



**L&D Professionals in Organizations: Much Ambition,  
Unfilled Promise**

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## ABSTRACT

**Purpose:** This monograph reports on the strategic and operational roles of learning and development (L&D) professionals in Irish, UK European and US organisations including MNCs, SMEs, public sector and not for profit organisations. We investigated the contextual factors influencing L&D roles in organisations, the strategic and operational roles that L&D professionals play in organisations, the competencies and career trajectories of L&D professionals, the perceptions of multiple internal stakeholders of the effectiveness of L&D roles and the relationships between context, L&D roles, competencies/expertise, and perceived organisational effectiveness.

**Design/ methodology/ approach:** The study findings are based on the use of multiple methods. We gathered data from executives, senior managers, line managers, employee and L&D professionals using multiple methods: survey (n=440), Delphi study (n=125) and semi-structured interviews (n=30).

**Findings:** The analysis revealed that L&D professionals increasingly respond to a multiplicity of external and internal contextual influences and internal stakeholders perceived the effectiveness of L&D professionals differently with significant gaps in perceptions of what L&D contributes to organisational effectiveness. L&D professionals perform both strategic and operational roles in organisations and they progress through four career levels. Each L&D role and career level requires a distinct and unique set of foundational competencies and L&D expertise. We found that different contextual predictors were important in explaining the perceived effectiveness of L&D roles and the importance attached to different foundational competencies and areas of L&D expertise.

**Originality/value:** This is one of the few studies to have investigated the L&D professional role in organisations from the perspective of multiple stakeholders utilising multiple research methods.

**Keywords:** Learning and development professionals. Perceived Effectiveness. Roles. Competencies. Careers.

**Paper type:** Research Paper

## INTRODUCTION

There is a growing recognition that the effective training and development of human resources is critical to organisational and financial performance (Tharenou, Saks & Moore, 2007; Nadiv, Raz & Kuna, 2017). As a consequence, the L&D function finds itself under increased scrutiny and pressure to add value to the business (Aguinis & Kraiger, 2009; Kim & Ployhart, 2014). The roles of L&D professionals have evolved throughout history from an emphasis on the direct delivery of training (Harrison, 2009) in the 20<sup>th</sup> century, to one where L&D professionals are expected in the 21<sup>st</sup> century to be managers of learning, change agents and architects of organisational learning (Stuart & Overton, 2015; Noe, Clarke, Klein, 2014). The L&D profession was criticised in the 1980s and 1990s for its focus on delivering direct training and its administrative tendencies. During the 21<sup>st</sup> century, the profession was urged to play a more strategic role in organisations (Garavan, 2007; Brandl, Ehnert, & Bos-Nehles 2012), with proponents arguing that a more strategic role would enable it to make a more valuable and measurable contribution to organisational performance. In spite of these calls, the work of L&D professionals continues to be perceived as operational, tactical and administrative, suggesting that L&D professionals have struggled to get out from under their history as a profession. The available evidence suggests that L&D professionals have struggled to make the transition to a strategic role (Mundy, 2012; CIPD, 2016). These strategic L&D roles include 'business partner', 'internal consultant' and 'strategic business partners' (Gao *et al.*, 2016; Campbell & Lambright, 2016; Nguyen, Teo, DeCieri, & Ho, 2019). L&D professionals have made efforts to reframe their expertise around these roles and to relinquish tasks associated with direct training, training administration and compliance activities. However, these efforts at reframing the role have proven difficult. First, research studies and industry reports have called into question the competences, skills and potential to influence performance in organisations (CIPD, 2017; Nadiv, Raz & Kuna, 2017). The specific skill gaps highlighted include the lack of strategic skills, poor business acumen and gaps in skills to leverage data and technology to contribute to strategic formulation and implementation. Second, key organisational stakeholders including CEOs, senior and line managers do not view L&D as a strategic priority (The Open University, 2016; Loon, 2016) and consider training and development to be a waste of time. L&D professionals are not viewed as strategic partners with organisational leaders when it comes to strategic change. Structurally, only a very small proportion of L&D professionals sit at the top table. Third, a prominent factor explaining the lack of strategic impact concerns the inability of L&D professionals to use evidence-based rigor in decision-making. Kruscynski *et al.* (2018) for example found that where HR specialists possessed higher-level analytical abilities, they were more effective. The lack of analytical skills and the inability to make use of evidence-based approaches to L&D has held back professionals from

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3 making a strategic business contribution (Dulebohn & Johnson, 2013). Fourth, L&D professionals  
4 experience inherent conflicts between daily operational roles and long-term strategic roles, giving the  
5 different demands made by senior managers, line managers and employees (Caldwell, 2003; Gao et al.,  
6 2016). Finally, there are significant perceptible differences between L&D professionals and their customers  
7 including employees, line and senior management concerning their effectiveness (Nadiv *et al.*, 2017). John  
8 & Bjorkman (2015) found, for example, significant differences in perceptions between HR professionals  
9 and line managers concerning capabilities and capacity to deliver the strategic agenda. In addition,  
10 employees perceive that L&D has become disconnected from the employee agenda and is no longer an  
11 employee champion (Van De Voorde & Beijer, 2015). This becomes manifest in criticisms that L&D  
12 professionals no longer focus on personal development planning, the enhancement of employees' careers  
13 and employability. Therefore, an important question concerns whether L&D professionals have delivered  
14 on the promise that is suggested by proponents of the strategic approach to role performance.

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25 Therefore the purpose of this monograph is to investigate: 1) the external and internal contextual factors  
26 that impact L&D roles and their effectiveness; 2) the types of strategic and operational roles that L&D  
27 professionals perform in organisations; 3) the career trajectories and foundational competencies/ areas  
28 of L&D expertise that L&D professionals require to perform both strategic and operational roles  
29 effectively; and 4) the relationships between external and internal contextual factors, L&D roles,  
30 foundational competencies and areas of L&D expertise and perceived organisational effectiveness. Our  
31 study enhances understanding of L&D professional roles in organisations in four ways. First, we draw on  
32 contingency theory (Tsai & Liao, 2017) to understand the role of context in shaping L&D in organisations.  
33 Contingency theory proposes that in order for L&D to be effective, it should be aligned with dimensions  
34 of the external and internal environment (Harney, 2016). Brandl *et al.* (2012) highlighted contingency  
35 factors that are relevant to the L&D professional role including strategy, organisational size, the life stage  
36 of the organisation, the industry in which the organisation operates, whether the organisation is domestic  
37 or international, the national setting of the organisation and cross-national cultural differences. The  
38 majority of these contingencies have not been systematically investigated in the context of L&D roles in  
39 organisations. Second, we address a significant gap in the literature concerning the roles that L&D  
40 professionals perform in organisations. We draw on the role based HRM approach (Mantere, 2008; Gao  
41 *et al.*, 2017) to understand the roles that L&D professionals play in organisations. Role theory (Katz &  
42 Kahn, 1978) proposes the notion of role sets which consist of the multiple role expectations which induce  
43 the required role behaviour. Of particular significance is the over emphasis on the investigation and  
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3 advocating of strategic roles and the under emphasis on the importance of operational L&D roles in  
4 organisations.  
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8 Third, we utilise the multiple constituency approach (Campbell & Lambright, 2016; Tsui, 1987) to  
9 understand the perceived effectiveness of L&D amongst internal stakeholders or constituencies  
10 (Marginson & Ogden, 2005). In the context of this study, these internal constituents include chief  
11 executives, senior managers, line managers, employees and, of course, L&D professionals. This  
12 theoretical approach argues that L&D professionals should pay attention to the needs of various  
13 constituencies and provide the learning and development practices, processes and systems that they  
14 require and expect. We therefore apply this approach to explore the effectiveness of L&D roles in  
15 organisations. Fourth, we investigate the types of foundational competencies and L&D expertise required  
16 to effectively perform strategic and operational L&D roles in organisations. L&D roles can be understood  
17 as 'clusters of interconnected competencies that portray the main attributes that must be possessed by  
18 anyone wishing to occupy an L&D role rather than as modular or loosely coupled entities, whose  
19 components can be understood in isolation' (Fiss, 2007, p.1180). Competencies in the context of this  
20 monograph are understood as different dimensions including knowledge, skill and personal  
21 characteristics (Marrelli, Tondora & Hoge, 2005). Brockbank and Ulrich (2002) define a competency and  
22 the ability of a jobholder to contribute value to the business and in the context of HR they identified five  
23 competency domains: strategic contribution, knowledge of the business, personal credibility, HR delivery  
24 and HR technology. Brockbank and Ulrich (2002) essentially argued that in the case of competent L&D  
25 specialists or practitioners they will require personal credibility combined with knowledge, skill and  
26 behaviour components to ensure that L&D practices are aligned with strategic goals and performance  
27 outcomes. Therefore, for the purpose of this study we adopt a notion of competency that incorporates  
28 knowledge, skill and behavioural components.  
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45 The monograph is structured as follows: First, we discuss the three theoretical perspectives – contingency  
46 theory (Harney, 2016), role theory (Katz & Kahn 1978) and multiple constituencies theory (Tsui, 1987) that  
47 foreground the research questions investigated in this monograph. Second, we review the literature on  
48 a) the contextual influences impacting the L&D professional role in organisations, b) L&D roles and  
49 competencies, c) the perceptions of different internal stakeholders of the effectiveness of the L&D  
50 professional role. Third, we describe the method used to conduct the study and the way in which we  
51 analysed the data. Fourth, we present our descriptive and analytical findings and in the final section we  
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3 discuss the implications of our study findings in respect of the theory, research and practice on L&D  
4 professional roles in organisations.  
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## 8 THEORETICAL AND EMPIRICAL BACKGROUND TO RESEARCH 9

### 10 11 Theoretical Perspectives Informing the Study 12

#### 13 14 15 Contingency Theory

16 Contingency theory helps researchers to understand the contingency factors that can influence L&D roles  
17 in organisations and it has been widely adopted in the HRM literatures to understand influence of  
18 contextual factors (Abt & zu Knyphausen-Aufseß, 2017), the dynamics of HRM roles (Caldwell, 2003;  
19 Farndale, Scullion & Sparrow, 2010) in organisations, and the antecedent of effectiveness of HR. Kast &  
20 Rozenzweig (1973) proposed that:  
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26 *“the contingency view of organisations and their management suggests that an organisation is a system*  
27 *composed of subsystems and delineated by identifiable boundaries from its environmental supra-system.*  
28 *The contingent view seeks to understand the interrelationships within and between subsystems as well as*  
29 *between the organisation and its environment and to define patterns of relationships of configurations or*  
30 *variables. It emphasises the multivariate nature of organisations and attempts to understand how*  
31 *organisations operate under varying conditions and in specific circumstances. Contingency views are*  
32 *ultimately directed towards suggesting organisational designs and managerial practices most appropriate*  
33 *for specific situations (ix)”*  
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42 Essentially, contingency theory argues that there is no optimal approach to structuring learning and  
43 development in organisations. This differs from the “one size fits all” model or universalistic perspective  
44 which is criticised for being too general and ignoring the unique characteristics of organisations and how  
45 they fit with environmental factors. We use contingency theory to address a significant gap in  
46 understanding L&D roles in organisations to understand the impact of both internal and external  
47 contingencies on L&D roles, competencies and areas of expertise. This is appropriate, as Sila (2007)  
48 suggested that contingency theory is appropriate to explain the context-structure-performance  
49 relationship. Contingency theory variables are derived from an organisations internal and external  
50 environment and emphasise that organisations are highly interdependent on their environment  
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(Wadango & Abdel-Kader, 2014). In the context of L&D roles, the internal environment variables highlighted a potentially relevant factor regarding the organisational structure and whether it is organised for domestic or international operations, the strategies of the organisation, technological intensity of the organisation, organisational strategy, organisational size, the maturity of the L&D function and the use of technology within the L&D function. The external environment includes the sector within which the organisation operates, the level of industry dynamism and industry growth.

We acknowledge that contingency theory has weaknesses in the context of explaining L&D roles in organisations. Brandl *et al.* (2012) for example found moderate support for a contingency perspective in explaining the organisation of the HRM department and line manager roles in organisations. Scholars have also highlighted the lack of clarity concerning the definition of concepts and variables (Rejc, 2004), with Tosi & Slocum (1984) pointing out that neither the concepts nor the relationships between different concepts in contingency theory are clearly delineated. In a similar vein, Pringle & Longenecker (1982) highlighted that contingency theory suggests an infinite set of ill-defined variables which are posited to interact with each other. However, Harney (2016) points out that the logic of contingency theory underpins much HRM research to date while noting that it has the potential to limit the agency of L&D practitioners to make decisions concerning how best to structure L&D in organisations.

### **Multiple Constituencies Theory and Perceptions of Stakeholders of L&D**

Multiple constituencies theory has its origins in the work of Connolly, Conlon and Deutsch (1980) and in the HRM context in the work of Tsui (1990). The theory proposes that organisations are composed of multiple sub-groups who have unique sets of priorities and interest when it comes to learning and development. Therefore, it does not make sense or desirable to arrive at a single set of evaluation criteria. Multiple constituency theory emphasises a positivist goal attainment perspective but highlights that different internal and external constituents will pursue different goals and criteria to assess the contribution of L&D (Herman & Renz, 1997). Evidence to date highlights that different constituent groups have distinct definitions of organisational effectiveness (Jun & Shiau, 2012) and the effectiveness of specific functions or roles within organisations including human resource management (Tsui, 1990). Traditionally, scholars have used multiple constituency theory to understand organisational effectiveness; however, it can also be used to explain perceptions of role performance. Patel & Hamlin (2017), for



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3 example, used multiple constituencies theory to evaluate the effectiveness of managers and leaders. Tsui  
4 (1990) highlighted the concept of reputational effectiveness, which involves constituent perceptions of  
5 the success or failure of L&D roles in organisations. Constituencies in the context of L&D will include top  
6 and senior management, line managers, HRM specialists and employees. Senior managers and executives  
7 will expect L&D professionals that perform strategic roles, to understand the role and influence of external  
8 factors and to contribute to both the formulation and implementation of strategy (Garavan, 2007). Line  
9 managers and department managers primarily have operational and tactical expectations of L&D  
10 professionals. These include the training and development of employees to meet day-to-day skill  
11 requirements (Tsui, 1990), and the skill and ability to respond to day-to-day crises and change issues  
12 (Aguinis & Kraiger, 2009). Employees have expectations that their development needs will be addressed  
13 (Antonacopoulou, 2000) utilising development planning processes. They will also have expectations that  
14 L&D professionals will provide them with opportunities to enhance their careers and employability (Cascio  
15 & Graham, 2016). Ulrich (1997) also highlights that meeting employee needs for personal and professional  
16 growth is an important expectation placed on L&D professionals.  
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28 In the context of L&D professionals, they must manage these different expectations (Noe, Hollenbeck,  
29 Gerhart & Wright, 2012). However, the research indicates that L&D professionals face significant  
30 challenges in establishing their role and meeting expectations due to their relatively low status in the  
31 organisational hierarchy. As already highlighted, the different sets of expectations may be difficult to  
32 reconcile and resource, therefore L&D professionals will respond to stakeholder expectations in a number  
33 of ways. For example, Tsui, Ashford, Clair & Xin (1995) suggest that they can seek to address the  
34 discrepancy between a stakeholder's expectations and the perceived obligations, or alternatively, they  
35 focus on justifying their own priorities. This may, however, be difficult for the L&D professional too, due  
36 to power deficits and positions within the hierarchy. Research points to the tendency of L&D professionals  
37 to focus on meeting the expectations of stakeholders or actors who they perceive to be the most powerful  
38 or on whom they are dependent for resources. However, making assessments about the relative  
39 importance of the different stakeholders is complex and will depend on the organisational context. In the  
40 case of small and medium firms, the owner-manager will likely hold sway (Nolan & Garavan, 2016) and  
41 there will be a high dependence on the owner-manager to secure resources for L&D. In contrast the  
42 situation in an MNC will be very different. For example, Makela, Björkman, Ehrnrooth, Smale & Sumelius  
43 (2013) suggest that there will be a complex dynamic between both corporate HQ and local subsidiary.  
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3 There may be a very high need to address local subsidiary expectations while also ensuring that the  
4 corporate policy agenda is addressed.  
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8 Organisational actors will utilise a different set of criteria when judging or evaluating the contribution of  
9 the L&D professional. Makela *et al.* (2013) proposed that organisational stakeholders will use either  
10 cognition- or experience-based evaluation. In the case of cognition-based evaluation, organisational  
11 actors will use their understanding of what the L&D role should do in an organisation to make an  
12 assessment of contribution. Cognition-based evaluation will be informed by their perception of the  
13 resources allocated to L&D, the size of the function, and its scope of activities. Larger L&D functions send  
14 important cues to organisational actors concerning the perceived importance of the function and role  
15 within an organisation. Stakeholders will view the size of the L&D function as an important proxy for its  
16 value to an organisation and will likely conclude that a larger L&D function is more strategic and better  
17 able to access resources. A large L&D function can create a very significant 'halo' effect, leading to  
18 perceptions of greater capabilities (Palmer & Loveland, 2008) In the case of experience-based evaluation,  
19 it will be based on their interactions with the services provided by L&D in an organisation. They will make  
20 evaluations based on the quality and relevance of L&D solutions delivered in addition to the  
21 professionalism of the function.  
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### 33 **Role Theory and L&D Competencies**

34 Structural functionalism (Merton, 1957) proposed that roles in organisations represent essential building  
35 blocks of systems and these roles engender behavioural expectations that transcend the occupants of the  
36 role. In the context of structural functionalism, the concept of structure emphasises the arrangement of  
37 the roles with a system and the concept of a function focuses on the contribution of that role to the system  
38 (McIntyre, 1964). Katz and Kahn (1978) argued that organisations are essentially systems of roles and  
39 that these roles explain how individuals and teams behave. They also highlighted that roles consist of sets  
40 of recurring interrelated actions and are, as a consequence, influenced by both the behavioural  
41 expectations and capacities of the individual who occupies the role (Sluss & Ashforth, 2007). Katz & Kahn  
42 (1978, p.29) explicitly defined a role as "structurally given demands and, as such, it confronts the occupant  
43 of a position with a set of pressures on how to act in the position". This definition conceptualises what is  
44 required to act in a job or position (Reichel & Lazarova, 2013) and it highlights the role of specific  
45 competencies (Egan & Akdere, 2005) relevant to effective role performance.  
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3 The role-based approach to HRM, for example, highlights that L&D professionals can perform control- and  
4 service-based roles. Control-based roles emphasising the implementation of L&D policy, whereas service-  
5 based roles emphasise the importance of the L&D professional as functional expert, offering training and  
6 development services to meet the needs of internal constituencies and to be proficient and skilled in  
7 helping line managers to meet their team knowledge and skill needs. Strategy-based roles emerged as  
8 important in the 2000s and were conceptualised as involving L&D professionals in helping organisations  
9 to achieve strategic change and implement strategy. The emphasis on strategic roles (Garavan, Shanahan,  
10 Carbery & Watson, 2016) demands that L&D professionals are skilled in shaping strategy, developing  
11 capability and delivering organisational performance (Noe *et al.*, 2014). Commitment-based roles are also  
12 highlighted in the literature. These include utilising L&D activities to motivate employees, enhance their  
13 job morale and encourage self-regulated work behaviour (Ulrich & Brockbank, 2005).  
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23 There is much debate within the literature on competencies, as to which competencies are required to  
24 meet the behavioural expectations of the L&D role. These appear to differ depending on whether one  
25 views the L&D role as strategic or functional in nature, and whether context is relevant in explaining the  
26 relative importance of competencies (Lo, Macky & Pio, 2015). Three approaches are used to consider the  
27 role of competencies in the context of HRM and L&D. The personal attribute model (McClelland, 1973),  
28 for example, has its foundations in psychology theory and defines competencies as underlying  
29 characteristics possessed by an individual that contribute to successful performance of the L&D role. It  
30 gives particular prominence to the role of traits, motives, self-concept, knowledge and skills. The  
31 behavioural model conceptualises competencies as behavioural repertoires that an L&D professional will  
32 bring to a job to achieve effective performance (Woodruffe, 1993). Both the personal attribute and the  
33 behavioural approaches emphasise a universal perspective highlighting that L&D competencies can be  
34 generic or have universal applicability to many contexts and role descriptions. The situationalist model  
35 (Sandberg, 2000) proposes a social phenomenological view of L&D competencies and considers their role,  
36 type and importance to be a function of context. Capaldo, Iandoli & Zollo (2006) and Le Deist & Winterton  
37 (2005) proposed that competencies are a function of the context in which they are activated. They are  
38 therefore situated, idiosyncratic and arise out of the interactions between an L&D professional and the  
39 context or situation. The situationalist model therefore rejects the idea of a generic competency list and  
40 instead proposed that competencies will vary depending on the breadth and depth of the L&D role and  
41 the organisational context.  
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3 Concerning the specific debates within the HRM and L&D literature, scholars make distinctions between  
4 strategic and functional L&D competencies (Huselid, Jackson & Schuler, 1997). Strategic L&D  
5 competencies focus on business related competencies that enable L&D professionals to align their  
6 strategies with business goals and priorities. Functional L&D competencies emphasis the personal  
7 credibility of the L&D role, as well as their communication and interpersonal skills. Other researchers have  
8 argued that L&D competencies are role-specific (Schoonover, 2003; Caldwell, 2010) and linked particular  
9 clusters of competencies to strategic L&D roles and L&D specialist roles. Scholars such as Francis & Keegan  
10 (2006) and Greenwood (2013) have emphasised the need for ethical standards and competencies around  
11 moral behaviour. In addition, research has called into question the lack of focus on employee-related L&D  
12 competencies (Graham & Tarbell, 2006) and there are questions concerning whether competences lead  
13 to enhanced L&D effectiveness. Brown, Metz, Cregan & Kulik (2009) and Teo and Rodwell (2007) found  
14 for example that the credibility of L&D will be related to its administrative efficiency and positioning within  
15 an organisation. We consider a number of specific strategic and functional competences in a later section  
16 of this literature review.  
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## 28 **Contextual Influences on the L&D Professional Role in Organisations**

### 29 ***External Context***

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31 Consistent with contingency theory, we highlight external and internal contextual dimensions that impact  
32 the performance of the L&D role. Research on HRM and L&D highlights a number of external factors  
33 impacting L&D roles in organisations (McGrandle, 2017). We focus on three external contingencies:  
34 organisational sector, industry growth and industry dynamism.  
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40 ***Organisational Sector.*** The role of organisational sector is particularly highlighted in the context of L&D  
41 as it relates to the amount and type of training undertaken and its impact on organisational performance.  
42 The key distinction is between manufacturing and service sector organisations. For example, service  
43 sector organisations will have a greater reliance on employee competencies to achieve organisational  
44 goals. In contrast, manufacturing industries are typically highly capital intensive (Quinn, Anderson &  
45 Finkelstein, 1997). The L&D role in these two contexts will differ considerable. In manufacturing sector  
46 organisations, the focus will be on production-focused training activities whereas in service sector  
47 contexts, employees will have greater discretion to use their skills and competencies than in  
48 manufacturing industries (Rosenthal, Hill & Peccei, 1997). Learning and development practitioner will  
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3 have much closer engagement with employees in service contexts given the importance of training to  
4 develop employee KSAs.  
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8 **Industry Growth.** The extent of industry growth will impact on the roles of L&D practitioners in  
9 organisations. Kim & Ployhart (2014), for example, found that in low growth industries, there will be less  
10 emphasis on investment in learning and development and, as a consequence, the L&D role-holder may  
11 perform the role on a part-time basis. In these low growth contexts, investment in learning and  
12 development will be a low priority because the investment is unlikely to be recouped (Way, Wright, Tracey  
13 & Isnard, 2018). In high growth industries, there will be a greater need for learning and development, thus  
14 requiring a different L&D role configuration. Higher levels of industry growth will impact the level of  
15 uncertainty that the L&D specialist has to cope with, thus requiring the L&D role to be involved in  
16 managing capacity and capability, as well as the ability to respond quickly to changing growth levels.  
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25 **Industry Dynamism.** Industry dynamism is conceptualised as the variability in competitive pressures that  
26 face the organisation and the extent of changes in the external environment (Chadwick, 2013). In  
27 organisations that operate in highly competitive environments, there will be a much stronger focus on  
28 training and development in order to capitalise on business opportunities and respond to change  
29 (Lecuona & Reitzig, 2014). Datta, Guthrie & Wright (2005) proposed that where firms operate in highly  
30 dynamic environments, they require more complex and varied competencies, thus suggesting more  
31 strategic roles for learning and development practitioners. In a similar vein, Martinez-Sanchez, Vela-  
32 Jiménez, Pérez-Pérez, & de-Luis-Carnicer (2007) found that there was a greater need for employees with  
33 board competencies, thus highlighting the contribution of L&D to the strategic growth of the organisation.  
34 This suggests that, moving forward, L&D roles will be more strategic, proactive and focused on change. In  
35 the context of HRM, Monks (1992) suggested that in stable environments, a simple model of HRM practice  
36 will be sufficient. However, in more complex and dynamic environments, the L&D role must focus on  
37 change and transformation.  
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#### 49 **Internal Context**

