\_post' vs 'employee\_overall\_engagement\_post'

The results indicate a significant association between the sets of ranks. There is statistical evidence to suggest good agreement (RS = 0.756) between the p value (1.345e-6). Hence there was agreement that there is a significant association between development post and engagement post.

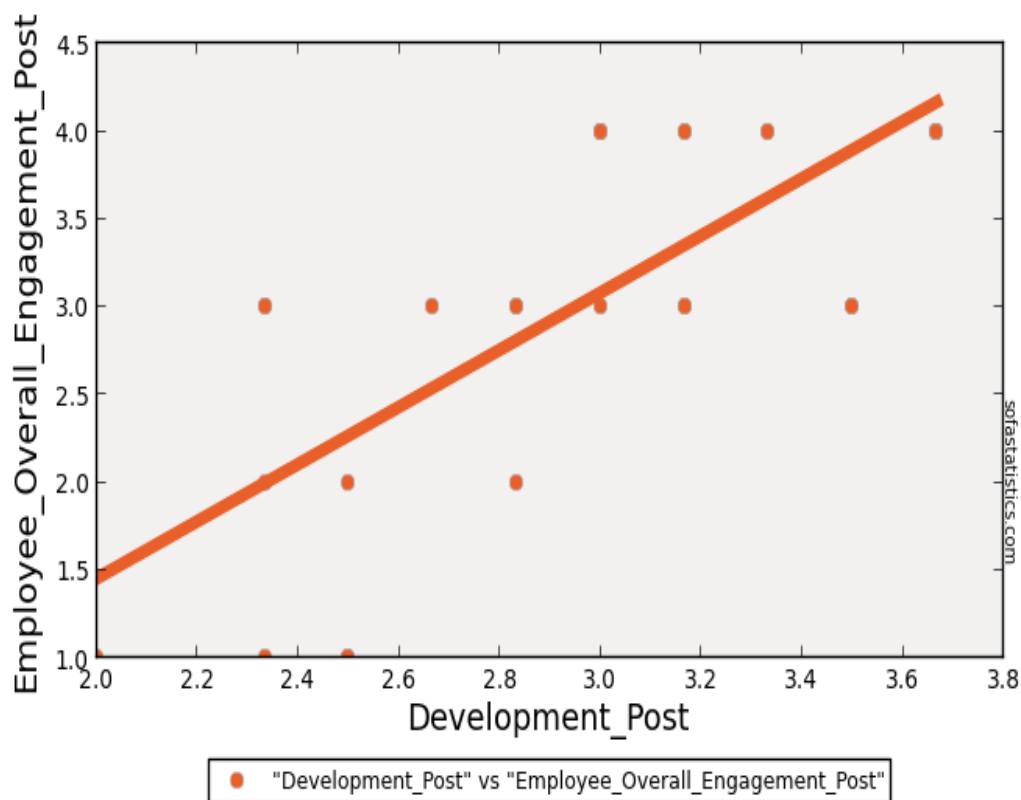


Figure 4.26: Results for development post and engagement post

**4.5.2. Results of Spearman's test of linear correlation for 'change\_post' vs 'employee\_overall\_engagement\_post'**

<b>p value:</b>	< 0.001 (7.851e-6)
<b>Spearman's R statistic:</b>	0.718
<b>Degrees of freedom (df):</b>	28
<b>Linear regression details:</b>	

<i>Slope:</i>	2.521
<i>Intercept:</i>	-3.152

Table 4.20: Spearman's test of linear correlation for 'change\_post' vs 'employee\_overall\_engagement\_post'

The results indicate a significant association between the sets of ranks. There is statistical evidence to suggest good agreement (RS = 0.718) between the p value (7.851e-6). Hence there was agreement that there is a significant association between change and engagement.

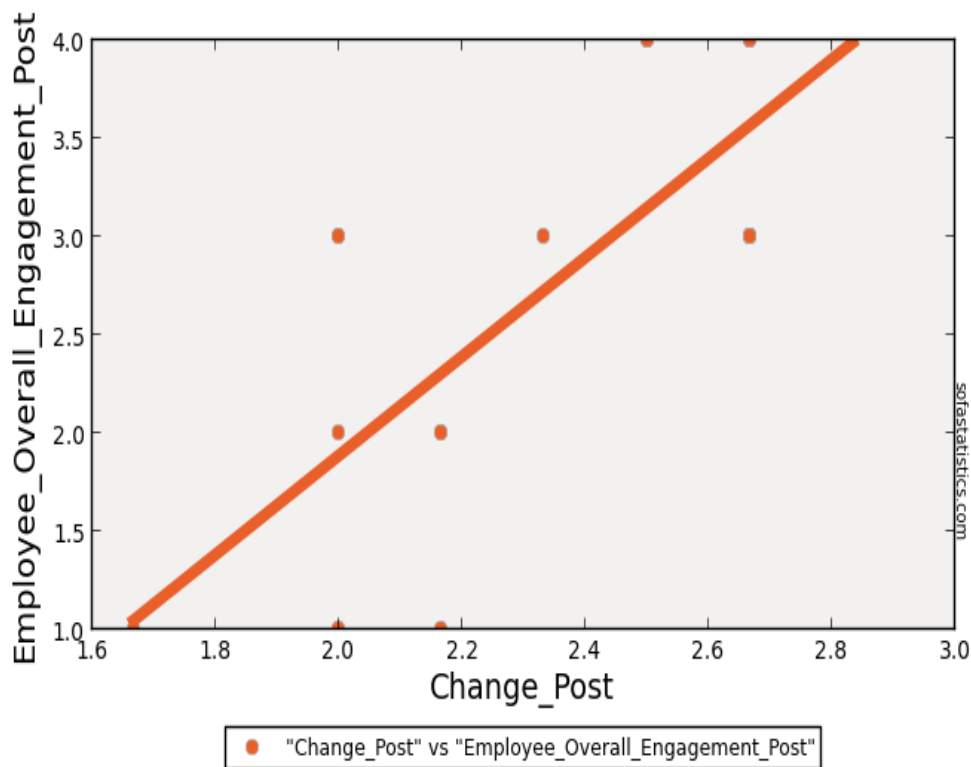


Figure 4.27: Results for change and engagement

#### 4.6. Unstructured interview feedback

The researcher conducted informal interview sessions to gauge the employees' general feelings. An analysis of the feedback concluded that many of the respondents were not happy because they were unsure of where they fit into the change. The theme of L&D came up multiple times, with respondents noting that they were not sufficiently equipped for the changes in their areas. Some were very happy with the change as it meant that they had opportunities for growth, while others were distraught and mentioned that the

lack of communication from leadership made them feel confused and upset that they didn't 'matter'.

