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Kick-starting strategic Learning and Development in a hyper growth startup in niche technology

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In the world that changing more and more rapidly, Learning and Development – a coordinated response to change – is a crucial priority for any organization that desires to exist also in the future. However, for Flowhaven Oy, the commissioning party for this thesis, there is also another driver for strategic Learning and Development (L&D): Flowhaven is operating in the niche business field of brand licensing, which means that there are limits to how much talent with industry experience Flowhaven can find from the job market. Therefore, growing talent internally, and aiming at high levels of retention, are key strategies for Flowhaven Human Resources (HR).

Combining this niche industry with operating in technology, where the talent war is on, has its challenges. In addition to the 'technology plus licensing' combo, Flowhaven needs talent that is skilled on Account Management (or Customer Success). This 'triple niche' can present quite the bottle neck for Flowhaven growth if not addressed accordingly by company leadership. To help solve this problem, the objective of this thesis is to kick-start strategic L&D efforts, starting with Customer Success as a piloting unit.

The selected research approach is service design for HR. Service design is traditionally known as a customer-oriented approach for product and service development. In the context of this thesis, the commissioning party is the customer, and its employees are the end-users. Service design is a highly collaborative and pragmatic approach to innovative improvement, and therefore a good fit for developing new HR structure for this young and agile hyper-growth startup, where high-quality employee experience is a must.

Final outcomes include an analysis of the current status of HRM as well as an analysis of the current status of L&D, and thus establish a good understanding of the starting point for strategic L&D. As a third outcome, a short-term strategy was created to kick-start the L&D efforts. Three additional outcomes were developed including processes for Flowhaven L&D, competence-building programs and templates for building learning paths and career path examples.

The expected outcomes were achieved, and according to the feedback, the project had a great impact on creating much needed L&D structure inside the company.

Keywords
Learning and Development, Strategic Human Resources Management, competence-building, individual learning, Talent Management, knowledge management

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Abbreviations

CS	Customer Success
CSM	Customer Success Manager
FH	Flowhaven Oy
HCM	Human Capital Management
HRM	Human Resources Management
L&D	Learning & Development
LXP	Learning Experience Platform
PM	Personnel Management
SHRM	Strategic Human Resource Management (People Management)
SME	Small or medium size enterprise
STEM	Science, technology, engineering, and mathematics

1 Introduction

The megatrends are revolutionizing many aspects of the word of work. Digitalization, demographic shifts, and the big generation gap are causing an unforeseen skills gap, and therefore a great need for re-skilling and re-tooling. The inability to keep up with the change is causing a labor shortage. All of this, together with the change in the way the younger generations view personal development, are undeniably making strategic Learning and Development (L&D) a crucial priority for any organization that desires to exist also in the future.

In addition to the above-mentioned, Flowhaven Oy, the commissioning party for this thesis, has another significant driver for developing strategic L&D operations, and it is not focused on change. Flowhaven is operating in the niche business field of brand licensing, which means that there are limits to how much talent with industry experience Flowhaven can find from the job market. Therefore, growing talent internally, and aiming at high levels of retention, are key strategies for Flowhaven Human Resources (HR). Combining this niche industry with operating in technology, where the job market is red hot, has its challenges. But that is not all that is standing in the way of Flowhaven's growth: In addition to the 'technology plus licensing' combo, Flowhaven needs talent that is skilled on Account Management (or Customer Success). This 'triple niche' can present quite the bottle neck for Flowhaven growth if not addressed accordingly by Flowhaven leadership.

The high-level aim of this thesis is to help Flowhaven better ensure knowledgeable, skilled, and engaged personnel. The main problem to be solved, is the challenge of having competent personnel to allow execution of strategic business aims and smooth growth, in a triple niche field. To help solve this problem, this thesis will focus on kick-starting strategic L&D efforts at Flowhaven. Putting systematic effort into establishing comprehensive competence-building programs, competence-based performance management and an organizational culture that supports knowledge sharing, are key areas to address to ease the talent shortage at Flowhaven.

Flowhaven is software startup established in 2016 in Finland. Today, Flowhaven employs around 100 people in Helsinki, London, Berlin and the United States. The company has been experiencing rapid growth after raising 3,6 million euros in seed funding in December 2019, and 13 million euros in series A funding only a little over a year later, in January 2021. Being a young hyper-growth startup sets some challenges to establishing L&D structure or any other HRM structure, because it requires effort from not only HR personnel but also from top leadership, line managers and employees. The resources for doing development work like this are scarce as everyone is already very busy with their core work. Like for any growth company, it is about maintaining a balance between surviving from day-to-day and building the company’s future.

Chapter two describes the objectives and the scope of this thesis project in detail. Chapter three presents the key concepts and theoretical models for this thesis as well as a description of the context in which the project is implemented. Chapter four describes the ways in which the project was carried out and supervised and includes information about the data collection and analysis methods, the selected strategic approach, and the design of the development work. The connection between the chosen methods and the theoretical framework is also presented. Chapter five describes the research and development process in practice, and what research and development outcomes were achieved. The final chapter, chapter six, focuses on evaluating the outcomes of the development project and providing conclusions on its benefits to the organization. Suggestions for further development work and author’s self-reflection are also included.

2 Objectives

The high-level aim of this thesis is to help Flowhaven better ensure knowledgeable, skilled and engaged personnel in the near future. The main problem to be solved is the challenge of having competent personnel to allow execution of strategic business aims and smooth growth in a triple niche field.

To help solve this problem, the objective of this thesis is to kick-start strategic L&D efforts by first establishing an understanding of the current status of Human Resource Management (HRM) at Flowhaven, and any existing L&D structure inside the HR system framework, and then creating a short-term strategy including immediate next steps.

2.1 Expected outcomes

Outcome 1: Analysis of the current status of Flowhaven HRM

Outcome 2: Analysis for the current status of Flowhaven L&D

Outcome 2: Short-term L&D strategy for Flowhaven

2.2 Research questions

RQ1: What is the current status of Flowhaven regarding kick-starting strategic L&D efforts? For example, the status of HR philosophy, HR system, HR resources and HR activities.

RQ2: What is the current status of L&D at Flowhaven, and especially at Flowhaven Customer Success (CS)? For example, existing and missing elements.

RQ3: What would a short-term L&D strategy look like for Flowhaven and especially for Flowhaven CS?

2.3 Scope

This project addresses L&D on a company-wide level, but the development work will be addressed from the viewpoint of Flowhaven Customer Success. Within the project, CS will act as a ‘pilot unit’ for kick-starting strategic L&D. This means, that any L&D structure developed during the project is designed specifically for CS but after piloting can be scaled and rolled out throughout the company.

This project will focus on the short-term strategy of Flowhaven L&D i.e., the very immediate next steps that the company should take to kick-start strategic L&D in order to ease the talent shortage in the near future. Considering the hyper-growth status of Flowhaven, it is not desirable, or even possible, to plan very far ahead, since the business strategy, and thus also the HR strategy, are constantly evolving. This project is therefore not aimed at developing a long-term strategy. For this project, the author has the role of an external consultant.

3 Theoretical framework

The theoretical framework for this thesis comprises of six main areas: 1) the theoretical definitions for HR, HRM and strategic HRM 2) the conceptual framework of the HR system 3) HR and organizational performance 4) L&D as a part of the HR system framework 5) building a strong L&D function and 6) case examples of for modern L&D in practice. Together these areas form a theoretical framework that gives insight into how strategic L&D can promote organizational effectiveness, and thus help answer the research questions. Figure one below visualizes the theoretical framework for this thesis.