50 Research on HRM and L&D highlights internal organisational factors and these include the size of the  
51 organisation, its structure and, specifically, whether it is domestic or international in structure, the  
52 organisation's strategy, and the level of technology and knowledge intensity  
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3 **Organisational Size:** The size of the organisation emerges as a particularly important internal contextual  
4 factor (Nolan & Garavan, 2016; Liff & Turner, 1999). The intrinsic characteristics associated with size  
5 create unique challenges for SMEs when it comes to training. They are unlikely to have a full-time training  
6 role or they may have junior level trainers who train employees in production or service skill. In addition,  
7 they are less likely to provide formal training because it is expensive (Kortekaas, 2007). The lack of a  
8 training specialists to systematically design the training courses, supervise training implementation and  
9 evaluate training outcomes in smaller firms (Nolan & Garavan, 2019). In contrast, the situation in large  
10 firms will differ. These firms will likely have a full-time training role (Garavan *et al.*, 2016) and the L&D  
11 practitioner will have to cope with greater amounts of complexity and diversity of training activities. In  
12 large firms, it is likely that L&D practitioners will perform strategic partner and transformational change  
13 roles (Nadiv *et al.*, 2017), and training and development will have a significantly higher profile.  
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23 **Organisational Structure:** The organisation structure in terms of whether the organisation is a domestic  
24 or international operation is an important dimension of context impacting the L&D role in organisations.  
25 In domestic organisations, the L&D role will be considerably simpler and will be organised as part of the  
26 HR function (Nadiv *et al.*, 2017). In international organisations, there will typically be a strong set of HQ-  
27 subsidiary relationships (Farndale *et al.*, 2010). The role of the L&D practitioner will become significantly  
28 more complex because of a combination of dependence of subsidiaries on HQ and interdependence  
29 among subsidiaries. In some situations, depending on the location of the HQ, the L&D role within  
30 subsidiaries may be mandated from the centre whereas in subsidiaries with greater distance between the  
31 parent and host countries the L&D role holder will have greater autonomy (Farndale & Paauwe, 2007).  
32 These relationships and role configurations are likely to evolve over time, due to changing operating  
33 conditions (Bouquet & Birkinshaw, 2008).  
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43 **Organisational Strategy:** Organisational strategy concerns the patterns of behaviour used by  
44 organisations to operate in the external environment (Miles, Snow, Meyer & Coleman, 1978). These  
45 strategies have important implications for the types of L&D practices implemented and the role of the  
46 L&D professional. Research suggests that organisations with more formal strategies will have L&D  
47 practices that are more aligned than is the case for organisation's with less formal approaches (Acur,  
48 Gertsen, Sun & Frick, 2003). In addition, the type of strategy adopted by the organisation will have  
49 implications for the L&D role. For example, where an organisation pursues a cost-leadership strategy the  
50 focus will be on a narrow role for training to enhance skills at the lowest cost. In contrast, organisations  
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3 that pursue a differentiation strategy will concentrate on learning and development as an enhancing skill  
4 and will utilise this stronger focus as a key differentiator (Snow & Hrebiniak, 1980) to achieve competitive  
5 advantage.  
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10 **Technological and Knowledge Intensity of the Organisation:** Organisations differ in terms of their  
11 technological and knowledge intensity. Where organisations operate in high-technology industries, they  
12 will utilise more sophisticated and complex methods, practices and technique and will require a significant  
13 investment in training (Rauch & Hatak, 2016; Khandwalla, 2006). In both technology and knowledge  
14 intensive firms, the primary source of competitive advantage derives from the ability of employees to  
15 create and manage knowledge (Bettis & Hitt, 1995; Grant, 1996). Therefore, in these organisations,  
16 training will have a major strategic role to ensure that employees can acquire quickly the critical  
17 knowledge and skills. In contrast, in low-technology and low-knowledge intensity organisations, the L&D  
18 function trains in relatively simpler job tasks and, thus, the requirement for training will be significantly  
19 lower.  
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#### 28 **Learning and Development Function Characteristics**

29 Finally, we highlight characteristics of the L&D function and the L&D role-holder that are important  
30 contextual influences.  
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35 **Maturity of the L&D Function and Use of Technology.** The maturity of the learning and development  
36 function will be important in explaining the types of L&D roles that are performed (Loon, 2016). For  
37 example, in the early stages of the development of the function, the focus will be on transactional-type  
38 roles (Gubbins & Garavan, 2009), whereas in the case of a more mature L&D function, the emphasis will  
39 be on strategic partner and transformational-type roles. These roles require a deep experience curve and  
40 the possession of a broad competency set which comes through operating for a considerable period of  
41 time. More mature functions will also have built up large networks and strong social capital within an  
42 organisation (Gubbins & MacCurtin, 2008). An important characteristic of an L&D function concerns the  
43 use of technology. L&D functions with greater usage of technology to deliver learning and development  
44 will be better positioned to implement strategic roles and make use of technology to perform  
45 transactional and operational roles.  
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3 **Characteristics of the L&D role-holder.** A number of individual characteristics of the L&D role-holder are  
4 important in explaining the type of L&D role that is performed in organisations. For example, the amount  
5 of business experience (Lounsbury, Steel, Gibson & Drost, 2008), experience of the learning and  
6 development function and the density of work experience are relevant. Quinones, Ford and Teachout  
7 (1995) refer to the developmental advantage provided by individual work experiences. The density of  
8 work experiences refers to the outcome of various roles and the corresponding amount of time spend in  
9 each role. This is considered a more accurate predictor of success than tenure in explaining the quality of  
10 foundational competencies and L&D expertise. Other individual characteristics highlighted include  
11 gender, age, personality traits and self-confidence (Wouters, Tesluk & Buyens, 2007; Maurer, Lippstreu &  
12 Judge, 2008).  
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### 22 **Internal Constituencies Perceptions of L&D Effectiveness**

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25 Consistent with multiple constituency theory, we focus on important internal constituents or stakeholders  
26 that will evaluate the effectiveness of the L&D professional: line managers, employees, senior managers,  
27 the CEO, and HR practitioners. These stakeholders will evaluate content, process and outcome dimensions  
28 of L&D (Ostroff & Bowen, 2016). The content dimensions focus on the “what” of L&D and include policies,  
29 practices and systems that focus on the development of employees. Stakeholders will have visibility or  
30 experience of these practices or policies. Senior managers and executives will evaluate their effectiveness  
31 in meeting the needs of business strategy, whereas line managers will focus on the relevance of these  
32 practices to the short and medium term needs of individuals and teams (Aguinis & Kraiger, 2009).  
33 Employees will assess the content of L&D practices with respect to how they address their learning and  
34 development needs. The process dimension of L&D focuses on how well practices are implemented.  
35 Stakeholders will utilise a variety of criteria to assess effectiveness including costs, timelines and quality  
36 of delivery. Stakeholders will also evaluate the outcome dimensions differently. For example, employees  
37 will focus on evaluating the employability outcomes of L&D whereas line managers will focus on  
38 performance improvements (Ulrich & Dulebohn, 2015). Senior managers and executives will be interested  
39 in how L&D enhances capability and competence of the organisation. In light of these differing outcome  
40 priorities, L&D practices will have different targets. Therefore, L&D will be evaluated on how it enhances  
41 the competence and ability of employees and workers. This means developing the right skills, in the right  
42 place, at the right time. L&D will therefore be fundamental to ensuring that these skills are effectively  
43 developed in a timely manner. L&D will also be expected to contribute to organisational capability. Ulrich  
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3 & Dulebohn, (2015) define organisational capabilities as what the organisation is known for and represent  
4 what the firm can do. Learning and development practices can be used to develop capabilities in the areas  
5 of innovation, agility, scaling up and creativity. In recent times, the focus of L&D has shifted to the  
6 development of leadership competencies and brand, which will be of particular concern for senior and  
7 executive management within an organisation (Garavan *et al.*, 2016).  
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13 Stakeholders, in particular CEOs and senior executives, will be concerned with the value or return from  
14 their investments in L&D. In this respect, L&D practitioners have not effectively accounted for the return  
15 on training investments. The reality is that investments in training take time to accrue (Bassi & McMurrer,  
16 2004), and L&D specialists have not made a good case of articulating that investments in L&D represent  
17 investments, not costs (Osterman & Weaver, 2014). The Society for Human Resource Management in the  
18 USA, for example, have suggested that firms should clearly isolate the extent of investments in training  
19 but do not go as far as suggesting that training expenditures should be treated as a depreciable asset on  
20 the balance sheet.  
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### 26 27 28 **L&D Roles and Competencies** 29

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32 Despite the importance of L&D practitioners in organisations, there is dearth of research on these roles  
33 and competencies. The literature suggests a variety of roles, including change agents (Lawler & Mohrman,  
34 2003), strategic business partner roles (Galang & Osman, 2016), course designers (Nadiv *et al.*, 2017),  
35 direct deliverers of training (Loon, 2016), and project managers of learning projects (Ulrich, Brockbank &  
36 Johnson, 2008). Gubbins & Garavan (2009) highlighted that L&D roles will differ in terms of whether they  
37 are focused on transactional or transformational L&D activities, whether they are short- or long-term in  
38 focus and whether they view the relationship with the client or customer as one- or two-way. These roles  
39 range from a passive provider of training solutions, to an internal consultant and change agent, to a  
40 strategic business partner and transformational change agent. These roles require different competency  
41 requirements. The number of studies on the competencies of L&D professionals is also sparse with the  
42 majority of research on the competencies of HR practitioner, however, it is possible to glean from these  
43 some of the core or priority competencies. For example, research by Khatri (2006), Ulrich (1997), Ulrich,  
44 Brockbank, Ulrich & Kryscynski (2015) and Long, Wan Ismail & Amin (2013) highlight competencies that  
45 are relevant to L&D practitioners. These primarily emphasise business knowledge, relationship skills,  
46 expertise in learning and development, strategic and cultural management and the management of  
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3 change. However, it should be highlighted that the relevance of these competencies is contextually  
4 determined. Dimensions of context that are relevant include size of the organisations, the sector in which  
5 the organisation operates, the geographic location of the organisations, its level of technological  
6 complexity, and characteristics of employees which we considered earlier in this monograph.  
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11 **Business and Strategic Knowledge.** The literature highlights the important role of business and strategic  
12 knowledge to strategic business partner and change agent roles (Boselie & Paauwe, 2004; Ulrich *et al.*,  
13 2015). Dimensions of business knowledge include business processes, the external environment, value  
14 chains, organisation structures and systems. Research also highlights the importance of L&D practitioners  
15 having functional knowledge components in areas such as finance, marketing, and operations (Heisler,  
16 2003). L&D practitioners are required to understand the organisation's strategy, the organisation's  
17 business model, its organisational capabilities, and its dynamic capabilities (Garavan *et al.*, 2016).  
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25 **Cultural Management and the Management of Change.** L&D practitioners are increasingly required to  
26 work as change agents and, as a consequence, they need to understand organisational change processes,  
27 the process of culture formation, development and change (Ulrich *et al.*, 2015). Dimensions of this group  
28 of competencies include managing the culture of the organisation, creating a learning culture, working as  
29 a change agent to bring about transformational change and encouraging creativity and innovation. Ulrich  
30 & Brockbank (2005) envisaged that change agent role would be part of the strategic business partner role.  
31 However, while learning and development practitioners highlight that they perform strategic partner roles  
32 they do so at a much more operational level (Nadiv *et al.*, 2017). Competencies important to performing  
33 a change agent role include understanding of change management processes and tolerance of ambiguity.  
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42 **Relationship Building, Networking and Collaboration Competencies.** L&D practitioners are expected to  
43 undertake considerable amounts of networking with stakeholders in organisations. Therefore, they need  
44 to possess the competencies to build effective relationships (Boselie & Paauwe, 2004). Studies of HR  
45 practitioners with responsibility for learning and development highlight the importance of social skills, the  
46 skills to collaborate effectively across and outside of the organisation (Loon, 2016; Long *et al.*, 2013) and  
47 to develop strong, trust-focused relationships with line managers, employees and senior management.  
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53 **Learning and Development Expertise.** The possession of learning and development expertise is  
54 highlighted in several studies (Werner & DeSimone, 2009; Ketter, 2006). Garavan (2019) found that  
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3 learning and development specialists required L&D expertise in three areas: knowledge of the process of  
4 designing, developing delivering and evaluating learning and development programmes; the management  
5 of the learning and development function; and the implementation of organisation wide learning and  
6 development projects. Other studies have highlighted the importance of a knowledge of learning theory  
7 and the skills to create a learning climate (Loon, 2016; Long *et al.*, 2013).  
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13 In summary, consistent with contingency, multiple constituency and role theories, we highlighted a) the  
14 contextual factors that impact L&D professional roles in organisations, b) the strategic and operational  
15 roles that L&D professionals perform in organisations, c) the multiple and different expectations that  
16 internal stakeholders have of the L&D role and d) the combinations of generic and L&D expertise that  
17 professionals require to be effective in their roles. Learning and development professional roles are  
18 shaped and influenced by a number of external and internal contextual contingencies and these will be  
19 salient in explaining the importance of the role and the competencies required and effectiveness of role  
20 performance. Our review of the literature highlighted three external factors (sector, industry growth and  
21 dynamism) and five internal factors (organisation size, strategy structure, technological and knowledge  
22 intensity) and three dimensions of the L&D function (the maturity of the L&D function, the use of  
23 technology and demographic and human capital characteristics of the L&D role-holder). We focused on  
24 five internal constituents or stakeholders – CEOs, senior management, line managers, employees and L&D  
25 professionals - because the literature highlights that they use different criteria when evaluating the  
26 effectiveness of the L&D role. The literature highlights that L&D professionals perform a combination of  
27 strategic and operational roles in organisations and these require different configurations of foundational  
28 competencies and L&D expertise. Overall, there is a scarcity of literature on the L&D roles in organisations  
29 and competency requirements. Therefore, researchers have to draw in the HR role competency literature.  
30 However, this may not be a good fit due to the unique dimensions of L&D as a professional role and the  
31 distinct sets of expertise that are required to perform the role.  
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## 46 **RESEARCH METHODS**

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50 To address our research questions, we gathered data using multiple data sources. Our analysis is based  
51 on data gathered during 2016 and 2017 with organisations within Ireland, UK, Europe and the USA. We  
52 purposely selected organisations that differed on key contingency factors including sector, geographic  
53 location, firm size, type of business, and characteristics of the L&D function.  
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### Study Participants

The profile of the study participants differed for the three data collection methods used in this study.

**Survey.** We derived data from a sample 125 firms and 280 individual business units. Within each organisation, we collected data from L&D specialists (where one existed or the individual with responsibility for learning and development), employees, line managers, senior managers and CEOs. We received 440 usable responses from 175 L&D practitioners, 25 HR practitioners with responsibility for learning and development, 75 line manager and supervisors, 120 employees, 25 senior managers, and 20 CEOs. The sample of organisations included in the survey, in terms of sector, were as follows: manufacturing (30 %), service organisations (45%), public and semi-state organisations (15%), and not for profit (10%). In terms of location of operations, 56% of organisations were domestic and 44% had international operations. In terms of organisation size, 15% of respondents came from small organisations (10-49) employees, 45% from medium sized organisations (50 to 249), and 40% from large firms (200+ employees). In terms of ownership, 40% were US-owned, 21.5% were European, 23% were Irish-owned, 12.5 % were UK-owned and 2% were Asian. 20% percent of respondents employed 1000+ employees. In terms of the existence of a training function, 30% of organisations did not have a formal training function or L&D role, 15% had a learning and development specialist, and 65% of organisations had an L&D function. All international organisations involved had either a formal L&D role and/or function in existence.

The sample of survey respondents has the following characteristics. L&D and HR practitioners had an average age of 37.6 years, they were predominantly female (75%) they had an average organisational tenure of 12.65 years and an average tenure in the L&D /HR profession of 14.25 years. The employees who responded to the survey had an average age of 31.25 years, they were 55% male and 45% female, that had an average organisational tenure of 11.15 years and a job tenure of 6.25 years. Line managers had an average age of 34.76 years and they were 62% male and 38% female, they had an average organisational tenure of 16.41 years and a job tenure of 8.36 years. Senior managers and managing directors had an average age of 39.54 years, they were 81% male and 19% female, and they had an average organisational tenure of 16.68 years and an average job tenure of 10.16 years. Table 1 summarises characteristics of the study sample.

**INSERT TABLE 1 HERE**

**Delphi Method.** Respondents to the Delphi study consisted of 55 L&D academics and 70 L&D practitioners. The profile of L&D/HRD academics in terms of country of origin were as follows: US (25%), UK (20%), Europe (15%), Asia (35%) and Australia (5%). Forty-five percent of academic respondents were female and 55% were male. The profile of L&D practitioner respondents was as follows: 75% performed L&D roles in Ireland and 25% performed international or global roles. Forty-five percent were male and 55% were female with an average tenure in the L&D role of 9.65 years. Twenty percent of respondent were senior executive level L&D practitioners, 65% were senior or middle level practitioners and 15% were in junior L&D roles. Practitioner L&D came from a variety of organisations with 55% from service organisations, 25% from manufacturing and 15% from public sector and semi-state organisations and 5% from not for profit.

**Semi-structured interviews.** We conducted interviews with 30 L&D practitioners. Fifty-five percent were from service sector organisations, 25% were from manufacturing and 20% were from the semi-state and public sector organisations. In terms of gender profile, 55% were female and 45% were male. The average L&D job tenure was 14.25 years. The average age of respondents was 36.25 years. Thirty percent of respondents were executive or senior level L&D professionals, 55% were middle level specialists and 15% were junior level L&D professional.

### **Data Collection Methods**

**Survey:** We administered a cross-sectional survey to gather data from L&D professionals and other stakeholders on context, L&D roles, competencies and perceived organisational effectiveness. We also collected data on a variety of contingency factors relevant to our analysis. We utilised a purposeful sample given the requirement to achieve a multi-respondent view of L&D on each of the study organisations. We surveyed 275 organisations and received a full set of respondents from 125 organisations. Appendix 1 summarises the main measures included in our survey, which formed the basis for the regression analyses. We achieved a response rate of 45%.

**Semi-Structured Interviews:** We conducted semi-structured interviews with 30 key informants who were L&D professionals in a variety of industry and service contexts and a variety of organisations in terms of size and characteristics of the L&D function. We utilised data from the semi-structured interviews to develop insights on: (a) the study participants career in learning and development; (b) the commitment of the L&D practitioner to learning and development; (c) the career trajectory of the L&D specialist prior to and within the learning and development role; (d) the positioning of the L&D practitioner within the

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3 organisation and its advantages and limitations, and (e) the future career aspirations of the L&D  
4 practitioner. Appendix 2 summarises the key themes and issues investigated in the semi-structured  
5 interviews.  
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9 **Delphi Study:** We utilised the Delphi method to gain insights on the most important competencies for  
10 L&D practitioners over the next five years. Learning and development competencies are typically  
11 identified utilising job or task analysis or through expert panels, the critical incident method and  
12 behavioural event interviewing (Russ-Eft, 1995). In this study, we used a panel of academic experts and  
13 practitioners consisting of two rounds of data collection and analysis (Okoli & Pawlowski, 2004). This  
14 method has been used in a HR context previously. For example, Coetzer & Sitlington (2014) utilised a  
15 similar approach in revising and updating strategic HR curriculum. Barrena-Martinez, López-Fernández &  
16 Romero-Fernández (2017) used the Delphi method to identify a configuration of socially responsible HRM  
17 policies and practices. Delphi panels are considered to have strengths in gathering expert opinions, thus  
18 ensuring that no one individual dominates the debate. It therefore reviews the possibility of biased  
19 assessments by maintaining the anonymity through an email process.  
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28 Given the limited number of studies that have empirically investigated the competencies of L&D  
29 professionals, we judged the Delphi method to be an appropriate method for generating and validating  
30 competency lists. We utilised a quantitative / qualitative approach utilising a structured questionnaire.  
31 Following Landeta (2006), we proceeded through four stages:  
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35 ● First, we conducted a review of the literature, industry reports and analysis of L&D curricula to  
36 identify a list of competencies. We generated a list of 50 competency dimensions.  
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- 38 ● Second, we developed a set of criteria to select both academic practitioner experts. We selected  
39 a list of 60 academic experts that we generated from lists provided by UFHRD and AHRD. We  
40 selected academic experts according to their academic experience of L&D: (a) academic teaching  
41 and research experience of more than five years, (b) active participation in the past five years at  
42 conferences, seminars and workshops at a national and international level; (c) publications of  
43 impact in the field of learning and development, and (d) participation as reviewers, editorial  
44 boards and editors in international L&D publications. We are confident that this filter ensured  
45 that the knowledge of the academic experts about L&D was up to date. We selected 100 L&D  
46 practitioners using two lists – the IITD membership list and a list generated by Garavan *et al.*  
47 (2016). We used the following criteria in selecting L&D practitioners: (a) significant experience of  
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3 L&D of more than five years, (b) experience at national and/or international level and (c)  
4 membership of a professional body such as IITD, CIPD.

- 6 • The third and fourth stages involved the development and launch of the questionnaire. The  
7 questionnaire was divided into four parts. The first part consisted of the list of 50 L&D  
8 competencies and study participants were asked to rate their importance for L&D in the next five  
9 years using a 5-point Likert type scale where 1 = not important to 5 = very important. Part 2 asked  
10 respondents to identify up to five of the list of 50 competency dimensions that they considered  
11 essential, and Part 3 asked participants to identify up to five of the list of 50 competency  
12 statements that they considered not essential for future L&D professionals. In Part 4, we asked  
13 respondents to identify up to 10 competency dimensions that they considered important but  
14 were not included in the original list of 50 competency dimensions. This questionnaire was  
15 administered through two rounds. The purpose of these two rounds was to reach a consensus of  
16 both academic and practitioner experts about two filter criteria (a) whether an L&D competency  
17 dimension is considered a component of L&D effectiveness and (b) whether each L&D  
18 competency dimension should be kept as an element of an L&D competency framework. In the  
19 first round we achieved responses from a total of 65 academics and 95 practitioners. Following  
20 Hsu and Sandford (2007), we used a consensus of 80% or higher among experts and practitioners  
21 was considered acceptable to consider inclusion of the dimension in the second round. We  
22 included 40 of the statements from the initial list in the second round. In the second round, we  
23 added an additional 40 statements based on feedback from qualitative feedback. We achieved  
24 responses from 55 academics and 70 practitioners. We then analysed the data and retained 70  
25 statements that reached the 80% agreement level. We then factor analysed these statements and  
26 they broke down into seven categories: four foundational competencies and three L&D areas of  
27 expertise.  
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## 47 **Data Analysis**

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49 **Survey:** Three statistical steps were deployed to analyse the survey responses. First, items capturing the  
50 ten L&D role dimensions were subjected to scaling analysis to test internal consistency. Second,  
51 exploratory factor analysis using a principle component extraction method with an oblique rotation were  
52 applied to the foundational competency and L&D expertise items. Since our L&D roles measure was  
53 adapted from Ulrich (1997), we therefore used CFA to confirm that our revised questionnaire exhibited a  
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3 ten-dimensional structure. We used CFA at the individual level over the 100 items on L&D roles. The  
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5 Goodness-of-Fit indices were accessible. The discrepancy / df (CMIN/DF) index is 2.82, which is considered  
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7 acceptable (Carmines & Mclver, 1981). We found a normal fit index of 0.95, which is considered  
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9 acceptable (Kline, 2015). The relative fit index (RFI) and incremental fit index are 0.95 and 0.97  
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11 respectively. Both values are acceptable. The comparative fit index (CFI) is 0.95 which is above the 0.90  
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13 acceptable range. The root mean square error of approximation (FMSEA) of the model is 0.071 which is  
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15 acceptable. Overall, we concluded that the model fit for the ten-dimension L&D roles was acceptable.  
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17 Lastly, we conducted regression analysis to assess the contribution of the a) assess the predictors of both  
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19 strategic and operational roles in organisations and b) the relationships between foundational  
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21 competencies and areas of L&D expertise and L&D roles, contextual predictors and perceived L&D  
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23 effectiveness. As proposed by Meyers, Gamst & Guarino (2012), the data were first checked by reviewing  
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25 the descriptive statistics, inter-item correlations and other assumption violations. The study minimised  
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27 the potential for common method variance by administering an anonymous survey, ordering questions to  
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29 encourage each to be answered separately and without reference to the previous question and scales  
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31 used different numbers of scale items. We computed descriptive statistics reporting means, standard  
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33 deviations, ANOVA and T-tests. The number of respondents varies from table to table because  
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35 respondents did not answer all of the questions in all cases. Given the level of responses to the survey,  
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37 we are 95% confident that the results are applicable to L&D professionals in general with a margin of error  
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39 of approximately 5%.  
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## RESULTS

We first report the descriptive findings on contextual influences including: a) external influences and L&D responses to these changes; b) current and future strategic and operational priorities facing organisations; c) L&D involvement in influencing key trends driving organisational change; d) the use of data analytics and technology by L&D professionals. Second, we report findings on how internal stakeholders perceived the effectiveness of L&D in organisations. Third, we report our findings on L&D roles, career levels, career transitions, foundational competencies and areas of L&D expertise. We then present our analytical findings which investigate the relationship between a) contextual factors and L&D roles, b) contextual predictors, foundational competencies / L&D expertise, L&D roles and perceived L&D effectiveness.

### Descriptive Findings

#### External and Internal Contextual Influences Impacting L&D Professional Roles

Table 2 summarises the key external context factors that will impact learning and development over the next 5 years.