Approximately 25% of respondents also mentioned that they considered the change to be unstructured, with no proper change management used to ease them into the change. A concurrent feeling was that L&D was not suitably driven, based on each person's role. The framework used was outdated and did not address all the requirements that respondents had as individuals doing their daily jobs.

Although the respondents did not admit to the researcher that they felt completely disengaged, there were aspects of the change that made them feel this way. Some were open enough to talk about how they felt, while others were wary of who would see their responses. They also noted that on the employee engagement survey they may not have answered truthfully as, due to the small size of teams, they wanted to avoid being victimised. Others were very straightforward and maintained that they wanted management to see how annoyed they were regarding the changes. These respondents indicated that they had vented in the employee engagement survey. Some respondents were not interested and were basically 'biding their time'. They wanted to see how matters developed and, although not completely negative, had a sense of hopelessness about where they fit within the organisation. Ultimately, the respondents displayed a mix of feelings about all three aspects that the researcher was trying to investigate, i.e. change, L&D and its effect on employee engagement.

The literature indicates that two contributors of engagement are change and L&D (Aon, 2013; Lombardozi, 2012). The concept of engagement has expanded academic and practitioner interest across the field of study (Shuck & Wollard, 2010). A study by Towers Perrin (2003) indicates that highly engaged people do outperform others. There are clear associations between employees' levels of engagement, their focus on customer satisfaction and service, and aspects of their organisation's financial and operational performance across a number of areas.

Key aspects identified by Towers Perrin (2003) were things that take time and commitment – such as strong leadership, accountability, autonomy, a sense of control over one's environment, a sense of shared destiny, and opportunities for development and advancement. Some of the benefits of having a more engaged workforce include increased productivity, improved job satisfaction and a substantial decrease in staff turnover (Saks, 2006). Although these benefits have resulted in organisations and HR practitioners worldwide adopting strategies to improve engagement, recent studies indicate that efforts may not be as successful as predicted when devising generic solutions (Gallup Consulting, 2010; Towers Perrin, 2008).

## **Chapter 5:**

### **Discussion of results**

This chapter discusses the findings derived from the surveys to understand their relationship to the hypothesis presented. An attempt to link the results obtained to the literature reviewed provides further insight to the final result. The research objectives of the study were to examine whether a relationship exists between learning and development (L&D) and employee engagement and between change and employee engagement. The results presented indicate the levels of engagement experienced prior to a specific L&D intervention and a huge organisational change. After the learning intervention, the researcher interviewed the same group of employees to understand whether the employee engagement levels changed due to the change in the learning platform.

#### **5.1. The results in relation to the hypotheses**

The researcher distributed a survey pre- and post- a change and L&D intervention. The data received was then analysed. The researcher's survey asked questions relating to a number of previously studied indicators of employee engagement. The focus of the study, however, was to isolate two variables, i.e. change and L&D, and to understand whether these factors are related to employee engagement. The tests used to prove the hypothesis started with a normality test of all three variables, i.e. change, L&D and employee engagement. The results indicated that the data was slightly skewed from a normal distribution.

This led the researcher to use a Mann Whitney U-test to indicate whether the descriptive statistics had an impact on the way that an employee answered the survey; for example, to understand whether age, title and qualification affected change, L&D and employee engagement opinions pre-intervention. The results of this test concluded that there was no significant relationship between the descriptive variables and those being studied.

A paired t-test was then performed to understand the relationship between the variables pre- and post-intervention. In all three instances, the results indicated a significant relationship between change, L&D, and employee engagement pre- and post-intervention. Finally a Spearman's rank correlation test was performed on the data to indicate whether a correlation existed between change and employee engagement and L&D and employee engagement. The results again indicated that there was a definite correlation between the variables.

### 5.1.1. Hypothesis 1

H0: Change is not significantly correlated to employee engagement

H1: Change is significantly correlated to employee engagement

The results of the Spearman's rank correlation coefficient test indicate a significant association between the sets of ranks. The statistical evidence suggested good agreement ( $R_S = 0.718$ ) between the p value ( $7.851e-6$ ), which meant that a significant association exists between change and engagement. This led to the acceptance of the alternate hypothesis (H1), that change is significantly correlated to employee engagement.

The paired t-test of pre- and post-change indicated a mean difference between the two results of 0.245, with a standard deviation of 0.015 and 95% confidence intervals of 0.224 to 0.235. The t-value (t) was -4.253, the degrees of freedom were 29, and the statistical significance (2-tailed p-value) of the paired t-test ( $\Pr(|T| > |t|)$  under H0:  $\text{mean}(\text{diff}) \neq 0$ ) was ( $2.005e-4$ ). As the p-value was less than 0.01 (i.e.,  $p < .001/.01$ ), the conclusion was that a statistically significant difference existed between the two variable scores (change\_pre and change\_post). In other words, the difference between the two surveys is not equal to zero.

The overall pre-change results reported that 60% of respondents answered strongly disagree or disagree. This indicates that the majority of respondents were dissatisfied with the change at organisation X, which has led to reduced engagement levels. The overall post-change results reported that 23% of respondents answered strongly disagree or disagree. This indicates that the majority of respondents experienced improved feelings of engagement and satisfaction with the change after the learning intervention at organisation X, which has led to somewhat improved engagement levels.

