

L&D professionals in organisations: 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 multinational corporations, small to medium enterprises, the public sector and not for profit organisations. This paper aims to investigate 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. The authors gathered data from executives, senior managers, line managers, employee and L&D professionals using multiple methods: a 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. The authors 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 using multiple research methods.

Keywords Careers, Roles, Competencies, Context, Learning and development professionals, Perceived effectiveness

Paper type Research paper

1. Introduction

There is a growing recognition that the effective training and development of human resources (HRs) is critical to organisational and financial performance (Tharenou *et al.*, 2007; Nadiv *et al.*, 2017). As a consequence, the learning and development (L&D) function finds itself under increased scrutiny and pressure to add value to the business (Aguinis and Kraiger, 2009; Kim and 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 twentieth century, to one where L&D professionals are expected in the twenty-first century to be managers of learning, change agents and architects of organisational learning (Stuart and Overton, 2015; Noe *et al.*, 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 twenty-first century, the profession was urged to play a more strategic role in organisations (Garavan, 2007; Brandl *et al.*, 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 and Lambright, 2016; Nguyen *et al.*, 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 *et al.*, 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 Chief Executive Officers (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. Kryscynski *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 making a strategic business contribution (Dulebohn and Johnson, 2013). Fourth, L&D professionals experience inherent conflicts between daily operational roles and long-term strategic roles, giving the different demands made by senior managers, line managers and employees (Caldwell, 2003; Gao *et al.*, 2016). Finally, there are significant perceptible differences between L&D professionals and their customers including employees, line and senior management concerning their effectiveness (Nadiv *et al.*, 2017). John and Bjorkman (2015) found, for example, significant differences in perceptions between HR professionals and line managers concerning capabilities and capacity to deliver the strategic agenda. In addition, employees perceive that L&D has become disconnected from the employee agenda and is no longer an employee champion (Van De Voorde and Beijer, 2015). This becomes manifest in criticisms that L&D professionals no longer focus on personal development planning, the enhancement of employees' careers and employability. Therefore, an important question concerns whether L&D professionals have delivered on the promise that is suggested by proponents of the strategic approach to role performance.

Therefore, the purpose of this monograph is to investigate:

- the external and internal contextual factors that impact L&D roles and their effectiveness;
- the types of strategic and operational roles that L&D professionals perform in organisations;
- the career trajectories and foundational competencies/areas of L&D expertise that L&D professionals require to perform both strategic and operational roles effectively; and
- the relationships between external and internal contextual factors, L&D roles, foundational competencies and areas of L&D expertise and perceived organisational effectiveness.

Our study enhances the understanding of L&D professional roles in organisations in four ways. First, we draw on contingency theory (Tsai and Liao, 2017) to understand the role of context in shaping L&D in organisations. Contingency theory proposes that for L&D to be effective, it should be aligned with dimensions of the external and internal environment (Harney, 2016). Brandl *et al.* (2012) highlighted contingency factors that are relevant to the L&D professional role including strategy, organisational size, the life stage of the organisation, the industry in which the organisation operates, whether the organisation is domestic or international, the national setting of the organisation and cross-national cultural differences. The majority of these contingencies have not been systematically investigated in the context of L&D roles in organisations. Second, we address a significant gap in the literature concerning the roles that L&D professionals perform in organisations. We draw on the role-based human resource management (HRM) approach (Mantere, 2008; Gao *et al.*, 2016) to understand the roles that L&D professionals play in organisations. Role theory (Katz and Kahn, 1978) proposes the notion of role sets, which consist of multiple role expectations, induce the required role behaviour. Of particular significance is the overemphasis on the investigation and advocating of strategic roles and the underemphasis on the importance of operational L&D roles in organisations.

Third, we use the multiple constituency approach (Campbell and Lambright, 2016; Tsui, 1987) to understand the perceived effectiveness of L&D amongst internal stakeholders or constituencies (Marginson and Ogden, 2005). In the context of this study, these internal constituents include chief executives, senior managers, line managers, employees, and of course, L&D professionals. This theoretical approach argues that L&D professionals should pay attention to the needs of various constituencies and provide the L&D practices, processes and systems that they require and expect. We, therefore, apply this approach to explore the effectiveness of L&D roles in organisations. Fourth, we investigate the types of foundational competencies and L&D expertise required to effectively perform strategic and operational L&D roles in organisations. L&D roles can be understood as:

[...] clusters of interconnected competencies that portray the main attributes that must be possessed by anyone wishing to occupy an L&D role rather than as modular or loosely coupled entities, whose components can be understood in isolation (Fiss, 2007, p. 1180).

Competencies in the context of this monograph are understood as different dimensions including knowledge, skill and personal characteristics (Marrelli *et al.*, 2005). Brockbank and Ulrich (2005) define competency and the ability of a jobholder to contribute value to the business and in the context of HR they identified five competency domains as follows: strategic contribution, knowledge of the business, personal credibility, HR delivery and HR technology. Brockbank and Ulrich (2005) essentially argued that in the case of competent L&D specialists or practitioners they will require personal credibility combined with knowledge, skill and behaviour components to ensure that L&D practices are aligned with strategic goals and performance outcomes. Therefore, for the purpose of this study we adopt a notion of competency that incorporates knowledge, skill and behavioural components.

The monograph is structured as follows: In Section 2, we discuss the three theoretical perspectives – contingency theory (Harney, 2016), role theory (Katz and Kahn, 1978) and multiple constituencies theory (Tsui, 1987) that foreground the research questions investigated in this monograph. In Section 3, we review the literature on:

- the contextual influences impacting the L&D professional role in organisations;
- L&D roles and competencies; and
- the perceptions of different internal stakeholders of the effectiveness of the L&D professional role.

In Section 4, we describe the method used to conduct the study and the way in which we analysed the data. In Section 5, we present our descriptive and analytical findings, and finally, in Section 6, we discuss the implications of our study findings in respect of the theory, research and practice on L&D professional roles in organisations.

2. Theoretical and empirical background to research

2.1 Theoretical perspectives informing the study

2.1.1 *Contingency theory.* Contingency theory helps researchers to understand the contingency factors that can influence L&D roles in organisations and it has been widely adopted in the HRM literatures to understand influence of contextual factors (Abt and zu Knyphausen-Aufseß, 2017), the dynamics of HRM roles (Caldwell, 2003; Farndale *et al.*, 2010) in organisations and the antecedent of effectiveness of HR. Kast and Rosenzweig (1973) proposed that:

The contingency view of organisations and their management suggests that an organisation is a system composed of subsystems and delineated by identifiable boundaries from its environmental supra-system. The contingent view seeks to understand the interrelationships within and between subsystems as well as between the organisation and its environment and to define patterns of relationships of configurations or variables. It emphasises the multivariate nature of organisations and attempts to understand how organisations operate under varying conditions and in specific circumstances. Contingency views are ultimately directed towards suggesting organisational designs and managerial practices most appropriate for specific situations (ix).

Essentially, contingency theory argues that there is no optimal approach to structuring L&D in organisations. This differs from the “one size fits all” model or universalistic perspective, which is criticised for being too general and ignoring the unique characteristics of organisations and how they fit with environmental factors. We use contingency theory to address a significant gap in understanding L&D roles in organisations to understand the impact of both internal and external contingencies on L&D roles, competencies and areas of expertise. This is appropriate, as [Sila \(2007\)](#) suggested that contingency theory is appropriate to explain the context-structure-performance relationship. Contingency theory variables are derived from an organisations internal and external environment and emphasise that organisations are highly interdependent on their environment ([Wadango and 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 and 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 and 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 data 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.

2.2 Multiple constituencies theory and perceptions of stakeholders of learning and development

Multiple constituencies theory has its origins in the work of [Connolly *et al.* \(1980\)](#) 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 interests when it comes to L&D. 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 and Renz, 1997](#)). Evidence to date highlights that different constituent groups have distinct definitions of

organisational effectiveness (Jun and Shiau, 2012) and the effectiveness of specific functions or roles within organisations including HRM (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 and Hamlin (2017), for example, used multiple constituencies theory to evaluate the effectiveness of managers and leaders. Tsui (1990) highlighted the concept of reputational effectiveness, which involves constituent perceptions of the success or failure of L&D roles in organisations. Constituencies in the context of L&D will include top and senior management, line managers, HRM specialists and employees. Senior managers and executives will expect L&D professionals that perform strategic roles, to understand the role and influence of external factors and to contribute both the formulation and implementation of strategy (Garavan, 2007). Line managers and department managers primarily have operational and tactical expectations of L&D professionals. These include the training and development of employees to meet day-to-day skill requirements (Tsui, 1990), and the skill and ability to respond to day-to-day crises and change issues (Aguinis and Kraiger, 2009). Employees have expectations that their development needs will be addressed (Antonacopoulou, 2000) using development planning processes. They will also have expectations that L&D professionals will provide them with opportunities to enhance their careers and employability (Cascio and Graham, 2016). Ulrich (1997) also highlights that meeting employee needs for personal and professional growth is an important expectation placed on L&D professionals.

In the context of L&D professionals, they must manage these different expectations (Noe *et al.*, 2012). However, the research indicates that L&D professionals face significant challenges in establishing their role and meeting expectations because of their relatively low status in the organisational hierarchy. As already highlighted, the different sets of expectations may be difficult to reconcile and resource, therefore, L&D professionals will respond to stakeholder expectations in a number of ways. For example, Tsui *et al.* (1995) suggest that they can seek to address the discrepancy between a stakeholder's expectations and the perceived obligations or alternatively, they focus on justifying their own priorities. This may, however, be difficult for the L&D professional too, due to power deficits and positions within the hierarchy. Research points to the tendency of L&D professionals to focus on meeting the expectations of stakeholders or actors who they perceive to be the most powerful or on whom they are dependent for resources. However, making assessments about the relative importance of the different stakeholders is complex and will depend on the organisational context. In the case of small and medium firms, the owner-manager will likely hold sway (Nolan and Garavan, 2016) and there will be a high dependence on the owner-manager to secure resources for L&D. In contrast, the situation in an multinational corporation (MNC) will be very different. For example, Makela *et al.* (2013) suggest that there will be a complex dynamic between both corporate headquarter (HQ) and local subsidiary. There may be a very high need to address local subsidiary expectations while also ensuring that the corporate policy agenda is addressed.

Organisational actors will use a different set of criteria when judging or evaluating the contribution of the L&D professional. Makela *et al.* (2013) proposed that organisational stakeholders will use either cognition- or experience-based evaluation. In the case of cognition-based evaluation, organisational actors will use their understanding of what the L&D role should do in an organisation to make an assessment of contribution. The cognition-based evaluation will be informed by their perception of the resources allocated to L&D, the size of the function and its scope of activities. Larger L&D functions send important cues to organisational actors concerning the perceived importance of the function

and role within an organisation. Stakeholders will view the size of the L&D function as an important proxy for its value to an organisation and will likely conclude that a larger L&D function is more strategic and better able to access resources. A large L&D function can create a very significant “halo” effect, leading to perceptions of greater capabilities (Palmer and Loveland, 2008). In the case of experience-based evaluation, it will be based on their interactions with the services provided by L&D in an organisation. They will make evaluations based on the quality and relevance of L&D solutions delivered in addition to the professionalism of the function.

2.3 Role theory and learning and development competencies

Structural functionalism (Merton, 1957) proposed that roles in organisations represent essential building blocks of systems and these roles engender behavioural expectations that transcend the occupants of the role. In the context of structural functionalism, the concept of structure emphasises the arrangement of the roles with a system and the concept of a function focusses on the contribution of that role to the system (McIntyre, 1964). Katz and Kahn (1978) argued that organisations are essentially systems of roles and that these roles explain how individuals and teams behave. They also highlighted that roles consist of sets of recurring interrelated actions and are, as a consequence, influenced by both the behavioural expectations and capacities of the individual who occupies the role (Sluss and Ashforth, 2007). Katz and Kahn (1978, p. 29) explicitly defined a role as “structurally given demands, and as such, it confronts the occupant of a position with a set of pressures on how to act in the position”. This definition conceptualises what is required to act in a job or position (Reichel and Lazarova, 2013) and it highlights the role of specific competencies (Egan and Akdere, 2005) relevant to effective role performance.

The role-based approach to HRM, for example, highlights that L&D professionals can perform control- and service-based roles. Control-based roles emphasising the implementation of L&D policy, whereas service-based roles emphasise the importance of the L&D professional as functional expert, offering training and development services to meet the needs of internal constituencies and to be proficient and skilled in helping line managers to meet their team knowledge and skill needs. Strategy-based roles emerged as important in the 2000s and were conceptualised as involving L&D professionals in helping organisations to achieve strategic change and implement strategy. The emphasis on strategic roles (Garavan *et al.*, 2016) demands that L&D professionals are skilled in shaping strategy, developing capability and delivering organisational performance (Noe *et al.*, 2014). Commitment-based roles are also highlighted in the literature. These include using L&D activities to motivate employees, enhance their job morale and encourage self-regulated work behaviour (Ulrich and Brockbank, 2005).

There is much debate within the literature on competencies, as to which competencies are required to meet the behavioural expectations of the L&D role. These appear to differ depending on whether one views the L&D role as strategic or functional in nature, and whether the context is relevant in explaining the relative importance of competencies (Lo *et al.*, 2015). Three approaches are used to consider the role of competencies in the context of HRM and L&D. The personal attribute model (McClelland, 1973), for example, has its foundations in psychology theory and defines competencies as underlying characteristics possessed by an individual that contribute to successful performance of the L&D role. It gives particular prominence to the role of traits, motives, self-concept, knowledge and skills. The behavioural model conceptualises competencies as behavioural repertoires that an L&D professional will bring to a job to achieve effective performance (Woodruffe, 1993). Both the personal attribute and the behavioural approaches emphasise a universal perspective

highlighting that L&D competencies can be generic or have universal applicability to many contexts and role descriptions. The situationalist model (Sandberg, 2000) proposes a social phenomenological view of L&D competencies and considers their role, type and importance to be a function of context. Capaldo *et al.* (2006) and Le Deist and Winterton (2005) proposed that competencies are a function of the context in which they are activated. They are, therefore, situated, idiosyncratic and arise out of the interactions between an L&D professional and the context or situation. The situationalist model, therefore, rejects the idea of a generic competency list and instead proposed that competencies will vary depending on the breadth and depth of the L&D role and the organisational context.

Concerning the specific debates within the HRM and L&D literature, scholars make distinctions between strategic and functional L&D competencies (Huselid *et al.*, 1997). Strategic L&D competencies focus on business-related competencies that enable L&D professionals to align their strategies with business goals and priorities. Functional L&D competencies emphasise the personal credibility of the L&D role, as well as their communication and interpersonal skills. Other researchers have argued that L&D competencies are role-specific (Schoonover, 2003; Caldwell, 2010) and linked particular clusters of competencies to strategic L&D roles and L&D specialist roles. Scholars such as Francis and Keegan (2006) and Greenwood (2013) have emphasised the need for ethical standards and competencies around moral behaviour. In addition, research has called into question the lack of focus on employee-related L&D competencies (Graham and Tarbell, 2006) and there are questions concerning whether competences lead to enhanced L&D effectiveness. Brown *et al.* (2009) and Teo and Rodwell (2007) found, for example, that the credibility of L&D will be related to its administrative efficiency and positioning within an organisation. We consider a number of specific strategic and functional competences in a later section of this literature review.

2.4 Contextual influences on the learning and development professional role in organisations

2.4.1 *External context.* Consistent with contingency theory, we highlight external and internal contextual dimensions that impact the performance of the L&D role. Research on HRM and L&D highlights a number of external factors impacting L&D roles in organisations (McGrandle, 2017). We focus on three external contingencies as follows: organisational sector, industry growth and industry dynamism.

2.4.1.1 *Organisational sector.* The role of organisational sector is particularly highlighted in the context of L&D, as it relates to the amount and type of training undertaken and its impact on organisational performance. The key distinction is between manufacturing and service sector organisations. For example, service sector organisations will have a greater reliance on employee competencies to achieve organisational goals. In contrast, manufacturing industries are typically highly capital intensive (Quinn *et al.*, 1997). The L&D role in these two contexts will differ considerably. In manufacturing sector organisations, the focus will be on production-focussed training activities, whereas in service sector contexts, employees will have greater discretion to use their skills and competencies than in manufacturing industries (Rosenthal *et al.*, 1997). L&D practitioner will have much closer engagement with employees in service contexts given the importance of training to develop employee knowledge, skills and abilities (KSAs).

2.4.1.2 *Industry growth.* The extent of industry growth will impact on the roles of L&D practitioners in organisations. Kim and Ployhart (2014), for example, found that in low growth industries, there will be less emphasis on investment in L&D, and as a consequence, the L&D role-holder may perform the role on a part-time basis. In these low growth contexts, investment in L&D will be a low priority because the investment is unlikely to be recouped (Way *et al.*, 2018). In high growth industries, there will be a greater need for L&D, thus

requiring a different L&D role configuration. Higher levels of industry growth will impact the level of uncertainty that the L&D specialist has to cope with, thus requiring the L&D role to be involved in managing capacity and capability, as well as the ability to respond quickly to changing growth levels.

2.4.1.3 Industry dynamism. Industry dynamism is conceptualised as the variability in competitive pressures that face the organisation and the extent of changes in the external environment (Chadwick, 2013). In organisations that operate in highly competitive environments, there will be a much stronger focus on training and development to capitalise on business opportunities and respond to change (Lecuona and Reitzig, 2014). Datta *et al.* (2005) proposed that where firms operate in highly dynamic environments, they require more complex and varied competencies, thus suggesting more strategic roles for L&D practitioners. In a similar vein, Martinez-Sanchez *et al.* (2007) found that there was a greater need for employees with board competencies, thus highlighting the contribution of L&D to the strategic growth of the organisation. This suggests that moving forward, L&D roles will be more strategic, proactive and focussed on change. In the context of HRM, Monks (1992) suggested that in stable environments, a simple model of HRM practice will be sufficient. However, in more complex and dynamic environments, the L&D role must focus on change and transformation.

2.4.2 *Internal context.* Research on HRM and L&D highlights internal organisational factors and these include the size of the organisation, its structure, and specifically, whether it is domestic or international in structure, the organisation's strategy and the level of technology and knowledge intensity

2.4.2.1 Organisational size. The size of the organisation emerges as a particularly important internal contextual factor (Nolan and Garavan, 2016; Liff and Turner, 1999). The intrinsic characteristics associated with size create unique challenges for small to medium enterprises (SMEs) when it comes to training. They are unlikely to have a full-time training role or they may have junior level trainers who train employees in production or service skill. In addition, they are less likely to provide formal training because it is expensive (Kortekaas, 2007). The lack of training specialists to systematically design the training courses, supervise training implementation and evaluate training outcomes in smaller firms (Nolan and Garavan, 2019). In contrast, the situation in large firms will differ. These firms will likely have a full-time training role (Garavan *et al.*, 2016) and the L&D practitioner will have to cope with greater amounts of complexity and diversity of training activities. In large firms, it is likely that L&D practitioners will perform strategic partners and transformational change roles (Nadiv *et al.*, 2017), and training and development will have a significantly higher profile.