**INSERT TABLE 2 HERE**

The data reveals that changes in the economic landscape represent the most significant external factor that will impact organisations and by extension the L&D profession. Other significant changes include changing business models, 24/7 work, changing demographics and new generations, changing notions of carers and international talent mobility. Our analysis indicates that there are differences in terms of these external factors when analysed by firm size. Small firms were primarily focused on changes in the economic landscape, the demand for flexible work and work-life balance and the influence of social media and communication. In contrast, large firms are primarily focused on the impact of changing business models, international talent mobility, changing demographics and new generations, and the emerging gig economy and new forms of contracting. Medium-sized firms are primarily concerned with changes in the economic landscape, the demand for flexible work and work-life balance and changing business models. We found significant Anova for each external actor investigated in our study. Study respondents reported different perceptions when it came to understanding the impact of the trend on the organisation. Trends that were perceived positively included the demand for flexible work practices and work-life balance,

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3 social media and communication, advanced technology and artificial intelligence, globalisation and off-  
4 shoring and new ways of delivering learning. External factors that were perceived as negative in terms of  
5 impact were changes in the economic landscape, changing business models, international talent mobility,  
6 the gig economy and new forms of contracting. Table 3 summarises the current and future internal  
7 challenges facing organisations.  
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19 Study respondents highlighted significant current and future strategic and operational challenges facing  
20 organisations. The most significant current challenge related to the management of costs, the need for  
21 enhanced organisational agility and flexibility, the achievement of productivity gains and the adaption of  
22 new technologies. In terms of significant future challenges, the analysis revealed that many of the current  
23 challenges will persist in the future. We found significant statistical differences between perceptions of  
24 current and future internal challenges with all of these challenges increasing in magnitude. The  
25 management of costs is also the most significant future challenge, followed by the need to adapt new  
26 technologies. We also found significant statistical differences by firm size in terms of current and future  
27 strategic and operational challenges. For small firms, the most significant current and future challenges  
28 are the management of costs and the achievement of productivity gains. For medium-sized firms, the  
29 management of costs is an important current and future challenge in addition to managing and developing  
30 talent, the adoption of new technologies and enhancing organisational agility and flexibility. Large firms  
31 are majorly concerned with enhancing organisational agility and flexibility, the management and  
32 development of talent and the adoption of new technologies.  
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50 Table 4 summarises the perceptions of both L&D professionals and other stakeholders of the potential  
51 and skill of L&D influence these external factors. The data analysis reveals that both sets of stakeholders  
52 differ in their perceptions of the potential of L&D to influence and their skills to influence. We found  
53 statistically significant differences. Overall, L&D professionals have more positive perceptions of the  
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3 capability of L&D to influence external factors. Similar trends are in evidence for skills to influence. L&D  
4 professionals perceive that they both have the potential and skill to influence developments in social  
5 media and technology, new ways of delivering learning and responding to changing notions of careers. In  
6 contrast, both sets of stakeholders have less potential and skills to respond to changes in the economic  
7 landscape and advances in technology and artificial intelligence.  
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### 11 12 13 14 **Use of Data Analytics and Technology by Learning and development Professionals**

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17 We explored several dimensions of data, analytics and technology including the use and quality of  
18 evidence to make decisions, the use and level of sophistication of L&D analytics, the use of L&D  
19 technology, the attributes of effective L&D technology, current use of L&D technology and the use of  
20 learning management systems. Learning and development professionals are less sophisticated in their use  
21 of evidence to make decisions about learning and development. Table 5 summarises the key trends.  
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28 **INSERT TABLE 5 HERE**  
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34 There is a strong reliance on the use of personal experience irrespective of the size of the firm; however,  
35 it is most prevalent in small firm. Small firms are also more likely to rely on intuitive approaches, advice  
36 from colleagues and the values and concerns of people influenced by the decisions. In contrast, large firms  
37 make significantly more use of insights provided by professional bodies and external experts, data facts  
38 and insights derived from management information systems and knowledge acquired through training  
39 and education activities. In terms of perceptions of the quality of the evidence, small firms perceive the  
40 more informal and intuitive approaches to be more effective and place less value on evidence derived  
41 from more formal sources. In contrast, we found that large firms perceive the quality of formal sources of  
42 evidence to be better. These include data derived from management information systems and insights  
43 derived from professional bodies and external experts. Overall, we found statistically significant  
44 differences between small, medium and large firms when it comes to the use of evidence to inform L&D  
45 decision making.  
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54 The use of analytics has emerged as an important topic in HR, therefore, we investigated both the usage  
55 and level of sophistication of usage of L&D analytics by professionals. Table 6 summarises the key trends.  
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**INSERT TABLE 6 HERE**

Overall, we found very little evidence of L&D analytics by small firms, thus the level of sophistication is extremely low. In the case of medium-sized firms, we found some use of L&D analytics in areas such as L&D planning, career planning and development, training activities and participation and workforce knowledge skills and capabilities. Large firms are significantly more likely to gather data on investments in formal training, L&D planning, workforce knowledge, skills and capabilities, career planning and development, employee engagement and well-being and training activities and participation. We also found statistically different differences in the sophistication of use by firm size. Large firms reported significantly higher levels of sophistication than small and medium-sized firms. We explored the use of L&D technology by firm size and maturity of the L&D function along three dimensions: satisfaction, confidence and importance. Table 7 summarises our findings.

**INSERT TABLE 7 HERE**

Overall, our findings reveal a mixed picture when it comes to satisfaction with L&D technology. However, satisfaction levels vary by firm size and maturity of the L&D function. Large firms reported greater satisfaction and firms with more mature L&D functions reported higher levels of satisfaction. The trends on confidence in current L&D technology also varied by firm size and maturity of the L&D function. Medium sized firms reported higher levels of confidence and the greater the maturity of the L&D function, the higher the levels of confidence reported. Small firms and those with L&D functions that were new, attached significantly less importance to the use of L&D technology. Large firms and those with mature L&D functions attached significantly higher levels of importance to L&D technology. Table 8 summarises the key trends for usage of technology.

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3 Where organisations make use of L&D technology, they do so for transactional rather than  
4 transformational purposes. Usage by small firms is very minimal and firms with new L&D functions make  
5 less use of technology. Medium and large firms are more likely to make use of L&D technology to monitor  
6 training attendance, programme scheduling and registration, learning assessment, testing and content  
7 distribution and reporting and training analytics. Medium and large firms are less likely to make use of  
8 L&D technology for content library and curation, branding and intellectual property content security and  
9 content creation. Our findings do, however, reveal that the maturity of the L&D function is an important  
10 factor explaining the use of L&D technology. In firms with an L&D function that is highly mature, there is  
11 evidence of significantly greater usage of L&D technology for multiple purposes. We also explored the  
12 attributes of effective L&D technology; however, we found significant differences in perceptions  
13 depending on firm size, whether the organisation had a dedicated or non-dedicated L&D function and the  
14 maturity of the function. Table 9 summarises the main findings.  
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31 Attributes of L&D technology that were most valued included technology that facilitated collaboration,  
32 had mobile capability and has strong systems integration with other HR systems. Smaller firms placed  
33 more emphasis on using technology to foster collaboration; whereas large firms placed more emphasis  
34 on system integration with other HR systems, the extent of user interface and mobile capability. Firms  
35 with a dedicated L&D function valued characteristics such as collaboration, mobile capability and systems  
36 integration with other HR systems. The maturity of the L&D function has an important role to play in how  
37 L&D professionals perceive the attributes of effective L&D technology. Firms with L&D functions described  
38 as highly mature, emphasised multiple attributes of L&D technology. The final dimension of technology  
39 that we investigated concerned the use of learning management systems. Table 10 summarises the  
40 trends.  
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3 In general, L&D professionals have negative perceptions of learning management systems. For small firms,  
4 the major issues are getting employee buy-in to use and the lack of a blended approach. Medium-sized  
5 firms emphasised lack of integration with other organisational systems, unclear technology and securing  
6 employee buy-in for use. Large firms had overall less negative perceptions of the use of learning  
7 management systems, as are firms with a dedicated L&D function and one that is rated highly mature.  
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## 14 **L&D Roles, Career Levels, Foundational Competencies and Areas of Expertise**

### 15 **L&D Roles in Organisations**

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19 We derived data on coverage of L&D roles and their quality from the cross-sectional survey. However, in  
20 order to understand the complexity of roles in organisations, we concluded interviews with 30 L&D  
21 practitioners to identify the potential scope and content of different roles. This data collection process  
22 identified five strategic and five operational roles that L&D professionals perform in organisations. We  
23 generated dimensions of each role and include them in the survey. We found a number of key trends on  
24 the frequency of these roles in organisations. The data reveals that thirty-five percent of firms implement  
25 a strategic partner type role. This role operated in a variety of ways in organisations, but included a  
26 number of elements: providing L&D support to employees and line managers within a specific business  
27 unit, providing L&D advice to senior business leaders within business units and some combination of  
28 business consulting with the aspiration to be strategic. Twenty percent of firms implement what we  
29 describe as 'pure strategic roles' such as learning and development strategies for manager of learning  
30 projects. These two roles were typically found in large multinational organisations and their activities were  
31 strongly aligned with the strategic priorities of the business unit or corporate functions. They typically  
32 executed strategic type L&D activities such as strategic development of the organisation, the professional  
33 coaching of senior leaders and organisational change consulting. We found that 52% of organisations  
34 implemented a training manager role. We categorised this role as strategic but acknowledge that it  
35 contained operational management elements such as the management of L&D resources and designs,  
36 L&D solutions that enhance the strategic capabilities of the organisation. Sixty-two percent of  
37 organisations had a learning and development specialist role. This role was conceptualised as strategic  
38 because the role holder designs quality training interventions and strategies that enhance capacity and  
39 contribute to organisational performance outcomes.  
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**INSERT TABLE 11 HERE**

Table 11 summarises multiple stakeholders' perceptions of the quality of L&D roles in organisations. Stakeholders differed in their perceptions of the quality of these roles. Overall, stakeholders rated the quality of the pure strategic roles to be the most effective, however, they were found in only 20% of organisations. The strategic partner role was perceived as the least effective in organisations. The data also revealed that stakeholders differed in how they perceived the quality of L&D roles. For example, L&D professionals reported more positive perceptions than any other stakeholder. We found statistically different differences across the majority of the role dimensions. The data indicates that line managers had as a group less positive perceptions of all roles, followed by employees. Senior managers and CEOs were relatively more positive. We also found that perceptions of the quality of L&D roles differed by a number of contingency factors.

The data reveals that L&D operational roles are more common in different types of organisations. Sixty-two percent of organisations implemented a production or product trainer role; 25% of organisations had technical trainer roles, 15% of organisations had instructional designers, 10% of organisations had instructional technology and media specialist roles, and 90% of organisations had L&D administrator type roles. Stakeholders had much more positive perceptions of the quality of operational L&D roles compared to strategic L&D roles. Four operational trainer roles were perceived as almost equally effective. Two of these roles – learning technology and media specialist and instructional designer roles are less common in organisations, however, they were rated the most effective. In contrast, the production / product trainer roles and the training administrator roles are found in a large number of organisations and are perceived to be effectively implemented. We found fewer significant differences in perceptions across stakeholders concerning the quality of operational L&D roles. However, L&D professionals rated the five roles to be more effective than other stakeholders. In general, senior managers / CEOs and employees had much more positive perceptions of operational L&D roles compared to strategic ones. Line managers in general had less positive perceptions of the operation of operational L&D roles. Table 12 summarises the key findings by stakeholder group.

**INSERT TABLE 12 HERE**

We also found some significant differences in perceptions of the quality of operational L&D roles by contextual factors. In general, operational L&D roles were more effectively performed in organisations with mature L&D functions, in organisations that have multinational operations and in private sector organisations. We found fewer differences between manufacturing and service sector organisations.

### **L&D Careers in Organisations**

We investigated the careers of L&D professionals through data derived from the semi-structured interviews. Our analysis generated four distinct career levels and associated transitions. Table 13 summarises the task characteristics, typical roles, the focus of the level, measurement of effectiveness, the foundational competencies / L&D expertise balance / where time is spent and the development and transition to next level issues.

**INSERT TABLE 13 HERE**

**Early Career Level.** The early career level is primarily focused on operational training role dimensions. The L&D professional who operates at this level will typically be a technical trainer, a product/production trainer or a learning and development administrator. These roles are typically defined as focused on delivering 'nuts and bolts' L&D and include direct training, providing information training support, managing basic training data and responding to immediate and ongoing needs. The foundational competencies / expertise requirements at this level focus predominantly on L&D specialist's expertise and a majority of the time will be spent on delivering L&D solutions to address immediate and specific L&D issues. The key measures of effectiveness appropriate at this career level emphasise timely delivery, the soundness of advice, flexibility in meeting the needs of the client and satisfactory resolutions of L&D problems. The transition to the next level of the career hierarchy involves four fundamental shifts:

- A move away from the short-term and immediate focus to more medium-term L&D issues.
- The need to take a broader and wider view of L&D issues and the requirement to work beyond work unit boundaries.

- A significant shift in the skill mix and greater focus on developing broader personal and interpersonal skills, while also developing a deeper level of L&D knowledge and expertise.
- A move away from working solo to working in a collaborative fashion and working through others.

**Mid-Career L&D Level.** The mid-career level is more focused on being in L&D generalist or performing an experienced specialist role. Our interviews suggest that L&D roles that operate at this level include a professional L&D specialist, an experienced L&D administrator, a learning and technology media specialist and an instructional designer. These roles vary in complexity; however, at the mid-career level the focus is on the development of L&D solutions to address a multiplicity of L&D problems, the provision of flexible options and recommendations, the management of resources and the use of specialist expertise to provide customised and personalised L&D solutions. The work of mid-career professionals will typically be issue-led and emphasise the short to medium term. These role requirements will require a relatively equal balance of generic or foundational competencies and specialist L&D expertise. The relationship with the customer or client will typically emphasise a mixture of operational and mid-strategic L&D issues with a focus on selecting L&D solutions that are cost effective and a strong fit with the needs of the client. Effectiveness will typically be measured in terms of flexibility and agility to deliver L&D solutions, the soundness of the advice provided and solutions developed, the efficient and timely delivery of L&D solutions. The transition to the next career level will require four significant shifts:

- A major shift to address increasingly complex operational and strategic L&D issues.
- A greater emphasis on building relationships with a broad range of stakeholders and the adaption of a long-term perspective.
- Significant enhancement of skills to include greater understanding of the business, the development of strategic skills and less reliance on technical or specialist L&D expertise.
- A move away from being able to make decisions quickly towards coping with ambiguity and thinking strategically.

**Senior L&D Career Level.** The senior L&D career level is typically focused on addressing L&D challenges at organisational level and the management of conflicting L&D priorities within budget and expertise constraints. The strategic business partner, professional L&D specialist and learning and development manager roles will typically operate at this level. Our interviews with L&D professionals emphasise that the roles that operate at this level will spend a considerable amount of time understanding functional and business requirements, developing innovative L&D solutions, networking with internal and external stakeholders and managing line and specialist relationships and working across organisational boundaries.

The competency expectations at this level primarily emphasise foundational competencies rather than L&D specialist expertise. The relationship with the client will typically be a complex long-term one with the L&D professional required to perform consultant, strategic business partner and professional coach role dimensions. The L&D professional at this level will have to be both reactive and proactive but will typically not have a seat at the senior table. Effectiveness will be measured using a variety of metrics some quantitative and others qualitative. The qualitative dimensions will emphasise trust, responsiveness, strong relationship building and the effective utilisation of L&D resources. The quantitative dimensions will focus on the bottom line contribution to individual, team and organisational performance. The transition to the next level will involve four major shifts in terms of tasks, perspectives, skillset and what must be left behind.

- A significant move to addressing long-term complex, strategic problem-solving and the development of strategic relationships.
- The requirement to operate in an increasingly independent way and have high visibility within the organisation.
- The development of a deeper understanding of the external environment, strategic level business partnering skills and strong transformational leadership.
- A major move away from the operational to the strategic and relinquishing the need to be technically competent.

**Executive L&D Career Level.** The executive L&D career level will involve the L&D professional operating at the most strategic level in an organisation with oversight for all L&D activities. The relationship will be with the leadership team and the role holder will frequently have a seat at the top table. L&D professionals who operate at this level will be learning and development strategies, the manager of major learning projects and strategic business partners who focus solely on strategic L&D issues. The executive L&D career level requires the job holder to spend a considerable amount of time understanding organisational and industrial realities and development of L&D strategies and solutions. The skill balance will draw very heavily on foundational business and management competencies with significantly less reliance on L&D expertise. A major challenge for L&D professionals who operate at the executive level will involve gaining commitment for strategic L&D including resource investments, challenging the top team to address L&D change issues, helping the senior team to both formulate and implement strategies and focusing on the alignment of L&D with the needs of strategy and the external environment. The measures of effectiveness will focus on contribution to organisational performance, the effectiveness of organisational change

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3 initiatives, the effectiveness of the L&D professional at the top table and the organisations reputation and  
4 ability to attract talent. The development issues for the executive L&D professional to transition to a  
5 senior VP role within the organisation involve:  
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- 9 ● The deepening of strategic and business knowledge and enhancement of skills to contribute to  
10 strategic formulation and implementation.
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- 12 ● The continued development of a global mind-set, an external focus and the deepening of skills to  
13 work collaboratively in strategic partnerships.
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- 15 ● The skills to manage at the boundaries of the organisation the handling of multiple diversities and  
16 the implementation of strategic projects that make an impact on how the business operates.  
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### 19 **L&D Professional Foundational Competencies**

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21 We derived insights on L&D professional competencies form both the Delphi study and follow up surveys.  
22 We conceptualised foundational competencies as generic personal, interpersonal managerial and  
23 business competencies that are necessary but of themselves sufficient to perform an L&D role within an  
24 organisation. We categorised the foundational competencies into personal, interpersonal, management  
25 and business competencies. We surveyed stakeholders' perceptions of the quality of these perceptions  
26 and the roles to which they apply.  
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- 33 ● Business foundational competencies focus on understanding business issues, wider external  
34 trends, corporate level strategic issues, customer expectations, financial acumen and how L&D is  
35 linked to strategic HRM within organisations.
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- 37 ● Management foundational competencies focus on the use of data and information designing and  
38 implementing management processes, managing people and resources, leveraging resources  
39 from different sources and working effectively within management structures.
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- 41 ● Interpersonal foundation competencies focus on relationship management, engaging with  
42 stakeholders, negotiating solutions, developing networks and professional connection,  
43 influencing, working across cultures and team working.
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- 45 ● Personal foundational competencies focus on attributes and characteristics of role holders, their  
46 values, commitment and mind-sets.  
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52 Table 14 summarises the perceptions of quality and the importance of the foundational competencies for  
53 each strategic and operational role.  
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8 We found that L&D professionals rated their strength on the four clusters of foundational competencies  
9 to be significantly higher than non L&D stakeholders. Our analysis reveals statistically significant gaps on  
10 business and management foundational competencies; however, there were gaps across the four clusters  
11 of foundational competencies. All stakeholders perceived that business foundational competencies were  
12 important for strategic L&D roles but significantly less important for operational L&D roles. Business  
13 foundational competencies become more important at higher L&D career levels. The data reveals similar  
14 trends for managerial foundational competencies. They were of particular importance for strategic L&D  
15 roles and higher career levels, but were significantly less important for operational L&D roles and earlier  
16 career levels. Interpersonal foundational competencies were important for all strategic L&D positions find  
17 for all four L&D career levels. They differed in their importance for operational L&D roles. Interpersonal  
18 foundational competencies were important for both strategic and operational L&D roles and for the four  
19 career levels. Some of the intrapersonal foundational competencies were rated as less important for  
20 executive roles such as tactical awareness and the need to differentiate between the organisational and  
21 the personal.  
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### 31 **L&D Areas of Expertise**

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34 Our Delphi study identified three domains of L&D expertise that are central to the performance of multiple  
35 L&D roles. Diagnosing, designing and delivering L&D solutions focuses on a core component of L&D  
36 including the skills and expertise to diagnose organisational performance problems, select and design  
37 appropriate L&D solutions and implement them effectively within the organisation. The analysis reveals  
38 significant differences for the quality of these areas of expertise between managing measuring and  
39 evaluating L&D focuses on managing the L&D function within organisations and includes stakeholder  
40 management, adapting a strategic perspective, prioritising L&D, securing and managing L&D resources  
41 and measuring effectiveness. Managing knowledge and organisational change focuses on the  
42 management of organisational change, the skills to develop and enhance innovation in organisations, the  
43 management of knowledge and its curation, the management of strategic learning projects, the skills to  
44 work with external stakeholders to implement collaborative and strategic L&D projects.  
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### 56 **L&D Professionals and Non-L&D Stakeholders**

The most significant gaps were revealed for managing knowledge and organisational change and managing and measuring and evaluating L&D. Diagnosing, designing and delivering L&D expertise is important for both strategic and operational L&D roles and the four career levels. However, some of the design and delivery components were less important for senior and executive career levels such as the importance of learning styles, the key stages of design and delivering of L&D, the involvement of learners in the design process and the core principles of learning design. Managing, measuring and evaluating L&D areas of expertise were of primary importance for strategic L&D roles and for senior and executive career levels. They had relatively limited importance to operational L&D roles. Managing knowledge and organisational change areas of expertise were primarily of relevance to strategic type roles as strategic business partner, learning and development strategist and the manager of learning projects. They were perceived as essential for executive L&D career levels.

#### **Relationships between Contingency Factors, L&D Roles, Career Levels, Foundational Competencies and Areas of Expertise and Perceived L&D Effectiveness**

#### **Contextual Predictors of L&D Roles in Organisations**

We conducted regression analyses to identify the different L&D roles found in organisations. Table 15 summarises the key findings for strategic roles.

**INSERT TABLE 15 HERE**

The results indicate that each L&D role is influenced by different individual, organisational and L&D contextual level factors. We found two individual level factors that predicted the five strategic L&D roles: the density of work experience (L&D manager, .29; strategic business partner, .44; learning and development specialist .19; learning and development strategist, .57, and manager of learning projects, .64) and the L&D practitioners position in the hierarchy (L&D manager, .16; strategic business partner, .18; learning and development strategist, .18; learning and development specialist 12 and manager of learning projects .18) for both dimensions they were all significant at either  $p < 0.01$  or  $0.001$ .



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3 Organisational contextual factors were important in explaining several of the strategic L&D roles found in  
4 organisations. For example, the number of employees within the organisation predicted the strategic  
5 business partner role (.35,  $p < 0.001$ ), the learning and development strategist (.37,  $p < 0.001$ ) and the  
6 manager of learning projects (.42,  $p < 0.001$ ). These roles were therefore almost invariably found in large  
7 organisations. In organisations that were structured for an international presence and had locations in  
8 other countries this was important in predicting the strategic business partner role (.19,  $p < 0.01$ ) the  
9 learning and development strategist role (.26,  $p < 0.001$ ) and the manager of learning projects role (.25,  $p <$   
10  $0.001$ ). Environmental dynamism emerged as important in predicting the strategic business partner role  
11 (.42,  $p < 0.001$ ) and the manager of learning projects (.57,  $p < 0.0001$ ). Industry growth was also an  
12 important predictor of these three roles: strategic business partner (.34,  $p < .0001$ ), L&D strategist (.37,  
13  $p < 0.001$ ) and the manager of learning projects (.52,  $p < 0.001$ ).

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22 Characteristics of the learning and development function were particularly important in predicting the  
23 existence of strategic L&D roles. For example, the size of the L&D function predicted the L&D manager  
24 role (.14,  $p < 0.01$ ), the strategic business partner role (.15,  $p < 0.01$ ) the learning and development  
25 strategist role (.43,  $p < 0.001$ ) and the manager of learning projects (.46,  $p < 0.001$ ). The maturity of the  
26 learning and development function predicted four of the strategic roles- strategic business partner (.26,  
27  $p < 0.001$ ), the L&D strategist role (.48,  $p < 0.001$ ) the learning and development specialist role (.26,  $P < 0.01$ )  
28 and the manager of learning projects role (.51,  $p < 0.001$ ). Table 16 summarises the findings for operational  
29 L&D roles.

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**INSERT TABLE 16 HERE**

In terms of operational roles two individual characteristics emerged as important. First, the density of  
work experience predicted the technical trainer role (.10,  $p < .05$ ), the instructional designer role (.10,  
 $p < .05$ ), and the learning and media specialist role (.12,  $p < .05$ ). The gender of the job holder was important  
in predicting the learning administrator role (.18,  $p < .010$ ).

Organisational characteristics were also important in explaining a number of the operational L&D roles.  
For example, where the organisation was in the manufacturing sector this predicted the production  
trainer role (.46,  $p < 0.001$ ) whereas organisations operating in the services sector were more likely to have  
technical trainers (.35,  $p < 0.0010$ ).