#### 5.1.1.1. Pre-L&D intervention

<b>Scale</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
In my organisation employees adapt quickly to difficult situations	37%	37%	10%	17%	0%
Employees in my organisation accept change	17%	70%	13%	0%	0%
My employer applies effective change management principles to assist with transitions	0%	67%	27%	7%	0%
I understand why my organisation needs to change	13%	63%	23%	0%	0%
Employees proactively identify future challenges and opportunities	3%	30%	67%	0%	0%
Employees are willing to take on new tasks as needed	10%	63%	27%	0%	0%

Table 5.21: Survey scores pre-L&D intervention (H1)

The survey item *'In my organisation employees adapt quickly to difficult situations'* resulted in 74% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 17% answered that they agree and feel satisfied while 10% felt neutral about change.

The survey item *'My employer applies effective change management principles to assist with transitions'* resulted in 67% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 27% answered that they agree and feel satisfied while 7% felt neutral about change.

The survey item *'Employees are willing to take on new tasks as needed'* resulted in 73% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 0% answered that they agree and feel satisfied while 27% felt neutral about change. The responses received pre-intervention indicated that most employees felt very negative and dissatisfied about the way change affected them.

#### 5.1.1.2. Post-L&D intervention

<b>Scale</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
In my organisation employees adapt quickly to difficult situations	10%	23%	23%	43%	0%
Employees in my organisation accept change	10%	80%	10%	0%	0%
My employer applies effective change management principles to assist with transitions	0%	30%	57%	13%	0%
I understand why my organisation needs to change	10%	43%	47%	0%	0%
Employees proactively identify future challenges and opportunities	3%	40%	57%	0%	0%
Employees are willing to take on new tasks as needed	27%	40%	33%	0%	0%

Table 5.22: Survey scores post-L&D intervention (H1)

The survey item *'In my organisation employees adapt quickly to difficult situations'* resulted in 33% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 43% answered that they agree and feel satisfied while 23% felt neutral about change. The survey item *'My employer applies effective change management principles to assist with transitions'* resulted in 30% of respondents answering 1 or 2, indicating that they disagree with this statement. Of the respondents, 13% answered that they agree and feel satisfied while 57% felt neutral about change.

The survey item *'Employees are willing to take on new tasks as needed'* resulted in 67% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 0% answered that they agree and feel satisfied while 33% felt neutral about change. The responses received post intervention indicated that

most employees still felt very negative and dissatisfied about the way change affected them.

Although the results improved marginally when the L&D initiative was implemented, the change still affected how respondents felt towards change specifically. Overall engagement levels, however, did improve. This may be because the L&D implementation was a positive change, which affected respondents' feelings towards engagement positively. Employees are still, however, wary of organisational change and how it is done.

The Corporate Leadership Council surveyed 50 000 employees. Results indicated that 13% of employees are 'disaffected' (actively disengaged) and 11% are 'true believers' (actively engaged). The remaining 76 % of employees can be referred to as 'agnostics' who neither apply themselves in their work nor put minimal effort in. These employees are inclined to have moderate levels of commitment, which means there are considerable variations when it comes to their intent to leave (The Leadership Council, 2004, p.7).

The results of the change portion of this survey show the same indications. Both pre and post results have a very high number of recipients that fall into the 'agnostics' category. This generates uncertainty in terms of findings as any trigger resulting from change may push the employees either towards or away from feeling engaged.

Robinson, Perryman and Hayday (2004) explain that employee engagement requires a bidirectional approach in relationship management between the employer and employee. Consistent and continuous communication needs to be developed and nurtured to maintain the levels of engagement. There must be collaboration and employer and employee must work together. From much of the feedback (survey and non-structured interviews) received by the researcher, it was clear that employees felt that the change was not effectively managed and communicated. Leadership was viewed as having worked in isolation without advising employees of what the change was, why it was happening and how it would affect them (Robinson, et al., 2004).

Leadership also had very few change management initiatives to drive the huge change. Involving employees in various decision-making processes allows them to feel important to the organisation (Sundaray, 2011). (Dibben, et al., 2011) describes how critical employee involvement is when viewing employee engagement. A result of feeling involved in the decision-making process is a more committed employee. (Rayner & Adam-Smith, 2009) state that if suitable decision-making processes are present and followed, for example consultation, implementation and evaluation mechanisms, then undesirable consequences can be avoided. Developing a voice for your employee is important and can be done through upward and downward communication channels. This results in a trusting and open environment, leading to improved engagement (Rayner & Adam-Smith, 2009).

Tyler Durham said

Dynamic business environments and a culture of continuous change is the new normal for large organizations, and it's only going to accelerate. Employees don't have time to adapt to one change before the next one is upon them. The challenge for leaders is to drive change in ways that energize and empower people and ensure their organizations are prepared both culturally and operationally to embrace change as opportunity, (HR Review, 2015).

### **5.1.2. Hypothesis 2**

H0: L&D is not significantly correlated to employee engagement

H1: L&D is significantly correlated to employee engagement

The results of the Spearman's rank correlation coefficient test indicate a significant association between the sets of ranks. The statistical evidence suggested good agreement ( $RS = 0.756$ ) between the p value ( $1.345e-6$ ), which meant that a significant association exists between development and engagement. This led to the acceptance of the alternate hypothesis (H1), that L&D is significantly correlated to employee engagement.

The paired t-test of pre- and post-L&D intervention indicated a mean difference between the two results of 0.4 with a standard deviation of 0.022 and 95% confidence intervals of 0.33 to 0.346. The t-value (t) was -4.942, the degrees of freedom were 29 and the statistical significance (2-tailed p-value) of the paired t-test ( $\Pr(|T| > |t|)$  under  $H_0$ :  $\text{mean}(\text{diff}) \neq 0$ ), was ( $2.982e-5$ ). As the p-value was less than 0.01 (i.e.,  $p < .001/.01$ ), the conclusion was that a statistically significant difference existed between the two variable scores (development and development\_post). In other words, the difference between the two surveys is not equal to zero.

The overall pre-L&D results reported that 51% of respondents answered strongly disagree or disagree. This indicates that the majority of respondents were dissatisfied with the L&D opportunities available at organisation X, which led to reduced engagement levels.