2.4.2.2 Organisational structure. The organisation structure in terms of whether the organisation is a domestic or international operation is an important dimension of context impacting the L&D role in organisations. In domestic organisations, the L&D role will be considerably simpler and will be organised as part of the HR function (Nadiv *et al.*, 2017). In international organisations, there will typically be a strong set of HQ-subsidary relationships (Farndale *et al.*, 2010). The role of the L&D practitioner will become significantly more complex because of a combination of the dependence of subsidiaries on HQ and interdependence among subsidiaries. In some situations, depending on the location of the HQ, the L&D role within subsidiaries may be mandated from the centre, whereas in subsidiaries with greater distance between the parent and host countries the L&D role holder will have greater autonomy (Farndale and Paauwe, 2007). These relationships and role configurations are likely to evolve over time because of changing operating conditions (Bouquet and Birkinshaw, 2008).

2.4.2.3 Organisational strategy. Organisational strategy concerns the patterns of behaviour used by organisations to operate in the external environment (Miles *et al.*, 1978). These strategies have important implications for the types of L&D practices implemented and the role of the L&D professional. Research suggests that organisations with more formal strategies will have L&D practices that are more aligned than is the case for organisation's with less formal approaches (Acur *et al.*, 2003). In addition, the type of strategy adopted by the organisation will have implications for the L&D role. For example, where an organisation pursues a cost-leadership strategy the focus will be on a narrow role for training to enhance skills at the lowest cost. In contrast, organisations that pursue a differentiation strategy will concentrate on L&D as an enhancing skill and will use this stronger focus as a key differentiator (Snow and Hrebiniak, 1980) to achieve competitive advantage.

2.4.2.4 Technological and knowledge intensity of the organisation. Organisations differ in terms of their technological and knowledge intensity. Where organisations operate in high-technology industries, they will use more sophisticated and complex methods, practices and techniques and will require a significant investment in training (Rauch and Hatak, 2016; Khandwalla, 2006). In both technology and knowledge-intensive firms, the primary source of competitive advantage derives from the ability of employees to create and manage knowledge (Bettis and Hitt, 1995; Grant, 1996). Therefore, in these organisations, training will have a major strategic role to ensure that employees can acquire quickly the critical knowledge and skills. In contrast, in low-technology and low-knowledge intensity organisations, the L&D function trains in relatively simpler job tasks, and thus, the requirement for training with being significantly lower.

2.5 Learning and development function characteristics

Finally, we highlight characteristics of the L&D function and the L&D role-holder that are important contextual influences.

2.5.1 *Maturity of the learning and development function and use of technology.* The maturity of the L&D function will be important in explaining the types of L&D roles that are performed (Loon, 2016). For example, in the early stages of the development of the function, the focus will be on transactional-type roles (Gubbins and Garavan, 2009), whereas in the case of a more mature L&D function, the emphasis will be on strategic partner and transformational-type roles. These roles require a deep experience curve and the possession of a broad competency set, which comes through operating for a considerable period of time. More mature functions will also have built up large networks and strong social capital within an organisation (Gubbins and MacCurtain, 2008). An important characteristic of an L&D function concerns the use of technology. L&D functions with greater usage of technology to deliver L&D will be better positioned to implement strategic roles and make use of technology to perform transactional and operational roles.

2.5.2 *Characteristics of the learning and development role-holder.* A number of individual characteristics of the L&D role-holder are important in explaining the type of L&D role that is performed in organisations. For example, the amount of business experience (Lounsbury *et al.*, 2008), the experience of the L&D function and the density of work experience are relevant. Quinones *et al.* (1995) refer to the developmental advantage provided by individual work experiences. The density of work experiences refers to the outcome of various roles and the corresponding amount of time spend in each role. This is considered a more accurate predictor of success than tenure in explaining the quality of foundational competencies and L&D expertise. Other individual characteristics highlighted include gender, age, personality traits and self-confidence (Wouters *et al.*, 2007; Maurer *et al.*, 2008).

2.6 Internal constituencies perceptions of learning and development effectiveness

Consistent with multiple constituency theory, we focus on important internal constituents or stakeholders that will evaluate the effectiveness of the L&D professional as follows: line managers, employees, senior managers, the CEO and HR practitioners. These stakeholders will evaluate content, process and outcome dimensions of L&D (Ostroff and Bowen, 2016). The content dimensions focus on the “what” of L&D and include policies, practices and systems that focus on the development of employees. Stakeholders will have visibility or experience of these practices or policies. Senior managers and executives will evaluate their effectiveness in meeting the needs of business strategy, whereas line managers will focus on the relevance of these practices to the short and medium-term needs of individuals and teams (Aguinis and Kraiger, 2009). Employees will assess the content of L&D practices with respect to how they address their L&D needs. The process dimension of L&D focusses on how well practices are implemented. Stakeholders will use a variety of criteria to assess effectiveness including costs, timelines and quality of delivery. Stakeholders will also evaluate the outcome dimensions differently. For example, employees will focus on evaluating the employability outcomes of L&D, whereas line managers will focus on performance improvements (Ulrich and Dulebohn, 2015). Senior managers and executives will be interested in how L&D enhances capability and competence of the organisation. In light of these differing outcome priorities, L&D practices will have different targets. Therefore, L&D will be evaluated on how it enhances the competence and ability of employees and workers. This means developing the right skills, in the right place, at the right time. L&D will, therefore, be fundamental to ensuring that these skills are effectively developed in a timely manner. L&D will also be expected to contribute to organisational capability. Ulrich and Dulebohn (2015) define organisational capabilities as what the organisation is known for and represent what the firm can do. L&D practices can be used to develop capabilities in the areas of innovation, agility, scaling up and creativity. In recent times, the focus of L&D has shifted to the development of leadership competencies and brand, which will be of particular concern for senior and executive management within an organisation (Garavan *et al.*, 2016).

Stakeholders, in particular, CEOs and senior executives, will be concerned with the value or return from their investments in L&D. In this respect, L&D practitioners have not effectively accounted for the return on training investments. The reality is that investments in training take time to accrue (Bassi and McMurrer, 2004), and L&D specialists have not made a good case of articulating that investments in L&D represent investments, not costs (Osterman and Weaver, 2014). The society for HRM in the USA, for example, have suggested that firms should clearly isolate the extent of investments in training but do not go as far as suggesting that training expenditures should be treated as a depreciable asset on the balance sheet.

2.7 Learning and development roles and competencies

Despite the importance of L&D practitioners in organisations, there is a dearth of research on these roles and competencies. The literature suggests a variety of roles, including change agents (Lawler and Mohrman, 2003), strategic business partner roles (Galang and Osman, 2016), course designers (Nadiv *et al.*, 2017), direct deliverers of training (Loon, 2016) and project managers of learning projects (Ulrich *et al.*, 2008). Gubbins and Garavan (2009) highlighted that L&D roles will differ in terms of whether they are focussed on transactional or transformational L&D activities, whether they are short- or long-term in focus and whether they view the relationship with the client or customer as one- or two-way. These roles range from a passive provider of training solutions to an internal consultant and change agent, to a strategic business partner and transformational change agent. These

roles require different competency requirements. The number of studies on the competencies of L&D professionals is also sparse with the majority of research on the competencies of HR practitioner, however, it is possible to glean from these some of the core or priority competencies. For example, research by [Khatri \(2006\)](#), [Ulrich \(1997\)](#), [Ulrich et al. \(2015\)](#) and [Long et al. \(2013\)](#) highlight competencies that are relevant to L&D practitioners. These primarily emphasise business knowledge, relationship skills, expertise in L&D, strategic and cultural management and the management of change. However, it should be highlighted that the relevance of these competencies is contextually determined. Dimensions of context that are relevant include the size of the organisations, the sector in which the organisation operates, the geographic location of the organisations, its level of technological complexity and characteristics of employees, which we considered earlier in this monograph.

2.7.1 Business and strategic knowledge. The literature highlights the important role of business and strategic knowledge to strategic business partner and change agent roles ([Boselie and Paauwe, 2004](#); [Ulrich et al., 2015](#)). Dimensions of business knowledge include business processes, the external environment, value chains, organisation structures and systems. Research also highlights the importance of L&D practitioners having functional knowledge components in areas such as finance, marketing and operations ([Heisler, 2003](#)). L&D practitioners are required to understand the organisation's strategy, the organisation's business model, its organisational capabilities and its dynamic capabilities ([Garavan et al., 2016](#)).

2.7.2 Cultural management and the management of change. L&D practitioners are increasingly required to work as change agents, and as a consequence, they need to understand organisational change processes, the process of culture formation, development and change ([Ulrich et al., 2015](#)). Dimensions of this group of competencies include managing the culture of the organisation, creating a learning culture, working as a change agent to bring about transformational change and encouraging creativity and innovation. [Ulrich and Brockbank \(2005\)](#) envisaged that change agent role would be part of the strategic business partner role. However, while L&D practitioners highlight that they perform strategic partner roles they do so at a much more operational level ([Nadiv et al., 2017](#)). Competencies important to performing a change agent role include understanding of change management processes and tolerance of ambiguity.

2.7.3 Relationship building, networking and collaboration competencies. L&D practitioners are expected to undertake considerable amounts of networking with stakeholders in organisations. Therefore, they need to possess the competencies to build effective relationships ([Boselie and Paauwe, 2004](#)). Studies of HR practitioners with responsibility for L&D highlight the importance of social skills, the skills to collaborate effectively across and outside of the organisation ([Loon, 2016](#); [Long et al., 2013](#)) and to develop strong, trust-focussed relationships with line managers, employees and senior management.

2.7.4 Learning and development expertise. The possession of L&D expertise is highlighted in several studies ([Werner and DeSimone, 2009](#); [Ketter, 2006](#)). [Garavan \(2019\)](#) found that L&D specialists required L&D expertise in three areas as follows: knowledge of the process of designing, developing delivering and evaluating L&D programmes; the management of the L&D function; and the implementation of organisation wide L&D projects. Other studies have highlighted the importance of a knowledge of learning theory and the skills to create a learning climate ([Loon, 2016](#); [Long et al., 2013](#)).

In summary, consistent with contingency, multiple constituency and role theories, we highlighted the contextual factors that impact L&D professional roles in organisations, the strategic and operational roles that L&D professionals perform in organisations, the

multiple and different expectations that internal stakeholders have of the L&D role and the combinations of generic and L&D expertise that professionals require to be effective in their roles. L&D professional roles are shaped and influenced by a number of external and internal contextual contingencies and these will be salient in explaining the importance of the role and the competencies required and effectiveness of role performance. Our review of the literature highlighted three external factors (sector, industry growth and dynamism) and five internal factors (organisation size, strategy, structure, technological and knowledge intensity) and three dimensions of the L&D function (the maturity of the L&D function, the use of technology and demographic and human capital characteristics of the L&D roleholder). We focussed on five internal constituents or stakeholders – CEOs, senior management, line managers, employees and L&D professionals – because the literature highlights that they use different criteria when evaluating the effectiveness of the L&D role. The literature highlights that L&D professionals perform a combination of strategic and operational roles in organisations and these require different configurations of foundational competencies and L&D expertise. Overall, there is a scarcity of literature on the L&D roles in organisations and competency requirements. Therefore, researchers have to draw in the HR role competency literature. However, this may not be a good fit because of the unique dimensions of L&D as a professional role and the distinct sets of expertise that are required to perform the role.

3. Research methods

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

3.1 Study participants

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

3.1.1 Survey. We derived data from a sample of 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 L&D), employees, line managers, senior managers and CEOs. We received 440 usable responses from 175 L&D practitioners, 25 HR practitioners with responsibility for L&D, 75 line managers 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 per cent), service organisations (45 per cent), public and semi-state organisations (15 per cent) and not for profit (10 per cent). In terms of location of operations, 56 per cent of organisations were domestic and 44 per cent had international operations. In terms of organisation size, 15 per cent of respondents came from small organisations (10-49 employees), 45 per cent from medium-sized organisations (50 to 249) and 40 per cent from large firms (200+ employees). In terms of ownership, 40 per cent were US-owned, 21.5 per cent were European, 23 per cent were Irish-owned, 12.5 per cent were UK-owned and 2 per cent were Asian. In total, 20 per cent of respondents employed 1,000+ employees. In terms of the existence of a training function, 30 per cent of organisations did not have a formal training function or L&D role, 15 per cent had an L&D specialist and 65 per cent 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 of 37.6 years of age, they were predominantly female (75 per cent) 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 per cent male and 45 per cent female that had an average organisational tenure of 11.15 years and a job tenure of 6.25 years. Line managers had an average of 34.76 years of age and they were 62 per cent male and 38 per cent 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 of 39.54 years of age, they were 81 per cent male and 19 per cent female, and they had an average organisational tenure of 16.68 years and an average job tenure of 10.16 years. [Table I](#) summarises characteristics of the study sample.

Characteristic	N[440]	(%)
<i>Firm size</i>		
Small	66	15
Medium	198	45
Large	176	40
<i>Respondent type</i>		
L&D/HR professionals	200	45
Line managers	75	17
Employees	120	27
Senior managers	25	5.5
CEOs/executives	20	4.5
<i>Maturity of L&D function</i>		
Low	95	21.5
Medium	230	52.5
High	115	26
<i>Dedicated L&D function</i>		
Yes	285	65
No	155	35
<i>Firm sector</i>		
Manufacturing	132	30
Service	308	70
<i>Firm type</i>		
Public	66	15
Private	330	75
Not for profit	44	10
<i>Operations</i>		
Single country	245	56
International	195	44
<i>Firm ownership</i>		
USA	175	40
European	95	21.5
Irish	105	23
Asian	10	2
UK	55	12.5

Table I.
Study sample
characteristics
(survey) [N = 440]

3.1.2 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: USA (25 per cent), UK (20 per cent), Europe (15 per cent), Asia (35 per cent) and Australia (5 per cent). In total, 45 per cent of academic respondents were female and 55 per cent were male. The profile of L&D practitioner respondents was as follows: 75 per cent performed L&D roles in Ireland and 25 per cent performed international or global roles. In total, 45 per cent were male and 55 per cent were female with an average tenure in the L&D role of 9.65 years. In total, 20 per cent of respondent were senior executive level L&D practitioners, 65 per cent were senior or middle level practitioners and 15 per cent were in junior L&D roles. Practitioner L&D came from a variety of organisations with 55 per cent from service organisations, 25 per cent from manufacturing and 15 per cent from public sector and semi-state organisations and 5 per cent from not for profit.

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

3.2 Data collection methods

3.2.1 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 used 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 per cent.

3.2.2 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 used data from the semi-structured interviews to develop insights on:

- the study participants career in L&D;
- the commitment of the L&D practitioner to L&D;
- the career trajectory of the L&D specialist prior to and within the L&D role;
- the positioning of the L&D practitioner within the organisation and its advantages and limitations; and
- the future career aspirations of the L&D practitioner. [Appendix 2](#) summarises the key themes and issues investigated in the semi-structured interviews.

3.2.3 Delphi study. We used the Delphi method to gain insights on the most important competencies for L&D practitioners over the next five years. L&D competencies are typically identified using a job or task analysis or through expert panels, the critical incident method and behavioural event interviewing ([Russ-Eft, 1995](#)). In this study, we used a panel of academic experts and practitioners consisting of two rounds of data collection and analysis ([Okoli and Pawlowski, 2004](#)). This method has been used in a HR context previously. For example, [Coetzer and Sitlington \(2014\)](#) used a similar approach in revising

and updating the strategic HR curriculum. [Barrena-Martínez et al. \(2017\)](#) used the Delphi method to identify a configuration of socially responsible HRM policies and practices. Delphi panels are considered to have strengths in gathering expert opinions, thus ensuring that no one individual dominates the debate. It, therefore, reviews the possibility of biased assessments by maintaining anonymity through an email process.

Given the limited number of studies that have empirically investigated the competencies of L&D professionals, we judged the Delphi method to be an appropriate method for generating and validating competency lists. We used a quantitative/qualitative approach using a structured questionnaire. Following [Landeta \(2006\)](#), we proceeded through four stages:

- Stage 1, we conducted a review of the literature, industry reports and analysis of L&D curricula to identify a list of competencies. We generated a list of 50 competency dimensions.
- Stage 2, we developed a set of criteria to select both academic-practitioner experts. We selected a list of 60 academic experts that we generated from lists provided by University Forum for Human Resource Development and Academy of Human Resource Development.

We selected academic experts according to their academic experience of L&D:

- academic teaching and research experience of more than five years;
- active participation in the past five years at conferences, seminars and workshops at a national and international level;
- publications of impact in the field of L&D; and
- participation as reviewers, editorial boards and editors in international L&D publications.

We are confident that this filter ensured that the knowledge of the academic experts about L&D was up to date. We selected 100 L&D practitioners using two lists – the IITD membership list and a list generated by [Garavan et al. \(2016\)](#). We used the following criteria in selecting L&D practitioners:

- significant experience of L&D of more than five years;
- experience at national and/or international level; and
- membership of a professional body such as IITD and Chartered Institute of Personnel and Development (CIPD).

Stages 3 and 4 involved the development and launch of the questionnaire. The questionnaire was divided into four parts. Part 1 consisted of the list of 50 L&D competencies and study participants were asked to rate their importance for L&D in the next five years using a five-point Likert type scale where 1 = not important to 5 = very important. Part 2 asked respondents to identify up to five of the list of 50 competency dimensions that they considered essential, and Part 3 asked participants to identify up to five of the list of 50 competency statements that they considered not essential for future L&D professionals. In Part 4, we asked respondents to identify up to 10 competency dimensions that they considered important but were not included in the original list of 50 competency dimensions. This questionnaire was administered through two rounds. The purpose of these two rounds was to reach a consensus of both academic and practitioner experts about two filter criteria whether an L&D competency dimension is considered a component of L&D effectiveness and whether each L&D competency dimension should be kept as an element of an L&D

competency framework. In Round 1, we achieved responses from a total of 65 academics and 95 practitioners. Following [Hsu and Sandford \(2007\)](#), we used a consensus of 80 per cent or higher among experts and practitioners were considered acceptable to consider the inclusion of the dimension in Round 2. We included 40 of the statements from the initial list in Round 2. In Round 2, we added an additional 40 statements based on feedback from qualitative feedback. We achieved responses from 55 academics and 70 practitioners. We then analysed the data and retained 70 statements that reached the 80 per cent agreement level. We then factor analysed these statements and they broke down into seven categories: four foundational competencies and three L&D areas of expertise.