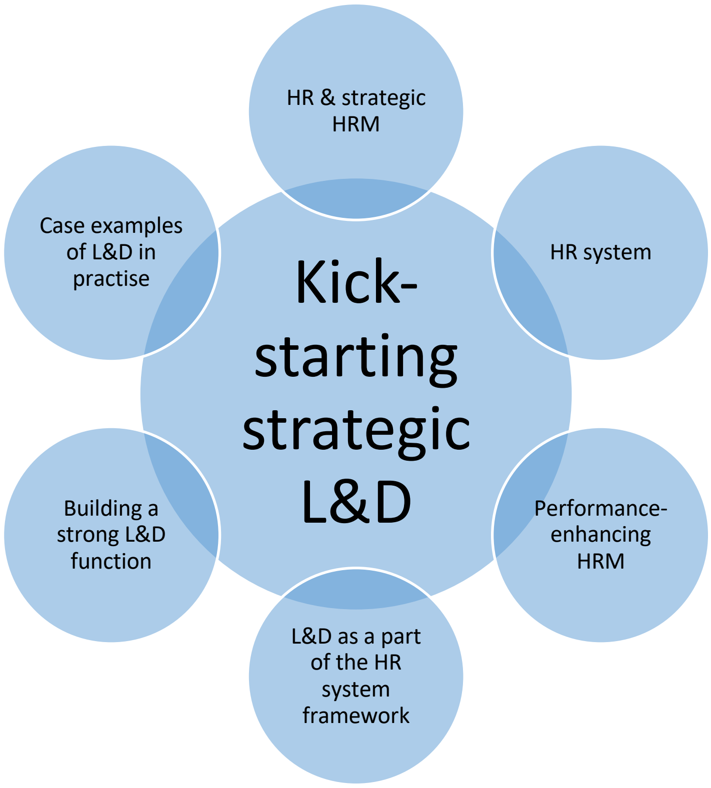

Figure 1: The theoretical framework for this thesis

3.1 Human Resources and its evolution

Human Resources (HR) as a business function emerged as s response to economic development and industrial change in the early 20th century with the purpose of addressing organizational challenges – such as lowering employee turnover and raising productivity – and adding value through effectively managing and rationalizing employment relationships. In the early 20th century, the manufacturing economy experienced organizational growth and technological change, but general and human resource management practices still remained quite elementary. (Ulrich & Duleboh 2015, 189.)

Frederick W. Taylor has been credited the title of the most influential management theorists of the 20th century and the father of scientific management (SM). As a professional engineer, Taylor aimed to improve the collaboration of workers and machines, more specifically by addressing turnover and productivity problems. He wanted to discover “the one best way” to do things. SM contributed to HR through many different ways: By originating and introducing job analysis to management practice, by using job analysis as the basis to select and train workers and as the basis for evaluating compensation, by promoting the use of performance-based pay and by highlighting the need for trained or specialized managers for different business functions. Taylor and other theorists of his time contributed thus significantly to the formalization and specialization of general management and HR as a business function. (Drucker 1955 in Ulrich & Duleboh 2015, 189; Drucker 1977 in Ulrich & Duleboh 2015, 189; Gilbreth 1912 in Ulrich & Duleboh 2015, 189; Ulrich & Duleboh 2015, 189.)

3.1.1 From Personnel Management to Human Resources Management

According to Armstrong (2020, 7) human resource management (HRM) is about employing, managing, and developing people inside organizations. According to Ulrich & Duleboh (2015, 189) several different factors such as globalization and with-it international competition, de-regulation, employment legislation, demographic changes, and the shift from manufacturing to a knowledge and service-based economy have acted as the driving forces for the transformation of Human Resources (HR) since the 1980’s. The term HRM or HR referred to employees as resources to be managed with other organizational resources and replaced personnel management (PM) which had viewed employees as expenses (Mahoney & Deckop 1986 in Ulrich & Duleboh 2015, 190). The second shift generating the transformation was the shift in perspective. Whereas PM suggested a set of reactive and passive activities and was viewed as secondary to other business functions, HR showed a more proactive approach and increased the importance of the function within the organization (Prewitt 1982 in Ulrich & Duleboh 2015, 190).

HRM has a strong theoretical background, of which the so-called called resource-based view (RBV) has had the strongest impact (Armstrong, 2016, 8, 17). The basis of RBV is the idea that firms achieve their competitive advantage through their internal resources (Truss, Mankin & Kelliher 2012, 116). According to this theory, a firm’s resources can be a source of sustained competitive advantage if they meet these four criteria: They are valuable, rare, hard to imitate and hard to substitute (Armstrong, 2016, 8, 17).

3.1.2 From Human Resources Management to Strategic Human Resources Management

With definitions of HRM, they often include also the strategic aspect like in this definition from Pande & Basak (2012): "-- HRM may be defined as a strategic and coherent approach to the management of an organization's most valued assets—the people working there, --". Or this definition by Armstrong (2016, 6): "Human resource management is defined as a strategic, integrated and coherent approach to the employment, development and well-being of the people working in the organizations." However, according to Ulrich (2016), linking HR to strategy is still quite a fresh idea as it started only 20 years ago. Nowadays, this kind of HRM has its own term: Strategic Human Resources Management (SHRM). In this thesis HRM and SHRM are considered as two different things highlighting the strategic aspect of HRM only when there is a justified connection.

Armstrong (2016, 37) defines SHRM as "an approach to managing people that deals with how the organizations goals will be achieved through its human resources by means of integrated HR strategies, policies and practices." Based on these definitions it seems that the difference between HRM and SHRM can be made by looking for HR strategies, policies, and practices and their driver. With SHRM these things would exists, and they would all draw from the main business strategy.

If HRM is strategic, then how do HRM and SHRM differ? Truss & Gratton (1994, 666) suggest that we consider SHRM as an umbrella, an overarching concept linking personnel management and development to the business and to the business environment, and HRM simply as an organizing activity that happens under this umbrella.

3.1.3 The way forward: People Operations for adding value

When talking about SHRM, one vital term to understand is Human Capital Management (HCM). According to Armstrong (2016, 105) HCM is "concerned with obtaining, analyzing and reporting on data that informs the direction of people management strategy". Kearns (2004) sums it up in plain English: "What we are looking for is the best monetary value from human potential." Kearns (2004) emphasizes that HCM is a very different discipline from traditional HRM as it focuses on expressing the value of successful people operations.

According to Ulrich & Duleboh (2015, 191) the transformation of HR can be characterized by three general waves: HR administration, HR practices, HR strategy and HR and context. According to the researchers, HR is currently moving from wave 3 to wave 4. Figure 2 below visualizes these four waves.