The overall post-L&D results reported that 29% of respondents answered strongly disagree or disagree. This indicates that the majority of respondents experienced improved feelings of engagement and satisfaction with the L&D opportunities available at organisation X, which led to somewhat improved engagement levels. Robinson, et al. (2004) concludes that providing opportunities for employees to develop in their jobs is an important driver of employee engagement and the general responses to this survey support this view.

### 5.1.2.1. Pre-L&D intervention

<b>Scale</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
I am pleased with the career advancement opportunities available to me	3%	50%	40%	7%	0%
My organisation is dedicated to my professional development	0%	13%	70%	17%	0%
I am satisfied with the job related training my organisation offers	0%	77%	7%	17%	0%
I am satisfied that I have the opportunities to apply my talents and expertise	0%	77%	0%	23%	0%
I am satisfied with the investment my organisation makes in training and development efforts	7%	17%	77%	0%	0%
The type of training offered assists in improving my current role	0%	63%	30%	7%	0%

Table 5.23: Survey scores pre-L&D intervention (H2)

The survey item '*I am pleased with the career advancement opportunities available to me*' resulted in 53% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 7% answered that they agree and feel satisfied while 30% felt neutral about L&D. The survey item '*I am satisfied with the investment my organisation makes in training and development efforts*' resulted in 34% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 0% answered that they agree and feel satisfied while 77% felt neutral about L&D.

The survey item '*The type of training offered assists in improving my current role*' resulted in 63% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 30% answered that they agree and feel satisfied while 7% felt neutral about L&D. The responses received post intervention indicated that most employees felt very neutral about the way L&D affected them. This did not provide a good enough indication of whether the employees felt sufficiently trained after the intervention. The number of dissatisfied employees was significantly lower than satisfied employees.

### 5.1.2.2. Post-L&D intervention

<b>Scale</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
I am pleased with the career advancement opportunities available to me	3%	33%	47%	17%	0%
My organisation is dedicated to my professional development	0%	23%	37%	40%	0%
I am satisfied with the job related training my organisation offers	0%	43%	17%	40%	0%
I am satisfied that I have the opportunities to apply my talents and expertise	0%	37%	7%	57%	0%
I am satisfied with the investment my organisation makes in training and development efforts	3%	13%	77%	7%	0%
The type of training offered assists in improving my current role	0%	17%	70%	13%	0%

Table 5.24: Survey scores post-L&D intervention (H2)

The survey item *'I am pleased with the career advancement opportunities available to me'* resulted in 36% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. This is a clear improvement from the responses pre-intervention. Of the respondents, 34% answered that they agree and feel satisfied while 47% felt neutral about L&D. The survey item *'I am satisfied with the investment my organisation makes in training and development efforts'* resulted in 16% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 7% answered that they agree and feel satisfied while 77% felt neutral about L&D.

The survey item *'The type of training offered assists in improving my current role'* resulted in 17% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 13% answered that they agree and feel satisfied while 70% felt neutral about L&D. The responses received post intervention indicated that most employees felt very neutral about the way L&D affected them. This did not provide a good enough indication of whether the employees felt sufficiently trained after the intervention. The number of dissatisfied employees was significantly lower than satisfied employees.

The statistics prove that after an intervention, when the next cycle was tested, the respondents had improved how they felt about L&D and overall engagement. The newly implemented framework clearly had an impact on the way that employees felt about engagement.

Kahn (1990) also posits that having the required capabilities and tools at work creates an environment where employees are more capable of engaging positively. Employees want the impression that the organisation is capitalising on and participating in their development, and that they can make a significant contribution to the company in return (Kahn, 1990). Kahn's (1990) engagement model also validates employees feeling valued as contributing to improved levels of engagement. Training and development may appear costly to organisations; however, it contributes to a feeling of positive engagement and can sustain levels of engagement in employees who can prove to be very valuable assets if engaged (Ahmadi, et al., 2012). The literature reviewed further states that L&D is critical to engagement when an organisation undergoes a change. This is supported by (Cameron, 1994) who advocates providing opportunities for employees to develop during huge changes in an organisation.

## **5.2. Overview of results**

The overall results indicated that pre-intervention, when a huge change took place in the organisation, 17% of employees were engaged. Unhappy and disengaged employees accounted for the other 83%. The statistical analysis concluded that demographic factors such as age, title and qualification had very little impact on how engaged the employee

felt. This finding is not aligned to the studies conducted by the Institute of Employment Studies, which demonstrated that engagement levels can drop as employees get older (Robinson, et al, 2004).

The post-intervention results of the same employees indicated an improvement of 43% feeling engaged and 56% feeling disengaged. This proved that implementing a change in the way L&D was conducted following a huge organisational change, employees felt a bit more engaged.

It must be noted that the researcher was submersed in the organisation at the time of the study. Various workshops were run to understand how employees felt and the researcher also incorporated feedback from the organisational employee engagement survey. The survey conducted used the following drivers to measure engagement

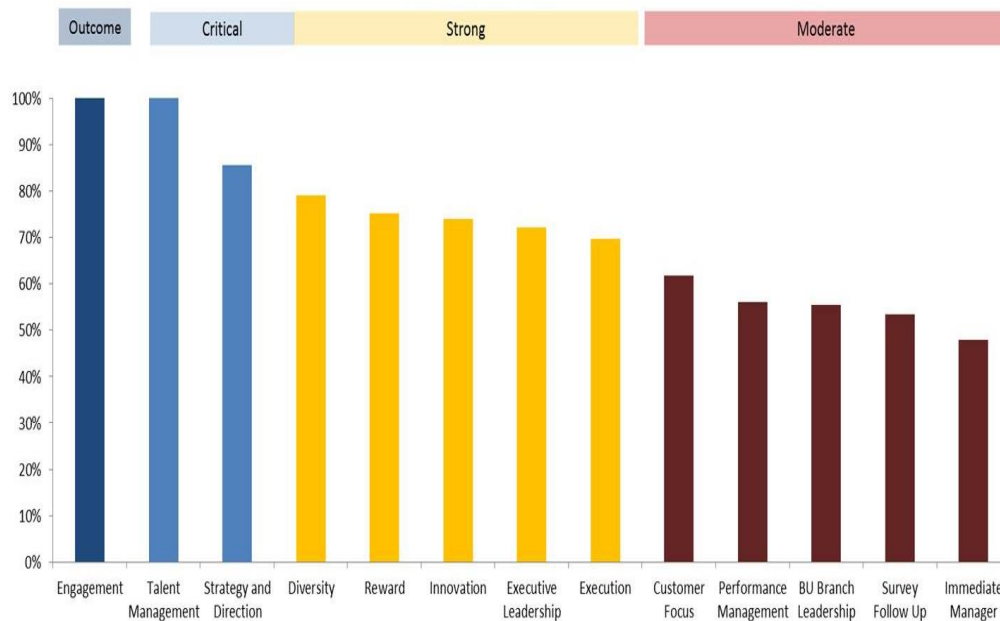


Figure 5.28: Organisational report (Organisation X, 2015)