3.3 Data analysis

3.3.1 Survey. Three statistical steps were deployed to analyse the survey responses. First, items capturing the 10 L&D role dimensions were subjected to scaling analysis to test internal consistency. Second, exploratory factor analysis using a principal component extraction method with oblique rotation was applied to the foundational competency and L&D expertise items. As our L&D roles measure was adapted from [Ulrich \(1997\)](#), we, therefore, used confirmatory factor analysis (CFA) to confirm that our revised questionnaire exhibited a ten-dimensional structure. We used CFA at the individual level over the 100 items on L&D roles. The goodness-of-fit indices were accessible. The discrepancy/df (CMIN/DF) index is 2.82, which is considered acceptable ([Carmines and McIver, 1981](#)). We found a normal fit index of 0.95, which is considered acceptable ([Kline, 2015](#)). The relative fit index and incremental fit index are 0.95 and 0.97, respectively. Both values are acceptable. The comparative fit index is 0.95, which is above the 0.90 acceptable range. The root means square error of the approximation of the model is 0.071, which is acceptable. Overall, we concluded that the model fit for the ten-dimension L&D roles was acceptable. Finally, we conducted regression analysis to contribution of the predictors of both strategic and operational roles in organisations and the relationships between foundational competencies and areas of L&D expertise and L&D roles, contextual predictors and perceived L&D effectiveness. As proposed by [Meyers et al. \(2012\)](#), the data were first checked by reviewing the descriptive statistics, inter-item correlations and other assumption violations. The study minimised the potential for common method variance by administering an anonymous survey, ordering questions to encourage each to be answered separately and without reference to the previous question and scales used different numbers of scale items. We computed descriptive statistics reporting means, standard deviations, ANOVA and *t*-tests. The number of respondents varies from table to table because respondents did not answer all of the questions in all cases. Given the level of responses to the survey, we are 95 per cent confident that the results are applicable to L&D professionals in general with a margin of error of approximately 5 per cent.

4. Results

We first report the descriptive findings on contextual influences including:

- external influences and L&D responses to these changes;
- current and future strategic and operational priorities facing organisations;
- L&D involvement in influencing key trends driving organisational change; and
- 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 contextual factors and L&D roles, contextual predictors, foundational competencies/L&D expertise, L&D roles and perceived L&D effectiveness.

4.1 Descriptive findings

4.1.1 External and internal contextual influences impacting learning and development of professional roles. [Table II](#) summarises the key external context factors that will impact L&D over the next five years.

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 careers 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 focussed 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 focussed 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, social media and communication, advanced technology and artificial intelligence, globalisation and off-shoring and new ways of delivering learning. External factors that were perceived as negative in terms of impact were changes in the economic landscape, changing business models, international talent mobility, the gig economy and new forms of contracting. [Table III](#) summarises the current and future internal challenges facing organisations.

Study respondents highlighted significant current and future strategic and operational challenges facing organisations. The most significant current challenge related to the management of costs, the need for enhanced organisational agility and flexibility, the achievement of productivity gains and the adaptation of new technologies. In terms of significant future challenges, the analysis revealed that many of the current challenges will persist in the future. We found significant statistical differences between perceptions of current and future internal challenges with all of these challenges increasing in magnitude. The management of costs is also the most significant future challenge, followed by the need to adopt new technologies. We also found significant statistical differences by firm size in terms of current and future strategic and operational challenges. For small firms, the most significant current and future challenges are the management of costs and the achievement of productivity gains. For medium-sized firms, the management of costs is an important current and future challenge in addition to managing and developing talent, the adoption of new technologies and enhancing organisational agility and flexibility. Large firms are majorly concerned with enhancing organisational agility and flexibility, the management and development of talent and the adoption of new technologies.

[Table IV](#) summarises the perceptions of both L&D professionals and other stakeholders of the potential and skill of L&D to influence these external factors. The data analysis reveals that both sets of stakeholders differ in their perceptions of the potential of L&D to influence and their skills to influence. We found statistically significant differences. Overall,

Trend	Importance of trend				Impact of trend				ANOVA F-stat
	Small [66]		Firm size Medium [192]		Large [172]		All All [440]		
	Mean	SD	Mean	SD	Mean	SD	Positive (%)	Negative (%)	
Changes in the economic landscape	4.65	0.59	4.45	0.67	4.15	0.68	25	65	16.98**
Demand for flexible work and work-life balance	3.25	0.41	4.05	0.71	4.15	0.71	62	16	45.34**
Changing business models: 24/7/ knowledge work	3.15	0.26	4.25	0.47	4.65	0.91	40	60	54.00**
Use of mobile technologies and remote working	2.55	0.29	3.95	0.46	4.05	0.71	51	34	59.20**
Social media and communication	3.25	0.41	3.85	0.62	4.05	0.72	85	10	15.38**
Advanced technology and artificial intelligence	2.65	0.42	3.75	0.62	3.75	0.71	82	4	33.94**
Changing demographics and new generations	3.15	0.46	3.95	0.72	4.15	0.76	40	10	24.29**
Globalisation/off-shoring	2.95	0.29	3.85	0.48	4.35	0.69	62	12	47.80**
International talent mobility	2.95	0.29	3.95	0.39	4.75	0.69	24	51	82.96**
Changing notions of careers	2.75	0.46	3.85	0.46	3.95	0.49	56	21	37.37**
The gig economy and new forms of contracting	2.45	0.45	3.75	0.61	4.35	0.81	20	57	188.89**
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	68	2	82.37**

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

Table II.
External trends
shaping work in
organisations:
importance and
impact on the
achievement of
organisational goals

Table III.
Current and future
strategic and
operational priorities
facing organisations
(mean score 1 = low;
5 = high)

Priority	All[440]		Current versus future		Firm size Small [66]	
	Current Mean	SD	Future Mean	SD	Current Mean	SD
Management of costs	4.15	0.72	4.55	0.77	4.45	0.57
Managing and development talent	3.85	0.71	4.00	0.67	3.45	0.46
Enhanced agility and organisational flexibility	3.95	0.58	3.95	0.59	3.55	0.53
Achievement of productivity gains	3.85	0.65	4.00	0.67	4.25	0.79
Enhanced innovation and creativity	3.55	0.64	3.75	0.51	3.25	0.41
Corporate social responsibility	3.45	0.42	3.35	0.49	3.00	0.46
Increased global presence/new markets	3.35	0.81	3.25	0.31	2.85	0.26
Change in the strategic focus of the organisation	3.45	0.41	3.65	0.36	3.45	0.46
Adoption of new Technologies	3.85	0.51	4.15	0.51	3.55	0.51
				<i>t</i> -stat		
				7.96**		
				3.22**		
				0.00		
				3.37**		
				5.13**		
				3.25**		
				2.42*		
				7.69**		
				8.72**		
					Future Mean	SD
					4.85	0.71
					3.55	0.61
					3.50	0.51
					4.35	0.81
					3.65	0.56
					3.00	0.26
					2.95	0.41
					3.55	0.47
					3.75	0.47

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

(continued)

Priority	Firm size												ANOVA	
	Medium [198]				Large [176]				Current by org. size		Future by org. size		F-stat	
	Current Mean	Current SD	Future Mean	Future SD	Current Mean	Current SD	Future Mean	Future SD	F-stat	SD	F-stat	SD		
Management of costs	4.00	0.57	4.35	0.67	4.00	0.62	4.55	1.04	16.28**	0.98	9.12**	0.98		
Managing and development talent	4.00	0.59	4.25	0.59	4.15	0.52	4.45	0.98	39.95**	0.91	19.55**	0.91		
Enhanced agility and organisational flexibility	3.95	0.51	3.95	0.54	4.95	0.41	4.25	0.91	299.75**	0.69	27.89**	0.69		
Achievement of productivity gains	3.65	0.50	3.85	0.81	3.75	0.67	3.85	0.71	23.47**	0.59	12.01**	0.59		
Enhanced innovation and creativity	3.65	0.56	3.75	0.71	3.85	0.53	3.75	0.71	31.24**	0.51	30.09**	0.51		
Corporate social responsibility	3.45	0.47	3.55	0.61	3.65	0.63	3.55	0.69	35.06**	0.79	44.44**	0.79		
Increased global presence/new markets	3.15	0.59	3.25	0.71	3.65	0.61	3.75	0.69	62.29**	0.89	21.61**	0.89		
Change in the strategic focus of the organisation	3.55	0.41	3.55	0.49	3.30	0.59	3.95	0.79	11.84**	0.89	5.68**	0.89		
Adoption of new Technologies	4.20	0.69	4.20	0.89	4.00	0.81	4.20	0.89	10.53**					

Table III.

Table IV.
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 t-stat	Skills to influence t-stat
	Potential to influence Mean	SD	Mean	SD		
Changes in the economic landscape	2.25	0.24	2.65	0.29	0.00	18.52**
Demand for flexible work and work-life balance	3.65	0.28	3.25	0.41	23.33**	4.65**
Changes in business models – 2A/7, knowledge work	3.15	0.34	3.05	0.51	2.70**	2.56*
Use of mobile technologies and remote working	3.85	0.48	3.25	0.62	3.18	1.46
Social media and communication	4.25	0.51	3.5	0.55	8.51**	2.94**
Advanced technology and artificial intelligence	2.95	0.29	2.25	0.41	16.67**	14.65**
Changing demographics and new generations	4.25	0.66	3.85	0.51	1.25	2.00*
Increased focus on corporate social responsibility/ethics	3.95	0.61	3.75	0.28	4.69**	0.00
Globalisation and off-shoring	3.15	0.51	3.05	0.53	11.36**	6.67**
International talent mobility	3.95	0.59	3.75	0.61	5.09**	5.26**
Changing notions of careers	4.15	0.69	3.85	0.59	2.94**	1.89
The gig economy and new forms of contracting	3.15	0.41	3.25	0.41	2.17*	7.50**
New ways of delivering learning	4.65	1.01	3.45	0.46	6.90**	2.08*

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

L&D professionals have more positive perceptions of the capability of L&D to influence external factors. Similar trends are in evidence of skills to influence. L&D professionals perceive that they both have the potential and skill to influence developments in social media and technology, new ways of delivering learning and responding to changing notions of careers. In contrast, both sets of stakeholders have less potential and skills to respond to changes in the economic landscape and advances in technology and artificial intelligence.

4.1.2 Use of data analytics and technology by learning and development professionals.

We explored several dimensions of data, analytics and technology including the use and quality of evidence to make decisions, the use and level of sophistication of L&D analytics, the use of L&D technology, the attributes of effective L&D technology, current use of L&D technology and the use of learning management systems. L&D professionals are less sophisticated in their use of evidence to make decisions about L&D. [Table V](#) summarises the key trends.

There is a strong reliance on the use of personal experience irrespective of the size of the firm; however, it is most prevalent in small firms. Small firms are also more likely to rely on intuitive approaches, advice from colleagues and the values and concerns of people influenced by the decisions. In contrast, large firms make significantly more use of insights provided by professional bodies and external experts, data facts and insights derived from management information systems and knowledge acquired through training and education activities. In terms of perceptions of the quality of the evidence, small firms perceive the more informal and intuitive approaches to be more effective and place less value on evidence derived from more formal sources. In contrast, we found that large firms perceive the quality of formal sources of evidence to be better. These include data derived from management information systems and insights derived from professional bodies and external experts. Overall, we found statistically significant differences between small, medium and large firms when it comes to the use of evidence to inform L&D decision making.

The use of analytics has emerged as an important topic in HR, therefore, we investigated both the usage and level of sophistication of usage of L&D analytics by professionals. [Table VI](#) summarises the key trends.

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 as follows: satisfaction, confidence and importance. [Table VII](#) summarises our findings.

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

Table V.
Use and quality of
evidence used by
L&D specialists to
make decisions

Types of evidence	Usage					Quality				
	Firm size					Firm size				
	Small [66]	Medium [198]	Large [176]	ANOVA	ANOVA	Small [66]	Medium [198]	Large [176]	ANOVA	ANOVA
	Mean	SD	Mean	SD	F-stat	Mean	SD	Mean	SD	F-stat
Personal experience	4.45	0.71	4.25	0.91	4.04	0.91	4.05	0.89	0.61	48.17**
Reliance on experienced L&D professionals within the organisation	1.65	0.21	4.25	0.81	4.45	1.08	3.85	0.19	0.29	398.62***
Advice from colleagues	3.95	0.46	3.95	0.51	4.25	0.82	3.65	1.21	0.52	61.89***
Intuitive approaches	4.75	1.09	3.95	0.51	3.85	0.72	3.85	0.91	0.46	30.47***
Insights provided by professional bodies and external experts	2.55	0.24	3.85	0.73	4.15	0.96	3.85	0.10	0.52	350.27***
Data from commissioned research	1.25	0.11	3.45	0.36	3.65	0.39	3.55	0.11	0.29	1,692.25***
Data, facts and insights from management information systems	1.25	0.10	3.45	0.32	3.95	0.38	3.75	0.14	0.26	558.41***
Values and concerns of people influenced by decisions	3.95	0.26	3.65	0.31	3.45	0.41	4.05	0.96	0.81	33.15**
Knowledge acquired through training and education	2.75	0.26	3.85	0.26	4.15	0.91	3.65	0.24	0.41	20.36**
Knowledge derived from literature	1.15	0.10	3.45	0.46	3.65	0.62	3.25	0.10	0.31	1,452.71***

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

L&D analytics area	Usage						Level of sophistication											
	Small [66]			Firm size			Small [66]			Firm size			Large [176]		ANOVA			
	Mean	SD		Medium	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	F-stat	F-stat		
Costs of investment in formal training	2.15	0.21		3.85	0.62		4.65	0.98		1.15	0.11		3.65	0.62		3.95	0.61	616.68**
Workforce composition and diversity	1.25	0.12		3.75	0.47		4.00	0.81		1.45	0.16		3.45	0.42		4.45	0.91	524.89**
L&D planning	1.25	0.10		4.10	0.81		4.50	0.97		1.15	0.12		3.55	0.41		4.65	1.08	541.55**
Workforce knowledge, skills and capability	1.50	0.12		3.75	0.39		4.75	1.06		1.25	0.14		3.45	0.46		4.10	0.81	542.38**
Workforce performance and capability	1.50	0.12		3.45	0.14		3.95	0.61		1.15	0.17		3.25	0.52		3.65	0.46	731.63**
Leadership capability and development	1.25	0.12		3.55	0.11		4.35	0.89		1.10	0.18		3.15	0.51		3.75	0.47	804.43**
Knowledge management	1.05	0.10		3.25	0.10		3.65	0.42		1.10	0.14		2.65	0.26		3.05	0.42	886.34**
Change management	1.05	0.10		3.05	0.79		3.55	0.62		1.10	0.16		2.25	0.14		3.10	0.32	1,883.49**
Regulatory compliance	1.45	0.11		3.65	0.68		3.95	0.61		1.55	0.11		3.65	0.38		3.85	0.41	1,020.03**
Career planning and development	1.25	0.14		4.15	0.81		4.35	0.96		1.15	0.10		3.55	0.41		4.35	0.67	957.26**
Employee engagement and well-being	1.45	0.12		3.85	0.58		4.15	0.81		1.15	0.10		3.65	0.62		3.85	0.47	724.15**
Organisation design and development	1.25	0.11		3.15	0.52		3.15	0.41		1.10	0.10		3.25	0.39		3.45	0.48	881.75**
Training activities and participation	2.50	0.18		3.95	0.61		4.65	1.07		2.50	0.10		3.95	0.43		4.85	1.10	239.19**

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

Table VI.
Application of L&D
analytics in
organisations: usage
and level of
sophistication

Table VII.
How do
organisations use
learning technology?

Uses	Small [66]			Firm size			Large [176]			ANOVA			Low [95]			Maturity of L&D function			High [115]			ANOVA		
	Mean	SD		Medium [198]	Mean	SD	Mean	SD	Mean	SD	F-stat	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	F-stat		
Learning assessment and testing	1.76	0.51		3.56	0.51		4.10	0.61		432.65**	2.86	0.51		3.80	0.52		4.50	1.02		149.36**				
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	0.41		4.70	1.07		344.02**				
Programme scheduling and registration	1.98	0.31		3.50	0.42		4.40	0.81		402.99**	2.31	0.31		3.50	0.42		4.70	1.01		393.85**				
Content creation	1.31	0.21		3.10	0.48		3.70	0.56		581.49**	1.21	0.10		3.20	0.40		4.25	0.91		815.17**				
Content distribution	1.78	0.33		3.90	0.47		4.30	0.71		493.95**	2.21	0.41		3.55	0.41		4.55	1.07		337.23**				
Content library and curation	1.11	0.10		2.75	0.18		3.10	0.41		1,163.70**	2.65	0.44		2.85	0.21		4.10	0.81		313.93**				
Reporting and training analytics	2.11	0.33		3.50	0.26		4.40	0.61		664.29**	2.81	0.51		3.75	0.41		4.85	1.09		242.24**				
Training attendance	3.21	0.53		4.10	0.81		4.50	0.41		98.96**	3.11	0.55		4.10	0.61		4.75	0.59		200.71**				
Brand/intellectual property content security	1.11	0.10		2.65	0.24		3.25	0.26		2,016.06**	1.10	0.10		2.25	0.21		3.55	0.35		2,764.08**				

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

and those with mature L&D functions attached significantly higher levels of importance to L&D technology. [Table VIII](#) summarises the key trends for the usage of technology.

Where organisations make use of L&D technology, they do so for transactional rather than transformational purposes. Usage by small firms is very minimal and firms with new L&D functions make less use of technology. Medium and large firms are more likely to make use of L&D technology to monitor training attendance, programme scheduling and registration, learning assessment, testing and content distribution and reporting and training analytics. Medium and large firms are less likely to make use of L&D technology for content library and curation, branding and intellectual property content security and content creation. Our findings do, however, reveal that the maturity of the L&D function is an important factor explaining the use of L&D technology. In firms with an L&D function that is highly mature, there is evidence of significantly greater usage of L&D technology for multiple purposes. We also explored the attributes of effective L&D technology; however, we found significant differences in perceptions depending on firm size, whether the organisation had a dedicated or non-dedicated L&D function and the maturity of the function. [Table IX](#) summarises the main findings.

Attributes of L&D technology that were most valued included technology that facilitated collaboration, had the mobile capability and has strong systems integration with other HR systems. Smaller firms placed more emphasis on using technology to foster collaboration, whereas large firms placed more emphasis on system integration with other HR systems, the extent of user interface and mobile capability. Firms with a dedicated L&D function valued characteristics such as collaboration, mobile capability and systems integration with other HR systems. The maturity of the L&D function has an important role to play in how L&D professionals perceive the attributes of effective L&D technology. Firms with L&D functions described as highly mature emphasised multiple attributes of L&D technology. The final dimension of technology that we investigated concerned the use of learning management systems. [Table X](#) summarises the trends.

In general, L&D professionals have negative perceptions of learning management systems. For small firms, the major issues are getting employee buy-in to use and the lack of a blended approach. Medium-sized firms emphasised lack of integration with other organisational systems, unclear technology and securing employee buy-in for use. Large firms had overall less negative perceptions of the use of learning management systems, as are firms with a dedicated L&D function and one that is rated highly mature.