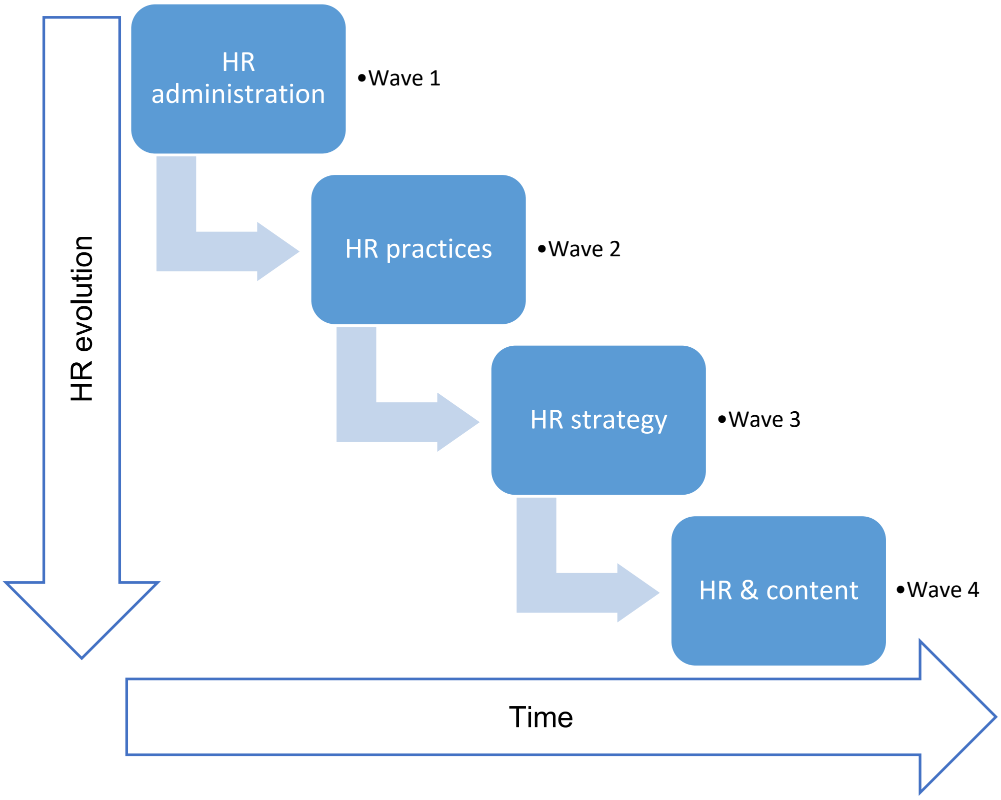

Figure 2: The four waves of HR evolution (adapted from Ulrich & Duleboh 2015, 190)

The fourth wave moves HR from connecting to the business to connecting to the broader business context. With this wave, the HR professionals shift from an inside/outside to an outside/inside approach, where HR creates value by aligning internal HR services with the expectations outside the company. This means looking at every HR practice from the perspective of the value that they bring for those outside the company. For example, focusing employee experience activities to attract talent that the customer would choose is an example of outside/inside thinking. The inside/outside approach focuses more on reacting to organizational challenges whereas the outside/inside approach aims to fully participate in strategy development and adding value. (Ulrich & Duleboh 2015, 191.)

As Armstrong (2020, 1) points out, there is an ongoing shift from the use of the term “HR” to the “people” function, as the before mentioned term can convey the uncontemporary message of employees being referred to as factors of production instead of human beings. Instead of HR Directors, there are now People Management professionals.

3.2 Human Resources system and Human Resources philosophy

According to Armstrong (2020, 11-12) organization needs an HR system to deliver HRM. An HR system can be described as a set of practices or activities that integrate and work together to achieve a certain aim. The three basic components of an HR system are

- HR strategy (defines the intended direction for different HR activities),
- HR policies (defines the purpose of HR and provide guidelines for application and implementation of different HR activities) and
- HR practices (the activities for managing and developing people and employment relationships) are the three basic components of an HR system.

An HR system is built on an HR philosophy which entails the guiding principles and values that guide people management in an organization (Armstrong 2020, 12).

Bowen & Ostroff (2004) introduce "strength of the HRM system" for effective implementation of HRM practices and thus better organizational effectiveness. This is a system that results in a strong organizational climate where people share a common understanding of what kind of behaviors are expected and rewarded. (Bowen & Ostroff 2004, 203.) Figure 3 below visualizes the HR system framework in high level.

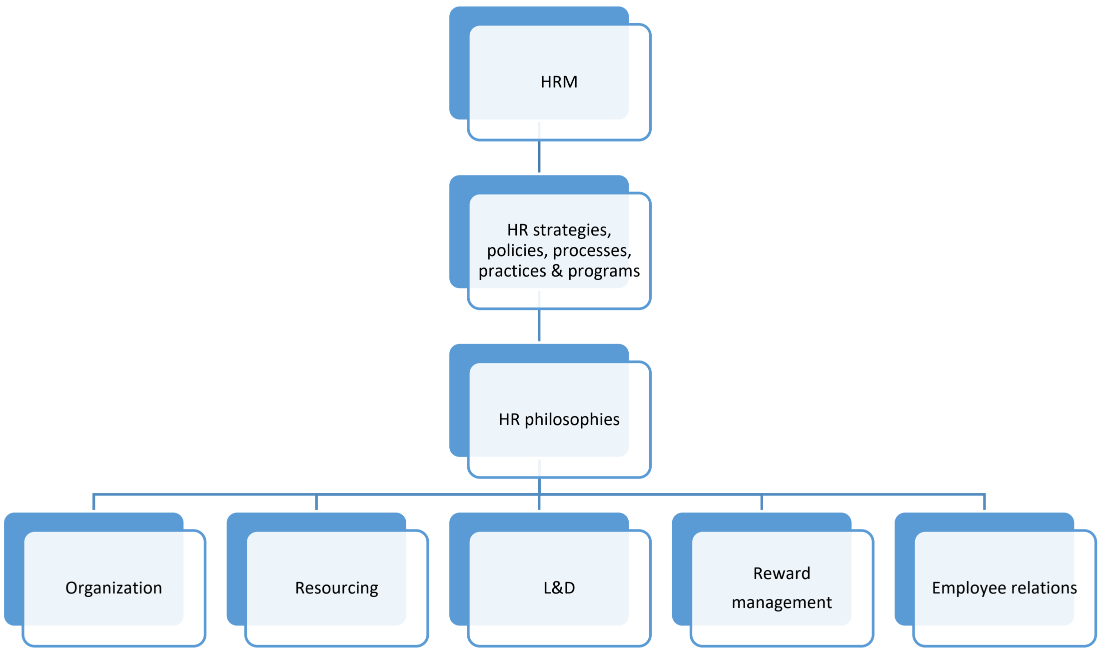

Figure 3: HR system framework in high level (adapted from Armstrong 2020, 11-12)

3.3 Human Resources and organizational performance

According to the resource-based view introduced in chapter 3.1.1, HRM is a source of added value for the business and helps it gain sustainable competitive advantage through strategic people operations. Thus, an assumption can be made, that when implementing necessary HR policies and practices, HRM will impact overall business performance. Even though a lot of research has been conducted that shows there is connection between good HRM practice and organizational performance, it is still premature to say that this good practice is indeed the cause, and the performance is the effect. More research is needed to determine this. (Armstrong 2020, 14, Guest 2011, 11.)

Armstrong (2020, 14-15) points out, that people interpret and react to HR policies and practices according to their individual experiences, values, and preferences, and thus a single, coherent response cannot exist, and Nishii & Wright (2008, 27) conclude that the research needs to acknowledge this variability, and its status as the thing impacting organizational performance. These observations explain the growing interest towards employee experience i.e., all the things that people encounter, observe, and feel during their time with the employing organization (Armstrong 2020, 14-15).

Boxall & Purcell (2008, 5) present the AMO model which states that performance is a result of individual's ability, motivation, and opportunity. Armstrong, (2020, 15) states that the model provides valuable information on HRM practices that should be a part of a high-performance work system since research has shown that the dimensions of the AMO model could lead to improved financial results and concludes that research promotes a combination of HRM practices instead of individual practices to achieve high employee performance. Figure 4 below is an adaptation of the AMO model.