For purposes of confidentiality the name of the organisation cannot be mentioned. However, it can be seen that the top drivers of the survey were talent management (L&D), engagement and strategy and direction.

Although the final results indicated that overall employees were not highly disengaged, there was a definite decline from the previous year's results. Talent management and overall engagement scored 70% and 71% respectively in 2014, and 67% and 69% in 2015. This indicated that employees felt that they were engaged and that talent management was sufficient. Those figures were contrary to the results of the researcher's survey in 2015, immediately after the organisational change was implemented. The researcher also had informal discussions with the survey recipients to better understand their general feeling of their engagement levels. The findings indicated

that employees were indeed frustrated with the L&D platform, which was not aligned to all their requirements from a job performance perspective. Respondents concluded that they felt ill equipped for the change and that they were not guided sufficiently in terms of the new roles and outputs. This led the researcher to implement an improvement project to address the lack of structured development based on the recent change. The researcher used systems thinking principles to drive the development of the new learning platform (discussed under the literature review section). The implementation of the learning framework warranted another review of the respondent's feelings of engagement a month after the implementation. Those results indicated an improvement in their overall engagement.

### 5.2.1. Employee engagement

The paired t-test of pre- and post-change indicated a mean difference between the two results of 0.8 with a standard deviation of 0.023 and 95% confidence intervals of 1.081 to 1.048. The t-value (t) was -4.0, the degrees of freedom were 29, and the statistical significance (2-tailed p-value) of the paired t-test ( $\Pr(|T| > |t|)$  under  $H_0: \text{mean}(\text{diff}) \neq 0$ ), was (4.001e-4). As the p-value was less than 0.01 (i.e.,  $p < .001/.01$ ), the conclusion was that a statistically significant difference existed between the two variable scores (engagement\_pre and engagement\_post). In other words, the difference between the two surveys is not equal to zero.

#### 5.2.1.1. Pre-L&D intervention

Scale	1%	2%	3%	4%	5%
On a five-point scale where 5 means extremely satisfied and 1 means extremely dissatisfied, how satisfied are you with this company as a place to work?	30%	30%	23%	17%	0%

Table 5.25: Survey scores pre-L&D intervention for engagement

The survey item 'On a five-point scale where 5 means extremely satisfied and 1 means extremely dissatisfied, how satisfied are you with this company as a place to work?' resulted in 60% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 17% answered that they agree and feel satisfied while 23% felt neutral about engagement. The responses received pre-intervention indicated that most employees felt very negative, dissatisfied and disengaged.

#### 5.2.1.2. Post-L&D intervention

Scale	1%	2%	3%	4%	5%
On a five-point scale where 5 means extremely satisfied and 1 means extremely dissatisfied, how satisfied are you with this company as a place to work?	13%	10%	33%	43%	0%

Table 5.26: Survey scores post-L&D intervention for engagement

The survey item ‘On a five-point scale where 5 means extremely satisfied and 1 means extremely dissatisfied, how satisfied are you with this company as a place to work?’ resulted in 23% of respondents answering 1 or 2 on the scale, indicating that they disagree with this statement. Of the respondents, 43% answered that they agree and feel satisfied while 33% felt neutral about engagement. The responses received post-intervention indicated that most employees felt more satisfied about the way change affected them and how engaged they were.

## BRINGING IT ALL TOGETHER

**Engagement is the extent to which employees commit to something or someone in their organization and how hard they work and how long they stay as a result of that commitment**

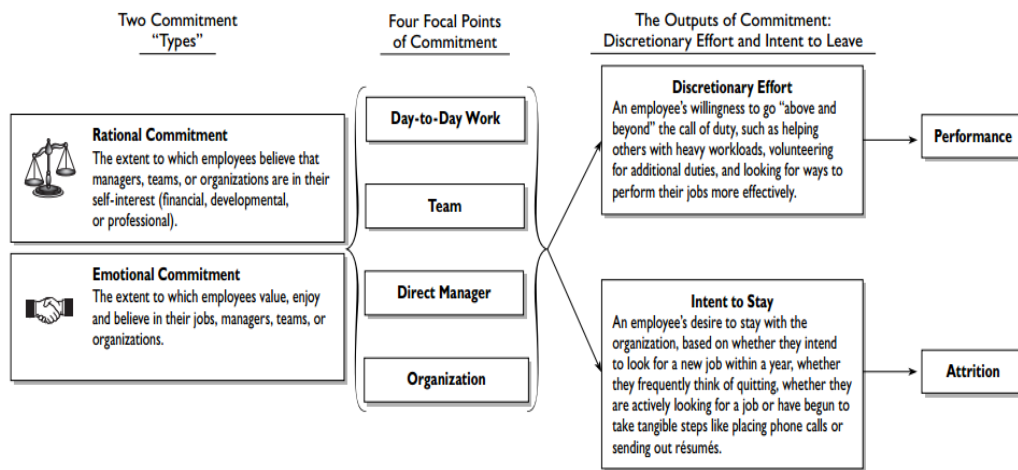


Figure 5.29: Corporate leaderships model of engagement (Corporate Leadership Council, 2004)

The figure 5.24 above describes the Corporate Leadership Council’s model of engagement. Factors that contribute to improved commitment include day to day work, team, manager and organisation. These factors lead to an employer adding or deleting effort and contributes to reinforcing an employee’s intent to stay (Corporate Leadership Council, 2004).