4.2 Learning and development roles, career levels, foundational competencies and areas of expertise

4.2.1 Learning and development roles in organisations. We derived data on coverage of L&D roles and their quality from the cross-sectional survey. However, to understand the complexity of roles in organisations, we concluded interviews with 30 L&D practitioners to identify the potential scope and content of different roles. This data collection process identified five strategic and five operational roles that L&D professionals perform in organisations. We generated dimensions of each role and include them in the survey. We found a number of key trends in the frequency of these roles in organisations. The data reveals that 35 per cent of firms implement a strategic partner type role. This role operated in a variety of ways in organisations, but included a number of elements: providing L&D support to employees and line managers within a specific business unit, providing L&D advice to senior business leaders within business units and some combination of business consulting with the aspiration to be strategic. In total, 20 per cent of firms implement what we describe as “pure strategic roles” such as L&D strategies for manager of learning projects. These two roles were typically found in large multinational organisations and their

Table VIII.
Use of L&D
technology:
satisfaction,
confidence and
importance

Technology	Small [66]		Firm size		Large [176]		ANOVA		Maturity of L&D function						ANOVA	
	Mean	SD	Medium [198]	SD	Mean	SD	F-stat	Low [95]	Medium [230]	High [115]	Mean	SD	Mean	SD	F-stat	F-stat
			Mean	SD	Mean	SD		Mean	Mean	Mean	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	0.37	3.85	0.48	1,254.46**		
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	0.41	3.95	0.72	931.11**		
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	0.42	4.35	0.69	577.92**		

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

Attributes	Firm size						L&D function						Maturity of L&D function						
	Small [66]		Medium [198]		Large [176]		Dedicated [285]		Non-dedicated [155]		Low [95]		Medium [230]		High [115]		ANOVA		
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	F-stat	F-stat	
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	4.25	0.91	4.78	1.07	143.78**
System integrated with other	3.10	0.51	4.25	0.452	4.85	1.14	109.13**	4.85	1.21	4.25	0.87	5.45**	2.89	0.31	4.21	0.92	4.65	0.96	124.23**
HR systems	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	4.35	0.82	4.85	1.02	128.68**
Flexibility to adapt to changing needs	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	3.95	0.41	4.75	1.10	141.27**
Mobile capability	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	3.80	0.42	4.20	0.81	22.04**
Delivered in the cloud	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	3.65	0.41	4.75	1.41	93.11**
Embedded analytics	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	4.10	0.72	4.45	1.01	79.67**
Facilitates collaboration																			

Notes: * $p \leq 0.05$, ** $p \leq 0.01$, *** $p \leq 0.001$

Table IX.
Attributes of
effective L&D
technology

Table X.
Perceptions of
learning
management
systems

Difficulty	Firm size						L&D function						Maturity of L&D function						
	Small [66]		Medium [198]		Large [176]		Dedicated [285]		Non-dedicated [155]		Low [95]		Medium [230]		High [115]		ANOVA		
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	F-stat
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	3.85	0.71	2.95	0.26	42.73**
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	4.25	0.91	2.95	0.29	122.97**
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	3.65	0.62	3.45	0.31	27.40**
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	3.95	0.67	3.45	0.36	107.57**
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	3.45	0.41	3.45	0.31	87.67**
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	3.35	0.38	3.25	0.36	140.49**
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	3.55	0.51	3.45	0.29	223.44**
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	4.55	0.81	2.55	0.16	550.46**
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	3.45	0.42	2.45	0.21	343.53**
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	3.95	0.38	3.65	0.38	379.14**
Lack of integration with other organisation 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	4.10	0.71	3.25	0.26	432.30**
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	3.10	0.19	2.65	0.19	163.41**

Notes: * $p \leq 0.05$, ** $p \leq 0.01$, *** $p \leq 0.001$

activities were strongly aligned with the strategic priorities of the business unit or corporate functions. They typically executed strategic type L&D activities such as strategic development of the organisation, the professional coaching of senior leaders and organisational change consulting. We found that 52 per cent of organisations implemented a training manager role. We categorised this role as strategic but acknowledge that it contained operational management elements such as the management of L&D resources and designs, L&D solutions that enhance the strategic capabilities of the organisation. In total, 62 per cent of organisations had a L&D specialist role. This role was conceptualised as strategic because the role holder designs quality training interventions and strategies that enhance capacity and contribute to organisational performance outcomes.

Table XI 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 per cent 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. In total, 62 per cent of organisations implemented a production or product trainer role; 25 per cent of organisations had technical trainer roles, 15 per cent of organisations had instructional designers, 10 per cent of organisations had instructional technology and media specialist roles and 90 per cent 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 XII summarises the key findings by the stakeholder group.

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.

4.2.2 Learning and development 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 XIII 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.

Table XI.
Quality of L&D
strategic roles in
organisations by
stakeholder

L&D role	All		L&D prof[200]		CEO [20]		Line managers [75]		Employees [120]		Senior manager [25]		ANOVA
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	F-stat
<i>Strategic business partner (mean = 3.56)</i>													
Achieves business goals and financial performance	3.97	0.61	4.20	0.71	3.81	0.62	3.45	1.09	3.51	0.62	3.96	0.71	21.76**
Implementing strategy in the organisation	3.71	0.56	4.10	0.62	3.61	0.71	3.37	1.07	3.41	0.51	3.69	0.74	25.13**
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	0.71	3.71	0.54	14.57**
Ensures that strategy is effectively implemented	3.42	0.58	3.85	0.71	3.37	0.81	3.12	0.78	3.27	0.61	3.38	0.67	21.57**
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	0.61	4.26	0.72	15.75**
Analyses and manages strategic implementation issues	3.25	0.71	3.78	0.46	3.27	0.56	3.05	0.79	3.00	0.75	3.31	0.63	36.81**
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	0.71	3.31	0.84	21.09**
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	0.67	3.36	0.81	29.29**
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	0.72	3.60	0.72	8.91**
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	0.81	3.51	0.69	24.19**
<i>Training manager (mean = 4.13)</i>													
Enhances efficiency of the organisation	3.81	0.59	4.21	0.71	3.61	0.74	3.41	0.97	3.95	0.54	3.87	0.69	18.17**
Manages L&D processes and activities	4.26	0.61	4.46	0.69	4.10	0.71	3.71	0.86	4.11	0.56	4.19	0.63	17.27**
Manages L&D processes effectively	4.18	0.64	4.36	0.72	4.06	0.72	3.81	0.72	4.08	0.59	4.16	0.62	9.77**
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	0.81	4.02	0.79	10.99**
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	0.71	3.89	0.72	14.30**
Manages day to day operational issues	4.51	1.00	4.81	0.91	4.35	0.72	4.21	0.65	4.45	0.69	4.53	0.89	9.26**
Designs L&D interventions	4.21	0.96	4.36	0.71	4.18	0.71	3.99	0.81	4.18	0.75	4.10	0.72	3.87**
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	0.92	4.21	0.84	13.66**
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	0.71	3.84	0.68	19.95**
Enhances employee KSAs effectively	4.12	0.71	4.41	0.79	4.31	0.71	3.82	0.79	4.01	0.64	4.06	0.71	11.05**

(continued)

L&D role	All		L&D prof [200]		CEO [20]		Line managers [75]		Employees [120]		Senior manager [25]		ANOVA <i>F</i> -stat
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
<i>L&D specialist (mean = 4.07)</i>													
Develops employee knowledge, skills and abilities	4.61	1.09	4.91	0.89	4.51	0.62	4.24	0.92	4.45	0.98	4.45	0.92	9.63**
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	0.79	4.34	0.72	4.82**
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	0.96	3.89	0.45	12.61**
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	0.62	4.12	0.62	20.16**
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	0.71	4.14	0.54	30.10**
Identifies knowledge, skill and ability gaps	4.21	0.69	4.46	0.72	4.14	0.73	3.72	0.64	4.26	0.72	4.29	0.71	15.08**
Delivers L&D activities in organisations	3.95	0.71	4.25	0.73	3.89	0.69	3.35	0.67	4.05	0.81	4.09	0.67	20.55**
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	0.87	4.11	0.73	4.16**
Delivers quality training and development	3.99	0.51	4.24	0.63	3.81	0.69	3.35	0.67	4.11	0.67	4.14	0.81	26.01**
Designs quality training strategies	3.97	0.61	4.21	0.68	3.99	0.64	3.45	0.62	4.04	0.72	4.12	0.71	17.17**
<i>L&D strategist (mean = 4.15)</i>													
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	0.79	4.62	0.81	20.87**
Develops new processes and strategies	4.21	0.97	4.65	0.84	4.27	0.96	3.72	0.75	4.18	0.81	4.14	0.82	19.25**
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	0.82	4.09	0.71	7.73**
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	0.72	4.17	0.62	27.30**
Is an effective capability builder	4.01	0.67	4.41	0.72	4.21	0.62	3.52	0.71	4.08	0.64	4.04	0.72	23.00**
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	0.62	4.14	0.71	15.77**
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	0.61	4.07	0.61	10.06**
	4.04	0.72	4.27	0.69	4.11	0.76	3.71	0.81	4.08	0.73	4.04	0.63	8.29**

(continued)

Table XI.

L&D role	All		L&D prof [200]		CEO [20]		Line managers [75]		Employees [120]		Senior manager [25]		ANOVA F-stat
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
Ensures that L&D is aligned with strategy formulation processes and future strategic goals	4.10	0.71	4.29	0.69	4.14	0.73	3.72	0.68	4.08	0.78	4.02	0.69	8.88**
Helps the organisation to develop strategic capabilities	4.21	0.91	4.41	0.98	4.16	0.89	3.79	0.94	4.17	0.92	4.17	0.71	6.08**
Helps the organisation to acquire and retain capabilities for competitive success	4.71	0.91	4.95	0.94	4.81	0.79	4.25	0.97	4.51	0.72	4.76	0.81	10.50**
<i>Manager of learning projects (mean = 4.37)</i> Manages major strategic projects in dynamic and complex environments	4.62	0.71	4.89	0.96	4.72	0.84	4.24	0.69	4.45	0.81	4.57	0.86	9.64**
Shapes the process of cultural change to bring about transformation	4.41	0.62	4.73	0.71	4.69	0.79	4.01	0.79	4.29	0.63	4.40	0.72	17.14**
L&D processes and interventions enhances the organisation's ability to transformational change	4.21	0.59	4.41	0.69	4.26	0.71	4.31	0.49	4.27	0.54	4.18	0.51	1.60**
Helps the organisation to manage major strategic transformations	4.61	0.67	4.81	0.79	4.59	0.62	4.21	0.72	4.51	0.69	4.57	0.62	9.79**
Acts as a transformation change agent	4.24	0.71	4.46	0.75	4.34	0.81	4.04	0.61	4.14	0.67	4.18	0.27	7.08**
Supports transformational change initiatives	4.14	0.81	4.43	0.72	4.24	0.71	3.89	0.72	4.07	0.59	4.07	0.81	10.56**
Implements processes of organisational renewal, change and transformation	4.04	0.71	4.24	0.81	4.26	0.79	3.72	0.86	4.14	0.82	4.14	0.62	5.82**
Reshapes and realigns the organisation to manage transformational change	4.14	0.62	4.46	0.71	4.19	0.81	3.81	0.72	4.04	0.61	4.07	0.67	14.99**
Helps the organisation to transform itself	4.64	0.71	4.89	0.72	4.79	0.76	4.24	0.62	4.46	0.71	4.45	0.72	15.03**
Makes transformational change happen													

Notes: * $p \leq 0.05$, ** $p \leq 0.01$; *** $p \leq 0.001$

L&D role	All		L&D prof [200]		CEO [20]		Line managers [75]		Employees [120]		Senior manager [25]		ANOVA F-stat
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
<i>Product or production trainer (mean = 4.33)</i>													
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	0.89	4.89	0.99	8.15**
Uses 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	0.79	4.71	0.69	7.97**
L&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	0.69	4.87	0.62	4.63**
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	0.72	4.38	0.68	6.23**
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	0.16	4.10	0.16	12.19**
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	0.61	4.05	0.67	8.94**
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	0.62	4.51	0.62	21.84**
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	0.62	4.17	0.62	6.73**
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	0.65	4.11	0.46	30.47**
L&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	0.47	4.29	0.72	61.29**
<i>Technical trainer (mean = 4.23)</i>													
Develops technical expertise and competence	4.10	0.49	4.46	0.51	4.21	0.71	3.70	0.52	3.97	0.65	4.11	0.46	30.47**
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	0.47	4.19	0.72	61.29**
L&D activities are focussed 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	0.73	4.33	0.81	14.92**

(continued)

Table XII.
Quality of L&D operational roles in organisations by stakeholder

L&D role	All		L&D prof [200]		CEO [20]		Line managers [75]		Employees [120]		Senior manager [25]		ANOVA
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	F-stat
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	0.65	4.20	0.63	18.35**
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	0.84	4.21	0.62	16.07**
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	0.78	4.31	0.72	9.24**
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	0.69	4.25	0.69	13.63**
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	0.71	4.27	0.62	3.36*
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	4.31	0.64	8.57**
Ensures the technical capabilities of employees to meet customer needs	4.30	0.72	4.47	0.69	4.40	0.67	4.15	0.67	4.21	0.72	4.27	0.67	4.30**
<i>Instructional designer (mean = 4.34)</i>													
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	0.63	4.77	0.69	7.46**
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	0.77	4.39	0.72	7.33**
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	0.76	4.79	0.61	4.12**
Designs L&D solutions that are cost effective	4.21	0.46	4.46	0.72	4.41	0.69	4.14	0.79	4.28	0.72	4.25	0.62	3.14*
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	0.61	4.05	0.67	4.40	0.71	4.27	0.81	4.38**
Uses instructional design principles to develop best fit training solutions	4.21	0.69	4.41	0.62	4.27	0.67	4.14	0.75	4.28	0.79	4.31	0.81	2.15
	4.21	0.71	4.46	0.73	4.34	0.87	4.01	1.07	4.11	0.62	4.18	0.42	6.67**

(continued)

L&D role	All		L&D prof [200]		CEO [20]		Line managers [75]		Employees [120]		Senior manager [25]		ANOVA F-stat
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
Identifies the best instructional strategies to match the characteristics of employees	4.10	0.74	4.36	0.71	4.47	0.62	3.85	1.11	4.06	0.72	4.08	0.46	7.50***
Ensures that best in class instructional design solutions are developed	4.31	0.62	4.56	0.72	4.41	0.62	4.07	0.67	4.14	0.72	4.26	0.51	10.38**
Consistently meets best in class instructional design	4.11	0.67	4.34	0.68	4.36	0.71	3.95	0.96	4.06	0.71	4.24	0.42	5.34**
Uses best in class instructional design principles to deliver training solutions	<i>Learning and technology media specialist (mean = 4.35)</i>												
Uses technology to deliver L&D solutions	4.76	0.61	4.95	0.79	4.81	0.69	4.35	0.71	4.69	0.71	4.78	0.89	8.92**
Designs training activities that can be effectively delivered using technology	4.45	0.72	4.69	0.81	4.41	0.67	4.10	0.72	4.29	0.79	4.35	0.71	9.92**
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	0.79	4.41	0.89	5.86**
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	0.71	4.27	0.71	3.25*
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	0.72	4.65	0.72	21.97**
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	0.67	4.51	0.81	6.46**
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	0.67	4.41	0.71	7.82**
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	0.72	4.46	0.52	11.15**
Reaches as many employees as possible using technology	4.14	0.69	4.46	0.71	4.21	0.67	3.80	1.04	4.04	0.67	4.12	0.71	12.29**
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	0.72	4.07	0.81	7.89**
L&D administrator (mean = 4.31)	<i>(continued)</i>												

Table XII.

L&D role	All		L&D prof[200]		CEO [20]		Line managers [75]		Employees [120]		Senior manager [25]		ANOVA F-stat
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	
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	0.81	4.27	0.72	24.71**
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	0.76	4.19	0.79	5.84**
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	0.61	4.07	0.67	4.79**
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	0.71	4.67	0.81	22.05**
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	0.81	4.79	0.82	10.88**
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	0.81	4.63	0.81	12.41**
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	0.51	4.11	0.72	16.32**
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	0.61	4.18	0.76	9.43**
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	0.69	4.26	0.71	9.76**
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	0.91	4.21	0.81	4.80**

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

Career level	Task characteristics and typical roles	Focus of level and measurement of effectiveness	Competency/L&D expertise balance/where time is spent	Development and transition to next level
Entry level	<p><i>Task characteristics:</i> Will carry out an operational training role May also be a generalist with limited experience May hold a formal title as trainer May perform a variety of administrative training task</p> <p><i>Typical roles:</i> Product/production trainer Technical trainer L&D administrator</p>	<p><i>Focus of role:</i> Delivery of key L&D fundamentals Short-term operational and immediate focus Meets the needs of clients through the provision of training Involved in direct training activities Focus on individual employees or groups of employees Administration of key aspects of day to day L&D</p> <p><i>Measurement of effectiveness:</i> Skill level of employees trained Efficiency and effectiveness of L&D solution implementation Demonstration of flexibility and agility to quickly deliver L&D solutions Focus on appropriateness of solutions Client satisfaction with training outcomes Impact of training on employee performance in the short term</p>	<p>30/70: in favour of L&D expertise Primary focus on possession of L&D expertise L&D expertise will focus on designing, diagnosing and delivering L&D solutions L&D expertise will be developed through formal education and on the job experience <i>Where time is spent:</i> Designing L&D solutions Direct delivery of training Engagement with supervisors, managers and employees Evaluation of training activities Administration of training including maintaining training Records Compiling data and information on training performance Day to day organizing of training</p> <p><i>Relationship with client:</i> Transactional focussed on delivering L&D fundamentals Provides training solutions, process support, data and information Dealing with day to day training problems highlighted by employees and line managers Responding to training requests from employees</p>	<p><i>Shift in focus concerning tasks</i> Major shift from short-term and immediate focus to problem analysis and solving L&D problems for line managers Shifting from delivering L&D alone to working with others to develop L&D solutions Focus on service of employees rather than individual employees <i>Shift in focus concerning perspective</i> Taking a view of wider L&D issues and the importance of working across boundaries Understanding the need to provide expertise inputs to deliver L&D solutions Focussing on coaching and supporting others rather than doing <i>Shift in skill requirements</i> Building on and understanding the role of L&D in developing employee capability Extensive use of interpersonal and relationship building skills and influencing stakeholders primarily internal to the organisation Broadening knowledge of organisation processes and how organisations work Developing greater L&D knowledge and competency <i>What needs to be left behind?</i> Letting go of being an operator and doer to working with others collaboratively Relinquishing personal control</p>

(continued)

Table XIII.
Characteristics of L&D career levels of L&D professionals

Table XIII.