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3 Characteristics of the L&D function were also important in predicting the existence of operational training  
4 roles. For example, the size of the L&D function predicted the instructional designer role (.20,  $p < 0.01$ )  
5 and the technology and media specialist role (.13,  $p < 0.05$ ). The maturity of the L&D function was  
6 important in predicting the instructional designer (.36,  $p < 0.001$ ) and the learning technology and media  
7 specialist (.43,  $p < 0.001$ ) roles.  
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### 11 12 13 14 **Predictors of Strength and Importance of Competencies and L&D Expertise** 15

16 We conducted numerous multiple regression analyses to identify the factors that predict both the quality  
17 and importance of both L&D foundational competencies and areas of expertise. Table 17 summarises the  
18 results of our regression analysis.  
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24 **INSERT TABLE 17 HERE**  
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29 Two individual characteristics were important in predicting personal foundational competencies:  
30 education (.52,  $p < 0.001$ ) and experience density (-.46,  $p < 0.001$ ). Education (.46,  $p < 0.001$ ), experience  
31 density (.67,  $p < 0.001$ ) and position in the hierarchy (.27,  $p < 0.001$ ) were important in explaining the  
32 strength of the interpersonal foundational competencies. The strength of management foundational  
33 competencies was predicted by experience density (.41,  $p < 0.001$ ) and organisational tenure (.31,  
34  $p < 0.001$ ), whereas the strength of business foundational competencies was predicted by experience  
35 density (.41,  $p < 0.001$ ) and job tenure in L&D (.42,  $p < 0.001$ ).  
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41 The strength of the L&D expertise was predicted by different individual level characteristics. For example,  
42 diagnosing, designing and delivering L&D expertise area was predicted by education (.31,  $p < 0.001$ ) and  
43 experience density (.45,  $p < 0.001$ ). The managing measuring and evaluating L&D expertise area was  
44 predicted by education (.31,  $p < 0.001$ ) and experience density whereas the managing knowledge and  
45 organisational change expertise area was predicted by experience density (.63,  $p < 0.001$ ), position in the  
46 organisational hierarchy (.41,  $p < 0.001$ ) and education level (.46,  $p < 0.001$ ).  
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52 A number of organisational contextual factors and L&D characteristics explained the importance of both  
53 foundational competencies and areas of L&D expertise. One organisational factor – service sector (.46,  
54  $p < 0.001$ ) and one L&D function characteristic – size of the L&D function (.11,  $p < 0.05$ ) predicted the  
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3 importance of personal foundational competencies whereas the importance of interpersonal  
4 competencies was predicted by service sector (.20,  $p < 0.01$ ), interpersonal organisation (.24,  $p < 0.01$ ) and  
5 size of the L&D function (.19,  $p < 0.05$ ). In contrast, the importance of management foundational  
6 competencies was predicted by four organisational factors – international firm (.31,  $p < 0.001$ ), number of  
7 employees (.16,  $p < 0.05$ ), environmental dynamism (.46,  $p < 0.001$ ) and industry growth (.27,  $p < 0.01$ ) and two  
8 characteristics of the L&D function – size of the function (.31,  $p < 0.001$ ) and the maturity of the L&D function  
9 (.26,  $p < 0.001$ ). The importance of business foundational competencies was predicted by four  
10 organisational factors – international organisation (.47,  $p < 0.001$ ), the number of employees (.21,  $p < 0.01$ ),  
11 environmental dynamism (.54,  $p < 0.001$ ) and industry growth (.28,  $p < 0.01$ ). Three L&D function  
12 characteristics were important predictors – size of L&D function (.24,  $p < 0.01$ ), maturity of the L&D function  
13 (.20,  $p < 0.01$ ) and where it was structurally separate from HR (.26,  $p < 0.01$ ).  
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22 The importance of diagnosing, designing and delivering L&D expertise was predicted by three  
23 organisational characteristics – technological intensity (.19,  $p < 0.05$ ), service sector (.27,  $p < 0.01$ ) and  
24 international organisation (.31,  $p < 0.001$ ). The size (.27,  $p < 0.001$ ) and maturity (.28,  $p < 0.01$ ) of the L&D  
25 function predicted the importance of the diagnosing, designing and delivery of L&D. The managing,  
26 ensuring and evaluating L&D expertise area was predicted by two organisational characteristics –  
27 international (.21,  $p < 0.01$ ) and service sector (.24,  $p < 0.01$ ). Two L&D function characteristics were also  
28 important – the size of the function (.28,  $p < 0.01$ ) and the maturity of the function (.23,  $p < 0.001$ ). Finally, the  
29 importance of the managing knowledge and organisational expertise area was predicted by five  
30 organisational factors – number of employees (.36,  $p < 0.001$ ), international organisation (.47,  $p < 0.001$ ),  
31 technology intensity (.36,  $p > 0.001$ ), environmental dynamism (.47,  $p < 0.001$ ) and industry growth (.24,  
32  $p < 0.01$ ).  
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#### 41 **Relationship between Foundational Competencies, Areas of Expertise, L&D Roles, Career Level and** 42 **Perceived L&D Effectiveness** 43 44

45 In this, the final section of our empirical results, we present our findings on the relationship between L&D  
46 foundational competencies and areas of expertise and L&D roles, career levels and L&D effectiveness.  
47 Table 18 summarises our findings.  
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3 Our analysis reveals that the role of foundational personal competencies increased on significance as L&D  
4 practitioners move through the career levels and the organisational hierarchy. These competencies were  
5 most significantly related to senior executive L&D career levels. When we investigated their significance  
6 for specific L&D roles within an organisation we found that they were strongly related to the manager of  
7 learning projects (.47,  $p < 0.001$ ) and learning and development manager (.47,  $p < 0.001$ ) roles. These roles  
8 clearly have a requirement for high levels of emotional intelligence and self-confidence. L&D professionals  
9 perceived these competencies to be important for predicting L&D effectiveness (.51,  $p < 0.001$ ) compared  
10 to other stakeholders (.21,  $p < 0.05$ ). Interpersonal foundational competencies are particularly important for  
11 three strategic roles – strategic business partner (.51,  $p < 0.001$ ), manager of learning projects (.67,  $p <$   
12  $0.001$ ) and learning and development manager (.41,  $p < 0.001$ ). Interpersonal foundational competencies  
13 are also important for two operational L&D roles- production trainer (0.14,  $p < 0.05$ ) and the technical  
14 trainer role (.24,  $p < 0.01$ ). The analysis revealed that a number of contextual factors emerged as  
15 important in explaining the strength of the interpersonal foundational competency and the organisational  
16 and L&D context in which it is valued. Three individual level factors emerge as important predictors of  
17 this competency- education level (.46,  $p < 0.001$ ), experience density (.67,  $p < 0.001$ ) and position in the  
18 hierarchy (.27,  $p < 0.001$ ). Two organisational level factors emerged as important in explaining the  
19 importance attached to these competencies – the organisations sector-service – (.26;  $p < 0.01$ ) and the  
20 structure of the organisation – international operations- (.24;  $p < 0.01$ ). The size of the organisation's L&D  
21 function emerged as the only important learning and development function characteristic (.19;  $p < 0.05$ ).  
22 L&D practitioners perceived interpersonal competencies to be more important to perceived  
23 organisational effectiveness (0.51;  $p < 0.001$ ) compared to that of other stakeholders (.21;  $p < 0.01$ ).  
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39 Managerial foundational competencies were primarily important for senior (.31;  $p < 0.001$ ) and executive  
40 (.62;  $p < 0.001$ ) career levels. In terms of specific L&D roles they emerged as particularly important for  
41 learning and development manager (.40;  $p < 0.001$ ) manager of learning projects (.40;  $p < 0.001$ ) and  
42 strategic business partner (.27;  $p < 0.01$ ) roles. This cluster of behaviours and skills was related to one L&D  
43 operational role- the learning and development administrator role (.21;  $p < 0.05$ ).  
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48 Personal foundational competencies were primarily important for L&D manager (.47,  $p < 0.001$ ) and  
49 manager of learning projects (.47,  $p < 0.001$ ). They are also linked to two operational LD roles, production  
50 trainer (.24,  $p < 0.01$ ) and technical trainer (.31,  $p < 0.001$ ). Interestingly they are linked to all career levels.  
51 L&D professionals perceive these competencies to be more important for L&D effectiveness (.41,  $p < 0.001$ )  
52 than non-L&D stakeholders (.14,  $p < 0.01$ ). Learning and development practitioners perceived management  
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3 foundational competencies to be significantly less important to organisational effectiveness than other  
4 stakeholders (.28;  $p < 0.001$ ; versus .57;  $p < 0.001$ ).

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7 Business competencies have significance for two senior career levels- senior (.21;  $p < 0.01$ ) and executive  
8 (.67;  $p < 0.001$ ). they were not significantly related to any of the L&D operational roles however business  
9 foundational competencies emerge as particularly important for three strategic L&D roles – learning and  
10 development strategist (.26;  $p < 0.001$ ) manager of learning projects (.47;  $p < 0.001$ ) and strategic business  
11 partner (.41;  $p < 0.001$ ). The possession of business foundational competencies was perceived to be much  
12 more important for other stakeholders (.68,  $p < .001$ ) than was the case for L&D professionals (.31,  $p < .001$ ).

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15 The expertise to diagnose, design and deliver L&D solutions is important to all career levels however  
16 contrary to expectations this competency was important for all career levels – (senior level (0.44;  $p <$   
17 0.001) executive level (.39;  $p < 0.001$ ). This suggests that L&D practitioners irrespective of level are  
18 expected to have a deep level of L&D expertise to diagnose, design and deliver learning and development  
19 solutions. This cluster of expertise was unsurprisingly very important for three strategic L&D roles – L&D  
20 manager (.27;  $p < 0.01$ ) strategic business partner (.31;  $p < 0.001$ ) and learning and development specialist  
21 (.41;  $p < 0.001$ ). They are important for two operational L&D roles – production trainer (.20;  $p < 0.01$ ) and  
22 instructional designer (.34;  $p < 0.001$ ).

24  
25 The importance of diagnosing, designing and delivering L&D solutions to perceived organisational  
26 effectiveness differed significantly between learning and development practitioners and other  
27 stakeholders (.67;  $p < 0.001$ ; versus .21;  $p < 0.01$ ). The management, measurement and evaluation of L&D  
28 expertise has value to all career levels, however, it emerges as particularly significant senior (.46;  $p <$   
29 0.001) and executive levels (.59;  $p < 0.001$ ). In terms of specific L&D roles it emerged as most important  
30 for the L&D manager (.46;  $p < 0.001$ ), strategic business partner (.27;  $p < .0.01$ ), and learning and  
31 development specialist (.24;  $p < 0.01$ ) roles. Both L&D practitioners (.56;  $p < 0.001$ ) and other stakeholders  
32 (.48;  $p < 0.001$ ) rated this competency to be important to explaining perceived organisational  
33 effectiveness. The management of knowledge and organisational change expertise is of primary  
34 importance for executive (.73;  $p < 0.001$ ) and to a lesser extent senior (.24;  $p < 0.001$ ) career levels. This  
35 areas of expertise had significance only for strategic L&D roles – L&D strategist (.59;  $p < 0.01$ ), strategic  
36 business partner (.27;  $p < 0.01$ ) and manager of learning projects (.63;  $p < 0.001$ ). Three individual level  
37 characteristics predicted the strength of this area of expertise – experience density (.63;  $p < 0.001$ ). The  
38 possession of this area of expertise was perceived as more significant for organisational effectiveness by  
39 other stakeholders (.71;  $p < 0.001$ ) compared to L&D practitioners (.31;  $p < 0.001$ ).

## DISCUSSION

It is now well established that learning and development practices are important within organisations. However, there are significant questions concerning the extent of alignment and strategic impact of learning and development in addition to the competencies and effectiveness of L&D practitioners to deliver the strategic agenda. These issues raise major questions as to whether the strategic project advocated by academics and professional bodies for L&D has failed and we do not have reliable information regarding the extent to which these issues are prevalent across organisations and there is a major lacuna in knowledge concerning the roles that L&D professionals play in organisations. The specific gaps focus on: (a) the factors that influence the L&D roles that are performed in organisations; (b) the strategic and operational challenges faced by L&D practitioners in their day to day work; (c) the different roles that L&D practitioners perform in organisations; and (d) the effectiveness of L&D from the perspectives of L&D practitioners and other stakeholders or actors. This research seeks to fill some of these gaps. Figures 1 & 2 summarise our conceptual framework which we developed based on the use of three data sources. We present it in a logical manner to highlight linkages between contextual factors, the type of L&D role performed, the competencies linked to each role, the typical career level of the role, perceptions of effectiveness and the key challenges encountered in performing the role. We complete this analysis for both strategic and operational roles. Before we explain the key linkages in our conceptual framework we describe the general findings from our research.

**INSERT FIGURES 1 & 2 HERE**

### **The Changing External Context of L&D.**

A number of significant external influences currently impact and will continue to impact L&D in organisations. Through our surveys and interview data, four trends emerged as critical for shaping the future of L&D within the next five years. First, *globalisation* will continue to play a major role in shaping L&D in organisations. This will take the form of business models, greater economic uncertainty, and increased volatility in the global market place and increased customer expectations. Second, there is evidence of *significant demographic change*. It is estimated that by 2021 there will be four generations in the workplace (Loretto & Vickerstaff, 2015). These different generations bring with them unique attitudes, behaviours and expectations in respect of learning and development. In particular, global talent



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3 mobility will have major implications for the personalisation of L&D, the proposition and career  
4 advancement and development (Twenge & Campbell, 2012). Third, *technology and flexible working*  
5 *practices* will shape how work is done and the ways in which employees and workers will engage with  
6 organisations. There is major growth in cloud-based and collaborative technologies (Huggett, 2013) that  
7 have major implications for how L&D is delivered in organisations (Ulrich et al., 2015). There is evidence  
8 that employees and workers have strong preferences for greater flexibility (Ellis, 2006) which have  
9 implications for how L&D is delivered and highlights the need for greater customisation and  
10 personalisation of L&D interventions and solutions. In addition, significant shifts are taking place in the  
11 employment relationship with a major move away from full-time employees (Zeytinoglu, Denton,  
12 Plenderleith & Chowhan, 2015) to workers with different relationships and expectations. Therefore, L&D  
13 will be expected to develop talent differently and tailor its offerings to the needs of these workers. Finally,  
14 the *nature of work* will itself continue to change. These will include major growth in knowledge work  
15 (Boxall & Macky, 2009), the requirement to work across cultures and interactions with workers and  
16 employees from different diversities.  
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### 27 **The Adoption of Technology and the Use of Analytics by L&D**

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29 We uncovered a number of significant trends in the extent to which L&D professionals make use of  
30 technology to deliver L&D solutions and incorporate L&D analytics into decision-making (Huselid, 2018).  
31 We found for example that L&D professionals perceive that technology is important (Minbaeva, 2018),  
32 however, they are less satisfied with current learning technologies. They do however, acknowledge that  
33 learning technologies can achieve stronger user interfaces (Hubbard, 2013), higher levels of integration  
34 with other technologies (Collins & Lancaster, 2015) and significant flexibility in the delivery of L&D  
35 (Bingham & Conner, 2015). However, L&D practitioners make use of technology primarily for the delivery  
36 of learning with less usage for knowledge creation and curation and the evaluation of L&D activities (Hart,  
37 2014). We found evidence that L&D professionals make significantly less use of L&D analytics (Kryscynski  
38 *et al.*, 2018). They appear not to be particularly data savvy and primarily make use of more informal, social  
39 and personal sources of evidence when making decisions. They also use evidence and data analytics to  
40 inform a variety of transactional type L&D decision areas, but make significantly less use of data analytics  
41 to inform strategic L&D decisions.  
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### 52 **Stakeholder Perceptions of L&D in Organisations**



We found that there is something of a gap or disparity when it comes to perceptions of the effectiveness of L&D in organisations. For example, line managers and employees rated the L&D staff to be less effective compared to CEOs and L&D professionals. They also differed in terms of perceptions of how well L&D achieved its goals with both line and senior managers having less favourable or positive perceptions compared to L&D practitioners. They do, however, agree on a number of dimensions of effectiveness. L&D professionals are significantly less effective in engaging with external stakeholders (Marler & Fisher, 2013) and the extent to which L&D supports corporate strategy (Marchington & Wilkinson, 2012). However, CEOs and senior managers are less positive in their assessments of the effectiveness of L&D in contributing to organisational strategy (Alfes, Truss, Soane, Rees & Gatenby, 2013). We found significant variations in the effectiveness of L&D across organisations by ownership, size, sector and nature of operations (Mamman & Al Kulaiby, 2014). For example, L&D is perceived as more effective in US owned organisations, firms with more than 500 employees (CIPD, 2015), service sector organisations (Cooke, Shen & McBride, 2005) and firms with international structures and operations (Firth, Fung, & Rui, 2006). The data also revealed that the L&D function was perceived as more effective where it is aligned with the strategic CEO agenda (Sako & Tierney, 2005) and the maturity of the L&D function. Finally, both L&D practitioners had different perspectives on the priority areas that require improvement. For example, the non-L&D stakeholders highlighted three priority areas: enhanced engagement with line managers (Carbery & Cross, 2015), development competencies and capabilities of L&D professionals (Braun, Pull, Alewell, Stormer & Thommes, 2011) and the demonstration of ROI for high profile L&D investments (Griffin, 2014). In contrast, L&D professionals highlighted the following priority areas of improvement: strong support for strategy and senior executives (Phillips & Phillips, 2007), the delivery of customised rather than one-size fits all solutions (Anderson, 2007) and the selection of and collaboration with external stakeholders (Loon, 2016). Our findings raise important questions concerning whether the strategic project has failed. Our findings reveal very limited progress in that for example, perceptions of the quality of the performance of the strategic business partner role and their competencies were perceived to be less effective by non L&D stakeholders. In contrast, there was much greater satisfaction with the quality of operational L&D roles (Chung, Sandholtz & Waisberg, 2018) and the competencies of L&D professionals who perform operational roles. Our findings also suggest that L&D professionals have found it difficult to disentangle themselves from operational tasks and the demands of line managers who expect them to perform these roles.

#### **L&D Roles and Competencies / Expertise**

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3 Study respondents highlighted a multiplicity of L&D roles in organisations with many organisations having  
4 more than four role types. In large organisations especially MNCs, we found evidence of a multi-tiered  
5 approach; however, the operation of these roles was subject to significant nuances. The research also  
6 revealed that organisations in general primarily implemented or made use of operational and mid-range  
7 strategic roles. The results also suggest that there is little evidence of significant transformation with only  
8 a small number of organisations implementing strategic roles in the L&D area (Harrison, 2009). We found  
9 major variation in role configurations by business sector, organisation size, industry and between business  
10 units and corporate functions. In terms of strategic business partner role, which is common in many of  
11 the respondent organisations, some strategic business partners were involved in more strategic projects  
12 whereas others were focused on more operational work (Bailey, Mankin, Kelliher & Garavan, 2018).  
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21 The study findings reveal critical foundational competencies necessary for L&D to make a more strategic  
22 contribution within the organisation (Osono, Kodama, Yachi & Nonaka, 2006) and to meet the demands  
23 of the external environment (Ulrich *et al.*, 2015). Our analysis reveals that management and business  
24 competencies as key differentiators explaining strategic impact (Cappelli, Singh, Singh & Useem, 2010),  
25 however, these are not as valued by L&D practitioners as they are by other stakeholders such as line  
26 managers, senior managers and executives. Within the domain of learning and development expertise,  
27 the key differentiator of a strategic contribution is the management of knowledge and organisational  
28 change (Holbeche 2009). L&D practitioners are increasingly expected to play a major role in helping  
29 organisations to respond to future external and internal trends, thus requiring L&D to be more integrated  
30 with strategic priorities (Boxall & Purcell, 2016), be more internally and externally visible (Mooney, 2001)  
31 and develop business and management competencies (Townsend, Wilkinson, Allan & Bamber, 2012).  
32 Therefore, L&D functions that continue to rely on the traditional L&D expertise areas are less likely to  
33 make that strategic contribution (Kochan, 2015). Overall, our data on L&D roles and competencies  
34 suggests that L&D practitioners need to make significant changes in order to be strategically successful.  
35 In particular, they are required to be innovative in the activities they implement to ensure that they align  
36 with the business (Cascio & Boudreau, 2014). They also need to take constructive steps to enhance  
37 strategic business partner models and enhance their business and management competencies.  
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## 52 **Our Conceptual Framework for L&D Roles in Organisations**

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3 Our analysis identified five key strategic and five operational L&D roles within organisations. The first  
4 strategic L&D role concerns the *strategic business partner* (Ulrich et al., 2015; Mitsakis, 2014). This role  
5 manifested itself in different ways depending on the context. In medium-sized domestic and public sector  
6 organisations, the role holder was responsible for a variety of operational HR related domains with L&D  
7 as one significant area of responsibility. In large organisations and in particular MNCs, the role was more  
8 strategic in focus and devoted more time to L&D issues. In these organisations, the role holder has  
9 stronger strategic mind-set, and there was greater involvement with line managers and employees in  
10 making decisions about learning and development. The role was significantly more customer-centric and  
11 there was less emphasis on providing standardised learning and development solutions. Proponents of a  
12 strategic business partner approach highlight the importance of internal fit, coherence and consistency  
13 with HRM practices (Evans, Pucik & Björkman 2011). L&D practitioners who perform this role are more  
14 likely to have access to corporate or senior level decision makers (Brandl & Pohler, 2010). We also found  
15 that this role was more prevalent in organisations that operated in dynamic external environments, and  
16 where the L&D function made greater use of technology and data analytics. The L&D function was also  
17 more mature and the role holder was positioned at mid and senior levels in organisations. The strategic  
18 business partner role placed emphasis on the full spectrum of foundational competencies and areas of  
19 L&D expertise and it was perceived to be moderately effective in organisations. The key challenges related  
20 to the lack of engagement with line managers, not enough involvement in strategic issues and the lack of  
21 business competence.

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36 The second strategic roles of *learning and development manager* is about the management of the L&D  
37 function. The focus of this role is on the effective delivery of learning and development solutions and the  
38 development of the expertise of L&D practitioners (Gubbins & Garavan, 2009). Key aspects of this role  
39 were an emphasis on utilising learning and development processes, the use of traditional learning and  
40 development interventions and some use of measurement and learning management systems. The key  
41 priorities of the role holder are to keep L&D processes efficient, and to foster a close alignment with the  
42 HR function. This role will most likely be located within the HR function and report to a HR director. We  
43 found that this role is typically found in organisations operating in stable external environments and in  
44 public sector organisations and SMEs (Nolan & Garavan 2016). It is a common role in manufacturing  
45 environments and there will be limited use of technology to deliver L&D solutions. This role primarily  
46 draws on personal, interpersonal and management competencies and two areas of expertise- diagnosing,  
47 developing and delivering L&D and managing measuring and evaluating L&D. There was significant less  
48 need for the possession of business competencies and specialist expertise in knowledge management and  
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3 organisational change. The role is typically mid career level and is rated a moderate to high in terms of  
4 effectiveness. The key challenges are the lack of strategic capabilities even though there is an expectation  
5 that the role will operate at the strategic level. In addition, role holders lack a strong global mind-set and  
6 they encounter difficulties in managing scale and major change (Loon, 2016).  
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10 The third strategic role that we identified is that of *learning and development specialist*. This role has the  
11 potential to be strategic in that it can contribute to strategic implementation and the development of  
12 KSAs that are necessary for strategic success (Garavan, 2007). The role has a strong specialist orientation  
13 and the focus is on the use of traditional class room based L&D interventions. L&D practitioners who hold  
14 this role argue that they are focused on building the capabilities and competencies of employees and they  
15 will train and develop a wide spectrum of employees. Their activities will be very much determined by  
16 either gaps or opportunities and they will operate within the HR function (Loon, 2016). They are found in  
17 all types of organisations but most frequently medium sized organisations operating in manufacturing and  
18 service sectors. They will typically be part of a large L&D function in they operate in large organisations  
19 and are more likely to specialise in particular areas of skill relevant to the organisation. They draw on a  
20 narrow set of foundational competencies and will possess expertise in two areas of L&D – diagnosing  
21 designing and delivering L&D and managing measuring and evaluating L&D. The possession of  
22 management and business skills are not of great perceived importance to this role category and they are  
23 typically mid-career level. They are perceived as very effective within a narrow role, however, they view  
24 themselves as specialists rather than generalists and they may not be focused sufficiently on the business  
25 agenda.  
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38 The fourth role we identified is that of the *learning and development strategist*. They have a particularly  
39 strong focus on strategic L&D issues and leveraging the intangible resources, competencies and  
40 capabilities of employees (Wright, Dunford & Snell, 2001). They play a unique role in managing strategic  
41 change and in ensuring that the organisation possesses the capability to be scalable in response to  
42 external environmental dynamism. They will orchestrate the full suite of L&D practices to ensure that  
43 employees are aligned with the strategic goals of the organisation and invest considerable amounts of  
44 time in developing a learning culture (Noe *et al.*, 2014). They will also be knowledge management  
45 champions and play a major role in the wider organisation (Sparrow, Harris & Brewster, 2003) in  
46 facilitating change. They are typically found in organisations that are internationally structured and  
47 operate in highly dynamic external environments. They will usually be located within a standalone L&D  
48 function. They will operate at senior and executive career levels and they primarily draw on business  
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3 competencies and expert knowledge of knowledge management and organisational change. They do not  
4 get involved in operational L&D issues and are politically well-connected within the organisation.  
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7 The fifth strategic L&D role that we identify is that of *manager of learning projects*. This is a high-level  
8 strategic role where the focus is on transformational change in the context of highly-dynamic external  
9 environments. The role holder will work across the organisation and with stakeholders external to the  
10 organisation on projects that behave a strong learning and change focus (Loon 2016; Gubbins & Garavan  
11 2009). The role-holder will be experienced in transformational change processes and will typically operate  
12 in a multinational or global organisation context. The role-holder will operate independently of the HR  
13 function and will be effectively positioned to be a boundary spanner and navigator of complexity (Lawler  
14 & Boudreau, 2009). The role-holder will draw on a broad spectrum of foundational competencies and  
15 one major area of L&D expertise –managing knowledge and organisational change. This role where it  
16 operates is rated as highly effective, however, the requirement for it will be very much contingent on large  
17 scale complex organisational change that involves the application of concepts from organisational and  
18 collective learning.  
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28 As mentioned earlier our study data revealed that organisations have a variety of operational L&D roles  
29 that work in conjunction with some of the strategic roles that we identified and discussed earlier. We  
30 identified five operational L&D roles. The first role *production trainer* is an increasingly common role in  
31 manufacturing environments. The role is narrowly prescribed and will involve a full- or part-time trainer  
32 training production operatives in core skills using elements of the ADDIE model. The role holder may be  
33 part of the production rather than the L&D team and will have a deep knowledge of key production  
34 processes. It is a typical entry career level role and draws on a narrow L&D expertise base in addition to  
35 personal some interpersonal foundational competencies. There may however be limited career mobility  
36 and the emphasis, may be primarily on the delivery rather than the diagnosis and design element of L&D.  
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38 The second operational L&D role is that of *technical trainer*. The role holder will possess a strong level of  
39 expertise and train customers and clients in the use of technical equipment. The amount of time spend  
40 on training delivery will be considerable and this role is found in many different types of organisations.  
41 They may work outside the L&D function and be part of an engineering or technical team. The third  
42 operational L&D role is *Instructional designer*. This is a highly-specialised role that has emerged with the  
43 advent of eLearning (Johnson & Brown 2017), It draws on specialist instructional design skills and will  
44 design eLearning and classroom based solutions in specialist areas. It is typically found in large MNCs that  
45 have a major requirement for instructional designers in areas of quality, and manufacturing. The role  
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holder places a strong emphasis on technical expertise and the career anchor and there will be limited career mobility to general L&D roles. The fourth operational L&D role is that of *Learning Technology and Media specialist*. The growth in mobile learnings and the use of technology based learning methods (Saks & Haccoun, 2008) has led to the emergence of this specialist role in large organisations with an international presence. They will possess a high level of technical ability in addition to skills in training design. The role may not be located in the L&D function but be found in IT engineering departments and there will be limited career progression to more strategic L&D roles. The fifth operational L&D role that we identified is *learning and development administrator*. This is an early career L&D role that involves significant components of transactional administration of L&D activities. It can be a path to more strategic roles such as learning and development specialist or managers and will be found in many different types of organisation. The role has a heavy reliance on interpersonal and management foundational competencies.