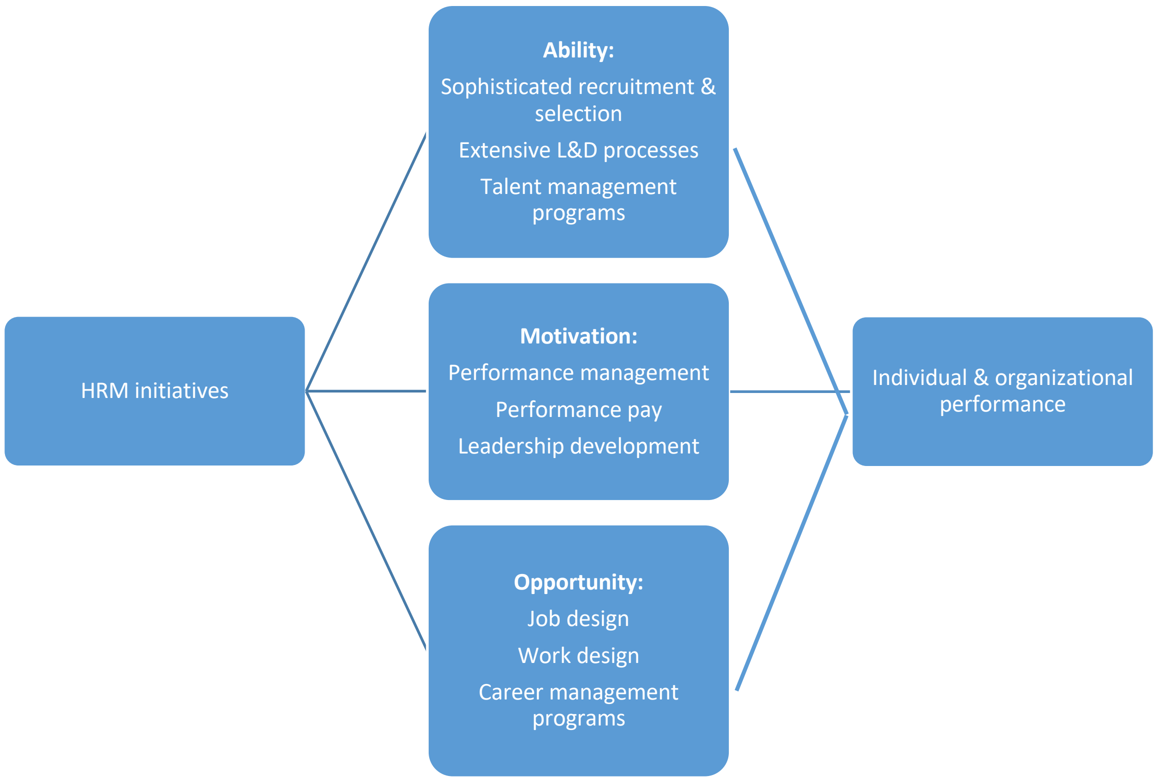

Figure 4: The AMO model for performance-enhancing HRM (adapted from Armstrong 2020, 16)

3.4 Learning and Development as a part of the Human Resources system framework

Learning in the workplace context is often referred to as 'development'. However, 'learning' is still the most accurate word to describe the process of gaining competence. Learning is change in knowledge, skills and attitudes, and most often, in all of them at the same time. The goals and the pace of working life, and the changes in those two elements, guide and direct learning. (Kupias & Peltola 2019, preface.)

According to Bressey et al. (2019), the key aim of L&D is to manage the development of people inside an organization. As the AMO model in previous chapter highlights, L&D is a key part of performance-enhancing HRM practices that contribute to organizational performance. SHRM and strategic L&D both deal with investing in people and thus developing human capital (HC), (Armstrong 2020, 236). Figure 3 in chapter 3.2 presents the highest level of the HR system framework and L&D as a part of it. Figure 5 below visualizes the different elements of L&D inside the HR system framework: organizational learning, individual learning, management development, performance management and knowledge management.

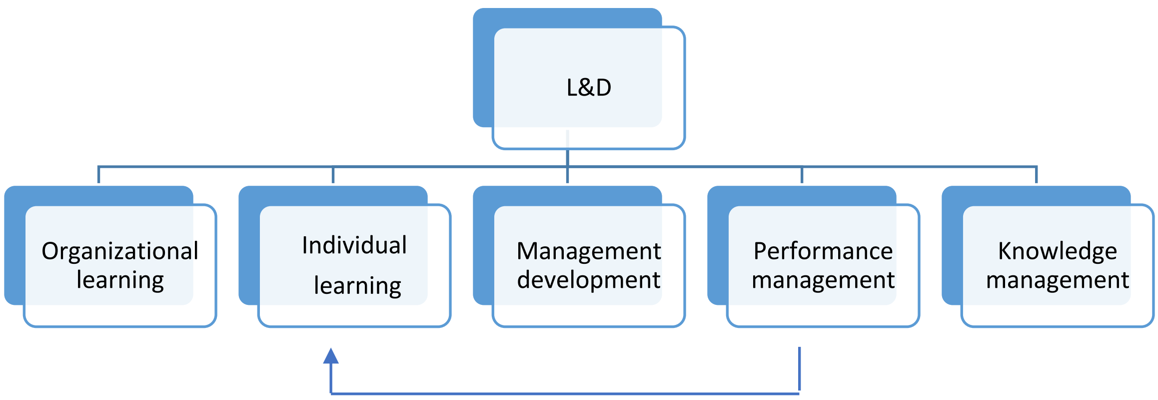

Figure 5: L&D in the HR system framework (adapted from Armstrong 2020, 11-12)

Strategic learning and development is about the broad and long-term view of ensuring knowledgeable, skilled and engaged workforce. L&D strategy is created to help the organization to achieve its strategic goals, and it consists of creating a learning culture, and a strategy for both organizational and individual learning. Although business-led, L&D strategy should also define the way that the organization provides its people with the opportunity to grow and develop as these things are a major source of job and organizational engagement. (Armstrong 2020, 235-236.)

3.4.1 Strategic Learning and Development philosophy

According to Armstrong (2020, 236) the following items are the building blocks of strategic L&D philosophy:

- Its plans and programs are designed to support the strategic goals of business and people management and so they integrate.
- They are also designed with the end goal in mind: they aim to achieve specified improvement.
- L&D is for everyone, and everyone is encouraged develop themselves.
- The primary responsibility for L&D rests with the individual. Managers and the L&D (or HR) team should guide and support, and the organization provide appropriate opportunities and facilities.
- Individual learning is based on personal development plans focused on self-managed learning. Coaching, mentoring, and training are there to support.

Parry-Slater (2021, 10) supports the performance-based approach to L&D presented in Armstrong’s philosophy above as she emphasizes the importance of asking ‘why’: Why do need learning? Why do need it right now? What is the business problem that we need to solve? After answering these questions, it is much easier to identify the learning needs and evaluate the effectiveness of the learning that took place.

Page-Tickell (2014, 6) points out the difference between training and learning, and similarly to Armstrong, emphasizes the role of modern L&D as something where the employee has an active role in and of which they take responsibility for themselves. Today’s employee forms a mutually beneficial partnership with their employee to promote their personal L&D.