Career level	Task characteristics and typical roles	Focus of level and measurement of effectiveness	Competency/L&D expertise balance/ where time is spent	Development and transition to next level
Mid-career level	<p><i>Task characteristics:</i> Maybe an L&D generalist or an experienced specialist Designs, delivers and manages the operational aspects of training programmes Has a good base of experience and is well-established within an organisation? Degree of specialisation will depend on the organisational context <i>Typical roles:</i> Instructional designer Learning and technology Media specialist L&D administrator Professional L&D specialist</p>	<p><i>Focus of role:</i> Provides specialist expertise on training processes, instructional design and application of technology Short or near term time focus May manage training and development activities and other Specialists Advises and manages on individual or team L&D issues Has a strong problem-solving focus and emphasis on matching the training solution to the performance issue <i>Measurement of effectiveness:</i> L&D issues addressed in a timely manner Time and other resources to address training problems are appropriate Flexibility in terms of L&D solutions and realism of solutions proposed L&D problems satisfactorily resolved Soundness of advice provided to line managers Immediate individual and team performance Impact</p>	<p><i>Competency/L&D expertise balance:</i> 50/50: equal emphasis on foundational competencies and Specialist expertise Strong understanding of business requirements and operational realities Expertise in diagnosing, designing and delivering L&D solutions and managing, measuring and evaluating of L&D Variable understanding of the application of technology to L&D <i>Where time is spent:</i> Understanding and analysing potential L&D issues Systematic issue analysis and use of instructional design models to deliver solution Development of specialist technical training solutions Development of technology-driven L&D solutions <i>Relationship with Client:</i> Advisor with strong focus on operational issues Understanding of client's L&D needs Selecting solutions that are cost-effective and will demonstrate results Demonstration to client that training is a good investment of time and financial Resources</p>	<p><i>Shift in focus concerning tasks</i> Major shift to increasingly complex strategic and operational problem solving Focus on building relationships with a broad range of stakeholders Working on L&D visioning and strategizing Communicating with and influencing a wider range of internal and external stakeholders Using the time to coach, mentor, engage with and support others <i>Shift in focus concerning perspective</i> Adopting a medium to long-term perspective Understanding the need to develop a reputation and personal impact Understanding synergies between L&D processes and other HR activities <i>Shift in skill requirements</i> Enhancing understanding of the dynamics of the business Less reliance on technical skills instead and enhancing social capital and relationship building skills Strong focus on developing skills to elicit and harvest ideas from internal and external stakeholders Enhancing skills and confidence to deal with ambiguity and complex problem solving Developing strong emotional resilience and deepening self-awareness <i>What needs to be left behind?</i> Making decisions on the fly rather than having to rely on full information Shifting from involvement in operational issues to focus on the strategic</p>

(continued)

Career level	Task characteristics and typical roles	Focus of level and measurement of effectiveness	Competency/L&D expertise balance/where time is spent	Development and transition to next level
Senior career level	<p><i>Task characteristics:</i> Can be a very experienced generalist or specialist Has responsibility for the management of L&D specialists Focus on managing conflicting L&D priorities within budget and expertise constraints Strong emphasis on building relationships with key stakeholders The development of customised and personalised L&D solutions Typical roles: Strategic business partner Professional L&D specialist L&D manager</p>	<p><i>Focus of role:</i> Addresses L&D challenges at organisational level May provide leadership of L&D activities Medium to long-term time focus May work on specialist L&D activity or be a generalist Uses a strategic lens to address L&D problems and opportunities Partnering with employees, line managers and senior management Developing credibility, professionalism and reputation of L&D <i>Measurement of effectiveness:</i> Respected and trusted business partner Responsiveness to business needs Development of effective relationships with clients and employees Effectiveness of management of L&D resources Impact on individual, team and organisational performance Effective utilisation of external training resources</p>	<p><i>Competency/L&D expertise balance:</i> 80/20 major shift toward use of foundational competencies Primary foundational competencies are in business, management and interpersonal areas Specialist expertise in managing knowledge and organisational change <i>Where time is spent:</i> Understanding the functional and business requirements Developing innovative L&D solutions Networking with key stakeholders to implement L&D solutions Managing line and specialist relationships and working across the organisation <i>Relationship with client:</i> Consultant, strategic partner, collaborative relationship Provides innovative solutions, ideas and insights to clients Strong focus on the delivery of best fit L&D solutions Negotiation of time and other resources for the delivery of L&D Management of the politics of L&D implementation and resolving conflicting priorities</p>	<p>Shift in focus concerning tasks: Major shift to long-term complex and strategic problem solving Developing strategic relationships with the executive team Integrating complex strategic change projects Integrating L&D into strategy formulation processes Working with stakeholders external to the organisation <i>Shift in focus concerning perspective:</i> Operating in a highly independent and proactive way with little guidance Understanding the need for high visibility and creating social capital with senior executives Shifting focus to the highest level of strategy and shaping, as well as implementing strategy <i>Shift in Skill Requirements:</i> Deepening understanding of the external environment, the industry and institutional context and the role of L&D in delivering value Developing high level strategic partnering skills, consulting strategic analysis and influencing skills Shifting from a reliance on technical expertise but using experts effectively Demonstrating courage and taking a stand for the role of L&D in the organisation <i>What needs to be left behind?</i> Shifting away from operational and hands-on activities Relinquishing the need to be technically competent</p>

(continued)

Table XIII.

Table XIII.

Career level	Task characteristics and typical roles	Focus of level and measurement of effectiveness	Competency/L&D expertise balance/ where time is spent	Development and transition to next level
Executive career level	<p><i>Task characteristics:</i> Typically, is the most senior L&D specialist or generalist in the organisation Can operate at Vice-President (VP) role and may be part of the senior organisation team Will have oversight for all L&D activities and integration with HR practices Will be seen as a credible leader on all L&D issues</p> <p><i>Typical roles:</i> L&D strategist Manager of learning projects Strategic business partner</p>	<p><i>Focus of role:</i> Leadership of L&D at the organisation or corporate level Alignment of L&D with organisations' strategic goals Development of best fit L&D strategy Partnering with senior management and the executive team Leads major strategic L&D projects Leveraging external L&D resources and working collaboratively with other organisations</p> <p><i>Measurement of effectiveness:</i> Seen at the leadership table Perceived by the client as an expert on strategic L&D issues Effectiveness of organisational change efforts Quality of knowledge, skills and abilities of the workforce Contribution to organisational performance, organisational reputation and ability to attract talent</p>	<p><i>Competency/L&D expertise balance:</i> 70/30: must be credible as a business leader, as well as an L&D professional Significant focus on foundational competencies, particularly business management and interpersonal skills Specialist expertise in managing knowledge and organisational change including major L&D change projects <i>Where time is spent:</i> Understanding organisational corporate and industry dynamics Analysing the external environment for L&D implications Developing L&D strategies and plans and linking to business Strategy Managing strategic projects to transform the organisation to fit the external environment <i>Relationship with the client:</i> Leader; colleague, coach, strategic partner and expert Helps client to both formulate and implement business strategies Challenges senior management on L&D issues Addresses complex organisational problems Gains commitment for L&D including resource investment</p>	<p><i>Development focus:</i> Deepening strategic and business knowledge Enhancing the skills to contribute to strategic formulations, as well as implementations Continued development of global mindset and cross-cultural perspective Development of an external focus and skills to read the external environment Deepening of skills to work collaboratively in strategic partnerships and complex business situations including mergers, structural and cultural change. <i>Shifts in tasks/challenges:</i> Managing at the boundaries of the organisation Handling multiple diversities and cross-cultural complexities Implementing strategic projects that fundamentally shape/alter the competitive dynamics or direction of the organisation Acting as a mentor or coach to senior organisational executives at organisational or corporate level Acting as a figurehead or representative of the organisation with external bodies and agencies Completion of tasks that prepare the role holder to assume Chief Operating Officer/ CEO or VP roles in L&D and HR</p>

4.2.2.1 Early career level. The early career level is primarily focussed 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 L&D administrator. These roles are typically defined as focussed 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 the 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:

- (1) A move away from the short-term and immediate focus to more medium-term L&D issues.
- (2) The need to take a broader and wider view of L&D issues and the requirement to work beyond work unit boundaries.
- (3) A significant shift in the skill mix and a greater focus on developing broader personal and interpersonal skills, while also developing a deeper level of L&D knowledge and expertise.
- (4) A move away from working solo to working in a collaborative fashion and working through others.

4.2.2.2 Mid-career learning and development level. The mid-career level is more focussed 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:

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

4.2.2.3 Senior learning and development career level. The senior L&D career level is typically focussed 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 L&D 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 other 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.

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

4.2.2.4 Executive learning and development 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 L&D strategies, the manager of major learning projects and strategic business partners who focusses 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 focussing 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 initiatives, the effectiveness of the L&D professional at the top table and the organisations reputation and ability to attract talent. The development issues for the executive L&D professional to transition to a senior VP role within the organisation involve:

-
- The deepening of strategic and business knowledge and enhancement of skills to contribute to strategic formulation and implementation.
 - The continued development of a global mind-set, an external focus and the deepening of skills to work collaboratively in strategic partnerships.
 - The skills to manage at the boundaries of the organisation the handling of multiple diversities and the implementation of strategic projects that make an impact on how the business operates.

4.3 Learning and development professional foundational competencies

We derived insights on L&D professional competencies from both the Delphi study and follow up surveys. We conceptualised foundational competencies as generic personal, interpersonal managerial and business competencies that are necessary but of themselves sufficient to perform an L&D role within an organisation. We categorised the foundational competencies into personal, interpersonal, management and business competencies. We surveyed stakeholders' perceptions of the quality of these perceptions and the roles to which they apply.

- Business foundational competencies focus on understanding business issues, wider external trends, corporate level strategic issues, customer expectations, financial acumen and how L&D is linked to strategic HRM within organisations.
- Management foundational competencies focus on the use of data and information designing and implementing management processes, managing people and resources, leveraging resources from different sources and working effectively within management structures.
- Interpersonal foundation competencies focus on relationship management, engaging with stakeholders, negotiating solutions, developing networks and professional connection, influencing, working across cultures and team working.
- Personal foundational competencies focus on attributes and characteristics of role holders, their values, commitment and mind-sets.

Table XIV summarises the perceptions of quality and the importance of the foundational competencies for each strategic and operational role.

We found that L&D professionals rated their strength on the four clusters of foundational competencies to be significantly higher than non-L&D stakeholders. Our analysis reveals statistically significant gaps in business and management foundational competencies; however, there were gaps across the four clusters of foundational competencies. All stakeholders perceived that business foundational competencies were important for strategic L&D roles but significantly less important for operational L&D roles. Business foundational competencies become more important at higher L&D career levels. The data reveal similar trends for managerial foundational competencies. They were of particular importance for strategic L&D roles and higher career levels but were significantly less important for operational L&D roles and earlier career levels. Interpersonal foundational competencies were important for all strategic L&D positions for all four L&D career levels. They differed in their importance for operational L&D roles. Interpersonal foundational competencies were important for both strategic and operational L&D roles and for the four career levels. Some of the intrapersonal foundational competencies were rated as less important for executive roles such as tactical awareness and the need to differentiate between the organisational and the personal.

Table XIV.
Stakeholder
perceptions of the
quality of L&D
foundational
competencies by
quality and
importance to roles
and career level

Foundational competency	L&D professional		Quality of competency Non L&D stakeholders		Entry		Mid		Senior		Importance to career level Executive	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
	(a)											
<i>Business foundational competencies</i>												
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	3.95	0.79	4.65	0.79
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	0.71	3.95	0.77	4.35	0.81
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	0.87	3.75	0.86	4.25	0.79
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	0.62	4.15	0.71	4.35	0.81
Possesses knowledge of various HRM functions and how they impact on L&D in organisations	4.25	0.45	3.78	0.79	3.11	0.72	3.81	0.72	4.04	0.62	4.14	0.69
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	0.82	3.95	0.62	4.04	0.75
Understands the key strategic and business issues that are relevant to the organisation's business sector	4.45	0.73	3.35	0.81	2.61	0.72	3.84	0.72	4.25	0.75	4.41	0.86
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	4.25	0.91	4.85	0.75
Possesses a strong appreciation and understanding of the organisations customer context and its implications or L&D	4.14	0.82	3.85	0.76	1.85	0.29	3.79	0.62	4.21	0.61	4.62	0.84
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	4.25	0.74	4.56	0.74
<i>Managerial foundational competencies</i>												
Continuously displays the political skills necessary to position L&D in an organisation	4.46	0.71	3.71	0.82	2.41	0.61	3.86	0.72	4.31	0.71	4.56	0.71
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	0.71	3.51	0.62	4.10	0.61
Skilled at using information acquired from different sources in the organisation to make decisions about L&D in organisations	4.21	0.76	3.51	0.97	2.26	0.51	3.45	0.61	4.26	0.71	4.56	0.72

(continued)

(a)

Foundational competency	L&D professional		Quality of competency Non L&D stakeholders		Entry		Mid		Senior		Executive	
	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD
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	0.61	4.25	0.71	4.14	0.68
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	0.55	4.25	0.69	4.41	0.69
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	0.62	3.86	0.71	3.52	0.41
Skilled in working strategically with line managers, other functions and work across multiple organisational layers	3.95	0.71	3.45	0.62	2.95	0.42	3.15	0.61	4.21	0.81	4.56	0.75
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	0.65	4.31	0.46	4.86	0.051
Skilled in balancing organisational and employee priorities and using appropriate criteria to resolve conflicts	4.40	0.79	3.52	0.62	3.45	0.62	3.85	0.71	3.45	0.26	3.25	0.61
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	0.46	6.26	0.74	4.56	0.71
<i>Interpersonal foundational competencies</i>												
Skilled at fostering strong relationships with organisational stakeholders	4.56	0.71	4.21	0.62	3.45	0.62	4.14	0.72	4.61	0.71	4.65	0.78
Skilled at presenting a case to senior management for investment in L&D	4.36	0.51	4.15	0.62	2.96	0.81	4.24	0.21	4.65	0.71	4.85	0.79
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	0.65	4.35	0.72	4.67	0.81
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	0.71	4.45	0.65	4.45	0.99
Is skilled at negotiating resources for effective L&D implementation	4.31	0.96	3.76	0.71	2.95	0.62	4.10	0.71	4.56	0.75	4.36	0.72
<i>Understands the importance of maintaining connections with professional bodies and external L&D peers</i>												
Skilled at fostering collaboration and connectivity using mobile and social technologies	4.21	0.81	4.04	0.61	4.10	0.71	4.31	0.56	3.81	0.79	3.75	0.21
	3.86	0.62	3.22	0.51	3.16	0.27	3.87	0.36	4.45	0.61	4.71	0.65

(continued)

Table XIV.

Table XIV.

	(b)																			
	Strategic						Importance to L&D role													
	Str. bus. partner	Training mgr	L&D specialist	L&D strategist	Mgr. of learning projs	Prod. trainer	Tech. trainer	Inst. designer	L&T media spec	L&D admin	Mean	SD								
Foundational competency	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD	Mean	SD						
<i>Business foundational competencies</i>																				
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	2.10	0.62	2.10	0.71	1.81	0.76
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	0.71	3.95	0.72	1.95	0.72
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	0.72	2.46	0.72	2.46	0.73
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	0.81	4.10	0.77	2.45	0.81
Possesses knowledge of various HRM functions and how they impact on L&D in organisations.	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	0.71	2.22	0.63	2.96	0.72
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	0.61	1.81	0.21	1.41	0.31
Understands the key strategic and business issues that are relevant to the organisation'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	0.44	1.21	0.24	1.31	0.41
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	0.21	1.61	0.31	1.41	0.20
Possesses a strong appreciation and understanding of the organisations 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	0.91	1.51	0.26	1.31	0.41

(continued)

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	0.27	1.51	0.26	1.31	0.62
<i>Managerial/foundational competencies</i>																				
Continuously displays the political skills necessary to position L&D in an organisation	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	0.81	2.72	0.61	2.45	0.67
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	0.65	4.45	0.61	2.41	0.62
Skilled at using information acquired from different sources in the organisation to make decisions about L&D in organisations	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	0.41	3.15	0.61	3.75	0.24
Possesses 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	0.31	2.41	0.31	2.72	0.31
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	0.14	2.71	0.41	2.95	0.65
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	0.25	2.41	0.40	2.71	0.26
Skilled in working strategically with line managers, other functions and work across multiple organisational 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	0.11	1.91	0.41	2.72	0.65
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	0.42	2.36	0.31	3.10	0.51
Skilled in balancing organisational 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	0.63	2.95	0.21	2.45	0.31
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	0.24	2.31	0.21	2.31	0.41

(continued)

<i>Interpersonal foundational competencies</i>																				
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	0.51	2.72	0.21	2.81	0.41
Skilled at presenting a case to senior management for investment in L&D	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	0.41	2.31	0.31	2.86	0.91
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	0.31	2.41	0.41	2.26	0.24
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	0.25	2.31	0.41	2.42	0.31
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	0.21	2.37	0.41	2.91	0.46
<i>Understands the importance of maintaining connections with professional bodies and external L&D peers</i>																				
Skilled at fostering collaboration and connectivity using 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	0.17	2.35	0.24	2.56	0.31
Possesses strong managing up and influencing upwards skills with key organisational decision makers	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	0.21	2.31	0.17	2.81	0.26
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	0.61	3.81	0.27	2.86	0.29
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	0.41	3.51	0.21	2.95	0.61
<i>Intra-personal foundational competencies</i>																				
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	0.62	3.15	0.61	3.65	0.21
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	0.21	3.81	0.41	4.21	0.62

(continued)

Table XIV.

Table XIV.

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	0.62	3.01	0.41	3.21	0.62
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	0.70	4.16	0.65	2.95	0.81
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	0.65	3.81	0.45	4.31	0.62
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	0.25	3.15	0.61	3.98	0.71
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	0.71	3.91	0.72	3.55	0.21
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	0.71	3.75	0.21	2.42	0.21
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	0.21	2.32	0.14	2.11	0.31
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	0.21	2.42	0.41	2.62	0.31

4.4 Learning and development areas of expertise

Our Delphi study identified three domains of L&D expertise that are central to the performance of multiple L&D roles. Diagnosing, designing and delivering L&D solutions focusses on a core component of L&D including the skills and expertise to diagnose organisational performance problems, select and design appropriate L&D solutions and implement them effectively within the organisation. The analysis reveals significant differences for the quality of these areas of expertise between managing measuring and evaluating L&D focusses on managing the L&D function within organisations and includes stakeholder management, adopting a strategic perspective, prioritising L&D, securing and managing L&D resources and measuring effectiveness. Managing knowledge and organisational change focusses on the management of organisational change, the skills to develop and enhance innovation in organisations, the management of knowledge and its curation, the management of strategic learning projects and the skills to work with external stakeholders to implement collaborative and strategic L&D projects.

4.5 Learning and development professionals and non-learning and development 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 a strategic business partner, L&D 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.

4.6 Contextual predictors of learning and development roles in organisations

We conducted regression analyses to identify the different L&D roles found in organisations. [Table XV](#) summarises the key findings for strategic roles.

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 as follows: the density of work experience (L&D manager, 0.29; strategic business partner, 0.44; L&D specialist, 0.19; L&D strategist, 0.57; and manager of learning projects, 0.64) and the L&D practitioners position in the hierarchy (L&D manager, 0.16; strategic business partner, 0.18; L&D strategist, 0.18; L&D specialist, 12; and manager of learning projects, 0.18) for both dimensions they were all significant at either $p < 0.01$ or 0.001 .