The results obtained from these surveys during both cycles concluded that the change in the organisation initially had a negative effect on employees and their engagement levels. Therefore, how they felt about the organisation was negative. A positive change, i.e. the learning framework that was implemented, had a positive effect on how employees felt about engagement. Their opinions of change, however, were still very skeptical. The figure below by Corporate Leadership Council indicates that individualised development enhanced feelings of being engaged. L&D was one of the top 50 levers for engagement in their survey, which concurs with the researcher’s results

from feedback. Communication was also key in contributing to employees' positive feelings of engagement.

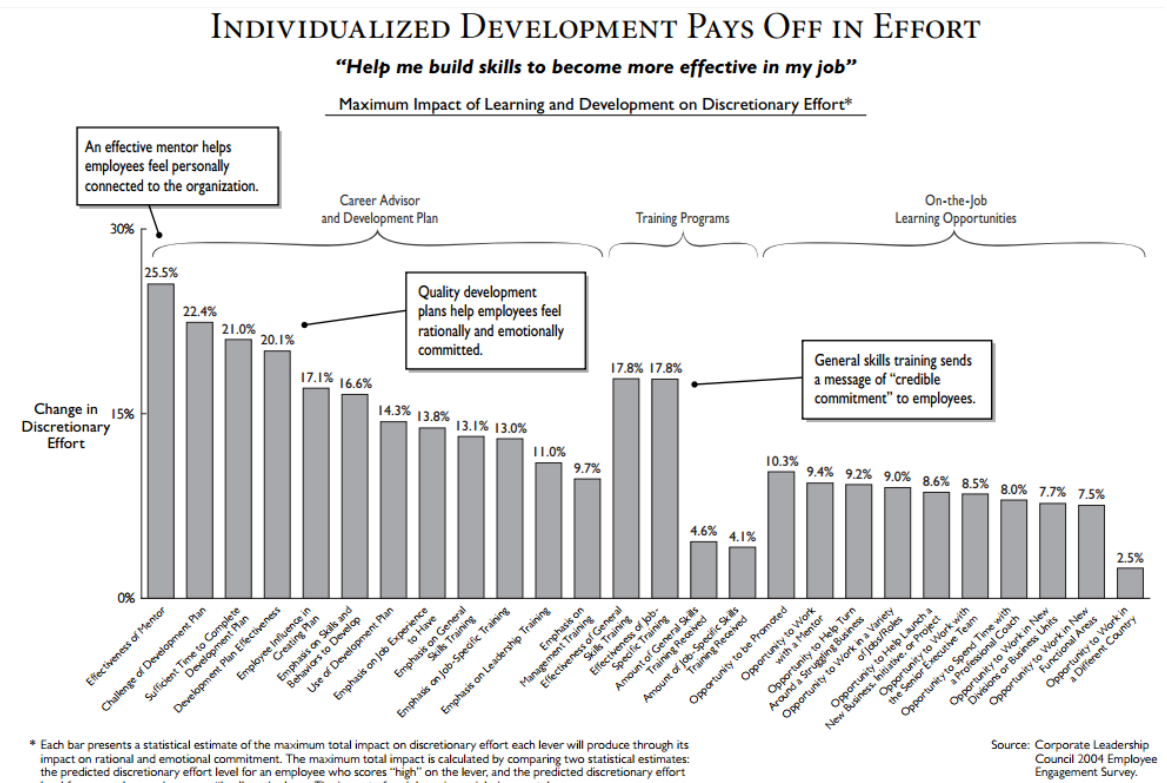


Figure 5.30: Development statistics (Corporate Leadership Council, 2004)

A critical point that was constantly broached by respondents during the informal interviews indicated that the lack of communication about the organisational change contributed to how 'uneasy' everyone felt. There was no understanding of the strategy and, although everything changed, there was no support to equip them in their new positions. This resulted in employees feeling demotivated about their daily jobs.

Although the internal survey results indicated that employees were engaged overall, when the researcher asked some respondents if they answered truthfully, they confirmed that the change took place after the survey was completed. A possibility is that the organisational results for the banking team may have differed significantly if it had been done after the organisational change.

The leadership team was also aware of the lack of engaged employees after the organisational change. To mitigate or assist in employee attrition, they held regular meetings to understand how to improve the general feelings of disengagement.