3.4.2 Organizational learning

According to Armstrong (2020, 239) organizations can be described as continuous learning systems, and organizational learning as a process of “coordinated systems change, with mechanisms built in for individuals and groups to access, built and use organizational memory, structure and culture to develop long-term organizational capacity” (Marsick 1994, 28 in Armstrong 2020, 239).

More simply put, organizational learning is a process that happens over time and as a result of which the organization improves itself. The process flows from gaining experience, to using that experience to create knowledge, to transferring that knowledge inside the organization. (Valamis 2019.)

The following five principles enable and support the above-mentioned process to happen and the organization to really be a continuous learning system:

1. Communicate and maintain a powerful and coherent vision of the organization to all employees to indicate a need for strategic thinking across entire organization.
2. Develop strategy for a vision that is powerful, open-ended and unambiguous to encourage employees to seek for a wide range of strategic options instead of a fixed one.
3. Nurture frequent dialogue, communication and conversation as major facilitators of organizational learning.
4. Encourage curiosity and questioning things that seem obvious.
5. Invest in building a climate that enables and supports learning and innovation.

(Harrison 1997 in Armstrong 2020, 14-15.)

3.4.3 Individual learning

According to Armstrong (2020, 239-240), individual learning is driven by an organization's people requirements i.e., required skills and behaviors, as opposed to organizational learning, which aims to develop an organization's human capital (stock of knowledge and skills).

Armstrong (2020, 240) suggests the building of any individual learning strategies should happen from the basis of the following key components:

- A systematic program to identify learning needs.
- Basic understanding how people learn.
- The understanding that most learning happens at the workplace and this needs to be encouraged.
- Training has only a complimentary role.
- Combination of different learning approaches yield the best results. They can complement and support each other.

From the list above, it can be concluded, that individual learning is the area of L&D that focuses on designing and implementing different learning interventions such as onboarding programs or other competence development programs, and thus addresses a very practical and hands on approach to practicing L&D. This makes individual learning the focus of any HR or L&D professional starting strategic L&D activities inside their organization.

3.4.4 Management development

According to SHRM (2021), management development is “the systematic process of creating effective managers” and inside a specific organization it should include various different topics and techniques, and focus on building each manager’s existing knowledge, skills and abilities. Common areas for management development include recognizing and accepting people's individual behavioral differences, communication (verbal and non-verbal) and conflict management.

Nelson (2021, introduction) points out that taking on a management role means accepting one of the most challenging positions in an organization, because managers have the opportunity to make a direct impact on the lives of their team members. Frontline managers are the very first level of management toward employees and very important to the overall health of the organization because they often set the tone inside their team. Management development training is a central function for any organization or HR department to provide the skills necessary for developing effective managers. (Nelson 2021, introduction.)

3.4.5 Performance management and competency-based performance management

Armstrong (2020, 179) separates organizational performance management from individual performance management and suggests that the latter functions within the context of the before mentioned. According to him, organizational performance is the responsibility of top management, but people management professionals have an important role in both formulating and implementing organizational performance strategies.

Individual performance management is a set of activities aimed to achieve improvement in performance and includes 1) goal setting 2) aligning individual goals with overall business goals 3) planning performance to achieve set goals 4) reviewing and assessing progress on goals and 5) developing the individual capabilities. (Armstrong 2020, 197)

According to Armstrong (2020, 197), the factors affecting individual performance include at least 1) the individual’s level of knowledge and skills, motivation, and engagement which allow them to perform effectively 2) the opportunity provided by the job for the individual to use and develop their skills as well as a sufficient level of autonomy to carry out the work 3) the manager providing leadership and support 4) the work group members providing a strong influence on the attitudes and behavior of the individual and 5) the organization providing a vision and operating a work system facilitating performance.

One increasingly popular approach to performance management is competency-based performance management, which according to Shet, Patil & Chandawarkar (2019, 755), -based utilizes for example competency-based self-assessment, finding competency gaps, feedback, coaching and L&D plans for performance building, and leadership competence management is a key factor. The authors note that are benefits to using a competency-based performance management system because it

- raises the level of performance of the employees,
- promotes training that uses key capabilities for the role in question,
- is a simple way of developing employee proficiency,
- results in a list of standardized capabilities throughout the organization,
- helps to identify training needs in a structured way,
- helps to identify competency gaps needed to formulate L&D plans, and
- helps to clarify the requirements for leadership competence.

3.4.6 Knowledge management

According to Armstrong (2020, 163) knowledge management aims to capture organization's collective expertise and deliver it to where it can best be used. Scarborough at al. (1999, 1 in Armstrong 2020, 163) define knowledge management as "any process or practice of creating, acquiring, capturing, sharing and using knowledge, wherever it resides, to enhance learning and performance in organizations".

According to Desouza & Awazu (2003), company's competitive advantage is determined by how well they succeed in knowledge sharing inside the organization. Knowledge is the key component of knowledge workers work, and thus they are expected to take it in, process it and disseminate it to other members inside their organization. Successful management of this knowledge is important if the organization wishes to remain dynamic, and HRM is a key element to knowledge management. People's interaction with each other is a mechanism for knowledge transfer, and therefore, whenever a person leaves the organization, they take knowledge with them. The key questions that HRM practitioners should ask themselves include, for example, how to promote knowledge contribution and how to identify the most valuable sources of knowledge. (Desouza & Awazu 2003.)

3.4.7 The drivers for Learning and Development

Technological breakthroughs, demographic shifts, rapid urbanisation, shifts in global economic power and resource scarcity and climate change are current megatrends reshaping society and with it, the world of work (Brown et al. 2018, 7). There is an ongoing discussion around how organizations can best prepare for the future and meet the challenges of the fast-changing business environment and a broad spectrum of opinions on how HR professionals should move forward to equip their leaders for the future. Technological development, leadership development, analytics skills and strategic HR capability are all on the list of top priorities and opportunities. (Nolan 2011.)

A whitepaper by Olivier Wyman, Orange & Mercer released in 2016 lists seven major trends underlying ongoing demographic, technological, sociological, and cultural transformation: 1) Digitalization 2) generation gap 3) values & purpose: terms of engagement 4) personal development over title, career & company 5) employees as customers 6) agile, flat & open organizations and 7) evolving leadership. (Amiot et al. 2016, 5-15) Along with the world, these trends are completely transforming business and work as we used to know them.

A whitepaper released in 2018 by another consulting company, PwC, similarly identifies five megatrends shaping the future: 1) the rapidly increasing number of technological breakthroughs 2) demographic shifts meaning the changing size, distribution, and age profile population globally 3) rapid global urbanization 4) power shifting globally between developed and developing countries, and 5) resource scarcity and climate change (Brown et al. 2018, 7).

At least the knowledge workers in the technology industry have been seeing and feeling the effects of these megatrends in their work and at their workplaces already for many years. To these people, they are already very much happening. The megatrend of digitalization is causing a skills gap as existing jobs disappear, and new ones emerge. As the generation of competent workforce is not able to keep up, we are experiencing a major labor shortage. Due to digitalization, software engineering jobs are already at high level, and are expected to grow at a rate of 18,8 % by 2024 (Thite 2019, xix).

Together with digitalization, the big generation gap is rapidly shaping how people view and approach the subject of work. The Millennials, also known as generation Y (people born between 1981 and 1996) are taking over the workplaces: they will represent 75 % of the workforce by 2025. Based on an analysis of generational expectations, many nominators appear to apply across generation: We all share a need for doing meaningful work, enjoying predictable rewards, advancing our professional opportunities, and experiencing dignity and respect. (Amiot et al. 2016, 5-6.)