Organisational contextual factors were important in explaining several of the strategic L&D roles found in organisations. For example, the number of employees within the organisation predicted the strategic business partner role (0.35, $p < 0.001$), the L&D strategist (0.37, $p < 0.001$) and the manager of learning projects (0.42, $p < 0.001$). These roles were, therefore, almost invariable found in large organisations. In organisations that were

Table XV.
Predictors of
strategic L&D roles
in organisations

Variable	L&D manager			SBP			L&D strategist			L&D specialist			Manager of learning projects		
	B	SE	β	B	SE	β	B	SE	β	B	SE	β	B	SE	β
<i>Individual characteristics</i>															
Education	0.082	0.005	0.021	0.061	0.005	0.003	0.004	0.005	0.026	0.003	0.005	0.018	0.061	0.071	0.033
Experience density	0.009	0.071	0.002	0.005	0.072	0.022	0.082	0.068	0.041	0.101	0.133	0.041	0.011	0.061	0.028
Gender	0.032	0.041	0.037	0.069	0.076	0.028	0.078	0.071	0.036	0.141	0.121	0.063	0.068	0.073	0.046
Organisation tenure	0.081	0.071	0.0213	0.047	0.127	0.021	0.191	0.132	0.081	0.019	0.131	0.081	0.021	0.022	0.048
Job tenure	0.021	0.021	0.031	0.062	0.016	0.028	0.006	0.014	0.082	0.131	0.123	0.068	0.094	0.012	0.041
Position in hierarchy	0.067	0.014	0.167***	0.071	0.014	0.167**	0.060	0.014	0.146**	0.071	0.015	0.152***	0.071	0.015	0.181**
<i>Organisation characteristics</i>															
No. of employees	0.067	0.011	0.021	0.412	0.010	0.356***	0.361	0.124	0.379***	0.094	0.087	0.060	0.511	0.116	0.430***
Technology intensity	0.041	0.071	0.022	0.011	0.021	0.003	0.068	0.082	0.041	0.051	0.072	0.021	0.031	0.059	0.019
Domestic	0.061	0.014	0.028	0.072	0.079	0.038	0.078	0.071	0.036	0.036	0.051	0.023	0.019	0.027	0.003
International	0.082	0.077	0.037	0.311	0.119	0.196**	0.582	0.107	0.267***	0.067	0.015	0.042	0.431	0.118	0.256***
Manufacturing	0.041	0.051	0.023	0.041	0.071	0.028	0.071	0.079	0.031	0.021	0.019	0.003	0.069	0.014	0.021
Service	0.011	0.005	0.021	0.051	0.061	0.020	0.041	0.042	0.028	0.002	0.044	0.023	0.064	0.015	0.011
Environmental dynamism	0.010	0.004	0.002	0.426	0.010	0.372***	0.467	0.103	0.436***	0.084	0.081	0.061	0.572	0.114	0.4821***
Industry growth	0.041	0.061	0.021	0.364	0.126	0.368***	0.371	0.111	0.387***	0.051	0.072	0.031	0.526	0.061	0.387***
<i>L&D function characteristics</i>															
Size of L&D function	0.067	0.014	0.146**	0.426	0.107	0.157**	0.163	0.103	0.436	0.079	0.005	0.011	0.426	0.128	0.465***
Maturity of L&D function	0.091	0.127	0.021	0.419	0.124	0.267**	0.460	0.119	0.487***	0.124	0.106	0.206**	0.671	0.121	0.316***
L&D separate to HR	0.004	0.005	0.021	0.009	0.012	0.004	0.216	0.103	0.196**	0.009	0.005	0.027	0.412	0.118	0.187**
L&D integrated to HR	0.003	0.005	0.021	0.000	0.005	0.001	0.004	0.005	0.027	0.003	0.006		0.016	0.005	0.097
R^2	0.121			0.177			0.191			0.121			0.269		
R^2 adj	0.110**			0.167***			0.184***			0.114**			0.259***		

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

structured for an international presence and had locations in other countries, this was important in predicting the strategic business partner role (0.19, $p < 0.01$) the L&D strategist role (0.26, $p < 0.001$) and the manager of learning projects role (0.25, $p < 0.001$). Environmental dynamism emerged as important in predicting the strategic business partner role (0.42, $p < 0.001$) and the manager of learning projects (0.57, $p < 0.0001$). Industry growth was also an important predictor of these three roles as follows: strategic business partner (0.34, $p < 0.0001$), L&D strategist (0.37, $p < 0.001$) and the manager of learning projects (0.52, $p < 0.001$).

Characteristics of the L&D function were particularly important in predicting the existence of strategic L&D roles. For example, the size of the L&D function predicted the L&D manager role (0.14, $p < 0.01$), the strategic business partner role (0.15, $p < 0.01$), the L&D strategist role (0.43, $p < 0.001$) and the manager of learning projects (0.46, $p < 0.001$). The maturity of the L&D function predicted four of the strategic roles-strategic business partner (0.26, $p < 0.001$), the L&D strategist role (0.48, $p < 0.001$), the L&D specialist role (0.26, $p < 0.01$) and the manager of learning projects role (0.51, $p < 0.001$). Table XVI summarises the findings for operational L&D roles.

In terms of operational roles, two individual characteristics emerged as important. First, the density of work experience predicted the technical trainer role (0.10, $p < 0.05$), the instructional designer role (0.10, $p < 0.05$) and the learning and media specialist role (0.12, $p < 0.05$). The gender of the job holder was important in predicting the learning administrator role (0.18, $p < 0.010$).

Organisational characteristics were also important in explaining a number of operational L&D roles. For example, where the organisation was in the manufacturing sector this predicted the production trainer role (0.46, $p < 0.001$), whereas organisations operating in the services sector were more likely to have technical trainers (0.35, $p < 0.0010$).

Characteristics of the L&D function were also important in predicting the existence of operational training roles. For example, the size of the L&D function predicted the instructional designer role (0.20, $p < 0.01$) and the technology and media specialist role (0.13, $p < 0.05$). The maturity of the L&D function was important in predicting the instructional designer (0.36, $p < 0.001$) and the learning technology and media specialist (0.43, $p < 0.001$) roles.

4.7 Predictors of strength and importance of competencies and learning and development expertise

We conducted numerous multiple regression analyses to identify the factors that predict both the quality and importance of both L&D foundational competencies and areas of expertise. Table XVII summarises the results of our regression analysis.

Two individual characteristics were important in predicting personal foundational competencies as follows: education (0.52, $p < 0.001$) and experience density (-0.46 , $p < 0.001$). Education (0.46, $p < 0.001$), experience density (0.67, $p < 0.001$) and position in the hierarchy (0.27, $p < 0.001$) were important in explaining the strength of the interpersonal foundational competencies. The strength of management foundational competencies was predicted by experience density (0.41, $p < 0.001$) and organisational tenure (0.31, $p < 0.001$), whereas the strength of business foundational competencies was predicted by experience density (0.41, $p < 0.001$) and job tenure in L&D (0.42, $p < 0.001$).

The strength of the L&D expertise was predicted by different individual level characteristics. For example, diagnosing, designing and delivering L&D expertise area was predicted by education (0.31, $p < 0.001$) and experience density (0.45, $p < 0.001$). The managing measuring and evaluating L&D expertise area was predicted by education

Table XVI.
Predictors of
operational L&D
roles in organisations

Variable	Product/production trainer			Technical trainer			Instructional design			Learning technology and media specialist			L&D administrator		
	B	SE	β	B	SE	β	B	SE	β	B	SE	β	B	SE	β
<i>Individual characteristics</i>															
Education	0.000	0.005	0.001	0.004	0.005	0.021	0.003	0.005	0.019	0.003	0.005	0.008	0.003	0.005	0.018
Experience	0.046	0.071	0.021	0.203	0.069	0.100*	0.214	0.071	0.101*	0.264	0.072	0.121*	0.001	0.004	0.002
Gender	0.041	0.070	0.021	0.082	0.068	0.041	0.041	0.000	0.05	0.051	0.004	0.008	0.136	0.071	0.181**
Organisation tenure	0.041	0.072	0.037	0.021	0.041	0.023	0.011	0.005	0.007	0.001	0.003	0.001	0.002	0.004	0.002
Job tenure	0.031	0.052	0.028	0.082	0.068	0.041	0.041	0.047	0.037	0.021	0.037	0.019	0.003	0.005	0.003
Position in hierarchy	0.001	0.005	0.002	0.002	0.004	0.003	0.020	0.030	0.026	0.007	0.073	0.035	0.002	0.005	0.001
<i>Organisational characteristics</i>															
No. of employees	0.004	0.007	0.003	0.001	0.002	0.001	0.003	0.002	0.001	0.003	0.002	0.001	0.006	0.007	0.004
Technology intensity	0.041	0.046	0.023	0.004	0.010	0.002	0.000	0.001	0.001	0.000	0.002	0.001	0.005	0.004	0.009
Domestic	0.000	0.001	0.000	0.000	0.002	0.001	0.002	0.003	0.001	0.001	0.004	0.001	0.001	0.004	0.010
International	0.002	0.003	0.001	0.041	0.021	0.027	0.003	0.005	0.012	0.006	0.007	0.003	0.004	0.005	0.006
Manufacturing	0.462	0.124	0.281***	0.081	0.041	0.037	0.000	0.001	0.000	0.005	0.007	0.003	0.001	0.002	0.001
Environmental dynamism	0.005	0.006	0.003	0.002	0.002	0.002	0.003	0.002	0.002	0.003	0.002	0.001	0.004	0.004	0.004
Industry growth	0.000	0.001	0.000	0.002	0.001	0.001	0.001	0.001	0.001	0.001	0.002	0.001	0.000	0.000	0.000
Service	0.001	0.003	0.002	0.126	0.167	0.351***	0.003	0.002	0.009	0.003	0.002	0.009	0.001	0.003	0.002
<i>L&D function characteristics</i>															
Size of L&D function	0.000	0.001	0.000	0.002	0.003	0.001	0.421	0.105	0.203***	0.286	0.068	0.137**	0.004	0.003	0.001
Maturity of L&D function	0.001	0.003	0.002	0.03	0.005	0.002	0.361	0.111	0.367***	0.367	0.118	0.430***	0.005	0.003	0.002
L&D separate to HR	0.002	0.003	0.002	0.002	0.004	0.003	0.000	0.003	0.001	0.004	0.005	0.003	0.004	0.006	0.002
L&D integrated to HR	0.001	0.002	0.001	0.001	0.002	0.001	0.01	0.002	0.001	0.000	0.001	0.000	0.001	0.002	0.001
R^2	0.120			0.110			0.167			0.182			0.91		
R^2 adj	0.109**			0.09*			0.165**			0.171***			0.76**		

Notes: * $p \leq 0.05$; ** $p \leq 0.01$; *** $p \leq 0.001$

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, $p < 0.001$] Experience density [0.46, $p < 0.001$]	<i>Organisational factors:</i> Service sector [0.46, $p < 0.001$] <i>L&D function characteristics:</i> Size of L&D function [0.011, $p < 0.05$]
Interpersonal competencies	Education [0.46, $p < 0.001$] Experience density [0.46, $p < 0.001$] Position in hierarchy [0.27, $p < 0.01$]	<i>Organisational factors:</i> Service sector [0.20, $p < 0.001$] International organisation [0.24, $p > 0.001$] <i>L&D function characteristics:</i> Size of L&D function [0.019, $p < 0.05$]
Management competencies	Experience density [0.46, $p < 0.001$] Organisational tenure [0.0331, $p < 0.001$]	<i>Organisational factors:</i> International organisation [0.32, $p < 0.001$] Number of employees [0.16, $p < 0.05$] Industry growth <i>L&D function characteristics:</i> Size of L&D function [0.31, $p < 0.001$] Maturity of function [0.26, $p < 0.001$]
Business competencies	Experience density [0.41, $p < 0.001$] Job tenure in L&D [0.42, $p < 0.001$]	<i>Organisational factors:</i> International organisation [0.47, $p < 0.001$] Number of employees [0.21, $p < 0.01$] Environmental dynamism [0.054, $p < 0.001$] Industry growth [0.28, $p < 0.01$] <i>L&D function characteristics:</i> Size of L&D function [0.24, $p < 0.01$] Nature of L&D function [0.20, $p < 0.01$] Structurally separate from HR [0.26, $p < 0.001$]
Diagnosing, designing and delivering L&D	Experience density [0.31, $p < 0.001$] Experience density [0.46, $p < 0.001$]	<i>Organisational factors:</i> Technology intensity [0.19; $p < 0.05$] Service sector [0.27, $p < 0.01$] International organisation [0.031, $p < 0.001$] <i>L&D function characteristics:</i> Size of L&D function [0.27, $p < 0.001$] Maturity of function [0.23, $p > 0.010$; 0.26, $p < 0.01$]

(continued)

Table XVII.
Predictors of the
strength and
importance of L&D
foundational
competencies and
areas of expertise

Table XVII.

L&D foundational competencies and areas of expertise	Strength of competency and area of expertise	Importance of competency and area of expertise
Managing, measuring and evaluating L&D	Experience density [0.31, $p < 0.001$] Experience density [0.31, $p < 0.001$]	<p><i>Organisational factors:</i> International organisation [0.21, $p < 0.01$] Service sector [0.24, $p < 0.01$] <i>L&D function characteristics:</i> Size of L&D function [0.27; $p < 0.001$] Maturity of function [0.28, $p < 0.010$; 0.26, $p < 0.001$]</p>
Managing Knowledge and organisational change	Experience density [0.63, $p < 0.001$] Position in hierarchy [0.41, $p < 0.001$] Education level [0.46; $p < 0.001$]	<p><i>Organisational factors:</i> Number of employees [0.36, $p < 0.001$] International organisation [0.47, $p < 0.001$] Technology intensity [0.36, $p < 0.001$] Environmental dynamism [0.47; $p < 0.001$] Industry growth [0.24, $p < 0.01$]</p>

(0.31, $p < 0.001$) and experience density, whereas the managing knowledge and organisational change expertise area was predicted by experience density (0.63, $p < 0.001$), position in the organisational hierarchy (0.41, $p < 0.001$) and education level (0.46, $p < 0.001$).

A number of organisational contextual factors and L&D characteristics explained the importance of both foundational competencies and areas of L&D expertise. One organisational factor – service sector (0.46, $p < 0.001$) and one L&D function characteristic – size of the L&D function (0.11, $p < 0.05$) predicted the importance of personal foundational competencies, whereas the importance of interpersonal competencies was predicted by service sector (0.20, $p < 0.01$), interpersonal organisation (0.24, $p < 0.01$) and size of the L&D function (0.19, $p < 0.05$). In contrast, the importance of management foundational competencies was predicted by four organisational factors – international firm (0.31, $p < 0.001$), number of employees (0.16, $p < 0.05$), environmental dynamism (0.46, $p < 0.001$) and industry growth (0.27, $p < 0.01$) and two characteristics of the L&D function – size of the function (0.31, $p < 0.001$) and the maturity of the L&D function (0.26, $p < 0.001$). The importance of business foundational competencies was predicted by four organisational factors – international organisation (0.47, $p < 0.001$), the number of employees (0.21, $p < 0.01$), environmental dynamism (0.54, $p < 0.001$) and industry growth (0.28, $p < 0.01$). Three L&D function characteristics were important predictors – the size of L&D function (0.24, $p < 0.01$), maturity of the L&D function (0.20, $p < 0.01$) and where it was structurally separate from HR (0.26, $p < 0.01$).

The importance of diagnosing, designing and delivering L&D expertise was predicted by three organisational characteristics – technological intensity (0.19, $p < 0.05$), service sector (0.27, $p < 0.01$) and international organisation (0.31, $p < 0.001$). The size (0.27, $p < 0.001$) and maturity (0.28, $p < 0.01$) of the L&D function predicted the importance of the diagnosing, designing and delivery of L&D. The managing, ensuring and evaluating L&D expertise area was predicted by two organisational characteristics – international (0.21, $p < 0.01$) and service sector (0.24, $p < 0.01$). Two L&D function characteristics were also important – the size of the function (0.28, $p < 0.01$) and the maturity of the function (0.23, $p < 0.001$). Finally, the importance of the managing knowledge and organisational expertise area was predicted by five organisational factors – number of employees (0.36, $p < 0.001$), international organisation (0.47, $p < 0.001$), technology intensity (0.36, $p > 0.001$), environmental dynamism (0.47, $p < 0.001$) and industry growth (0.24, $p < 0.01$).

4.8 Relationship between foundational competencies, areas of expertise, learning and development roles, career level and perceived learning and development effectiveness

In this, the final section of our empirical results, we present our findings on the relationship between L&D foundational competencies and areas of expertise and L&D roles, career levels and L&D effectiveness. [Table XVIII](#) summarises our findings.