# A CULTURE OF COMMUNICATION, INTEGRITY, AND INNOVATION

**“Give me job-relevant information, the opportunity to innovate, and a sense of pride”**

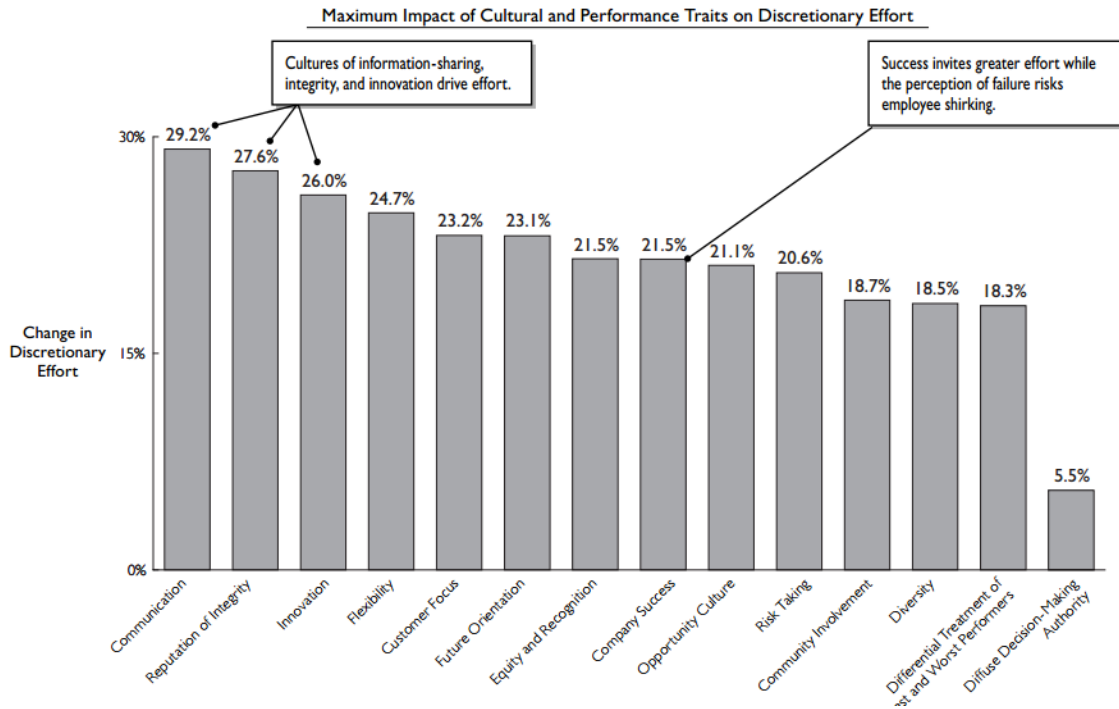


Figure 5.31: Culture and communication results (Corporate Leadership Council, 2004)

During the first 10 years of the 21st century there were huge declines in the financial industry, resulting in serious economic challenges. Organisations struggled to keep afloat and were forced to change their strategies with efforts to improve efficiencies and money. This resulted in downsizing and restructuring for their survival. Employees that stayed during the changes had typically been left feeling insecure and frustrated with the organisation (Cascio, et al., 1997).

Additional research indicated that restructuring reduces employee morale and harms the long-term operational efficiency of the organisation (Cascio, et al, 1997). A study by (Roche, et al., 2011) reported both income and employment losses over the period of the recession. The study found that employers are becoming more aware that tapping into the motivation and commitment of their employees is critical for their existence. A component that employers need to improve is employee engagement.

Human beings in general rely on being rational and naturally question why change is needed. They will examine the extent to which the change is required, whether it will move the organisation in the right direction and whether they are prepared to make the change work. They will also look to leadership for answers. Leaders therefore need to formally create a case for why the change is required to assist the teams to align their understanding of the needs as they are compelled to buy in (Bennis, 1994).

### **5.3. Recommendations for future research**

Future research could focus on the measurement of how engagement affects operational efficiency. In this study the researcher came across multiple suggestions that the overall performance was affected following the change. Although statistically this was not examined, it may be a crucial topic to explore in the future. This will, in turn, give organisations a view and measurement of just how important engagement practices are. The researcher also had difficulty in finding other research where the variable of L&D and its impact on engagement was examined. Although much of the literature explores the concept of how change affects the organisation, it appears that L&D and its impact on employee engagement was not formally measured.

### **5.4. Recommendations for future managerial practice: L&D framework**

After the first survey a new project was launched within the organisation, with the help of leadership, to improve the learning capabilities amid the huge change. The researcher then employed tactics using systems thinking to implement a framework in learning that was driven by the employees. The researcher used the concept of systems thinking to drive the final output of the project. Thereafter another cycle of surveys was sent out to the same group of employees to determine whether the intervention had an impact on the employees. Appendix 1 provides the details of the process employed to reach the final result of the learning framework that was developed.

	Journey	Start	6 months	> 1 year	Notes
1	Training	1) Learning Plan	1) Business training	1) Training overview	Training Material development
		2) Base training (product)	2) Project Roll -outs	2) Consolidated System reports	Liasing with project teams for training requirements
		3) Induction	2) Consolidated System reports		scheduling
2	Customised training	1) Segment Specific	1) Rules for client visits (training packs)		Liasing with project teams for training requirements. Anaysis and Design of training solutions for projects
		2) Playbook - I - checklist			
3	Performance Management	1) 90 day Accountability Plan	1) Gap Analysis	1) Review the PDP and the scorecard etc	Consolidated View
		2) Scorecard	2) PDP	2) PDP and Gap	
4	Development	1) Define PDP and GAP - assisted completion	1) ongoing Specialised training based on GAP and PDP	1) Additional training - referral to academy	Leadership and development programmes
		2) Roadmap of where PB wants to be within timelines			
5	Academy (movement/upskilling)	1) Skills matrix			
		2) 2 year plan			
		3) Define base minimum per segment/individual and team, and what is needed to move roles eg, Portfolio size, Coaching, minimum Product Knowledge, Sales, min req to move			
		4) Possible Accreditation - future			
		5) Finance Curriculum			
		6) Sales Curriculum			
		7) General Curriculum			
		8) Define Curriculum			

Figure 5.32: Framework developed for learning by researcher (Makan, 2015)

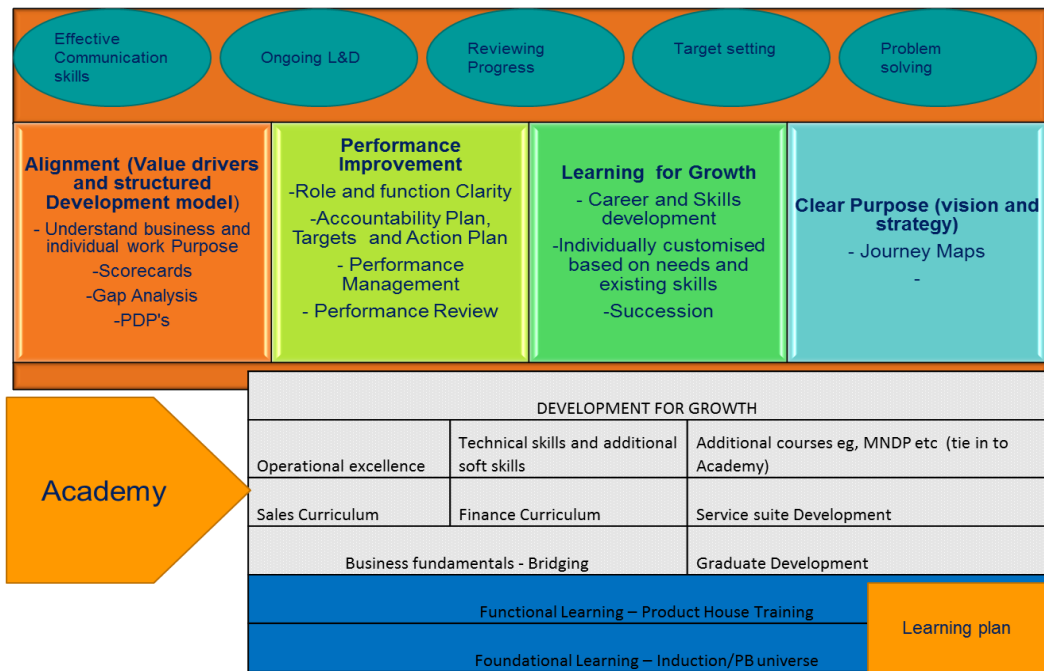


Figure 33: Academy model (Makan, 2015)

## 5.5. Conclusion

There is nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success than to take the lead in the introduction of a new order of things, (Niccolo Machiavelli,1532).