Our analysis therefore has placed a focus on both strategic and operational learning and development roles in organisations. The operational roles are frequently ignored in favour of more high profile strategic roles. Therefore, a novel contribution of this study is in unearthing the multiplicity of operational L&D roles found in organisations. Many of these role types are unexplored in the literature with an over focus on strategic business and learning and development specialist roles. While we suggest some type of a typological approach to understanding L&D roles in organisations, the reality is that many organisations have combinations of these roles and it is their combination that will enhance the contribution of learning and development to organisational effectiveness. Our analysis revealed consistent with a contingency approach (Harney, 2016) that a variety of organisational and L&D function characteristics impacted the importance and prevalence of these roles in organisations. These contingencies include sectoral and environmental characteristics of the organisation, its size, structure and the maturity of the L&D function. We expand on previous research in the area of HR roles by lending support to some of the more generic HR roles found in the literature (Ulrich, Brockbank & Johnson, 2008; Caldwell, 2003), while at the same time, identifying nuances and differences relevant to L&D. We expand consistent with contingency theory the range of situational or contextual factor that are relevant the L&D context. We also highlight that organisational actors make different attributions concerning the effectiveness of L&D roles which, in turn, impact their perceptions of how they contribute to organisational effectiveness.

### **Implications for L&D Research**



Our study highlights a number of questions that can be addressed in future research. Given that our research design was essentially cross-sectional, there is scope for more longitudinal research to determine trends over time and to gain more rigorous insights into the long term impact of L&D roles on organisational effectiveness. Teo (2002) and Boldizzoni & Quaratino (2011), in longitudinal studies on the HR role in organisations, highlight that the trajectory may not be from traditional to expanded roles or increased execution of multiple roles. It is therefore possible that some roles will increase in priority and others decline due to changing external and internal contingencies. There is also scope to research aspects of internal and external context in a longitudinal way to better understand how change in context factors impacts L&D role performance and its contribution to organisational effectiveness. We focused on different categories of organisations, however, future research can delve deeper in to the contextual factors that shape L&D roles in SMEs (Nolan & Garavan, 2016) and MNCs. Loon (2016) highlights that L&D practitioners are increasingly required to deliver L&D solutions in an international context. Therefore, the context factors relevant to the international context will be different. These context factors will include sociocultural and institutional differences (Thite, Budhwar & Wilkinson, 2014)

### **Implications for L&D Practice and Professional Development**

Our study findings highlight important implications for practice. We highlight four practice implications here. Table 19 summarises in more detail these implications for practice.

**INSERT TABLE 19 HERE**

**Aligning of L&D with Business Strategy and Ability to Respond to Organisational Requirements.** Based on our study and data derived from multiple stakeholders, key themes and insights emerge that are important to redefining the value of L&D in organisations. The need for alignment of L&D with business strategy and agility to respond to business strategy is a recurring theme across the different data points and therefore a priority area for future proofing. Much of the effectiveness of L&D will be influenced by how quickly it can move in response to organisational requirements. This involves the capacity to align the L&D portfolio of activities with the goals of the organisation and ensure a more fluid match between the demands of the organisations and what L&D can contribute. Table 4.1 summarises key actions that



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3 L&D can take to enhance future proof for strategic alignment and agility. A key starting point for L&D to  
4 deliver value is to ensure alignment with the strategic goals of the business. However, alignment is not  
5 static, but dynamic therefore L&D must develop agility to respond quickly to changing competitive and  
6 strategic dynamics.  
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10 **Utilising Technology and L&D Analytics.** The second apriority area that requires future proofing concerns  
11 the use of technology and analytics. Technology and real time data are transforming the way in which  
12 business is undertaken. It is also impacting how L&D communicates with its stakeholders how it networks  
13 and the ways in which employees learn. The trend for future generations is a progression towards life-  
14 long learning and continuous learning facilitated by technology. Technology can be used to deliver  
15 learning in Bite-sized chunks to learners, however, L&D is behind the curve when it comes to embracing  
16 the use of technology. In a similar way the use of real time data analytics is a key future-proofing strategy.  
17 An evidence-based approach to L&D requires that decisions about the use of learning strategies are based  
18 on real-time data that is both reliable and valid. L&D professionals must become more skilled in the use  
19 of data analytics. It does, however, require a mind-set change where they value the use of such data. “Big  
20 Data” management is a key trend that will shape L&D activities in the future. However, there is much work  
21 to be done to realise this priority in the L&D context our findings highlight that many L&D functions do  
22 not have the ability to use data in a predictive way to make decisions about learning process and activities.  
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33 **Enhancing the Employee Experience of Learning and Development.** The employee has become lost in  
34 the discourse and talk about strategic L&D. However, the landscape of what it means to be an employee  
35 is changing. The growing trend of contingent employees is one which will have major implications for L&D  
36 priorities. Contingent, virtual and semi-permanent employees are demanding a redefinition of how L&D  
37 delivers its services and the need to understand the learning priorities and needs of these groups.  
38 Therefore, L&D needs to broaden its traditional view of how it operates and consider the customisation  
39 of solutions to meet the needs of different employee groups. Employees are increasingly viewed as the  
40 key agents in managing their careers. They are expected to craft their careers and learning and  
41 development. Therefore, they expect greater inputs into decisions about learning and development. The  
42 employee experience of L&D is fundamental to participation in development activities gaining buy-in for  
43 transformational change, ensuring greater use of self-service L&D technologies and retaining highly  
44 developed talent  
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54 **Enhancing the Competencies of L&D Practitioners.** The development of the competencies of L&D  
55 professionals is a key component of future proofing. Our research highlights that the profession should  
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3 focus on a few key areas that will have maximum impact. These include the development of competencies  
4 around talent analytics, the development of change, management expertise, strategic partnering and  
5 customisation of L&D solutions. It is imperative that professionals stay abreast of technology innovations  
6 and develop data analysis skills. The lack of analytical skills will hamper the capability of L&D to use data  
7 effectively. We go so far as to suggest that the skills of L&D professionals to integrate technology, data  
8 analytics and analytical skills is central to the reputation and strategic value of the profession going  
9 forward. An important component of the process of redefining the value of L&D in organisations concerns  
10 the competencies, skills and mind-sets of L&D specialists. The requirement to make a strategic  
11 contribution to the business as well as enhance the employee experience demands a different perspective  
12 and set of competencies.  
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### 23 **CONCLUSION**

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25 Over almost twenty years, L&D scholars have purported that for L&D practitioners to be effective, they  
26 need to take on strategic roles in organisations. This is one of the first studies to investigate how L&D  
27 practitioners perform their roles in organisations and how they are perceived by organisational  
28 stakeholders. Utilising contingency role and multiple constituency theories, we explored contingency  
29 influences on both roles and competencies and the relationship between competencies, roles, career  
30 levels and perceptions of L&D effectiveness. Our findings reveal that L&D professionals perform a  
31 combination of more traditional, expanded and strategic roles in organisations. Our second contribution  
32 is to provide empirical evidence of the context factors that influence the importance of these roles, the  
33 competency requirements that each role requires and how each role is perceived in terms of contribution  
34 to organisational effectiveness from the perspectives of multiple stakeholders. Overall, our findings reveal  
35 that a combination of organisational and L&D function characteristics impact L&D roles in organisations  
36 and they differed in terms of their perceived contribution to organisational effectiveness. An important  
37 takeaway from our study concerns the relatively modest progress that L&D professionals have made to  
38 laying a more strategic role in organisations. It has struggled to disentangle its operational remit and  
39 transform its focus and activities. We highlight that future research can further expand our research by  
40 conducting longitudinal investigations to capture change in both context and L&D roles.  
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Table 1: Study Sample Characteristics (Survey) [N=440]

Characteristic	N [440]	%
<b>Firm Size</b>		
· Small	66	15
· Medium	198	45
· Large	176	40
<b>Respondent Type</b>		
· L&D/HR Professionals	200	45
· Line Managers	75	17
· Employees	120	27
· Senior Managers	25	5.5
· CEOs/Executives	20	4.5
<b>Maturity of L&amp;D Function</b>		
· Low	95	21.5
· Medium	230	52.5
· High	115	26
<b>Dedicated L&amp;D Function</b>		
· Yes	285	65
· No	155	35
<b>Firm Sector</b>		
· Manufacturing	132	30
· Service	308	70
<b>Firm Type</b>		
· Public	66	15
· Private	330	75
· Not for Profit	44	10
<b>Operations</b>		
· Single Country	245	56
· International	195	44
<b>Firm Ownership</b>		
· US	175	40
· European	95	21.5
· Irish	105	23
· Asian	10	2
· UK	55	12.5

**Table 2: External Trends Shaping Work in Organisations: Importance and Impact on Achievement of Organisational Goals**

Trend	Importance of Trend					
	Firm Size					
	Small [66]		Medium [192]		Large [172]	
	Mean	SD	Mean	SD	Mean	SD
Changes in the Economic Landscape	4.65	0.59	4.45	0.67	4.15	0.68
Demand for Flexible Work and Work-Life Balance	3.25	0.41	4.05	0.71	4.15	0.71
Changing Business Models: 24/7 / Knowledge Work	3.15	0.26	4.25	0.47	4.65	0.91
Use of Mobile Technologies and Remote Working	2.55	0.29	3.95	0.46	4.05	0.71
Social Media and Communication	3.25	0.41	3.85	0.62	4.05	0.72
Advanced Technology and Artificial Intelligence	2.65	0.42	3.75	0.62	3.75	0.71
Changing Demographics and New Generations	3.15	0.46	3.95	0.72	4.15	0.76
Globalization / Off-Shoring	2.95	0.29	3.85	0.48	4.35	0.69
International Talent Mobility	2.95	0.29	3.95	0.39	4.75	0.69
Changing Notions of Careers	2.75	0.46	3.85	0.46	3.95	0.49
The Gig Economy and New Forms of Contracting	2.45	0.45	3.75	0.61	4.35	0.81
New Ways of Delivering Learning e.g. Games, Gamification, Virtual and Augmented Reality	2.15	0.79	3.75	0.72	3.95	0.62

**Table 3: Current and Future Strategic and Operational Priorities Facing Organisations (Mean Score 1= Low; 5=High)**

Priority	Firm Size																
	All [440]					Small [66]				Medium [198]				Large [17]			
	Current		Future		Current v Future	Current		Future		Current		Future		Current			
	Mean	SD	Mean	SD	t-Stat	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
Management of Costs	4.15	0.72	4.55	0.77	7.96**	4.45	0.57	4.85	0.71	4.00	0.57	4.35	0.67	4.00	0.62	4.00	0.62
Managing and Development Talent	3.85	0.71	4.00	0.67	3.22**	3.45	0.46	3.55	0.61	4.00	0.59	4.25	0.59	4.15	0.52	4.15	0.52
Enhanced Agility and Organizational Flexibility	3.95	0.58	3.95	0.59	0.00	3.55	0.53	3.50	0.51	3.95	0.51	3.95	0.54	4.95	0.41	4.95	0.41
Achievement of Productivity Gains	3.85	0.65	4.00	0.67	3.37**	4.25	0.79	4.35	0.81	3.65	0.50	3.85	0.81	3.75	0.67	3.75	0.67
Enhanced Innovation and Creativity	3.55	0.64	3.75	0.51	5.13**	3.25	0.41	3.65	0.56	3.65	0.56	3.75	0.71	3.85	0.53	3.85	0.53
Corporate Social Responsibility	3.45	0.42	3.35	0.49	3.25**	3.00	0.46	3.00	0.26	3.45	0.47	3.55	0.61	3.65	0.63	3.65	0.63
Increased Global Presence / New Markets	3.35	0.81	3.25	0.31	2.42*	2.85	0.26	2.95	0.41	3.15	0.59	3.25	0.71	3.65	0.61	3.65	0.61
Change in the Strategic Focus of the Organization	3.45	0.41	3.65	0.36	7.69**	3.45	0.46	3.55	0.47	3.55	0.41	3.55	0.49	3.30	0.59	3.30	0.59
Adoption of New Technologies	3.85	0.51	4.15	0.51	8.72**	3.55	0.51	3.75	0.47	4.20	0.69	4.20	0.89	4.00	0.81	4.00	0.81



**Table 4: L&D Responses to Key Trends Driving Organisational Change: Potential and Skills to Influence**

Trend	L&D Professionals [175]				Other Stakeholders [265]			
	Potential to Influence		Skills to Influence		Potential to Influence		Skills to Influence	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD
Changes in the Economic Landscape	2.25	0.24	2.65	0.29	2.25	0.28	2.15	0.26
Demand for Flexible Work and Work-Life Balance	3.65	0.28	3.25	0.41	2.95	0.31	3.45	0.46
Changes in Business Models – 24/7, Knowledge Work	3.15	0.34	3.05	0.51	3.05	0.41	3.15	0.31
Use of Mobile Technologies and Remote Working	3.85	0.48	3.25	0.62	3.75	0.47	3.18	0.38
Social Media and Communication	4.25	0.51	3.5	0.55	3.85	0.46	3.65	0.51
Advanced Technology and Artificial Intelligence	2.95	0.29	2.25	0.41	2.35	0.42	2.88	0.46
Changing Demographics and New Generations	4.25	0.66	3.85	0.51	4.15	0.91	3.75	0.52
Increased Focus on CSR / Ethics	3.95	0.61	3.75	0.28	3.65	0.69	3.75	0.51
Globalization and Off-Shoring	3.15	0.51	3.05	0.53	2.65	0.41	2.75	0.42
International Talent Mobility	3.95	0.59	3.75	0.61	3.65	0.62	3.45	0.56
Changing Notions of Careers	4.15	0.69	3.85	0.59	3.95	0.71	3.75	0.51
The Gig Economy and New Forms of Contracting	3.15	0.41	3.25	0.41	3.05	0.51	2.95	0.41
New Ways of Delivering Learning	4.65	1.01	3.45	0.46	4.05	0.81	3.35	0.51

**Table 5: Use and Quality of Evidence Used by L&D Specialists to Make Decisions**

	Usage							ANOVA	Quality		
	Firm Size								Firm Size		
	Small [66]		Medium [198]		Large [176]		Small [66]		Medium [198]		
Types of Evidence	Mean	SD	Mean	SD	Mean	SD	F-Stat	Mean	SD	Mean	
Personal Experience	4.45	0.71	4.25	0.91	4.04	0.91	5.85**	4.65	0.89	4.05	
Reliance on Experienced L&D Professionals within the Organization	1.65	0.21	4.25	0.81	4.45	1.08	267.02**	2.65	0.19	3.85	
Advice from Colleagues	3.95	0.46	3.95	0.51	4.25	0.82	11.37**	4.75	1.21	3.65	
Intuitive Approaches	4.75	1.09	3.95	0.51	3.85	0.72	41.06**	4.25	0.91	3.85	
Insights provided by Professional Bodies and External Experts	2.55	0.24	3.85	0.73	4.15	0.96	101.08**	1.75	0.10	3.85	
Data from Commissioned Research	1.25	0.11	3.45	0.36	3.65	0.39	1,234.09**	1.25	0.11	3.55	
Data, Facts and Insights from Management Information Systems	1.25	0.10	3.45	0.32	3.95	0.38	1,687.61**	1.45	0.14	3.75	
Values and Concerns of People Influenced by Decisions	3.95	0.26	3.65	0.31	3.45	0.41	51.54**	4.45	0.96	4.05	
Knowledge Acquired through Training and Education	2.75	0.26	3.85	0.26	4.15	0.91	127.38**	3.65	0.24	3.65	
Knowledge Derived from Literature	1.15	0.10	3.45	0.46	3.65	0.62	648.45**	1.25	0.10	3.25	

**Table 6: Application of L&D Analytics in Organisations: Usage and Level of Sophistication**

L&D Analytics Area	Usage						ANOVA F-Stat	Level of Sophistication			
	Firm Size							Firm Size			
	Small [66]		Medium [198]		Large [176]			Small [66]		Medium [198]	
	Mean	SD	Mean	SD	Mean	SD		Mean	SD	Mean	SD
Costs of investment in formal training	2.15	0.21	3.85	0.62	4.65	0.98	267.09**	1.15	0.11	3.65	0.11
Workforce composition and diversity	1.25	0.12	3.75	0.47	4.00	0.81	535.34**	1.45	0.16	3.45	0.16
L&D planning	1.25	0.10	4.10	0.81	4.50	0.97	395.19**	1.15	0.12	3.55	0.12
Workforce knowledge, skills and capability	1.50	0.12	3.75	0.39	4.75	1.06	488.22**	1.25	0.14	3.45	0.14
Workforce performance and capability	1.50	0.12	3.45	0.14	3.95	0.61	910.06**	1.15	0.17	3.25	0.17
Leadership capability and development	1.25	0.12	3.55	0.11	4.35	0.89	710.45**	1.10	0.18	3.15	0.18
Knowledge management	1.05	0.10	3.25	0.10	3.65	0.42	2184.89**	1.10	0.14	2.65	0.14
Change management	1.05	0.10	3.05	0.79	3.55	0.62	347.55**	1.10	0.16	2.25	0.16
Regulatory compliance	1.45	0.11	3.65	0.68	3.95	0.61	439.62**	1.55	0.11	3.65	0.11
Career planning and development	1.25	0.14	4.15	0.81	4.35	0.96	379.37**	1.15	0.10	3.55	0.10
Employee engagement and well-being	1.45	0.12	3.85	0.58	4.15	0.81	444.93**	1.15	0.10	3.65	0.10
Organization design and development	1.25	0.11	3.15	0.52	3.15	0.41	530.12**	1.10	0.10	3.25	0.10
Training activities and participation	2.50	0.18	3.95	0.61	4.65	1.07	176.92**	2.50	0.10	3.95	0.10

Table 7: How do Organisations use Learning Technology?

Uses	Firm Size						ANOVA	Maturity of L&		
	Small [66]		Medium [198]		Large [176]			Low [95]		Medium
	Mean	SD	Mean	SD	Mean	SD		F-stat	Mean	SD
Learning Assessment and Testing	1.76	0.51	3.56	0.51	4.10	0.61	432.65**	2.86	0.51	3.80
Programme Delivery using Webinar or Virtual Classroom	1.41	0.31	3.25	0.46	4.20	0.72	594.95**	2.41	0.22	3.60
Programme Scheduling and Registration	1.98	0.31	3.50	0.42	4.40	0.81	402.99**	2.31	0.31	3.50
Content Creation	1.31	0.21	3.10	0.48	3.70	0.56	581.49**	1.21	0.10	3.20
Content Distribution	1.78	0.33	3.90	0.47	4.30	0.71	493.95**	2.21	0.41	3.55
Content Library and Curation	1.11	0.10	2.75	0.18	3.10	0.41	1163.70*	2.65	0.44	2.85
Reporting and Training Analytics	2.11	0.33	3.50	0.26	4.40	0.61	664.29**	2.81	0.51	3.75
Training Attendance	3.21	0.53	4.10	0.81	4.50	0.41	98.96**	3.11	0.55	4.10
Brand / Intellectual Property Content Security	1.11	0.10	2.65	0.24	3.25	0.26	2016.06*	1.10	0.10	2.25

**Table 8: Use of L&D Technology: Satisfaction, Confidence and Importance**

Technology	Firm Size						ANOVA F-Stat	Maturity of L&D F			
	Small [66]		Medium [198]		Large [176]			Low [95]		Medium [23]	
	Mean	SD	Mean	SD	Mean	SD		Mean	SD	Mean	SD
Satisfaction with L&D Technology	1.15	0.14	3.45	0.46	3.65	0.36	1,082.80*	1.45	0.11	3.35	0.0
Confidence in current L&D Technology	1.15	0.16	4.45	0.41	3.45	0.29	2,393.87*	1.25	0.12	3.35	0.0
Importance of L&D Technology	2.25	0.21	3.95	0.38	4.15	0.62	408.49**	2.15	0.21	3.65	0.0

**Table 9: Attributes of Effective L&D Technology**

Attributes	Firm Size						ANOVA F-stat	L&D Function				t-Stat	Maturity	
	Small [66]		Medium [198]		Large [176]			Dedicated [285]		Non-Dedicated [155]			Low [95]	
	Mean	SD	Mean	SD	Mean	SD		Mean	SD	Mean	SD		Mean	SD
Extent of User Interface	2.41	0.41	3.85	0.41	4.65	0.51	597.09**	4.65	0.71	3.65	0.59	14.94**	2.79	0.41
System Integrated with other HR Systems	3.10	0.51	4.25	0.52	4.85	1.14	109.13**	4.85	1.21	4.25	0.87	5.45**	2.89	0.31
Flexibility to adapt to Changing Needs	3.30	0.55	4.45	0.71	4.25	0.95	52.29**	4.35	0.96	3.95	0.67	4.61**	3.11	0.33
Mobile Capability	2.77	0.31	4.25	0.62	4.65	1.09	128.91**	4.75	1.08	4.35	0.81	4.03**	3.15	0.57
Delivered in the Cloud	3.14	0.33	3.80	0.71	4.10	0.51	63.86**	4.40	0.96	3.70	0.71	4.97**	3.66	0.81
Embedded Analytics	3.11	0.44	3.70	0.62	4.20	0.61	87.59**	4.10	0.81	3.80	0.62	4.01**	3.33	0.61
Facilitates Collaboration	3.68	0.66	3.90	0.51	4.10	0.59	14.41**	4.80	1.21	3.60	0.63	11.52**	3.11	0.66



**Table 10: Perceptions of Learning Management Systems**

Difficulty	Firm Size						ANOVA	L&D Function				t-Stat	Ma	
	Small [66]		Medium [198]		Large [176]			Dedicated [285]		Non-Dedicated [155]			Low [95]	
	Mean	SD	Mean	SD	Mean	SD		Mean	SD	Mean	SD		Mean	SD
Difficulties in Updating / Revising Content	1.96	0.21	3.75	0.46	3.25	0.29	585.77**	2.95	0.41	4.10	0.61	25.53**	4.11	0.31
Getting Employees Buy-in to Use	4.21	0.66	4.15	0.49	3.55	0.41	83.46**	2.85	0.42	4.40	0.67	29.77**	3.99	0.61
Inflexibility	3.11	0.21	3.25	0.31	3.65	0.49	71.74**	3.15	0.48	3.75	0.71	10.52**	2.75	0.57
Limited Value for Social Learning	3.66	0.56	3.45	0.32	4.25	0.46	172.32**	3.65	0.59	3.95	0.59	5.09**	2.99	0.42
The Lack of Blended Approach	3.99	0.55	3.25	0.41	3.65	0.31	100.43**	3.45	0.61	3.45	0.62	0.00	2.88	0.34
Major Ongoing Maintenance Issues	3.55	0.61	3.65	0.21	2.95	0.28	227.95**	2.85	0.41	3.95	0.39	27.34**	3.99	0.25
Very little Tracking and Reporting	2.11	0.22	3.95	0.36	3.60	0.31	811.02**	3.65	0.41	3.95	0.69	5.72**	2.51	0.24
Unclear Terminology	3.12	0.41	4.25	0.47	3.75	0.38	186.95**	2.75	0.21	4.45	0.77	34.99**	2.76	0.25
Negative End User Feedback on Ease of Use	3.55	0.55	3.55	0.51	3.25	0.29	24.25**	2.85	0.28	4.15	0.72	26.98**	2.77	0.31
Negative End User Feedback on Usefulness	3.24	0.65	3.95	0.62	3.65	0.41	43.72**	2.75	0.19	4.10	0.81	26.84**	2.71	0.33
Lack of Integration with other Organization Systems	1.87	0.21	4.15	0.71	3.65	0.51	381.45**	2.85	0.41	4.40	0.91	24.55**	2.10	0.41
Poor Customer Support to Update System	3.11	0.41	2.65	0.41	2.25	0.29	143.10**	2.10	0.16	2.85	0.29	34.97**	2.61	0.46