Our analysis reveals that the role of foundational personal competencies increased on significance as L&D practitioners move through the career levels and the organisational hierarchy. These competencies were most significantly related to senior executive L&D career levels. When we investigated their significance for specific L&D roles within an organisation we found that they were strongly related to the manager of learning projects (0.47, $p < 0.001$) and L&D manager (0.47, $p < 0.001$) roles. These roles clearly have a requirement for high levels of emotional intelligence and self-confidence. L&D professionals perceived these competencies to be important for predicting L&D effectiveness (0.51, $p < 0.001$) compared to other stakeholders (0.21, $p < 0.05$). Interpersonal foundational competencies are particularly important for three strategic roles – strategic business partner (0.51, $p < 0.001$),

Table XVIII.
Relationship between
foundational
competencies, career
levels, L&D roles,
perceived
effectiveness and
contextual factors
predictors
[regression results]

Competency/expertise area	Career level	L&D roles	Perceived L&D effectiveness
Personal foundational competencies	Entry L&D career [0.07, NS]	<i>Strategic L&D roles:</i>	L&D professional perceived L&D effectiveness [0.41, $p < 0.001$]
	Mid L&D career [0.17, $p < 0.05$]	L&D manager [0.47, $p < 0.001$]	Other stakeholder perceived effectiveness [0.14, $p < 0.05$]
	Senior L&D career [0.26, $p < 0.0001$]	Manager of learning projects [0.47, $p < 0.001$]	
Interpersonal competencies	Executive L&D career [0.21, $p < 0.0001$]	<i>Operational L&D roles:</i>	
		Production trainer [0.24, $p < 0.01$]	
		Technical trainer [0.31, $p < 0.0001$]	
	Entry L&D career [0.11, $p < 0.05$]	<i>Strategic L&D roles:</i>	L&D professional perceived effectiveness [0.51, $p < 0.001$]
	Mid L&D career [0.19, $p < 0.01$]	Strategic business partner [0.51, $p < 0.0001$]	Other stakeholder perceived L&D effectiveness [0.21, $p < 0.01$]
	Senior L&D career [0.36, $p < 0.0001$]	Manager of learning projects [0.67, $p < 0.0001$]	
Management competencies	Executive L&D career [0.51, $p < 0.0001$]	L&D specialist [0.51, $p < 0.0001$]	
		L&D manager [0.41, $p < 0.0001$]	
		<i>Operational L&D roles:</i>	
		Production trainer [0.14, $p < 0.05$]	
		Technical trainer [0.24, $p < 0.01$]	
		<i>Strategic L&D roles:</i>	
Business competencies	Entry L&D career [0.06, PNS]	L&D manager [0.46, $p < 0.0001$]	L&D practitioner perceived effectiveness [0.28, $p < 0.001$]
	Mid L&D career [0.10, $p < 0.05$]	Strategic business partner [0.27, $p < 0.0001$]	Other stakeholder perceived effectiveness [0.57, $p < 0.0001$]
	Senior L&D career [0.31, $p < 0.0001$]	Manager of learning projects [0.41, $p < 0.0001$]	
	Executive L&D career [0.62, $p < 0.0001$]	<i>Operational L&D roles:</i>	
		L&D administrator [0.21, $p < 0.01$]	
		<i>Strategic L&D roles:</i>	
Diagnosing, designing and delivering L&D	Entry L&D career [0.07, PNS]	L&D strategist [0.49, $p < 0.0001$]	L&D practitioner perceived effectiveness [0.31, $p < 0.001$]
	Mid L&D career [0.08, PNS]	Manager of learning projects [0.47, $p < 0.0001$]	Other stakeholder perceived effectiveness [0.68, $p < 0.001$]
	Senior L&D career [0.21, $p < 0.01$]	Strategic business partner [0.44, $p < 0.0001$]	L&D practitioner perceived effectiveness [0.67, $p < 0.0001$]
	Executive L&D career [0.67, $p < 0.0001$]	<i>Strategic roles:</i>	Other stakeholder perceived effectiveness [0.21, $p < 0.01$]
	Entry L&D career [0.24, $p < 0.01$]	L&D manager [0.27, $p < 0.01$]	
	Mid L&D career [0.36, $p < 0.01$]	Strategic business partner [0.31, $p < 0.0001$]	
	Senior L&D career [0.64, $p < 0.0001$]	<i>Operational roles:</i>	
	Executive L&D career [0.39, $p < 0.0001$]	Production/product trainer [0.20, $p < 0.01$]	
		Technical trainer [0.24, $p < 0.01$]	
		Instructional designer [0.47, $p < 0.0001$]	
		Learning technology and media specialist [0.31, $p < 0.001$]	

(continued)

Competency/expertise area	Career level	L&D roles	Perceived L&D effectiveness
Managing, measuring and evaluating L&D	Entry L&D career [0.24, $p < 0.01$]	<i>Strategic roles:</i> L&D manager [0.46, $p < 0.001$] Strategic business partner [0.27, $p < 0.001$] L&D specialist [0.24, $p < 0.01$] <i>Operational roles:</i> Product/production trainer [0.17, $p < 0.05$] Learning technology and media specialist [0.15, $p < 0.05$]	L&D practitioner perceived effectiveness [0.56, $p < 0.001$] Other stakeholder perceived effectiveness [0.48, $p < 0.01$]
	Mid L&D career [0.36, $p < 0.01$] Senior L&D career [0.64, $p < 0.001$] Executive L&D career [0.39, $p < 0.001$]		
Managing knowledge and organisational change	Entry L&D career [0.04, PNS]	<i>Strategic roles:</i> L&D strategist [0.59, $p < 0.001$] Strategic business partner [0.27, $p < 0.001$] Manager of learning projects [0.63, $p < 0.001$]	L&D practitioner perceived effectiveness [0.31, $p < 0.001$] Other stakeholder perceived effectiveness [0.71, $p < 0.01$]
	Mid L&D career [0.08, PNS] Senior L&D career [0.24, $p < 0.01$] Executive L&D career [0.73, $p < 0.001$]		

Table XVIII.

manager of learning projects (0.67, $p < 0.001$) and L&D manager (0.41, $p < 0.001$). Interpersonal foundational competencies are also important for two operational L&D roles – production trainer (0.14, $p < 0.05$) and the technical trainer (0.24, $p < 0.01$) roles. The analysis revealed that a number of contextual factors emerged as important in explaining the strength of the interpersonal foundational competency and the organisational and L&D context in which it is valued. Three individual level factors emerge as important predictors of this competency – education level (0.46, $p < 0.001$), experience density (0.67, $p < 0.001$) and position in the hierarchy (0.27, $p < 0.001$). Two organisational level factors emerged as important in explaining the importance attached to these competencies – the organisations sector-service – (0.26, $p < 0.01$) and the structure of the organisation – international operations (0.24, $p < 0.01$). The size of the organisation's L&D function emerged as the only important L&D function characteristic (0.19, $p < 0.05$). L&D practitioners perceived interpersonal competencies to be more important to perceived organisational effectiveness (0.51, $p < 0.001$) compared to that of other stakeholders (0.21, $p < 0.01$).

Managerial foundational competencies were primarily important for senior (0.31, $p < 0.001$) and executive (0.62, $p < 0.001$) career levels. In terms of specific L&D roles they emerged as particularly important for L&D manager (0.40, $p < 0.001$), manager of learning projects (0.40, $p < 0.001$) and strategic business partner (0.27, $p < 0.01$) roles. This cluster of behaviours and skills was related to one L&D operational role and the L&D administrator role (0.21, $p < 0.05$).

Personal foundational competencies were primarily important for L&D manager (0.47, $p < 0.001$) and manager of learning projects (0.47, $p < 0.001$). They are also linked to two operational LD roles, production trainer (0.24, $p < 0.01$) and technical trainer (0.31, $p < 0.001$). Interestingly they are linked to all career levels. L&D professionals perceive these competencies to be more important for L&D effectiveness (0.41, $p < 0.001$) than non-L&D stakeholders (0.14, $p < 0.01$). L&D practitioners perceived management foundational competencies to be significantly less important to organisational effectiveness than other stakeholders (0.28, $p < 0.001$; versus 0.57, $p < 0.001$).

Business competencies have significance for two senior career levels – senior (0.21; $p < 0.01$) and executive (0.67; $p < 0.001$), they were not significantly related to any of the L&D operational roles, however, business foundational competencies emerge as particularly important for three strategic L&D roles – L&D strategist (0.26, $p < 0.001$), manager of learning projects (0.47, $p < 0.001$) and strategic business partner (0.41, $p < 0.001$). The possession of business foundational competencies was perceived to be much more important for other stakeholders (0.68, $p < 0.001$) than was the case for L&D professionals (0.31, $p < 0.001$).

The expertise to diagnose, design and deliver L&D solutions is important to all career levels, however, contrary to expectations this competency was important for all career levels – senior level (0.44, $p < 0.001$) and executive level (0.39, $p < 0.001$). This suggests that L&D practitioners irrespective of level are expected to have a deep level of L&D expertise to diagnose, design and deliver L&D solutions. This cluster of expertise was unsurprisingly very important for three strategic L&D roles – L&D manager (0.27, $p < 0.01$), strategic business partner (0.31, $p < 0.001$) and L&D specialist (0.41, $p < 0.001$). They are important for two operational L&D roles – production trainer (0.20, $p < 0.01$) and instructional designer (0.34, $p < 0.001$).

The importance of diagnosing, designing and delivering L&D solutions to perceived organisational effectiveness differed significantly between L&D practitioners and other stakeholders (0.67, $p < 0.001$; versus 0.21, $p < 0.01$). The management, measurement and evaluation of L&D expertise have value to all career levels, however, it emerges as

particularly significant senior (0.46, $p < 0.001$) and executive levels (0.59, $p < 0.001$). In terms of specific L&D roles it emerged as most important for the L&D manager (0.46, $p < 0.001$), strategic business partner (0.27, $p < 0.01$) and L&D specialist (0.24, $p < 0.01$) roles. Both L&D practitioners (0.56, $p < 0.001$) and other stakeholders (0.48, $p < 0.001$) rated this competency to be important in explaining perceived organisational effectiveness. The management of knowledge and organisational change expertise is of primary importance for executive (0.73, $p < 0.001$) and to a lesser extent senior (0.24, $p < 0.001$) career levels. These areas of expertise had significance only for strategic L&D roles – L&D strategist (0.59, $p < 0.01$), strategic business partner (0.27, $p < 0.01$) and manager of learning projects (0.63, $p < 0.001$). Three individual level characteristics predicted the strength of this area of expertise – experience density (0.63, $p < 0.001$). The possession of this area of expertise was perceived as more significant for organisational effectiveness by other stakeholders (0.71, $p < 0.001$) compared to L&D practitioners (0.31, $p < 0.001$).

5. Discussion

It is now well-established that L&D practices are important within organisations. However, there are significant questions concerning the extent of alignment and strategic impact of L&D 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:

- the factors that influence the L&D roles that are performed in organisations;
- the strategic and operational challenges faced by L&D practitioners in their day to day work;
- the different roles that L&D practitioner perform in organisations; and
- 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](#) and [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.

5.1 *The changing external context of learning and development*

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 and Vickerstaff, 2015](#)). These different generations bring with them

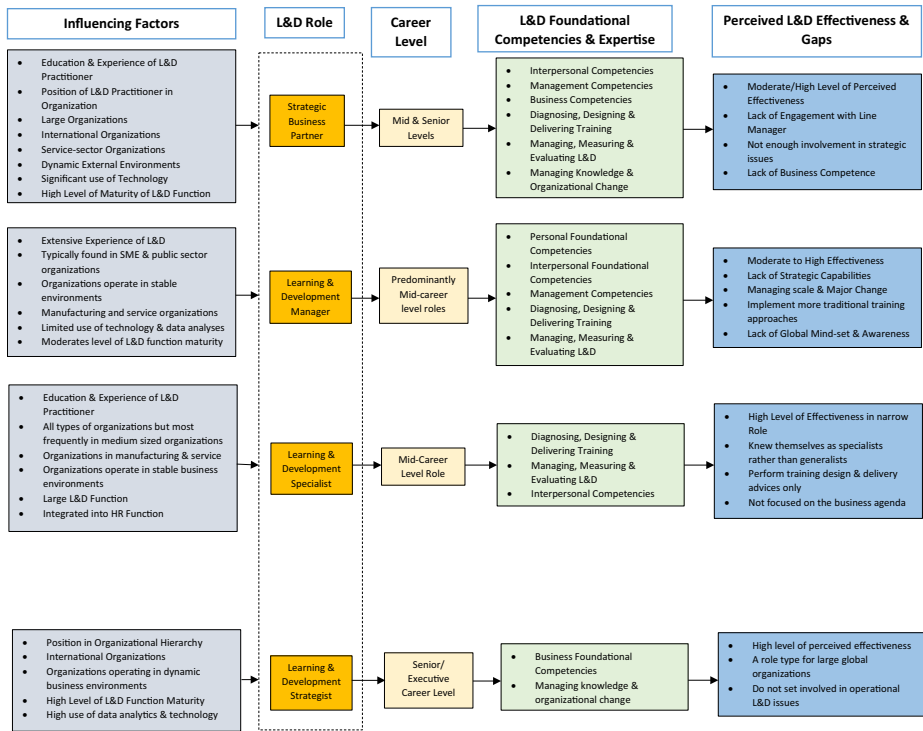


Figure 1. Framework on L&D strategic roles in organisations: contextual factors, L&D competencies, career level and perceived effectiveness

unique attitudes, behaviours and expectations in respect of L&D. In particular, global talent mobility will have major implications for the personalisation of L&D, the proposition and career advancement and development (Twenge and Campbell, 2012). Third, technology and flexible working practices will shape how work is done and the ways in which employees and workers will engage with organisations. There is major growth in cloud-based and collaborative technologies (Huggett, 2013) that have major implications for how L&D is delivered in organisations (Ulrich *et al.*, 2015). There is evidence that employees and workers have strong preferences for greater flexibility (Ellis, 2006), which have implications for how L&D is delivered and highlights the need for greater customisation and personalisation of L&D interventions and solutions. In addition, significant shifts are taking place in the employment relationship with a major move away from full-time employees (Zeytinoglu *et al.*, 2015) to workers with different relationships and expectations. Therefore, L&D will be expected to develop talent differently and tailor its offerings to the needs of these workers. Finally, the nature of work will continue to change. These will include major growth in knowledge work (Boxall and Macky, 2009), the requirement to work across cultures and interactions with workers and employees from different diversities.

5.2 The adoption of technology and the use of analytics by learning and development

We uncovered a number of significant trends in the extent to which L&D professionals make use of technology to deliver L&D solutions and incorporate L&D analytics into decision making (Huselid, 2018). We found, for example, that L&D professionals perceive

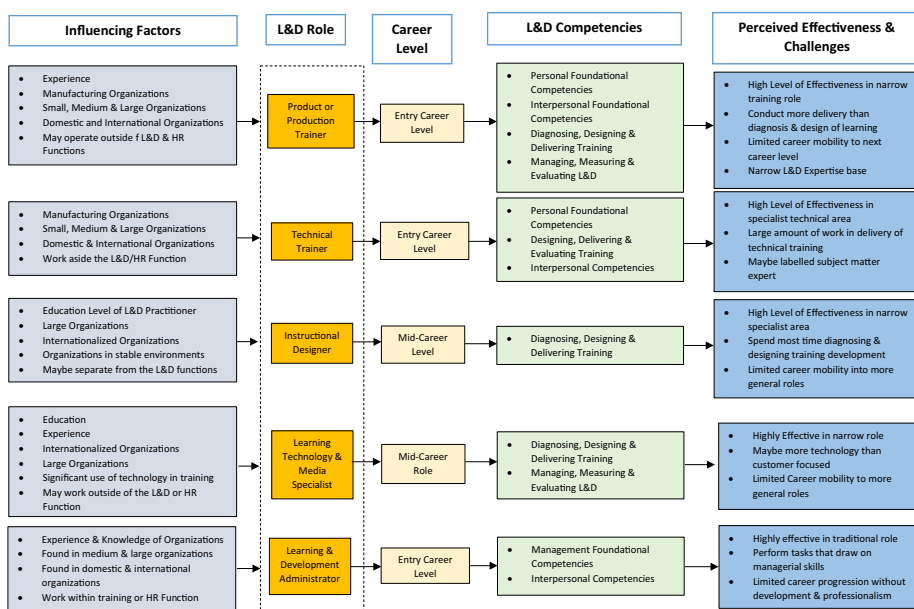


Figure 2. Framework on L&D operational roles in organisations: contextual factors, L&D competencies, career level and perceived effectiveness

that technology is important (Minbaeva, 2018), however, they are less satisfied with current learning technologies. They do, however, acknowledge that learning technologies can achieve stronger user interfaces (Hubbard, 2013), higher levels of integration with other technologies (Collins and Lancaster, 2015) and significant flexibility in the delivery of L&D (Bingham and Conner, 2015). However, L&D practitioners make use of technology primarily for the delivery of learning with less usage for knowledge creation and curation and the evaluation of L&D activities (Hart, 2014). We found evidence that L&D professionals make significantly less use of L&D analytics (Kryscynski *et al.*, 2018). They appear not to be particularly data savvy and primarily make use of more informal, social and personal sources of evidence when making decisions. They also use evidence and data analytics to inform a variety of transactional type L&D decision areas but make significantly less use of data analytics to inform strategic L&D decisions.

5.3 Stakeholder perceptions of learning and development 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 and Fisher, 2013) and the extent to which L&D supports corporate strategy (Marchington and 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 *et al.*, 2013). We found significant variations in the effectiveness of L&D across organisations by ownership, size,

sector and nature of operations (Mamman and 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 *et al.*, 2005) and firms with international structures and operations (Firth *et al.*, 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 and 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 as follows: enhanced engagement with line managers (Carbery and Cross, 2015), development competencies and capabilities of L&D professionals (Braun *et al.*, 2011) and the demonstration of return on investment 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 and 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 *et al.*, 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.

5.4 Learning and development roles and competencies/expertise

Study respondents highlighted a multiplicity of L&D roles in organisations with many organisations having more than four role types. In large organisations especially MNCs, we found evidence of a multi-tiered approach; however, the operation of these roles was subject to significant nuances. The research also revealed that organisations in general primarily implemented or made use of operational and mid-range strategic roles. The results also suggest that there is little evidence of significant transformation with only a small number of organisations implementing strategic roles in the L&D area (Harrison, 2009). We found major variations in role configurations by business sector, organisation size, industry and between business units and corporate functions. In terms of strategic business partner role, which is common in many of the respondent organisations, some strategic business partners were involved in more strategic projects, whereas others were focussed on more operational work (Bailey *et al.*, 2018).

The study findings reveal critical foundational competencies necessary for L&D to make a more strategic contribution within the organisation (Osono *et al.*, 2006) and to meet the demands of the external environment (Ulrich *et al.*, 2015). Our analysis reveals that management and business competencies as key differentiators explaining strategic impact (Cappelli *et al.*, 2010), however, these are not as valued by L&D practitioners as they are by other stakeholders such as line managers, senior managers and executives. Within the domain of L&D expertise, the key differentiator of a strategic contribution is the management of knowledge and organisational change (Holbeche, 2009). L&D practitioners are increasingly expected to play a major role in helping organisations to respond to future external and internal trends, thus requiring L&D to be more integrated with strategic priorities (Boxall and Purcell, 2016), be more internally and externally visible (Mooney, 2001) and develop business and management competencies (Townsend *et al.*, 2012). Therefore, L&D functions that continue to rely on the traditional L&D expertise areas are less likely to

make that strategic contribution (Kochan, 2015). Overall, our data on L&D roles and competencies suggests that L&D practitioners need to make significant changes to be strategically successful. In particular, they are required to be innovative in the activities they implement to ensure that they align with the business (Cascio and Boudreau, 2014). They also need to take constructive steps to enhance strategic business partner models and enhance their business and management competencies.

5.5 Our conceptual framework for learning and development roles in organisations

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

The second strategic role of L&D manager is about the management of the L&D function. The focus of this role is on the effective delivery of L&D solutions and the development of the expertise of L&D practitioners (Gubbins and Garavan, 2009). Key aspects of this role were an emphasis on using L&D processes, the use of traditional L&D interventions and some use of measurement and learning management systems. The key priorities of the role holder are to keep L&D processes efficient and to foster a close alignment with the HR function. This role will most likely be located within the HR function and report to a HR director. We found that this role is typically found in organisations operating in stable external environments and in public sector organisations and SMEs (Nolan and Garavan, 2016). It is a common role in manufacturing environments and there will be limited use of technology to deliver L&D solutions. This role primarily draws on personal, interpersonal and management competencies and two areas of expertise – diagnosing, developing and delivering L&D and managing to measure and evaluating L&D. There was significantly less need for the possession of business competencies and specialist expertise in knowledge management and organisational change. The role is typically mid career level and is rated a moderate to high in terms of effectiveness. The key challenges are the lack of strategic capabilities even though there is an expectation that the role will operate at the strategic level. In addition, role holders lack a strong global mind-set and they encounter difficulties in managing scale and major change (Loon, 2016).