Leadership plays an important role in guaranteeing that employees are motivated. Since there has been a shortage of motivation within the organisation, employees have shown disinterest in the organisational vision and tended not to be very productive. Standard issues that broached involved the lack of communication about the change and not understanding the strategy. According to the literature reviewed, this lack of motivation can lead to employees undermining the efforts and authority of leadership (Cyprus, 2003).

For the organisation to move forward, it is imperative to motivate employees. The solution may be as easy as communicating the strategy and having sessions with the wider teams to inform them of the 'why'. In other instances leadership may need to work closely with demotivated employees to reconsider remuneration. A lot of worker motivation has to do with workplace psychology. The happier and more valued employees feel, the more likely it is that they will give the company their best efforts (Cyprus, 2003). Investing in employee happiness sometimes seems contradictory, but ignoring corporate culture is often seen as a serious fault.

A huge challenge within the organisation is to ensure that each time leadership changes, the new leaders are proficient and skilled enough to lead the business effectively. 'The skills needed to head up a cause or execute specific goals are not usually intuitive, and they cannot always be learned in a classroom,' (Cyprus, 2003). Although there are many development opportunities for leadership, leaders may not always identify their weak areas. It may be beneficial to develop a unique L&D plan aimed at senior leadership that covers the basic requirements of leadership and how to become 'better' leaders.

In my opinion, there is no specific methodology that will fit every organisation or every changing situation. There needs to be a cohesive effort within the change management discipline within my organisation to understand the basic principles of change management that are widely published by the many change management professionals and academics. It is the responsibility of our change agents to fully understand each change being proposed in isolation, and then adapt a framework that is flexible and encompasses the key principles and more to successfully implement the changes at hand.

CEOs involved in transformation often say they are concerned about how the work force will react, how they can get their team to work together, and how they will be able to lead their people. They also worry about retaining their company's unique values and sense of identity and about creating a culture of commitment and performance.

Leadership teams that fail to plan for the human side of change often find themselves wondering why their best-laid plans have gone away (Jones, et al., 2004).

According to evolutionary theories introduced by Charles Darwin and Jean-Baptiste Lamarck, survival in a permanently modified environment takes place through adaptation. The same is true today in the private banking industry. Whether it is through circumstantial mutation, embodied by young start-ups, or through the transformation of existing institutions, only the ones who are willing to accept change and adapt shall prosper. This fundamental law of nature is more relevant than ever for the financial services industry and particularly for private banking (Kearney, 2014).

From the statement above, organisations ought to be receptive to change in an organisation whether they are accepting of it or not. The bank, however, will need to rethink the way that they operate and consider the effect of unsuccessful change initiatives on the organisation. By embracing change, we will be able to develop a sustainable model for profitability, but this change must be intelligently and gracefully executed for success (Makan, 2015).

Change is both an institutional journey and a very personal one. People spend many hours each week at work; many think of their colleagues as a second family. Individuals (or teams of individuals) need to know how their work will change, what is expected of them during and after the change program, how they will be measured, and what success or failure will mean for them and those around them. Team leaders should be as honest and explicit as possible. People will react to what they see and hear around them, and need to be involved in the change process, (Jones, et al., 2004).

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## Appendix 1: Questionnaire used for research

<b>Employee overall engagement</b>	<b>Full Score</b>
On a five-point scale where 5 means extremely satisfied and 1 means extremely dissatisfied, how satisfied are you with this company as a place to work?	5
<b>Relationships</b>	
Employees in my organisation take the initiative to help other employees when the need arises	5
My immediate manager and I have a strong working relationship	5
Leadership and employees trust each other	5
<b>Development</b>	
I am pleased with the career advancement opportunities available to me	5
My organisation is dedicated to my professional development	5
I am satisfied with the job related training my organisation offers	5
I am satisfied that I have the opportunities to apply my talents and expertise	5
I am satisfied with the investment my organisation makes in training and development efforts	5
The type of training offered assists in improving my current role	5
<b>Motivation</b>	
Employees here are positive and keep going when the going gets tough	5
I am inspired to meet my goals at work	5

I feel completely involved in my work	5
I get excited to go to work	5
I am determined to give my best effort at work each day	5
When at work I am completely focused on my job duties	5
I am satisfied with my total remuneration and benefits package	5
I am satisfied with the level of flexibility offered by my organisation	5
I have the tools required to do my job efficiently	5
In the last seven days, I have received recognition or praise for doing good work.	5
	5
<b>Change</b>	
In my organisation employees adapt quickly to difficult situations	5
Employees in my organisation accept change	5
My employee applies effective change management principles to assist with transitions	5
I understand why my organisation needs to change	5
Employees proactively identify future challenges and opportunities	5
Employees are willing to take on new tasks as needed	5
<b>Leadership</b>	
Communication between leadership and employees is effective in my organisation	5
I am able to make decisions affecting my work	5
Management within my organisation recognises strong job performance	5
I am satisfied with the culture of my organisation	5
I understand how my work impacts the organisations business goals	5

In the last 6 months someone has spoken to me about my performance	5
We have leaders that understand our business and want to change for the best	5
My manager/supervisor creates a high performance and collaborative work team.	5
My manager/supervisor involves me in decision making, problem solving and planning processes.	5