**Table 11: Quality of L&D Strategic Roles in Organisations by Stakeholder**

L&D Role	All		L&D Prof [200]		CEO [20]		Line Managers [75]		Employ
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean
<b>Strategic Business Partner (Mean=3.56)</b>									
Achieves business goals and financial performance	3.97	0.61	4.20	0.71	3.81	0.62	3.45	1.09	3.51
Implementing strategy in the organisation	3.71	0.56	4.10	0.62	3.61	0.71	3.37	1.07	3.41
L&D strategies are aligned with the needs of the business strategy	3.62	0.59	4.01	0.79	3.65	0.41	3.42	0.96	3.41
Ensures that strategy is effectively implemented	3.42	0.58	3.85	0.71	3.37	0.81	3.12	0.78	3.27
Is a business partner with the line	4.10	0.64	4.29	0.73	3.81	0.79	3.71	0.69	3.79
Analyses and manages strategic implementation issues	3.25	0.71	3.78	0.46	3.27	0.56	3.05	0.79	3.00
Develops strategy implementation plans with line managers	3.20	0.81	3.76	0.72	3.36	0.71	3.01	0.81	3.13
Ensures that L&D is aligned with strategy implementation	3.41	0.59	3.81	0.59	3.61	0.51	2.97	0.62	3.29
Links L&D strategies and interventions to ensure effective strategy implementation	3.52	0.71	3.69	0.71	3.47	0.61	3.14	0.62	3.46
Helps in realising the organisation's strategic goals	3.47	0.81	3.97	0.84	3.34	0.62	3.11	0.72	3.25
<b>Training Manager (Mean=4.13)</b>									
Enhances efficiency of the organisation	3.81	0.59	4.21	0.71	3.61	0.74	3.41	0.97	3.95
Manages L&D processes and activities	4.26	0.61	4.46	0.69	4.10	0.71	3.71	0.86	4.11
Manages L&D processes effectively	4.18	0.64	4.36	0.72	4.06	0.72	3.81	0.72	4.08
Efficiently manages L&D resources and processes	4.01	0.81	4.24	0.69	3.81	0.89	3.72	0.69	3.78
Is an effective manager of L&D resources	3.97	0.71	4.21	0.67	4.06	0.72	3.51	0.69	3.99
Manages day to day operational issues	4.51	1.00	4.81	0.91	4.35	0.72	4.21	0.65	4.45
Designs L&D interventions	4.21	0.96	4.36	0.71	4.18	0.71	3.99	0.81	4.18
Ensures the efficient use of L&D resources	4.26	0.91	4.57	0.81	4.38	0.91	3.81	0.99	4.01
Ensures that L&D needs are addressed in an efficient way	3.99	0.71	4.35	0.73	4.27	0.81	3.51	0.78	3.95
Enhances employee KSAs effectively	4.12	0.71	4.41	0.79	4.31	0.71	3.82	0.79	4.01
<b>Learning and Development Specialist (Mean=4.07)</b>									
Develops employee knowledge, skills and abilities	4.61	1.09	4.91	0.89	4.51	0.62	4.24	0.92	4.45
Enhances the lot of employees with organisational requirements	4.31	0.81	4.51	0.96	4.51	0.82	4.04	0.89	4.21
Responds to specific skill gaps and opportunities facing the business	3.79	0.69	4.27	0.79	4.27	0.64	3.51	0.95	3.87
Helps employees to reach experienced worker standard	3.97	0.61	4.26	0.71	3.81	0.73	3.42	0.81	4.01
Is a source of expertise to develop employee KSAs	3.97	0.51	4.34	0.72	3.84	0.68	3.31	0.69	4.11
Identifies knowledge, skill and ability gaps	4.21	0.69	4.46	0.72	4.14	0.73	3.72	0.64	4.26
Delivers L&D activities in organisations	3.95	0.71	4.25	0.73	3.89	0.69	3.35	0.67	4.05
Provides employees with the training they need to achieve performance outcomes	3.81	0.71	4.21	0.73	3.87	0.72	3.84	0.69	4.21
Delivers quality training and development	3.99	0.51	4.24	0.63	3.81	0.69	3.35	0.67	4.11
Designs quality training strategies	3.97	0.61	4.21	0.68	3.99	0.64	3.45	0.62	4.04
<b>Learning and Development Strategist (Mean=4.15)</b>									
Builds confidence, capability and capacity of organisation to adapt to change	4.62	0.95	4.85	0.81	4.47	0.91	3.81	0.99	4.57
Develops new processes and strategies	4.21	0.97	4.65	0.84	4.27	0.96	3.72	0.75	4.18
L&D activities enhance the capabilities of the organisation	4.10	0.71	4.34	0.69	4.16	0.72	3.81	0.81	4.04
Helps the organisation to have the capability to adjust to new markets and greater opportunities	4.14	0.61	4.34	0.63	4.31	0.69	3.41	0.67	4.12
Is an effective capability builder	4.01	0.67	4.41	0.72	4.21	0.62	3.52	0.71	4.08
Identifies capabilities required to realise business strategy	4.01	0.67	4.26	0.71	4.02	0.64	3.52	0.78	4.14
Facilitates the senior team to formulate strategies	4.11	0.62	4.29	0.72	4.12	0.71	3.72	0.61	4.10
Ensures that L&D is aligned with strategy formulation processes and future strategic goals	4.04	0.72	4.27	0.69	4.11	0.76	3.71	0.81	4.08
Helps the organisation to develop strategic capabilities	4.10	0.71	4.29	0.69	4.14	0.73	3.72	0.68	4.08
Helps the organisation to acquire and retain capabilities for competitive success	4.21	0.91	4.41	0.98	4.16	0.89	3.79	0.94	4.17
<b>Manager of Learning Projects (Mean=4.37)</b>									
Manages major strategic projects in dynamic and complex environments	4.71	0.91	4.95	0.94	4.81	0.79	4.25	0.97	4.51
Shapes the process of cultural change to bring about transformation	4.62	0.71	4.89	0.96	4.72	0.84	4.24	0.69	4.45
L&D processes and interventions enhances the organisation's ability to transformational change	4.41	0.62	4.73	0.71	4.69	0.79	4.01	0.79	4.29
Helps the organisation to manage major strategic transformations	4.21	0.59	4.41	0.69	4.26	0.71	4.31	0.49	4.27
Acts as a transformation change agent	4.61	0.67	4.81	0.79	4.59	0.62	4.21	0.72	4.51
Supports transformational change initiatives	4.24	0.71	4.46	0.75	4.34	0.81	4.04	0.61	4.14
Implements processes of organisational renewal, change and transformation	4.14	0.81	4.43	0.72	4.24	0.71	3.89	0.72	4.07
Reshapes and realigns the organisation to manage transformational change	4.04	0.71	4.24	0.81	4.26	0.79	3.72	0.86	4.14
Helps the organisation to transform itself	4.14	0.62	4.46	0.71	4.19	0.81	3.81	0.72	4.04
Makes transformational change happen	4.64	0.71	4.89	0.72	4.79	0.76	4.24	0.62	4.46

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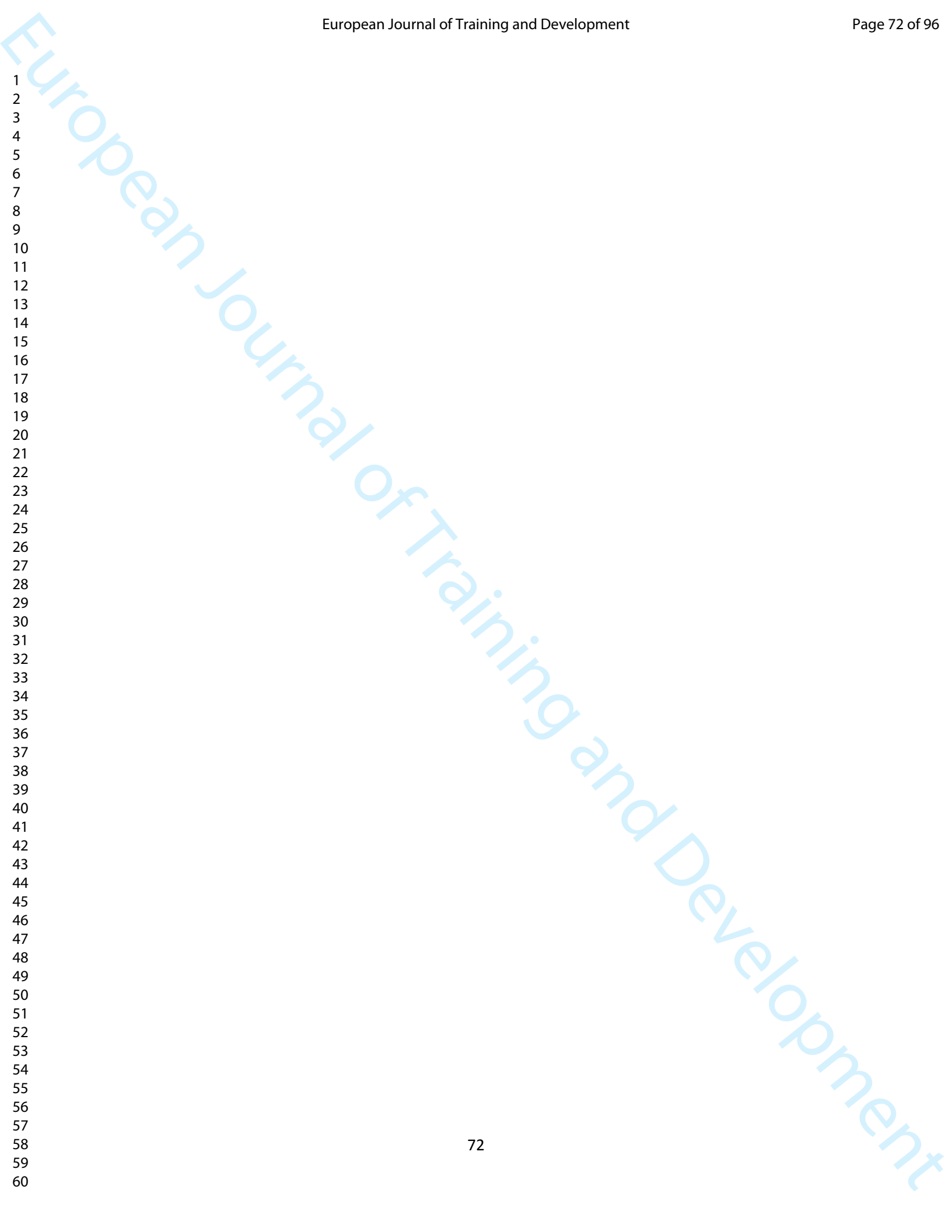


Table 12: Quality of L&amp;D Operational Roles in Organisations by Stakeholder

L&D Role	All		L&D Prof [200]		CEO [20]		Line Managers [75]		Employees [120]	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
<b>Product or Production Trainer (Mean=4.33)</b>										
Trains employees in core production service skills	4.72	0.91	4.89	0.92	4.51	0.89	4.21	0.89	4.67	0.91
Utilises training processes to ensure that employees reach experienced worker standard	4.62	0.71	4.84	0.72	4.51	0.71	4.31	0.69	4.57	0.71
T&D activities help impart the core skills necessary to achieve productivity	4.81	0.71	4.91	0.76	4.67	0.81	4.51	0.72	4.71	0.71
Ensures that employees reach experienced worker standard in the quickest possible time	4.26	0.71	4.46	0.72	4.31	0.51	4.05	0.79	4.14	0.71
L&D is used to ensure high levels of product and service quality	4.10	0.62	4.46	0.67	4.21	0.42	4.01	0.72	4.14	0.62
Analyses the capabilities of core employees who produce products or deliver services	3.97	0.59	4.25	0.42	4.10	0.49	3.85	0.69	3.99	0.59
Diagnoses gaps in core employees knowledge and skills	4.63	0.71	4.85	0.65	4.51	0.62	4.10	0.62	4.42	0.71
Ensures that the best training solutions are used to develop employee skills	3.97	0.76	4.21	0.71	4.01	0.62	3.75	0.63	4.11	0.76
Ensures that employees are skilled to meet customer quality requirements	4.10	0.49	4.46	0.51	4.21	0.71	3.70	0.52	3.97	0.49
T&D credibility is derived from its ability to achieve skill in the shortest time possible	4.21	0.51	4.45	0.67	4.14	0.41	3.51	0.49	3.56	0.51
<b>Technical Trainer (Mean=4.23)</b>										
Develops technical expertise and competence	4.10	0.49	4.46	0.51	4.21	0.71	3.70	0.52	3.97	0.49
Develops training processes to ensure that all technical processes operate effectively	4.11	0.51	4.35	0.67	4.14	0.41	3.41	0.49	3.36	0.51
L&D activities are focused on ensuring that technical expertise is at industry standard level	4.21	0.71	4.45	0.67	4.31	0.67	3.85	0.74	3.95	0.71
Develops the organisation's technical expertise to the level required by customers	4.10	0.62	4.40	0.61	4.20	0.63	3.75	0.61	3.97	0.62
Training is a strategy to develop the organisation's technical expertise	4.01	0.81	4.28	0.63	4.11	0.67	3.55	0.72	3.91	0.81
Spends time analysing the technical capabilities required to meet customer needs	4.41	0.82	4.61	0.89	4.51	0.62	4.01	0.62	4.24	0.82
Identifies gaps in technical skills to meet customer requirements	4.31	0.72	4.63	0.71	4.61	0.71	4.07	0.67	4.17	0.72
Ensures that employees can meet customer technical requirements	4.10	0.69	4.27	0.64	4.23	0.65	4.00	0.67	4.06	0.69
Ensures that all organisational technical needs are addressed	4.40	0.67	4.65	0.71	4.45	0.71	4.21	0.72	4.27	0.67
Ensures the technical capabilities of employees to meet customer needs	4.30	0.72	4.47	0.69	4.40	0.62	4.15	0.67	4.21	0.72
<b>Instructional Designer (Mean=4.34)</b>										
Translates learning objectives into instructional products and strategies	4.71	0.91	4.81	0.69	4.61	0.91	4.31	0.97	4.51	0.91
Uses instructional design processes to develop best in class training activities	4.46	0.71	4.67	0.74	4.39	0.81	4.14	0.91	4.36	0.71
Develops L&D strategies that follow best in class instructional design principles	4.81	0.59	4.95	1.01	4.72	0.96	4.45	1.09	4.71	0.59
Designs learning and development solutions that are cost effective	4.21	0.46	4.46	0.72	4.41	0.69	4.14	0.79	4.28	0.46
Is a source of expertise on the use of instructional design to develop training solutions	4.31	0.71	4.46	0.79	4.42	0.62	4.05	0.67	4.40	0.71
Utilises instructional design principles to develop best fit training solutions	4.21	0.69	4.41	0.62	4.27	0.62	4.14	0.75	4.28	0.69
Identifies the best instructional strategies to match the characteristics of employees	4.21	0.77	4.46	0.73	4.34	0.81	4.01	1.07	4.11	0.77
Ensures that best in class instructional design solutions are developed	4.10	0.74	4.36	0.71	4.47	0.62	3.85	1.11	4.06	0.74
Consistently meets best in class instructional design	4.31	0.62	4.56	0.72	4.41	0.62	4.07	0.67	4.14	0.62
Utilises best in class instructional design principles to deliver training solutions	4.11	0.67	4.34	0.68	4.36	0.71	3.95	0.96	4.06	0.67
<b>Learning and Technology Media Specialist (Mean=4.35)</b>										
Utilises technology to deliver learning and development solutions	4.76	0.61	4.95	0.79	4.81	0.69	4.35	0.71	4.69	0.61
Designs training activities that can be effectively delivered utilising technology	4.45	0.72	4.69	0.81	4.41	0.62	4.10	0.72	4.29	0.72

1	L&D activities are delivered using the most appropriate technology solutions	4.53	0.81	4.79	0.79	4.45	0.71	4.45	0.69	4.42	0
2	Helps organisations through the use of technology to train all employees	4.31	0.59	4.45	0.81	4.32	0.61	4.16	0.71	4.19	0
3	Leverages technology to deliver high quality training to employees	4.51	0.71	4.71	0.81	4.46	0.79	3.75	1.11	4.11	0
4	Leverages technology to deliver best fit training solutions	4.46	0.69	4.59	0.79	4.36	0.72	4.12	0.79	4.29	0
5	Identifies where technology can be used to deliver training	4.10	0.59	4.31	0.56	4.14	0.75	3.91	0.81	4.01	0
6	Ensures that technology is used to deliver training to employees in a cost-effective manner	4.11	0.71	4.45	0.51	4.21	0.61	4.01	0.79	4.06	0
7	Reaches as many employees as possible utilising technology	4.14	0.69	4.46	0.71	4.21	0.67	3.80	1.04	4.04	0
8	Leverages training in a credible way to deliver training throughout the organisation	4.26	0.53	4.49	0.72	4.34	0.62	3.96	1.09	4.14	0
9	<b>Learning and Development Administrator (Mean=4.31)</b>										
10	Administers records related to employee training to ensure compliance	4.46	0.71	4.76	0.74	4.31	0.51	3.81	0.79	4.21	0
11	Implements activities to ensure that the organisation has accurate and compliant training records	4.31	0.72	4.45	0.81	4.27	0.51	3.96	0.72	4.24	0
12	Ensures L&D activities are compliant with external regulatory requirements	4.14	0.49	4.34	0.45	4.24	0.71	4.14	0.64	4.09	0
13	Ensures that training processes and systems are compliant	4.51	0.76	4.75	0.81	4.64	0.78	3.81	0.72	4.34	0
14	Administers effectively training and development processes in the organisation	4.81	0.69	4.95	0.72	4.91	0.72	4.27	0.89	4.67	0
15	Administers training and development processes to ensure operational efficiency	4.51	0.69	4.76	0.59	4.40	0.62	4.15	0.71	4.41	0
16	Ensures that the costs and benefits of all training activities are monitored	3.97	0.81	4.24	0.65	4.14	0.71	3.51	0.89	4.07	0
17	Ensures that all training and development processes are implemented consistently	4.21	0.69	4.51	0.81	4.19	0.81	4.01	0.62	4.11	0
18	Ensures the delivery of training in a timely manner	4.31	0.75	4.51	0.67	4.31	0.81	4.01	0.62	4.15	0
19	Enhances credibility through administering training and development processes efficiently and effectively	4.14	0.81	4.37	0.62	4.24	0.71	4.01	0.71	4.07	0

Table 13: Characteristics of L&amp;D Career Levels of L&amp;D Professionals

Career Level	Task Characteristics & Typical Roles	Focus of Level and Measurement of Effectiveness	Competency/L&D Expertise Balance/Where Time is Spent	
<b>Entry Level</b>	<p><b>Task Characteristics:</b></p> <ul style="list-style-type: none"> <li>● Will carry out an operational training role.</li> <li>● May also be a generalist with limited experience.</li> <li>● May hold a formal title as trainer.</li> <li>● May perform a variety of administrative training task.</li> </ul> <p><b>Typical Roles:</b></p> <ul style="list-style-type: none"> <li>● Product/ Production Trainer</li> <li>● Technical Trainer</li> <li>● Learning and Development Administrator.</li> </ul>	<p><b>Focus of Role:</b></p> <ul style="list-style-type: none"> <li>● Delivery of key L&amp;D fundamentals.</li> <li>● Short-term operational and immediate focus.</li> <li>● Meets the needs of clients through the provision of training.</li> <li>● Involved in direct training activities.</li> <li>● Focus on individual employees or groups of employees</li> <li>● Administration of key aspects of day to day learning and development.</li> </ul> <p><b>Measurement of Effectiveness:</b></p> <ul style="list-style-type: none"> <li>● Skill level of employees trained.</li> <li>● Efficiency and effectiveness of L&amp;D solution implementation.</li> <li>● Demonstration of flexibility and agility to quickly deliver L&amp;D solutions.</li> <li>● Focus on appropriateness of solutions.</li> <li>● Client satisfaction with training outcomes.</li> <li>● Impact of training on employee performance In the short term.</li> </ul>	<p><b>Competency/L&amp;D Expertise Balance:</b></p> <ul style="list-style-type: none"> <li>● 30/70: in favour of L&amp;D Expertise.</li> <li>● Primary focus on possession of L&amp;D expertise.</li> <li>● L&amp;D Expertise will focus on designing, diagnosing and Delivering L&amp;D solutions.</li> <li>● L&amp;D Expertise will be developed through formal education and on the job experience.</li> </ul> <p><b>Where Time is Spent:</b></p> <ul style="list-style-type: none"> <li>● Designing learning and development solutions.</li> <li>● Direct delivery of training.</li> <li>● Engagement with supervisors, managers &amp; employees.</li> <li>● Evaluation of training activities.</li> <li>● Administration of training including maintaining training records</li> <li>● Compiling data and information on training performance.</li> <li>● Day to day organizing of training.</li> </ul> <p><b>Relationship with Client:</b></p> <ul style="list-style-type: none"> <li>● Transactional focused on delivering L&amp;D fundamentals.</li> <li>● Provides training solutions, process support, data and information.</li> <li>● Dealing with day to day training problems highlighted by employees and line managers.</li> <li>● Responding to training requests from employees.</li> </ul>	<p>De</p> <p>Shi</p> <p>●</p> <p>●</p> <p>●</p> <p>Shi</p> <p>Per</p> <p>●</p> <p>Shi</p> <p>●</p> <p>●</p> <p>●</p> <p>WH</p> <p>●</p> <p>●</p>





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4	<b>Senior Career Level</b>	<p><b>Task Characteristics:</b></p> <ul style="list-style-type: none"> <li>• Can be a very experienced generalist or specialist.</li> <li>• Has responsibility for the management of learning and development specialists.</li> <li>• Focus on managing conflicting L&amp;D priorities within budget and expertise constraints.</li> <li>• Strong emphasis on building relationships with key stakeholders.</li> <li>• The development of customized and personalized L&amp;D solutions.</li> </ul> <p><b>Typical Roles:</b></p> <ul style="list-style-type: none"> <li>• Strategic Business Partner</li> <li>• Professional L&amp;D Specialist</li> <li>• Learning and Development Manager</li> </ul>	<p><b>Focus of Role:</b></p> <ul style="list-style-type: none"> <li>• Addresses L&amp;D challenges at organizational level.</li> <li>• May provide leadership of L&amp;D activities.</li> <li>• Medium to long-term time focus.</li> <li>• May work on specialist L&amp;D activity or be a generalist.</li> <li>• Utilizes a strategic lens to address L&amp;D problems and opportunities.</li> <li>• Partnering with employees, line managers and senior management.</li> <li>• Developing credibility, professionalism and reputation of L&amp;D.</li> </ul> <p><b>Measurement of Effectiveness:</b></p> <ul style="list-style-type: none"> <li>• Respected and trusted business partner.</li> <li>• Responsiveness to business needs.</li> <li>• Development of effective relationships with clients and employees.</li> <li>• Effectiveness of management of L&amp;D resources.</li> <li>• Impact on individual, team and organizational performance.</li> <li>• Effective utilization of external training resources.</li> </ul>	<p><b>Competency/L&amp;D Expertise Balance:</b></p> <ul style="list-style-type: none"> <li>• 80/20: Major shift towards use of foundational competencies.</li> <li>• Primary foundational competencies are in business, management and interpersonal areas.</li> <li>• Specialist expertise in managing knowledge and organizational change.</li> </ul> <p><b>Where Time is Spent:</b></p> <ul style="list-style-type: none"> <li>• Understanding the functional and business requirements.</li> <li>• Developing innovative learning and development solutions.</li> <li>• Networking with key stakeholders to implement L&amp;D solutions</li> <li>• Managing line and specialist relationships and working across the organization.</li> </ul> <p><b>Relationship with Client:</b></p> <ul style="list-style-type: none"> <li>• Consultant, strategic partner, collaborative relationship.</li> <li>• Provides innovative solutions, ideas and insights to clients.</li> <li>• Strong focus on the delivery of best fit L&amp;D solutions.</li> <li>• Negotiation of time and other resources for delivery of L&amp;D.</li> <li>• Management of the politics of L&amp;D implementation and resolving conflicting priorities.</li> </ul>	Shi
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<b>Executive Career Level</b>	<b>Task Characteristics:</b> <ul style="list-style-type: none"> <li>Typically, is the most senior L&amp;D specialist or generalist in the organization.</li> <li>Can operate at VP role and may be part of the senior organization team.</li> <li>Will have oversight for all L&amp;D activities and integration with HR practices.</li> <li>Will be seen as a credible leader on all L&amp;D issues.</li> </ul> <b>Typical Roles:</b> <ul style="list-style-type: none"> <li>Learning and Development Strategist</li> <li>Manager of Learning Projects</li> <li>Strategic Business Partner.</li> </ul>	<b>Focus of Role:</b> <ul style="list-style-type: none"> <li>Leadership of L&amp;D at the organization or corporate level.</li> <li>Alignment of L&amp;D with organizations' strategic goals.</li> <li>Development of best fit L&amp;D strategy.</li> <li>Partnering with senior management and the executive team.</li> <li>Leads major strategic learning and development projects.</li> <li>Leveraging external L&amp;D resources and working collaboratively with other organizations.</li> </ul> <b>Measurement of Effectiveness:</b> <ul style="list-style-type: none"> <li>Seat at the leadership table.</li> <li>Perceived by client as an expert on strategic L&amp;D issues.</li> <li>Effectiveness of organizational change efforts.</li> <li>Quality of knowledge, skills and abilities of the workforce.</li> <li>Contribution to organizational performance, organizational reputation and ability to attract talent.</li> </ul>	<b>Competency/L&amp;D Expertise Balance:</b> <ul style="list-style-type: none"> <li>70/30: Must be credible as a business leader as well as an L&amp;D professional.</li> <li>Significant focus on foundational competencies, particularly business, management and interpersonal skills.</li> <li>Specialist expertise in managing knowledge and organizational change including major L&amp;D change projects.</li> </ul> <b>Where Time is Spent:</b> <ul style="list-style-type: none"> <li>Understanding organizational corporate and industry dynamics.</li> <li>Analysing the external environment for L&amp;D implications.</li> <li>Developing L&amp;D strategies and plans and linking to business Strategy.</li> <li>Managing strategic projects to transform the organization to fit the external environment.</li> </ul> <b>Relationship with Client:</b> <ul style="list-style-type: none"> <li>Leader, colleague, coach, strategic partner and expert.</li> <li>Helps client to both formulate and implement business strategies.</li> <li>Challenges senior management on L&amp;D issues.</li> <li>Addresses complex organizational problems.</li> <li>Gains commitment for L&amp;D including resource investment.</li> </ul>	De • • • • • • • Shi • • • • • • •