However, some generational differences also exist. For example, the following differs between generations: 1) Factors related to engagement, motivation, and recognition; 2) expectations for work-life balance; 3) perception of and expectations for personal development and career planning; and 4) the impact of national culture (Amiot et al. 2016, 7). To be successful in attracting, hiring, and retaining talent, employers need to understand these different expectations of this ever-growing generation of Millennials, and, the new generation, generation Z (people born after 1996).

For these younger generations, it's not about career paths anymore but about employability. For most of the millennial generation, personal development opportunities play a major role in choosing an employer. Opportunities for professional progress are valued as they enhance employability. But so are development opportunities also outside work, such as the realization of personal goals and ideals, and so on. Employee loyalty is hard to find as navigating between companies for an updated skillset or a new challenge is becoming the new normal. (Amiot et al. 2016, 10-11.)

Diplomas and seniority have lost their position as the number one way to promotions and pay raises. Instead of just trying to move up the hierarchical latter, career paths are becoming more and more about lateral progressions from one expert community to another. In trail blazing organizations personal development draws not just from talent but also from interests and opportunities, and employees are empowered to become architects of their own careers. (Amiot et al. 2016, 10-11.)

For the younger generations, training and development is an ongoing process that can include anything from coaching to learning on the job to more traditional (increasingly digital) training. Inclusivity and accessibility are key: everyone is free to participate and create in the name of learning and knowledge sharing. Mobility is encouraged across teams and divisions or even outside the organization, permitting talent to seek new challenges elsewhere and possibly later return with an updated skillset. (Amiot et al. 2016, 10-11.)

As highlighted above, the megatrends are revolutionizing many aspects of the word of work. Along with digitalization, demographic shifts and the big generation gap, a skills gap exists. The STEM industries are already very much affected, and others follow pursuit. Re-skilling and re-tooling are needed. All of this, together with the change in the way the younger generations view personal development, are undeniably making strategic learning and development efforts a crucial priority for any organization that desires to exist also in the future. Figure 6 below visualizes how the megatrends boost the L&D function. As Page-Tickell (2014, 6) describes it, an L&D process and its management are the organization's focused and coordinated response to change.

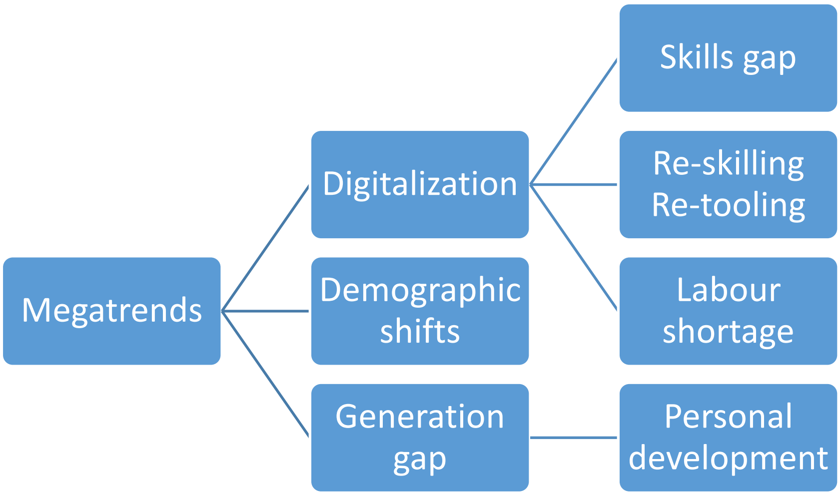

Figure 6: Megatrends boosting L&D

3.4.8 The strategic role of Learning and Development

According to Brassey et al. (2019), the strategic role of the L&D function stretches across the following five areas visualized in figure 7 below:

1. Attract and retain talent:
   Instead of just improving productivity, learning is also about employability these days. Personal and professional growth and development are key as the focus shifts from the employee staying with one employer throughout their professional life to being retained only if they keep delivering value. The lack of proper L&D constitutes a reason to leave a company.

2. Develop people capabilities:
   The Human Capital of an organization requires ongoing investment or otherwise it will quickly become outdated.

3. Create a values-based culture:
   L&D can help with building a values-based culture and creating a sense of community in an increasingly virtual and global workplace.

4. Build an employer brand:
   Investments in L&D can positively affect the employer brand and the reputation of the organization as an "employer of choice."

5. Motivate and engage employees:
   When employees are challenged and given the skills to grow and develop, they are more likely to be satisfied with their current organization, and they will feel motivated and engaged.

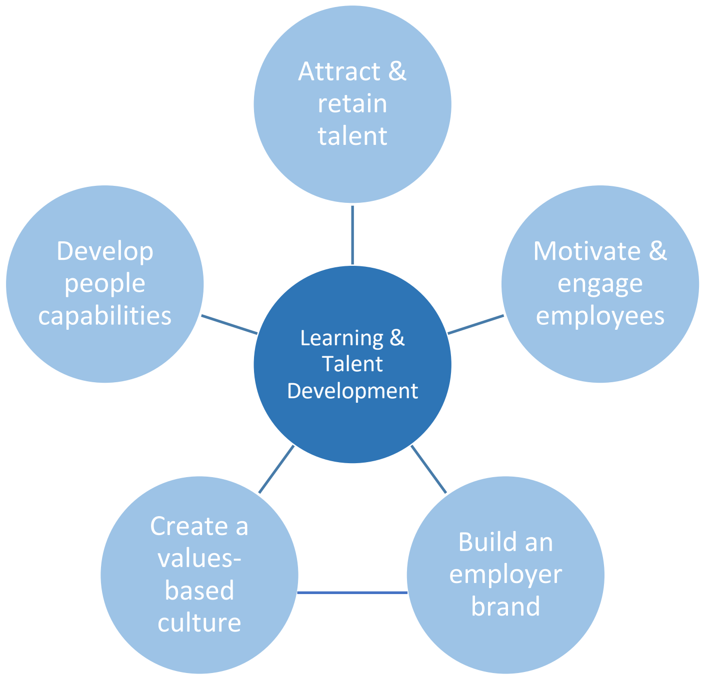

Figure 7: The strategic role of the learning function (adapted from van Dam 2008 in Brassey et al. 2019)

3.4.9 Current trends and priorities in Learning and Development

As Brassey et al (2019) accurately put it, the L&D function of today is fighting two main battles: On one hand, it's trying to meet the changing needs of organizations and continue to excel in upskilling employees, and on the other, it's responding to the growing levels of interest toward professional development. According to the authors, this cannot be done unless L&D leaders take on a broader role and create an ambitious vision their function, and therefore they suggest a comprehensive and coordinated strategy.

Brassey et al. (2019) note that the learning function needs to change rapidly to keep up with the technological advances. The authors put updating training content, focusing on blended learning, and empowering employees to take ownership of their own professional development by introducing e-learning platforms on their to-do list for L&D practitioners. They also note that all this will of course need considerable investment from the organizations and estimate to see a significant rise in L&D budget in the upcoming years.

3.5 Building a strong Learning and Development function

According to Brassey et al. (2019), there are nine dimensions that contribute to a strong L&D function. The authors present their framework titled 'the ACADEMIES framework' based on these dimensions and covering different aspects of L&D functions. Figure 8 below is an adaptation of this framework.