The third strategic role that we identified is that of L&D specialist. This role has the potential to be strategic in that it can contribute to strategic implementation and the development of KSAs that are necessary for strategic success (Garavan, 2007). The role has a strong specialist orientation and the focus is on the use of traditional classroom-based L&D interventions. L&D practitioners who hold this role argue that they are focussed on building the capabilities and competencies of employees and they will train and develop a wide spectrum of employees. Their activities will be very much determined by either gaps or opportunities and they will operate within the HR function (Loon, 2016). They are found in all types of organisations but most frequently medium-sized organisations operating in manufacturing and service sectors. They will typically be part of a large L&D function in large organisations and are more likely to specialise, in particular, in areas of skill relevant to the organisation. They draw on a narrow set of foundational competencies and will possess expertise in two areas of L&D – diagnosing and delivering L&D and managing to measure and evaluating L&D. The possession of management and business skills are not of great perceived importance to this role category and they are typically mid-career level. They are perceived as very effective within a narrow role, however, they view themselves as specialists rather than generalists and they may not be focussed sufficiently on the business agenda.

The fourth strategic role we identified is that of the L&D strategist. They have a particularly strong focus on strategic L&D issues and leveraging the intangible resources, competencies and capabilities of employees (Wright *et al.*, 2001). They play a unique role in managing strategic change and in ensuring that the organisation possesses the capability to be scalable in response to external environmental dynamism. They will orchestrate the full suite of L&D practices to ensure that employees are aligned with the strategic goals of the organisation and invest considerable amounts of time in developing a learning culture (Noe *et al.*, 2014). They will also be knowledge management champions and play a major role in the wider organisation (Sparrow *et al.*, 2003) in facilitating change. They are typically found in organisations that internationally structure and operate in highly dynamic external environments. They will usually be located within a standalone L&D function. They will operate at senior and executive career levels and they primarily draw on business competencies and expert knowledge of knowledge management and organisational change. They do not get involved in operational L&D issues and are politically well-connected within the organisation.

The fifth strategic L&D role that we identify is that of the manager of learning projects. This is a high-level strategic role where the focus is on transformational change in the context of highly-dynamic external environments. The role holder will work across the organisation and with stakeholders external to the organisation on projects that have a strong learning and change focus (Loon, 2016; Gubbins and Garavan, 2009). The role-holder will be experienced in transformational change processes and will typically operate in a multinational or global organisation context. The role-holder will operate independently of the HR function and will be effectively positioned to be a boundary spanner and navigator of complexity (Lawler and Boudreau, 2009). The role-holder will draw on a broad spectrum of foundational competencies and one major area of L&D expertise – managing knowledge and organisational change. This role where it operates is rated as highly effective, however, the requirement for it will be very much contingent on large scale complex organisational change that involves the application of concepts from organisational and collective learning.

As mentioned earlier our study data revealed that organisations have a variety of operational L&D roles that work in conjunction with some of the strategic roles that we identified and discussed earlier. We identified five operational L&D roles. The first role

production trainer is an increasingly common role in manufacturing environments. The role is narrowly prescribed and will involve a full- or part-time trainer training production operatives in core skills using elements of the analysis, design, development, implementation, and evaluation model. The role holder may be part of the production rather than the L&D team and will have a deep knowledge of key production processes. It is a typical entry career level role and draws on a narrow L&D expertise base in addition to personal and some interpersonal foundational competencies. There may, however, be limited career mobility and the emphasis, maybe primarily on the delivery rather than the diagnosis and design element of L&D. The second operational L&D role is that of technical trainer. The role holder will possess a strong level of expertise and train customers and clients in the use of technical equipment. The amount of time spent on training delivery will be considerable and this role is found in many different types of organisations. They may work outside the L&D function and be part of an engineering or technical team. The third operational L&D role is instructional designer. This is a highly-specialised role that has emerged with the advent of eLearning (Johnson and Brown, 2017), it draws on specialist instructional design skills and will design eLearning and classroom-based solutions in specialist areas. It is typically found in large MNCs that have a major requirement for instructional designers in areas of quality and manufacturing. The role 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 and 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 L&D 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 L&D specialists 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 L&D 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 L&D 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 L&D 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 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 *et al.*, 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 factors 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.

5.6 Implications for learning and development 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 and 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 because of changing external and internal contingencies. There is also scope to research aspects of the 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 focussed on different categories of organisations, however, future research can delve deeper into the contextual factors that shape L&D roles in SMEs (Nolan and 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 contextual factors relevant to the international context will be different. These context factors will include sociocultural and institutional differences (Thite *et al.*, 2014)

5.7 Implications for learning and development practice and professional development

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

5.7.1 Aligning of learning and development 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 redefine the value of L&D in organisations. The need for alignment of L&D with business strategy and agility to respond 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 IV summarises key actions that L&D can take to enhance future proof for strategic alignment and agility. A key starting point for L&D to deliver value is to ensure alignment with the strategic goals of the business. However, alignment is not static, but dynamic, therefore, L&D must develop agility to respond quickly to changing competitive and strategic dynamics.

5.7.2 Using technology and learning and development analytics. The apriority area that requires future-proofing concerns the use of technology and analytics. Technology and real-time data are transforming the way in which business is undertaken. It is also impacting how L&D communicates with its stakeholders how it networks and the ways in which employees learn. The trend for future generations is a progression toward life-long learning and continuous learning facilitated by technology. Technology can be used to deliver learning in bite-sized chunks to learners, however, L&D is behind the curve when it comes to embracing the use of technology. In a similar way the use of real-time data analytics is a key future-proofing strategy. An evidence-based approach to L&D requires that decisions about the use of learning strategies are based on real-time data that is both reliable and valid. L&D professionals must become more skilled in the use of data analytics. It does, however, require a mindset change where they value the use of such data. “Big data” management is a key trend that will shape L&D activities in the future. However, there is much work to be done to realise this priority in the L&D context our findings highlight that many L&D functions do not have the ability to use data in a predictive way to make decisions about learning processes and activities.

Alignment of L&D with business strategy and agility (L&D focusses 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)	Develop and L&D vision	Identify the L&D value proposition	Craft structures, processes and strategies to align with the business agenda
<p>Applying L&D technology and analytics (using technology and L&D analytics to enhance the delivery of L&D activities and strategies)</p>	<p>Evaluate how L&D is currently positioned to deliver strategic value</p> <p>Formulate an L&D vision of what it wishes to become</p> <p>Gain buy-in from senior leaders and executives</p> <p>Possess the alignment of L&D processes with business goals and objectives</p> <p>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</p> <p>Gather data on the leading L&D tools and technology and their strengths and limitations</p> <p>Assess the readiness of the organisation to adopt new L&D technologies</p> <p>Develop change management strategies to implement and scale up use of technology</p> <p>Analyse how data is currently used to inform decisions about L&D investments</p> <p>Analyse the skills and abilities of L&D staff to make data driven decisions</p>	<p>Be precise about the value L&D will deliver to the organisation</p> <p>Explain how L&D processes, systems and activities will align with the business</p> <p>Make decisions about resource allocation based on value contribution</p> <p>Develop an L&D dashboard to demonstrate value add</p> <p>Develop structures for L&D that are agile, flexible and responsive to changing strategic requirements</p> <p>Engage with senior organisational decision makers and understand their perspectives and priorities</p> <p>Use technologies that map employee development, job and career moves and performance</p> <p>Develop L&D technologies with self-service capabilities and which allow customisation</p> <p>Implement L&D technology that integrates with other enterprise systems</p> <p>Develop L&D solutions that are underpinned by L&D analytics</p> <p>Develop the capabilities of L&D professionals to analyse and use L&D data and analytics to drive L&D</p> <p>Begin the process of building L&D data warehouses to evaluate contributions of L&D</p>	<p>Work collaboratively with the business and solicit feedback on L&D performance</p> <p>Work with HR to deliver business value on a continuous basis</p> <p>Demonstrate agility and flexibility to respond to strategic changes</p> <p>Experiment with new L&D models to deliver L&D value</p> <p>Do not get locked into a particular structural mode but experiment with different ways of aligning with business needs</p> <p>Move to the development of customised L&D technology that fits best with the needs of the organisation</p> <p>Work in reinforcing the use of L&D technology through enhancing ease of use and usefulness</p> <p>Continue to innovate and develop organisational knowledge around L&D analytics</p> <p>Use L&D analytics to develop future scenarios concerning L&D contribution</p> <p>Reinforce a culture where L&D analytics are a consistent and continuous part of problem-solving and decision making</p>

(continued)

Table XIX.
Future proofing L&D: four priority areas for practice

Table XIX.

	Develop and L&D vision	Identify the L&D value proposition	Craft structures, processes and strategies to align with the business agenda
<p>Enhancing the employee learning experience (conscious efforts to enhance the employee experience of L&D in organisations)</p>	<p>Collect data to understand current employee perceptions on L&D Begin the process of providing solutions that are employee-centric and development focussed Share responsibility with employees for the development of L&D solutions Begin the process of moving from standard one-size-fits-all L&D solutions to programmes and solutions that are personalised and customised Gather evidence of current skill and competency levels Incorporate business awareness and strategic mind-sets in education programmes for L&D professionals Use education and training strategies to increase technology awareness and knowledge of LD analytics Professional bodies with responsibility for L&D education need to ensure that professionals are educated and skilled in business strategy, finance and understanding the external environment</p>	<p>Diversify the L&D product offerings available to employees Enhance the capability of L&D to gather real-time feedback and give voice to employee perspective Communicate the focus on employee shared ownership for L&D effectiveness Accumulate data on employee perceptions of the quality of the employee learning experience Enhance current collaborative and relationship building skills using mentoring, coaching to build collective capabilities Focus efforts on developing strategic persistence and emotional intelligence Use strategic coaching to develop future senior and executive L&D professionals Develop the analytical skills to manage "big data" and to combine with technology Professional bodies representing L&D professionals need to engage more with stakeholders other than L&D professionals. Create opportunities for dialogue</p>	<p>Use data on the employee experience to innovate delivery of L&D solutions Segment the workforce and offer customised L&D solutions to these different segments Create and enhance learning spaces so learners can continuously learn and grow Develop L&D solutions that can innovatively respond to strategic requirements for speed and agility Develop the mind-sets of L&D professionals to look forward and outwards for innovative strategic approaches Continually enhance L&D professionals' potential for self-directed learning and strategic ability Provide L&D professionals with the competencies to challenge the status quo and push the boundaries of the profession Move L&D skill development up the list of priorities. Both L&D leaders and professional bodies should be vocal about the skills and competencies required to succeed in a dynamic and fast changing business environment</p>
<p>Enhancing L&D professional competencies (development of mindsets, skills and competencies of L&D professionals to enhance their organisational contribution)</p>			

5.7.3 Enhancing the employee experience of learning and development. The employee has become lost in the discourse and talk about strategic L&D. However, the landscape of what it means to be an employee is changing. The growing trend of contingent employees is one, which will have major implications for L&D priorities. Contingent, virtual and semi-permanent employees are demanding a redefinition of how L&D delivers its services and the need to understand the learning priorities and needs of these groups. Therefore, L&D needs to broaden its traditional view of how it operates and consider the customisation of solutions to meet the needs of different employee groups. Employees are increasingly viewed as key agents in managing their careers. They are expected to craft their careers and L&D. Therefore, they expect greater inputs into decisions about L&D. The employee experience of L&D is fundamental to participation in development activities gaining buy-in for transformational change, ensuring greater use of self-service L&D technologies and retaining highly developed talent.

5.7.4 Enhancing the competencies of learning and development practitioners. The development of the competencies of L&D professionals is a key component of future-proofing. Our research highlights that the profession should focus on a few key areas that will have maximum impact. These include the development of competencies around talent analytics, the development of change, management expertise, strategic partnering and customisation of L&D solutions. It is imperative that professionals stay abreast of technology innovations and develop data analysis skills. The lack of analytical skills will hamper the capability of L&D to use data effectively. We go so far as to suggest that the skills of L&D professionals to integrate technology, data analytics and analytical skills are central to the reputation and strategic value of the profession going forward. An important component of the process of redefining the value of L&D in organisations concerns the competencies, skills and mindsets of L&D specialists. The requirement to make a strategic contribution to the business, as well as enhance the employee experience demands a different perspective and set of competencies.

6. Conclusion

Over almost 20 years, L&D scholars have purported that for L&D practitioners to be effective, they need to take on strategic roles in organisations. This is one of the first studies to investigate how L&D practitioners perform their roles in organisations and how they are perceived by organisational stakeholders. Using contingency role and multiple constituency theories, we explored contingency influences on both roles and competencies and the relationship between competencies, roles, career levels and perceptions of L&D effectiveness. Our findings reveal that L&D professionals perform a combination of more traditional, expanded and strategic roles in organisations. Our second contribution is to provide empirical evidence of the context factors that influence the importance of these roles, the competency requirements that each role requires and how each role is perceived in terms of contribution to organisational effectiveness from the perspectives of multiple stakeholders. Overall, our findings reveal that a combination of organisational and L&D function characteristics impact L&D roles in organisations and they differed in terms of their perceived contribution to organisational effectiveness. An important takeaway from our study concerns the relatively modest progress that L&D professionals have made to lay a more strategic role in organisations. It has struggled to disentangle its operational remit and transform its focus and activities. We highlight that future research can further expand our research by conducting longitudinal investigations to capture the change in both context and L&D roles.

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Appendix 1. Study measures included in regression analysis

Environmental dynamism (Miller and Friesen, 1982; Jap, 1999)

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

Industry growth (Murphy and Bruce, 2003; Matthews, Bianchi, Perks and Healy Wickramasekera, 2015)

- Sales in the past five years have significantly increased;
- The numbers employed in the industry have significantly increased over the past five years;
- There has been significant growth in new customers in the industry over the past five years;
- There has been significant growth in existing markets over the past five years; and
- There has been significant growth in new firms within the industry over the past five years.

Perceived learning and development effectiveness measures (Wright et al., 2001)

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

Experience density of learning and development professionals adapted from[. . .])

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

- To start up or buy something new or to initiate strategic change;
- To deal with tasks that are relatively new to me that were not linked to my prior experience or education;

- To perform activities that were highly visible to others in my organisation;
- Responsibility to cooperate with individuals from diverse backgrounds; and
- To carry out tasks that my colleagues considered risky.

Learning and development role assessment questionnaire (adapted from Ulrich et al., 2012)

L&D helps the organisation [. . .]:

- Achieve business goals and financial performance [strategic business partner];
- Enhance the productive efficiency of the organisation;
- Develop employee knowledge skills and abilities;
- Build competence, capability and capacity of organisation to adapt to change;
- Manage major strategic change in dynamic and complex environments;
- Train employees in core production and service skills;
- Develop technical expertise and competence;
- Translate learning objectives into instructional products and strategies;
- Use technology to deliver L&D solutions; and
- Administer records related to employee training to ensure compliance.

Learning and development participates in [. . .]

- The process of implementing strategy in the organisation;
- Managing L&D processes and activities;
- Enhancing the fit of employees with organisational skills requirements;
- The process of developing new processes and strategies;
- Shaping the process of cultural change to bring about transformation;
- Training processes to ensure that employees reach experienced worker standard quickly;
- Training activities designed to ensure that all technical processes operate effectively;
- Instructional design processes to develop best in class training activities;
- Activities that use technology to deliver training; and
- Activities to ensure that the organisation has accurate and compliant training records.

Learning and development make sure that [. . .]

- L&D strategies are aligned with the needs of the business strategy;
- L&D processes are effectively managed;
- L&D activities respond to the skill gaps and opportunities facing the business;
- L&D activities enhance the capabilities of the organisation;
- L&D processes and interventions enhance the organisations ability for transformational change;
- L&D activities help impart the core skills necessary to achieve productivity;
- L&D activities are focussed on ensuring that technical expertise is at industry standard level;
- L&D strategies follow best in class instructional design principles;
- L&D activities are delivered using the most appropriate technology solutions; and
- L&D activities are compliant with external regulatory requirements.

Learning and development effectiveness is measured by its ability to [..]

- Ensure that strategy is effectively implemented;
- Efficiently manages L&D resources and processes;
- Helps employees to reach experienced worker standard;
- Helps the organisation to have the capabilities to adjust to a new market and greater opportunities;
- Helps the organisation to manage major strategic transformations;
- Ensure that employees reach experienced worker standard in the quickest possible time;
- Develop the organisations technical expertise to the level required by its customers;
- To design L&D solutions that are cost-effective;
- Help organisations through the use of technology to train all of its employees; and
- Ensure that training processes and systems are robust and compliant.

Learning and development in organisations in used as [..]

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

Learning and development spend time on [..]

- Analysing and managing strategic implementation issues;
- Managing day to day operational issues;
- Identifying knowledge, skill and ability gaps;
- Identifying capabilities required to realise business strategy;
- Supporting transformational change initiatives;
- Analysing the capabilities of core employees who produce products or deliver services;
- Analysing the technical capabilities required to meet customer needs;
- Using instructional design principles to develop the best fit training solutions;
- Leveraging technology to deliver training; and
- Administering training and development processes to ensure operational efficiency.

Learning and development is an active participant in [..]

- Developing strategy implementation plans with line managers;
- Designing L&D interventions;

- Delivering L&D activities in organisations;
- Facilitating the senior team to formulate strategies;
- Processes of organisational renewal change and transformation;
- Diagnosing gaps in core employees' knowledge and skills;
- Identifying gaps in technical skills to meet customer requirements;
- Identifying the best instructional strategies to match the characteristics of employees;
- Identifying where technology can be used to deliver training; and
- Ensuring that the costs and benefits of training are monitored.

Learning and development works to [. . .]

- Ensure that L&D is aligned with strategy implementation;
- Ensure the efficient use of L&D resources;
- Provide employees with the training they need to achieve performance outcomes;
- Ensure that L&D is aligned with strategy formulation processes and future strategic goals;
- Reshape and realign the organisations to manage transformational change;
- Ensure that the best training solutions are used to develop core employee skills;
- Ensure that employees can meet the technical requirements of customers;
- Ensure that best in class instructional design solutions are developed;
- Ensure that technology is used to deliver training to employees in a cost-effective manner; and
- Ensure that all training and development processes are implemented consistently.

Learning and development develop processes and interventions to [. . .]

- Link L&D strategies and interventions to ensure effective strategy implementation;
- Ensure that L&D needs are addressed in an efficient way;
- Deliver quality training and development;
- Help the organisation to develop strategic capabilities;
- Helps the organisation to transform itself;
- Ensure that employees are skilled to meet customer quality requirements;
- Ensure that the technical learning needs of the organisation are addressed;
- Meet best in class instructional design;
- Reach as many employees as possible using technology; and
- Deliver training and development in a timely manner.

Learning and development's credibility comes from [. . .]

- Helping to realise the organisation's strategic goals;
- Enhancing employee KSAs;
- Designs quality training strategies;
- Helping the organisation to acquire and retain capabilities for competitive success;
- Make transformational change happen;

- Its ability to help employees meet experienced worker standard in the shortest time possible;
- Its ability to use best in class instructional design principles to develop training solutions;
- Its ability to enhance the technical capabilities of employees to meet customer needs;
- Leverage technology to deliver training to employees throughout the organization; and
- 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; and
- Motivations for becoming an L&D professional.

Organisation learning and development profile

- Structure, reporting arrangements, purposes and strategic focus of L&D function;
- Key L&D activities undertaken and characteristics of the L&D team; and
- 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; and
- Engagement with and involvement of employees in the design and delivery of L&D.

Learning and development roles

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

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