**Table 14: Stakeholder Perceptions of the Quality of L&D Foundational Competencies by Quality and Importance to Roles and Career Level****(a)**

Foundational Competency	Quality of Competency							
	L&D Professional		Non L&D Stakeholders		Entry		Mid	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD
<b>Business Foundational Competencies</b>								
Understands the need to stay abreast of new and emerging external trends in L&D	3.95	0.72	3.45	0.91	2.62	0.74	3.15	0.72
Understands the issues related to the use of technology and its potential applications to L&D	4.10	0.71	3.65	0.97	2.75	0.69	3.14	0.72
Understands changing generational preferences and their impact on the provision of L&D	3.97	0.81	3.65	0.81	2.95	0.81	3.15	0.81
Understand the role of digital, mobile and social technologies and their impact on L&D	3.96	0.72	3.51	0.63	3.10	0.65	3.51	0.63
Possesses knowledge of various HRM functions and how they impact on L&D in organizations	4.25	0.45	3.78	0.79	3.11	0.72	3.81	0.72
Understand the importance of corporate social responsibility and sustainability and their significance for L&D	4.14	0.79	3.84	0.87	1.81	0.62	3.14	0.81
Understands the key strategic and business issues that are relevant to the organization's business sector.	4.45	0.73	3.35	0.81	2.61	0.72	3.84	0.72
Is skilled to act as business partner working with senior management on business strategy	4.26	0.72	3.71	0.86	2.62	0.72	3.85	0.41
Possesses a strong appreciation and understanding of the organizations customer context and its implications on L&D	4.14	0.82	3.85	0.76	1.85	0.29	3.79	0.63
Possesses strong financial acumen, the skills to prepare budgets and develop cost-effective L&D strategies	4.24	0.71	3.21	0.62	1.91	0.65	3.75	0.81
<b>Managerial Foundational Competencies</b>								
Continuously displays the political skills necessary to position L&D in an organization	4.46	0.71	3.71	0.82	2.41	0.61	3.86	0.72
Skilled at leveraging new technology to support employee self-directed learning, peer-to-peer learning and knowledge sharing	4.04	0.72	3.41	0.69	2.21	0.62	2.96	0.72
Skilled at using information acquired from different sources in the organization to make decisions about L&D in organizations	4.21	0.76	3.51	0.97	2.26	0.51	3.45	0.63
Possesses a detailed knowledge of KPI's, planning processes and goal setting	4.14	0.72	3.61	0.75	3.15	0.71	3.75	0.63
Possesses a strong understanding of management processes and their role in managing the L&D function	4.24	0.81	3.65	0.72	2.76	0.22	3.15	0.51
Skilled in delegating tasks, making effective use of L&D expertise and the skills to lead the function effectively	4.10	0.84	3.47	0.62	2.95	0.41	3.45	0.63
Skilled in working strategically with line managers, other functions and work across multiple organizational layers	3.95	0.71	3.45	0.62	2.95	0.42	3.15	0.63
Skilled at leveraging the skills and resources of external agencies and trainers to achieve the priorities of L&D	4.14	0.62	3.52	0.81	2.41	0.31	3.05	0.63
Skilled in balancing organizational and employee priorities and using appropriate criteria to resolve conflicts	4.40	0.79	3.52	0.62	3.45	0.62	3.85	0.72
Understands complex management situations and is skilled in analysing the interconnections among their elements	4.21	0.69	3.14	0.62	3.12	0.62	3.45	0.41
<b>Interpersonal Foundational Competencies</b>								
Skilled at fostering strong relationships with organisational stakeholders	4.56	0.71	4.21	0.62	3.45	0.62	4.14	0.72
Skilled at presenting a case to senior management for investment in learning and development	4.36	0.51	4.15	0.62	2.96	0.81	4.24	0.21
Skilled at communicating the outcomes of L&D to organisational stakeholders	4.51	0.71	3.85	0.69	2.97	0.65	3.81	0.63
Understands the importance of feedback from stakeholders to enhance the effectiveness of L&D in organisations	4.27	0.81	3.51	0.64	2.96	0.51	3.65	0.72
Is skilled at negotiating resources for effective L&D implementation	4.31	0.96	3.76	0.71	2.95	0.62	4.10	0.72
Understands the importance of maintaining connections with professional bodies and external L&D peers.								

1	Skilled at fostering collaboration and connectivity using utilising mobile and social technologies	4.21	0.81	4.04	0.61	4.10	0.71	4.31	0.5
2	Possesses strong managing up and influencing upwards skills with key organisational decision makers	3.86	0.62	3.22	0.51	3.16	0.27	3.87	0.5
3	Possesses the interpersonal skills and sensitivity to work effectively across cultures and collaborate with strategic partners in different locations	4.41	0.61	3.86	0.55	3.15	0.62	3.81	0.6
4	Skilled in working as part of team to achieve the goals and priorities of L&D in organisations	4.31	0.71	3.96	0.51	3.17	0.62	4.34	0.7
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6	<b>Intra-Personal Foundational Competencies</b>								
7									
8	Possesses a strong set of ethical values and professional principles that guide day to day practice	4.56	0.52	4.41	0.71	4.41	0.21	4.51	0.2
9	Understands the importance of a personal communication style, credibility and professionalism in enhancing L&D in organisations	4.52	0.71	4.32	0.61	4.31	0.27	4.27	0.3
10	Understands the importance of diversity and equality in the provision of L&D in organisations	4.62	0.47	4.24	0.81	4.16	0.29	4.15	0.2
11	Possesses strong analytical skills, data and digital literacy and can use them effectively in different situations	4.46	0.52	3.87	0.81	3.15	0.26	3.45	0.6
12	Possesses a strong tactical awareness and has insight concerning the day-to-day realities of organisations	4.34	0.24	4.14	0.62	4.26	0.71	4.14	0.4
13	Possesses strong emotional intelligence and self-awareness and how it impacts personal effectiveness	4.76	0.81	4.44	0.62	3.81	0.29	3.75	0.6
14	Possesses the skill to self –reflect on practices and is aware of the impact of these practice son all stakeholders	4.71	0.62	4.45	0.65	4.26	0.79	43.14	0.7
15	Possesses the skill and ability to deal with complexity and ambiguity in problem solving and decision making	4.35	0.71	4.28	0.71	2.95	0.14	2.99	0.3
16	Possesses the skill and insight to differentiate between personal and organisational priorities	4.61	0.42	4.31	0.62	3.98	0.51	3.95	0.7
17	Possesses an entrepreneurial mind-set and the ability to assess a situation for organisational advantage	4.04	0.62	3.76	0.81	2.86	0.72	3.25	0.7
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(b)

Foundational Competency	Importance to L&D Role														
	Strategic										Operational				
Business Foundational Competencies	Str. Bus. Partner		Training Mgr.		L&D Specialist		L&D Strategist		Mgr. of Learning Projs.		Prod. Trainer		Tech. Trainer		Inst. Design
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean
Understands the need to stay abreast of new and emerging external trends in L&D	4.65	0.79	4.75	0.81	4.85	0.76	4.15	0.62	4.10	0.71	1.75	0.69	1.81	0.71	2.20
Understands the issues related to the use of technology and its potential applications to L&D	4.25	0.67	4.65	0.81	4.25	0.71	4.65	0.71	4.55	0.81	1.81	0.71	1.91	0.79	3.45
Understands changing generational preferences and their impact on the provision of L&D	4.10	0.72	4.20	0.71	4.10	0.69	4.51	0.65	4.55	0.72	1.91	0.72	1.97	0.72	2.76
Understand the role of digital, mobile and social technologies and their impact on L&D	4.14	0.71	4.31	0.84	4.14	0.67	4.71	0.69	4.65	0.71	2.10	0.71	2.20	0.72	3.67
Possesses knowledge of various HRM functions and how they impact on L&D in organizations	4.40	0.77	4.15	0.81	4.51	0.62	4.85	0.71	4.62	0.79	2.11	0.67	2.51	0.76	2.14
Understand the importance of corporate social responsibility and sustainability and their significance for L&D	4.15	0.79	4.25	0.67	4.35	0.72	3.95	0.67	3.85	0.79	1.81	0.51	1.41	0.26	1.72
Understands the key strategic and business issues that are relevant to the organization's business sector.	4.65	0.79	4.85	0.91	4.65	0.79	3.99	0.71	3.75	0.69	2.14	0.64	1.51	0.36	1.71
Is skilled to act as business partner working with senior management on business strategy	4.85	0.79	4.65	0.72	4.71	0.81	3.76	0.72	3.86	0.71	2.20	0.42	1.97	0.41	1.21
Possesses a strong appreciation and understanding of the organizations customer context and its implications or L&D	4.65	0.79	4.51	0.72	4.41	0.81	4.12	0.71	4.14	0.89	2.91	0.67	3.45	0.71	1.76
Possesses strong financial acumen, the skills to prepare budgets and develop cost-effective L&D strategies	4.34	0.81	4.81	0.75	4.65	0.72	3.72	0.76	3.41	0.51	1.81	0.31	1.41	0.21	1.41
<b>Managerial Foundational Competencies</b>															
Continuously displays the political skills necessary to position L&D in an organization	4.65	0.79	4.85	0.81	4.65	0.71	3.85	0.75	3.55	0.79	1.96	0.78	1.94	0.81	2.16
Skilled at leveraging new technology to support employee self-directed learning, peer-to-peer learning and knowledge sharing	4.14	0.67	4.21	0.84	4.24	0.87	4.41	0.65	4.51	0.81	1.81	0.41	2.72	0.62	3.45

1	Skilled at using information acquired from different sources in the organization to make decisions about L&D in organizations	4.81	0.99	4.65	0.79	4.84	0.99	4.46	0.84	4.14	0.72	2.14	0.21	1.96	0.41	3.25
2																
3																
4	Possesses a detailed knowledge of KPI's, planning processes and goal setting	4.24	0.67	4.31	0.81	4.51	0.62	4.18	0.62	3.51	0.79	1.96	0.24	1.85	0.21	2.61
5																
6																
7	Possesses a strong understanding of management processes and their role in managing the L&D function	4.46	0.71	4.41	0.72	4.61	0.85	4.65	0.89	3.81	0.72	2.11	0.41	2.12	0.21	2.62
8																
9																
10																
11	Skilled in delegating tasks, making effective use of L&D expertise and the skills to lead the function effectively	4.10	0.67	4.31	0.81	4.62	0.76	4.71	0.81	3.81	0.72	2.01	0.41	2.10	0.41	2.11
12																
13																
14	Skilled in working strategically with line managers, other functions and work across multiple organizational layers	4.45	0.67	4.72	0.79	4.38	0.96	3.95	0.71	3.85	0.62	1.56	0.21	1.81	0.41	1.41
15																
16																
17	Skilled at leveraging the skills and resources of external agencies and trainers to achieve the priorities of L&D	4.46	0.71	4.81	0.65	4.45	0.62	3.72	0.68	3.45	0.71	2.14	0.41	2.21	0.31	2.86
18																
19																
20	Skilled in balancing organizational and employee priorities and using appropriate criteria to resolve conflicts	4.65	0.85	4.25	0.81	4.14	0.45	4.26	0.71	4.45	0.65	2.72	0.41	2.16	0.21	3.15
21																
22																
23	Understands complex management situations and is skilled in analysing the interconnections among their elements	4.25	0.71	4.85	0.71	4.65	0.75	4.15	0.75	4.01	0.91	2.21	0.21	2.41	0.31	2.01
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30	<b>Interpersonal Foundational Competencies</b>															
31																
32																
33	Skilled at fostering strong relationships with organisational stakeholders	4.62	0.77	4.81	0.61	4.76	0.72	3.99	0.81	3.72	0.69	2.65	0.51	2.41	0.21	2.96
34																
35	Skilled at presenting a case to senior management for investment in learning and development	4.75	0.51	4.85	0.72	4.75	0.62	3.95	0.71	3.51	0.62	2.45	0.42	2.31	0.31	2.36
36																
37																
38	Skilled at communicating the outcomes of L&D to organisational stakeholders	4.85	0.87	4.85	0.67	4.71	0.81	3.85	0.71	3.61	0.72	2.24	0.62	2.24	0.32	2.61
39																
40																
41	Understands the importance of feedback from stakeholders to enhance the effectiveness of L&D in organisations	4.71	0.69	4.69	0.71	4.46	0.72	3.95	0.72	3.85	0.62	2.51	0.31	2.42	0.31	2.49
42																
43																
44	Is skilled at negotiating resources for effective L&D implementation	4.45	0.71	4.55	0.76	4.51	0.62	4.65	0.71	3.45	0.81	2.14	0.14	2.13	0.12	2.31
45																
46																
47	Understands the importance of maintaining connections with professional bodies and external L&D peers.															
48																
49																
50	Skilled at fostering collaboration and connectivity using utilising mobile and social technologies	4.25	0.64	3.95	0.65	3.85	0.61	4.45	0.71	4.45	0.61	2.24	0.17	2.31	0.41	2.41
51																
52																
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54																
55	Possesses strong managing up and influencing upwards	4.41	0.65	4.78	0.65	4.81	0.59	4.21	0.81	3.56	0.75	2.21	0.42	2.31	0.41	2.41
56																
57																



1	skills with key organisational decision makers																
2																	
3	Possesses the interpersonal skills and sensitivity to work effectively across cultures and collaborate with strategic partners in different locations	4.21	0.74	4.41	0.61	4.51	0.81	3.95	0.72	3.45	0.61	3.11	0.41	3.14	0.36	3.71	
4																	
5	Skilled in working as part of team to achieve the goals and priorities of L&D in organisations	4.56	0.72	4.45	0.13	4.41	0.81	4.16	0.71	3.51	0.62	3.16	0.47	3.21	0.37	3.11	
6																	
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9																	
10																	
11	<b>Intra-Personal Foundational Competencies</b>																
12																	
13																	
14	Possesses a strong set of ethical values and professional principles that guide day to day practice	4.24	0.62	4.41	0.51	4.31	0.57	4.46	0.71	4.24	0.81	3.65	0.21	3.85	0.41	3.15	
15																	
16	Understands the importance of a personal communication style, credibility and professionalism in enhancing L&D in organisations	4.45	0.71	4.31	0.65	4.41	0.78	4.34	0.83	4.86	0.71	4.10	0.10	4.40	0.61	3.17	
17																	
18	Understands the importance of diversity and equality in the provision of L&D in organisations	4.25	0.62	4.31	0.42	4.56	0.51	4.24	0.71	4.37	0.81	2.72	0.61	2.81	0.62	3.10	
19																	
20																	
21	Possesses strong analytical skills, data and digital literacy and can use them effectively in different situations	4.31	0.71	4.47	0.65	4.71	0.64	3.81	0.62	3.45	0.71	3.11	0.62	3.01	0.51	4.06	
22																	
23	Possesses a strong tactical awareness and has insight concerning the day-to-day realities of organisations	4.75	0.62	3.86	0.71	4.15	0.49	4.65	0.71	3.81	0.62	4.11	0.62	3.10	0.42	3.72	
24																	
25	Possesses strong emotional intelligence and self-awareness and how it impacts personal effectiveness	4.26	0.73	3.98	0.71	4.16	0.47	4.14	0.61	4.31	0.61	3.95	0.47	3.45	0.62	3.16	
26																	
27	Possesses the skill to self – reflect on practices and is aware of the impact of these practice son all stakeholders	4.23	0.61	4.10	0.61	4.10	0.71	4.14	0.25	4.41	0.62	3.65	0.71	2.89	0.73	3.86	
28																	
29	Possesses the skill and ability to deal with complexity and ambiguity in problem solving and decision making	4.56	0.74	4.81	0.72	4.41	0.36	4.14	0.36	3.75	0.62	2.81	0.21	2.21	0.24	3.15	
30																	
31	Possesses the skill and insight to differentiate between personal and organisational priorities	4.15	0.62	4.21	0.26	4.14	0.31	4.31	0.72	4.46	0.71	3.56	0.31	2.72	0.41	2.44	
32																	
33	Possesses an entrepreneurial mind-set and the ability to assess a situation for organisational advantage	3.86	0.71	4.15	0.24	4.44	0.31	3.46	0.71	3.26	0.25	1.81	0.25	1.91	0.35	2.14	
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**Table 15:** Predictors of Strategic L&D Roles in Organizations

VARIABLE	L&D MANAGER			SBP			L&D STRATEGIST			L&D SPECIALIST		
	B	SE B	$\beta$	B	SE B	$\beta$	B	SE B	$\beta$	B	SE B	$\beta$
<b>Individual Characteristics:</b>												
Education	.082	.005	.021	.061	.005	.003	.004	.005	.026	.003	.005	.018
Experience Density	.009	.071	.002	.005	.072	.022	.082	.068	.041	.101	.133	.041
Gender	.032	.041	.037	.069	.076	.028	.078	.071	.036	.141	.121	.063
Organization Tenure	.081	.071	.0213	.047	.127	.021	.191	.132	.081	.019	.131	.081
Job Tenure	.021	.021	.031	.062	.016	.028	.006	.014	.082	.131	.123	.068
Position in Hierarchy	.067	.014	.167**	.071	.014	.167**	.060	.014	.146**	.071	.015	.152**
<b>Organization Characteristics</b>												
No. of Employees	.067	.011	.021	.412	.010	.356***	.361	.124	.379***	.094	.087	.060
Technology Intensity	.041	.071	.022	.011	.021	.003	.068	.082	.041	.051	.072	.021
Domestic	.061	.014	.028	.072	.079	.038	.078	.071	.036	.036	.051	.023
International	.082	.077	.037	.311	.119	.196**	.582	.107	.267***	.067	.015	.042
Manufacturing	.041	.051	.023	.041	.071	.028	.071	.079	.031	.021	.019	.003
Service	.011	.005	.021	.051	.061	.020	.041	.042	.028	.002	.044	.023
Environmental Dynamism	.010	.004	.002	.426	.010	.372***	.467	.103	.436***	.084	.081	.061
Industry Growth	.041	.061	.021	.364	.126	.368***	.371	.111	.387***	.051	.072	.031
<b>L&amp;D Function Characteristics</b>												
Size of L&D Function	.067	.014	.146**	.426	.107	.157**	.163	.103	.436	.079	.005	.011
Maturity of L&D Function	.091	.127	.021	.419	.124	.267**	.460	.119	.487***	.124	.106	.206*
L&D Separate to HR	.004	.005	.021	.009	.012	.004	.216	.103	.196**	.009	.005	.027
L&D Integrated to HR	.003	.005	.021	.000	.005	.001	.004	.005	.027	.003	.006	.019
R2				.177			.191			.121		
R2 Adj.	.110**			.167***			.184***			.114**		

**Table 16: Predictors of Operational L&D Roles in Organizations**

VARIABLE	PRODUCT/PRODUCTION TRAINER			TECHNICAL TRAINER			INSTRUCTIONAL DESIGN			LEARNING TECHNOLOGY & MEDIA SPECIALIST		
	B	SE B	$\beta$	B	SE B	$\beta$	B	SE B	$\beta$	B	SE B	$\beta$
<b>Individual Characteristics:</b>												
Education	.000	.005	.001	.004	.005	.021	.003	.005	.019	.003	.005	.008
Experience	.046	.071	.021	.203	.069	.100*	.214	.071	.101*	.264	.072	.121*
Gender	.041	.070	.021	.082	.068	.041	.041	.000	0.05	.051	.004	.008
Organization	.041	.072	.037	.021	.041	.023	.011	.005	.007	.001	.003	.001
Tenure												
Job Tenure	.031	.052	.028	.082	.068	.041	.041	.047	.037	.021	.037	.019
Position in Hierarchy	.001	.005	.002	.002	.004	.003	.020	.030	.026	.007	.073	.035
<b>Organizational Characteristics</b>												
No. of Employees	.004	.007	.003	.001	.002	.001	.003	.002	.001	.003	.002	.001
Technology Intensity	.041	.046	.023	.004	.010	.002	.000	.001	.001	.003	.002	.001
Domestic	.000	.001	.000	.000	.002	.001	.002	.003	.001	.001	.004	.001
International	.002	.003	.001	.041	.021	.027	.003	.005	.012	.006	.007	.003
Manufacturing	.462	.124	.281***	.081	.041	.037	.000	.001	.000	.005	.007	.003
Environmental Dynamism	.005	.006	.003	.002	.002	.002	.003	.002	.002	.003	.002	.001
Industry Growth	.000	.001	.000	.002	.001	.001	.001	.001	.001	.001	.002	.001
Service	.001	.003	.002	.126	.167	.351***	.003	.002	.009	.003	.002	.009
<b>L&amp;D Function Characteristics</b>												
Size of L&D Function	.000	.001	.000	.002	.003	.001	.421	.105	.203***	.286	.068	.137**
Maturity of L&D Function	.001	.003	.002	0.03	.005	.002	.361	.111	.367***	.367	.118	.430***
L&D Separate to HR	.002	.003	.002	.002	.004	.003	.000	.003	.001	.004	.005	.003
L&D Integrated to HR	.001	.002	.001	.001	.002	.001	0.01	.002	.001	.000	.001	.000
R2	.120			.110			.167			.182		
R2 Adj.	.109**			.09*			.165**			.171***		

**Table 17: Predictors of the Strength and Importance of L&D Foundational Competencies and Areas of Expertise**

L&D Foundational Competencies and Areas of Expertise	Strength of Competency and Area of Expertise	Importance of Competency and Area of Expertise
Personal Foundational Competencies	Education [0.52; p<.001] Experience Density [0.46; p<.001]	<b>Organisational Factors:</b> <ul style="list-style-type: none"> <li>Service Sector [0.46; p&lt;.001]</li> </ul> <b>L&amp;D Function Characteristics:</b> Size of L&D Function [.011; p.05]
Interpersonal Competencies	Education [0.46; p<.001] Experience Density [0.46; p<.001] Position in Hierarchy [0.27; p.01]	<b>Organisational Factors:</b> <ul style="list-style-type: none"> <li>Service Sector [0.20; p&lt;.001]</li> <li>International Organisation [0.24; p.01]</li> </ul> <b>L&amp;D Function Characteristics:</b>

1			Size of L&D Function [.019; p.05]
2	Management Competencies	Experience Density [0.46; p<.001] Organisational Tenure [.0331; p.001]	<b>Organisational Factors:</b> <ul style="list-style-type: none"> <li>● International Organisation [0.32; p.0</li> <li>● Number of Employees [0.16; p05]</li> <li>● Industry Growth</li> </ul> <b>L&amp;D Function Characteristics:</b> <ul style="list-style-type: none"> <li>● Size of L&amp;D Function [0.31; p.001]</li> <li>● Maturity of Function [0.26; p.001]</li> </ul>
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21	Diagnosing, Designing and Delivering L&D	Experience Density [0.31; p<.001] Experience Density [0.46; p.001]	<b>Organisational Factors:</b> <ul style="list-style-type: none"> <li>● Technology Intensity [0.19; p.05]</li> <li>● Service Sector [0.27; p.01]</li> <li>● International Organisation [.031; p&lt;.0</li> </ul> <b>L&amp;D Function Characteristics:</b> <ul style="list-style-type: none"> <li>● Size of L&amp;D Function [0.27; p.001]</li> <li>● Maturity of Function [0.23; p.010.26</li> </ul>
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30	Managing, Measuring and Evaluating L&D	Experience Density [0.31; p<.001] Experience Density [0.31; p.001]	<b>Organisational Factors:</b> <ul style="list-style-type: none"> <li>● International Organisation [0.21; p.0</li> <li>● Service Sector [0.24; p.01]</li> </ul> <b>L&amp;D Function Characteristics:</b> <ul style="list-style-type: none"> <li>● Size of L&amp;D Function [0.27; p.001]</li> <li>● Maturity of Function [0.28; p.010.26</li> </ul>
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38	Managing Knowledge and Organisational Change	Experience Density [0.63; p<.001] Position in Hierarchy [0.41; p.001] Education Level [0.46; p.001]	<b>Organisational Factors:</b> <ul style="list-style-type: none"> <li>● Number of Employees [0.36; p.001]</li> <li>● International Organisation [0.47; p.0</li> <li>● Technology Intensity [0.36; p&lt;.001]</li> <li>● Environmental Dynamism [0.47; p&lt;.0</li> <li>● Industry Growth [0.24; p01]</li> </ul>
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**Table 18: Relationship between Foundational Competencies, Career Levels, L&D Roles, Perceived Effectiveness & Contextual Factors Predictors [Regression Results]**