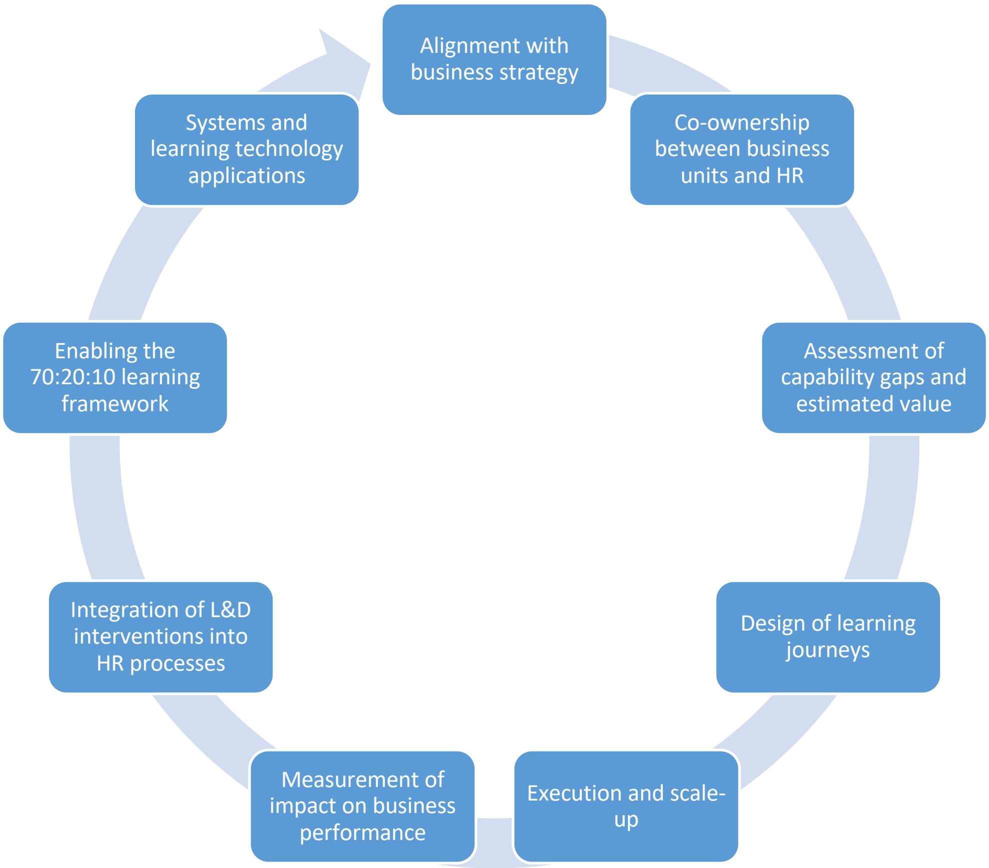

Figure 8: The nine dimensions of a strong Learning and Development function (adapted from Brassey et al. 2019)

Brassey et al. (2019) give the following descriptions for each of the above-mentioned dimension:

1. Alignment with business strategy
   The main goal for L&D is to lead a learning strategy that is based on the overall business strategy and the different talent strategies. L&D supports the achievement of business goals by building capabilities that make it possible to achieve them.

2. Co-ownership between business units and HR
   Shared responsibility for designing and implementing capability-building programs, and for securing the necessary resources for it is key. Commitment from senior leadership will secure systematic implementation of L&D's long-term vision.

3. Assessment of capability gaps and estimated value
   A comprehensive competency model based on business strategy is necessary for evaluating capability gaps that the L&D function will then systematically aim to close.

4. Design of learning journeys
   Learning journeys aim to build employee capability in the most efficient way possible by offering continuous learning opportunities in a diversified manner. In addition to traditional classroom learning, a learning journey can include learning

interventions such as fieldwork, social learning, mentoring and on-the job coaching.

5. Execution and scale-up
   Ongoing discussion between business leadership and L&D is necessary for securing resources and support for L&D initiatives as well as agreeing on priorities. Piloting is a great way to introduce L&D initiatives without big risks. An online orientation program is an example of a costs reducing L&D initiative that can be rolled out for the entire organization after piloting.

6. Measurement of impact on business performance
   The following three KPI's indicate the level of L&D strategy execution and impact: 1) Alignment of L&D investments and initiatives with the business goals 2) the change in people's behavior and performance and 3) the use of L&D investments and resources. Accurate measuring is not simple, but high-performing organizations focus on outcomes-based metrics such as impact on individual performance, employee engagement and team effectiveness.

7. Integration of L&D interventions into HR processes
   L&D is in close connection with HR activities such as recruitment, onboarding, performance management and promotion, and therefore L&D leadership must understand these processes well and collaborate with HR leadership.

8. Enabling of the 70:20:10 learning framework
   Instead of focusing on formal training, L&D must embrace the approach where, for the most part, learning takes place on the job, then through interaction and collaboration with other people, and only lastly through formal learning interventions such as classroom training.

9. Systems and learning technology applications
   Cloud-based platforms provide L&D with unlimited opportunity for fully digital and agile execution of the learning function. L&D practitioners must ensure systems connection and support with entire talent cycle, for example recruitment, onboarding, performance management, career management and rewards.

3.5.1 Plan, act and measure

There is an extensive amount of literature and research around the theory of L&D, and some if it is reviewed in chapter 3.4. However, the most important question for all L&D practitioners is the question of how to do it in practice.

As Page-Tickell (2014, 71) points out, doing L&D in practice differs from other areas of HRM – such as salary and benefits – in the sense that doing it in practice is not guided by any immediate framework – such as legislation – and that it is less immediate in its impact. Therefore, delivering L&D can look very different depending on the organization, and this has its ups and downs: On one hand it allows a lot of room for creativity for the L&D practitioners but on the other hand the lack of guiding framework can make it difficult.

For her target audience, HR and L&D practitioners, Page-Tickell (2014, vi) divides doing L&D in practice into three phases s: 1) Planning 2) Action and 3) Measurement. After completing these three steps, the process can start again based on the insight gained from measuring the effects of the implemented L&D efforts. Figure 9 below visualizes the three phases for doing L&D in practice.

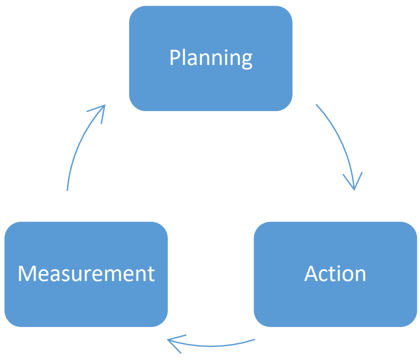

Figure 9: Three phases for doing L&D in practice (adapted from Page-Tickell 2014, vi)

Page-Tickell (2014, 139-140) suggests for L&D practitioner to address the following factors when planning L&D activities:

- Dividing roles and responsibilities between the line managers, HR, CEO, and so on.
- Identifying L&D needs to know what needs to be addressed and planning how to address them.
- Planning how to source the L&D activities, for example using in-house expertise or buying external consulting.
- Planning for the right kind of interventions, for example on-the-job learning or classroom training, self-managed learning, or formal training program.
- Utilizing technology, for example e-learning and blended learning.
- Follow-up and bedding in the skills and competence.

According to Page-Tickell (2014, 183-184), evaluation of the L&D activities is important because it is the way to demonstrate the value that it brings. She suggests that evaluation could answer, for example, the following questions:

- Were there elements in the learning intervention that did not work?
- Was there something that felt effective but did not really have an impact at the workplace?
- Was there something that turned out to be surprisingly effective?
- Was there something that worked for some part of the business or for example some country? Why did it not work for other parts or countries?
- How much did the performance approve as a result of the intervention?
- How sustainable was the rise in performance?