Competency/Expertise Area	Career Level	L&D Roles	Perceived L&D Effectiveness
Personal Foundational Competencies	<ul style="list-style-type: none"> <li>Entry L&amp;D Career [0.07: NS]</li> <li>Mid L&amp;D Career [0.17: P&lt;.05]</li> <li>Senior L&amp;D Career [0.26: P&lt;.001]</li> <li>Executive L&amp;D Career [0.21: P&lt;.001]</li> </ul>	<p><b>Strategic L&amp;D Roles:</b></p> <ul style="list-style-type: none"> <li>L&amp;D Manager [0.47: P&lt;.001]</li> <li>Manager of Learning Projects [0.47: P&lt;.001]</li> </ul> <p><b>Operational L&amp;D Roles:</b></p> <ul style="list-style-type: none"> <li>Production Trainer [0.24: P&lt;.01]</li> <li>Technical Trainer [0.31: P&lt;.001]</li> </ul>	<ul style="list-style-type: none"> <li>L&amp;D Professional [0.41: P&lt;.001]</li> <li>Other Stakeholders [0.14: P&lt;.05]</li> </ul>
Interpersonal Competencies	<ul style="list-style-type: none"> <li>Entry L&amp;D Career [0.11: P&lt;.05]</li> <li>Mid L&amp;D Career [0.19: P&lt;.01]</li> <li>Senior L&amp;D Career [0.36: P&lt;.001]</li> <li>Executive L&amp;D Career [0.51: P&lt;.001]</li> </ul>	<p><b>Strategic L&amp;D Roles:</b></p> <ul style="list-style-type: none"> <li>Strategic Business Partner [0.51: P&lt;.001]</li> <li>Manager of Learning Projects [0.67: P&lt;.001]</li> <li>Learning &amp; Development Specialist [0.51: P&lt;.001]</li> <li>Learning &amp; Development Manager [0.41: P&lt;.001]</li> </ul> <p><b>Operational L&amp;D Roles:</b></p> <ul style="list-style-type: none"> <li>Production Trainer [0.14: P&lt;.05]</li> <li>Technical Trainer [0.24: P&lt;.01]</li> </ul>	<ul style="list-style-type: none"> <li>L&amp;D Professional [0.51: P&lt;.001]</li> <li>Other Stakeholders Effectiveness</li> </ul>
Management Competencies	<ul style="list-style-type: none"> <li>Entry L&amp;D Career [0.06: PNS]</li> <li>Mid L&amp;D Career [0.10: P.05]</li> <li>Senior L&amp;D Career [0.31: P&lt;.001]</li> <li>Executive L&amp;D Career [0.62: P&lt;.001]</li> </ul>	<p><b>Strategic L&amp;D Roles:</b></p> <ul style="list-style-type: none"> <li>Learning &amp; Development Manager [0.46: P&lt;.001]</li> <li>Strategic Business Partner [0.27: P&lt;.001]</li> <li>Manager of Learning Projects [0.41: P&lt;.001]</li> </ul> <p><b>Operational L&amp;D Roles:</b></p> <ul style="list-style-type: none"> <li>Learning &amp; Development Administrator [0.21: P&lt;.01]</li> </ul>	<ul style="list-style-type: none"> <li>L&amp;D Practitioner [0.28: P&lt;.001]</li> <li>Other Stakeholders [0.57: P&lt;.001]</li> </ul>
Business Competencies	<ul style="list-style-type: none"> <li>Entry L&amp;D Career [0.07: PNS]</li> <li>Mid L&amp;D Career [0.08: PNS]</li> <li>Senior L&amp;D Career [0.21: P&lt;.01]</li> <li>Executive L&amp;D Career [0.67: P&lt;.001]</li> </ul>	<p><b>Strategic L&amp;D Roles:</b></p> <ul style="list-style-type: none"> <li>Learning &amp; Development Strategist [0.49: P&lt;.001]</li> <li>Manager of Learning Projects [0.47: P&lt;.001]</li> <li>Strategic Business Partner [0.44: P&lt;.001]</li> </ul>	<ul style="list-style-type: none"> <li>L&amp;D Practitioner [0.31: P&lt;.001]</li> <li>Other Stakeholders [0.68: P&lt;.001]</li> </ul>
Diagnosing, Designing & Delivering L&D	<ul style="list-style-type: none"> <li>Entry L&amp;D Career [0.24: P&lt;.01]</li> <li>Mid L&amp;D Career [0.36: P&lt;.01]</li> <li>Senior L&amp;D Career [0.64: P&lt;.001]</li> <li>Executive L&amp;D Career [0.39: P&lt;.001]</li> </ul>	<p><b>Strategic Roles:</b></p> <ul style="list-style-type: none"> <li>L&amp;D Manager [0.27: P&lt;.01]</li> <li>Strategic Business Partner [0.31: P&lt;.001]</li> <li>L&amp;D Specialist [0.41: P&lt;.001]</li> </ul> <p><b>Operational Roles:</b></p> <ul style="list-style-type: none"> <li>Production/ Product Trainer [0.20: P&lt;.01]</li> <li>Technical Trainer [0.24: P&lt;.01]</li> <li>Instructional Designer [0.47: P&lt;.001]</li> <li>Learning Technology &amp; Media Specialist [0.31: P&lt;.001]</li> </ul>	<ul style="list-style-type: none"> <li>L&amp;D Practitioner [0.67: P&lt;.001]</li> <li>Other Stakeholders [0.21: P&lt;.01]</li> </ul>
Managing, Measuring & Evaluating L&D	<ul style="list-style-type: none"> <li>Entry L&amp;D Career [0.24: P&lt;.01]</li> <li>Mid L&amp;D Career [0.36: P&lt;.01]</li> <li>Senior L&amp;D Career [0.64: P&lt;.001]</li> <li>Executive L&amp;D Career [0.39: P&lt;.001]</li> </ul>	<p><b>Strategic Roles:</b></p> <ul style="list-style-type: none"> <li>L&amp;D Manager [0.46: P&lt;.001]</li> <li>Strategic Business Partner [0.27: P&lt;.001]</li> <li>Learning &amp; Development Specialist [0.24: P&lt;.01]</li> </ul> <p><b>Operational Roles:</b></p> <ul style="list-style-type: none"> <li>Product/Production Trainer [0.17: P&lt;.05]</li> <li>Learning Technology &amp; Media Specialist [0.15: P&lt;.05]</li> </ul>	<ul style="list-style-type: none"> <li>L&amp;D Practitioner [0.56: P&lt;.001]</li> <li>Other Stakeholders [0.48: P&lt;.01]</li> </ul>
Managing Knowledge & Organizational Change	<ul style="list-style-type: none"> <li>Entry L&amp;D Career [0.04: PNS]</li> <li>Mid L&amp;D Career [0.08: PNS]</li> <li>Senior L&amp;D Career [0.24: P&lt;.01]</li> </ul>	<p><b>Strategic Roles:</b></p> <ul style="list-style-type: none"> <li>L&amp;D Strategist [0.59: P&lt;.001]</li> <li>Strategic Business Partner [0.27: P&lt;.001]</li> </ul>	<ul style="list-style-type: none"> <li>L&amp;D Practitioner [0.31: P&lt;.001]</li> </ul>

	<ul style="list-style-type: none"> <li>• Executive L&amp;D Career [0.73: P&lt;.001]</li> </ul>	<ul style="list-style-type: none"> <li>• Manager of Learning Projects [0.63: P&lt;.001]</li> </ul>	<ul style="list-style-type: none"> <li>• Other Stake [0.71: P&lt;.01]</li> </ul>
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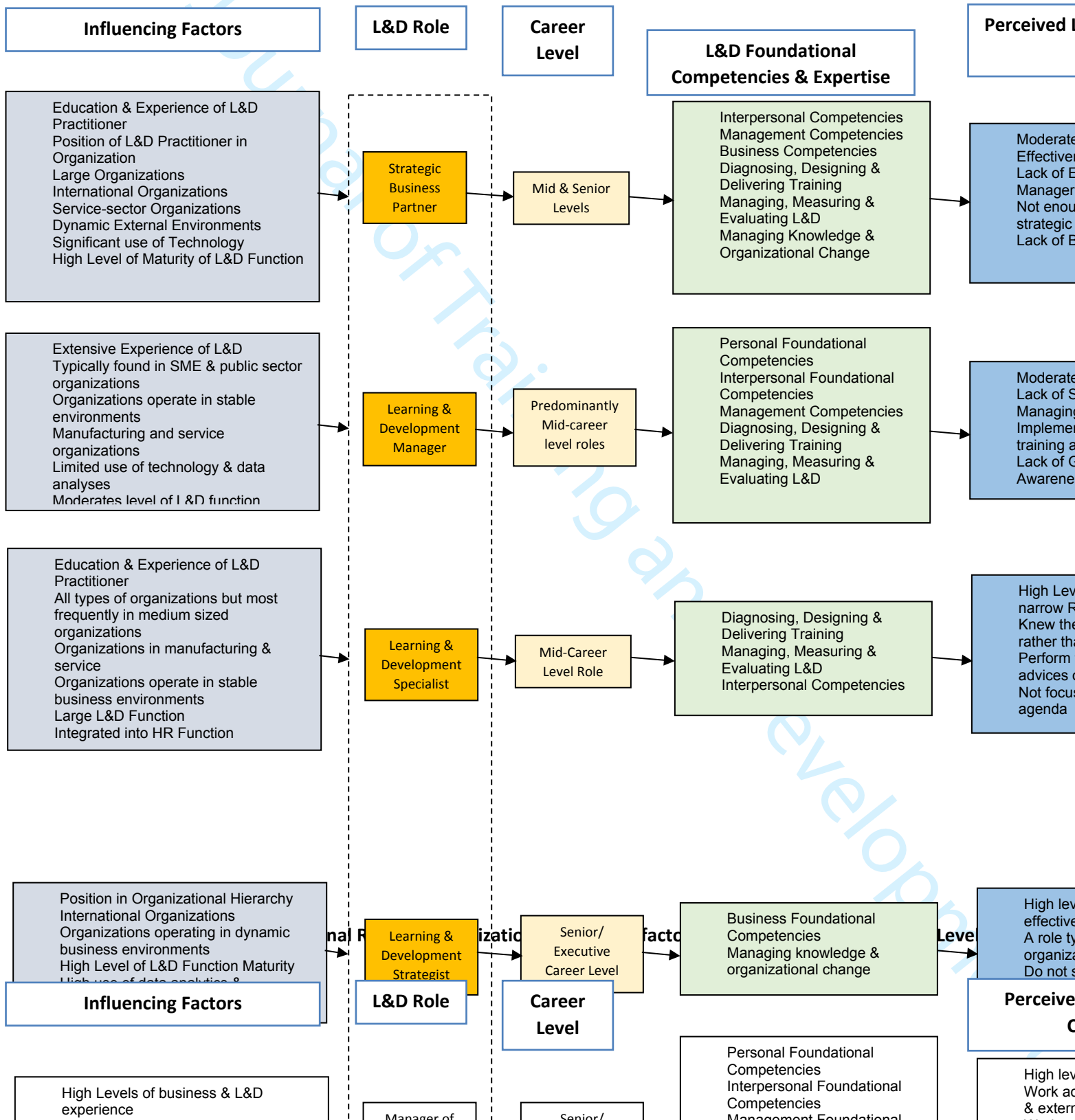
Table 19: Future Proofing L&amp;D: Four Priority Areas for Practice

	Develop and L&D Vision	Identify the L&D Value Proposition	
<p><b>Alignment of L&amp;D with Business Strategy and Agility</b> (L&amp;D focuses on strategically positioning its activities to deliver strategic insights and value to the business and be agile to move with the needs of the business )</p>	<ul style="list-style-type: none"> <li>● Evaluate how L&amp;D is currently positioned to deliver strategic value</li> <li>● Formulate an L&amp;D vision of what it wishes to become</li> <li>● Gain buy-in from senior leaders and executives</li> <li>● Possess the alignment of L&amp;D processes with business goals and objectives</li> <li>● Network and engage with senior executives to develop insights on how the business is developing and be prepared to change structures and processes where necessary.</li> </ul>	<ul style="list-style-type: none"> <li>● Be precise about the value L&amp;D will deliver to the organisation</li> <li>● Explain how L&amp;D processes, systems and activities will align with the business</li> <li>● Make decisions about resource allocation based on value contribution</li> <li>● Develop an L&amp;D dashboard to demonstrate value add</li> <li>● Develop structures for L&amp;D that are agile, flexible and responsive to changing strategic requirements</li> <li>● Engage with senior organisational decision makers and understand their perspectives and priorities.</li> </ul>	
<p><b>Applying L&amp;D Technology and Analytics</b> (Using technology and L&amp;D analytics to enhance the delivery of L&amp;D activities and strategies)</p>	<ul style="list-style-type: none"> <li>● Gather data on the leading L&amp;D tools and technology and their strengths and limitations</li> <li>● Assess the readiness of the organisation to adopt new L&amp;D technologies</li> <li>● Develop change management strategies to implement and scale up use of technology</li> <li>● Analyse how data is currently used to inform decisions about L&amp;D investments</li> <li>● Analyse the skills and abilities of L&amp;D staff to make data driven decisions</li> </ul>	<ul style="list-style-type: none"> <li>● Utilise technologies that map employee development, job and career moves and performance</li> <li>● Develop L&amp;D technologies with self-service capabilities and which allow customisation</li> <li>● Implement L&amp;D technology that integrates with other enterprise systems</li> <li>● Develop L&amp;D solutions that are underpinned by L&amp;D analytics</li> <li>● Develop the capabilities of L&amp;D professionals to analyse and use L&amp;D data and analytics to drive L&amp;D</li> <li>● Begin the process of building L&amp;D data warehouses to evaluate contributions of L&amp;D</li> </ul>	
<p><b>Enhancing the Employee Learning Experience</b> (Conscious efforts to enhance the employee experience of L&amp;D in organisations)</p>	<ul style="list-style-type: none"> <li>● Collect data to understand current employee perceptions on L&amp;D</li> <li>● Begin the process of providing solutions that are employee-centric and development focused</li> <li>● Share responsibility with employees for the development of L&amp;D solutions</li> <li>● Begin the process of moving from standard one-size-fits-all L&amp;D solutions to programmes and solutions that are personalised and customised</li> </ul>	<ul style="list-style-type: none"> <li>● Diversify the L&amp;D product offerings available to employees</li> <li>● Enhance the capability of L&amp;D to gather real time feedback and give voice to employee perspective</li> <li>● Communicate the focus on employee shared ownership for L&amp;D effectiveness</li> <li>● Accumulate data on employee perceptions of quality of the employee learning experience</li> </ul>	
<p><b>Enhancing L&amp;D Professional Competencies</b> (Development of mind-sets, skills and competencies of L&amp;D professionals to enhance their organisational contribution)</p>	<ul style="list-style-type: none"> <li>● Gather evidence of current skill and competency levels</li> <li>● Incorporate business awareness and strategic mind-sets in education programmes for L&amp;D professionals</li> <li>● Utilise education and training strategies to increase technology awareness and knowledge of LD analytics</li> </ul>	<ul style="list-style-type: none"> <li>● Enhance current collaborative and relationship building skills utilising mentoring, coaching to build collective capabilities</li> <li>● Focus efforts on developing strategic persistence and emotional intelligence</li> <li>● Utilise strategic coaching to develop future senior and executive L&amp;D professionals</li> <li>● Develop the analytical skills to manage “Big Data” and to combine with technology.</li> </ul>	



	<ul style="list-style-type: none"> <li>Professional bodies with responsibility for L&amp;D education need to ensure that professionals are educated and skilled in business strategy, finance and understanding the external environment</li> </ul>	<ul style="list-style-type: none"> <li>Professional bodies representing L&amp;D professionals need to engage more with stakeholders other than L&amp;D professionals. Create opportunities for dialogue.</li> </ul>	
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**Figure 1: Framework on L&D Strategic Roles in Organizations: Contextual Factors, L&D Competencies, Career Level & Perceived Effectiveness**



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**L&D Competencies**

Experience  
Manufacturing Organizations  
Small, Medium & Large Organizations  
Domestic and International  
Organizations  
May operate outside of L&D & HR  
Functions

Product or  
Production  
Trainer

Entry Career  
Level

Personal Foundational  
Competencies  
Interpersonal Foundational  
Competencies  
Diagnosing, Designing &  
Delivering Training  
Managing, Measuring &  
Evaluating L&D

High Level  
narrow tra  
Conduct  
diagnosis  
Limited ca  
career lev  
Narrow L

Manufacturing Organizations  
Small, Medium & Large Organizations  
Domestic & International  
Organizations  
Work aside the L&D/HR Function

Technical  
Trainer

Entry Career  
Level

Personal Foundational  
Competencies  
Designing, Delivering &  
Evaluating Training  
Interpersonal Competencies

High Level  
specialist  
Large am  
of technic  
Maybe lab  
expert

Education Level of L&D Practitioner  
Large Organizations  
Internationalized Organizations  
Organizations in stable environments  
Maybe separate from the L&D  
functions

Instructional  
Designer

Mid-Career  
Level

Diagnosing, Designing &  
Delivering Training

High Level  
narrow sp  
Spend mo  
designing  
Limited ca  
general r

Education  
Experience  
Internationalized Organizations  
Large Organizations  
Significant use of technology in  
training  
May work outside of the L&D or HR  
Function

Learning  
Technology &  
Media  
Specialist

Mid-Career  
Role

Diagnosing, Designing &  
Delivering Training  
Managing, Measuring &  
Evaluating L&D

Highly E  
Maybe n  
custome  
Limited  
general

Experience & Knowledge of  
Organizations  
Found in medium & large  
organizations  
Found in domestic & international  
organizations  
Work within L&D or HR Function

Learning &  
Development  
Administrator

Entry Career  
Level

Management Foundational  
Competencies  
Interpersonal Competencies

Highly e  
Perform  
manage  
Limited d  
develop

## APPENDIX 1: STUDY MEASURES INCLUDED IN REGRESSION ANALYSIS

### Environmental Dynamism (Miller & Friesen, 1982; Jap, 1999)

1. The environmental demands on us are constantly changing
2. Marketing practices in our industry are constantly changing
3. Environmental changes in our industry are unpredictable
4. In our environment, new business models evolve frequently
5. Products / services change often and in major ways

### Industry Growth (Murphy & Bruce, 2003; Matthews, Bianchi, Perks, Healy Wickramasekera, 2015)

1. Sales in the last five years have significantly increased
2. The numbers employed in the industry have significantly increased over the past five years
3. There has been significant growth in new customers in the industry over the past five years
4. There has been significant growth in existing markets over the past five years
5. There has been a significant growth in new firms within the industry over the past five years

### Perceived L&D Effectiveness Measures (Wright, Snell & Gerhart, 2001)

1. Overall, I am satisfied with the service and support provided by the L&D professionals in our company.
2. The L&D professionals in our company are efficient (i.e. timely, cost-efficient) when training candidates needed for business development
3. The L&D department is performing its job the way I would like it to be performed
4. The L&D department is very responsive to meeting line managers' and employees' needs
5. The L&D department provides me with useful and timely information regarding HR issues
6. The L&D department has helped to enhance the firm's competitive position
7. The L&D department provides value-added contributions to the firm's bottom line
8. The L&D department contributes to building the firm's human capital as a source of competitive advantage
9. The policies, practices and procedures coming from the L&D department help line managers and employees perform their jobs well
10. The L&D policies, practices and procedures help support the firm's business plan

### Experience Density of L&S Professionals Adapted from...

To what extent had you, over the past five years took responsibility for the following activities:

1. To start up or buy something new or to initiate strategic change
2. To deal with tasks that are relatively new to me that were not linked to my prior experience or education
3. To perform activities that were highly visible to others in my organization
4. Responsibility to cooperate with individuals from diverse backgrounds
5. To carry out tasks that my colleagues considered risky

### L&D Role Assessment Questionnaire (Adapted form Ulrich & Connor, 1984)

L&D Helps the Organization...

1. Achieve business goals & financial performance [SBP]
2. Enhance the productive efficiency of the organization [TM]
3. Develop employee knowledge skills & abilities [L&D SP]
4. Build competence, capability & capacity of organization to adapt to change
5. Manage major strategic change in dynamic & complex environments
6. Train employees in core production and service skills
7. Develop technical expertise and competence
8. Translate learning objectives into instructional products and strategies
9. Utilise technology to deliver learning and development solutions
10. Administer records related to employee training to ensure compliance

#### **L&D participates in...**

1. The process of implementing strategy in the organization
2. Managing L&D processes & activities
3. Enhancing the fit of employees with organizational skills requirements
4. The process of developing new processes & strategies
5. Shaping the process of cultural change to bring about transformation
6. Training processes to ensure that employees reach experienced worker standard quickly
7. Training activities designed to ensure that all technical processes operate effectively
8. Instructional design processes to develop best in class training activities
9. Activities that utilise technology to deliver training
10. Activities to ensure that the organisation has accurate and compliant training records

#### **L&D makes sure that...**

1. L&D strategies are aligned with the needs of the business strategy
2. L&D processes are effectively managed
3. L&D activities respond to the skill gaps & opportunities facing the business
4. L&D activities enhance the capabilities of the organization
5. L&D processes & interventions enhance the organizations ability for transformational change
6. L&D activities help impart the core skills necessary to achieve productivity
7. L&D activities are focused on ensuring that technical expertise is at industry standard level
8. L&D strategies follow best in class instructional design principles
9. L&D activities are delivered using the most appropriate technology solutions
10. L&D activities are compliant with external regulatory requirements

#### **L&D effectiveness is measured by its ability to...**

1. Ensure that strategy is effectively implemented
2. Efficiently manages L&D resources and processes
3. Helps employees to reach experienced worker standard
4. Helps the organization to have the capabilities to adjust to new market & greater opportunities
5. Helps the organization to manage major strategic transformations
6. Ensure that employees reach experienced worker standard in the quickest possible time
7. Develop the organisations technical expertise to the level required by its customers

8. To design learning and development solutions that are cost effective
9. Help organisations through the use of technology to train all of its employees
10. Ensure that training processes and systems are robust and compliant

#### L&D in organizations is used as...

1. A business partner with the line
2. A manager of L&D resources
3. A source of expertise to develop employee KSAs
4. A capability builder
5. A transformational change agent
6. A strategy to ensure high levels of product and service quality
7. A strategy to develop the organisation's technical expertise
8. As a source of expertise in the use of instructional design to develop training solutions
9. As a function that leverages technology to deliver high quality training to employees
10. Administer effectively training and development processes in the organisation

#### L&D spends time on...

1. Analysing and managing strategic implementation issues
2. Managing day to day operational issues
3. Identifying knowledge, skill & ability gaps
4. Identifying capabilities required to realize business strategy
5. Supporting transformational change initiatives
6. Analysing the capabilities of core employees who produce products or deliver services
7. Analysing the technical capabilities required to meet customer needs
8. Utilising instructional design principles to develop best fit training solutions
9. Leveraging technology to delivery training
10. Administering training and development processes to ensure operational efficiency

#### L&D is an active participant in...

1. Developing strategy implementation plans with line managers
2. Designing L&D interventions
3. Delivering L&D activities in organizations
4. Facilitating the senior team to formulate strategies
5. Processes of organizational renewal change and transformation
6. Diagnosing gaps in core employees' knowledge and skills
7. Identifying gaps in technical skills to meet customer requirements
8. Identifying the best instructional strategies to match the characteristics of employees
9. Identifying where technology can be used to deliver training
10. Ensuring that the costs and benefits of training are monitored

#### L&D works to...

1. Ensure that L&D is aligned with strategy implementation
2. Ensure the efficient use of L&D resources
3. Provide employees with the training they need to achieve performance outcomes
4. Ensure that L&D is aligned with strategy formulation processes & future strategic goals

5. Reshape & realign the organizations to manage transformational change
6. Ensure that the best training solutions are used to develop core employee skills
7. Ensure that employees can meet the technical requirements of customers
8. Ensure that best in class instructional design solutions are developed
9. Ensure that technology is used to deliver training to employees in a cost effective manner
10. Ensure that all training and development processes are implemented consistently

#### **L&D develops processes & interventions to...**

1. Link L&D strategies & interventions to ensure effective strategy implementation
2. Ensure that L&D needs are addressed in an efficient way
3. Deliver quality training & development
4. Help the organization to develop strategic capabilities
5. Helps the organization to transform itself
6. Ensure that employees are skilled to meet customer quality requirements
7. Ensure that the technical learning needs of the organisation are addressed
8. Meet best in class instructional design
9. Reach as many employees as possible utilising technology
10. Deliver training and development in a timely manner

#### **L&D's credibility comes from...**

1. Helping to realize the organization's strategic goals
2. Enhancing employee KSAs
3. Designs quality training strategies
4. Helping the organization to acquire & retain capabilities for competitive success
5. Make transformational change happen
6. Its ability to help employees meet experienced worker standard in the shortest time possible
7. Its ability to utilise best in class instructional design principles to develop training solutions
8. Its ability to enhance the technical capabilities of employees to meet customer needs
9. Leverage technology to deliver training to employees throughout the organisation
10. Its ability to administer training and development processes effectively and efficiently

**APPENDIX 2: Semi-Structured Interview Protocol****Respondent Profile**

- Education and years' experience in L&D
- Career path to date both within L&D and outside L&D
- Motivations for becoming an L&D professional

**Organisation L&D Profile**

- Structure, reporting arrangements, purposes and strategic focus of L&D function
- Key L&D activities undertaken and characteristics of the L&D team
- Key L&D challenges facing the organisation and how L&D has to-date responded

**Stakeholder Engagement and Involvement**

- Engagement with line managers, challenges and opportunities
- Engagement with senior leaders and executives: commitment, challenges, opportunity and resource issues
- Engagement with and involvement of employees in the design and delivery of L&D

**L&D Roles**

- Perceptions of L&D roles performed in the organisation
- Challenges in meeting stakeholder expectations re role performance
- Measures of effectiveness used to determine L&D contributions