According to Page-Tickell (2014, 183-184), there are two key part to evaluating the effectiveness of L&D: 1) Evaluating the intervention and its effectiveness in enabling employees to build new knowledge, skills, attitudes, and behaviors and 2) evaluating the effectiveness of the learning to the entire organization. Part number one can sometimes be very difficult. For example, there is no explicit way to measure the effectiveness of coaching, since there is such a large number of influencing factors between the parties delivering and receiving it. Part two is key, because even though an intervention might be very effective and well-sourced, it will not deliver value, if the learning is not required. (Page-Tickell 2014, 183-184.)

3.5.2 The five stages of Learning and Development activities

The literature and the research as well as best practices around L&D give some guidance into the tools, techniques, activities, and interventions. For example, Page-Tickell (2014, 107) identifies the following five stages for doing out any L&D activities inside an organization:

1. Identifying the need – Finding out what needs to be developed, what is the order of priority and what areas are more open and receptive to development.
2. Making the case – Forming a clear rationale for the interventions considered best for the most beneficial for the organization in long-term.
3. Sourcing interventions – Deciding what it is exactly that you will do.
4. Follow up – Monitoring the impact of the intervention, adapting if necessary and following up with all parties to ensure transfer of learning. Also keeping management informed and engaged.
5. Evaluation – Quantifying the impact of the intervention to demonstrate its effectiveness and ensure support for future interventions.

However, Page-Tickell (2014, 107-108) points out that doing L&D in practice is a very complex area, and that the different stages take place iteratively and most typically simultaneously. This means that L&D activities on different stages of the before-mentioned process might be ongoing at the same time inside an organization. One department might be working on stage one, while the other one is already on stage five.

Page-Tickell (2014, 108) highlights, that for successful transfer of learning, all L&D activities need to be closely integrated with other HR activities, such as performance management and talent management, and also encourages L&D practitioners to first seek support in their own skills and competence as well as the readiness of their organization before launching any L&D processes. This might include for example studying L&D literature and relying on some external consulting.

3.5.3 Addressing different learning needs

As Page-Tickell suggest in her list in the previous chapter, and also in chapter 3.9, it is important to identify which learning need it is that needs to be addressed. Koskinen (2020, 30) divides different learning needs into three different categories presented in figure 10 below.

Figure 10: Categorization of different learning needs (adapted from Koskinen 2020, 30)

Koskinen (2020, 30) suggests, that the learning and thinking skills in the first category are often forgotten at the workplace because the focus is on developing professional skills and career skills with the hope of creating systematic skills which is the third and last category. However, since the learning and thinking skills are a requirement for any other skills, one can conclude that this very basis for all learning should not be overlooked.

3.5.4 Selecting the appropriate way of learning

Page-Tickell also highlights in her list in the previous chapter, and also in chapter 3.9, the importance of deciding how to address a selected learning need. Koskinen (2020, 34) suggest selecting between the different ways of learning based on the goal for the learning and weather it is the individual or the work community that is learning. Figure 11 below lists different ways of learning based on Koskinen's categorization.

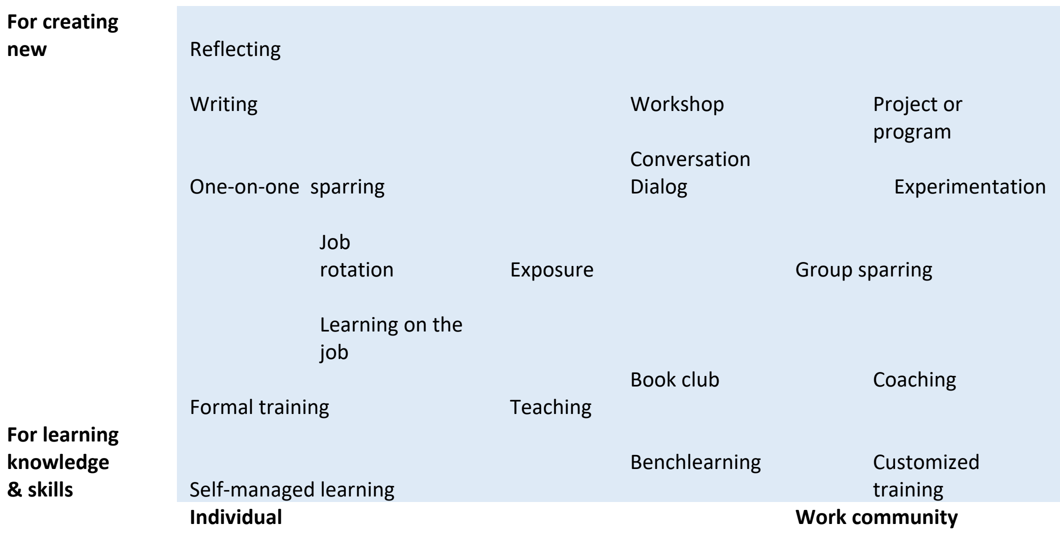

Figure 11: The different ways of learning (adapted from Koskinen 2020, 34)

3.5.5 Investing in onboarding

Onboarding is the start of employee learning journey inside a specific organization. According to Harpelund, Højberg & Nielsen (2019, 9-10), onboarding is "a process that strengthens retention, productivity and engagement". The authors highlight, that onboarding is a means for the new employee to integrate into the organization, as well as to create direction and set expectations. They also separate orientation from onboarding, stating that orientation programs are "processes where a new hire participates in a series of activities with the primary focus to convey information about the organization", and onboarding is much more than that.

Harpelund et al. (2019, 10-13) claim that onboarding is an underdeveloped area of the new hire ecosystem, where recruitment, engagement, performance, and reputation are more looked after. According to the authors, this misbalance is a costly mistake that the organizations make as it results in new hires leaving their jobs. They predict the uprise of onboarding simply because it is good business sense and estimate it to reach a similar status as recruitment has – that of a key HR process. Figure 12 below describes the onboarding ecosystem.

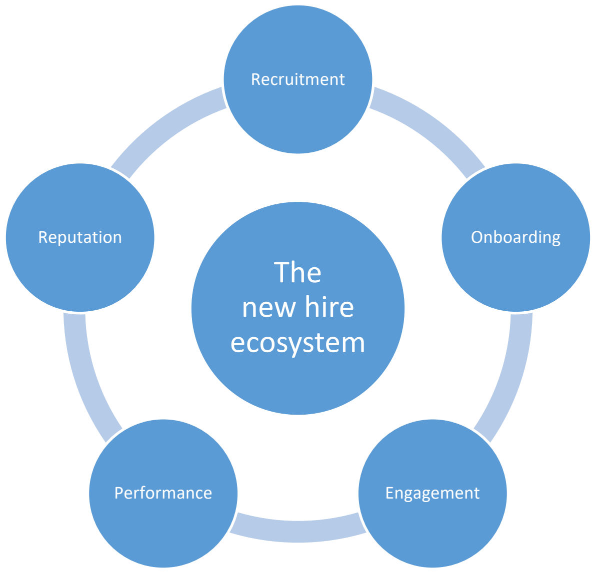

Figure 12: The onboarding ecosystem (adapted from Harpelund et al. 2019, 11)

Harpelund et al. (2019, 9-10) conclude that onboarding is all about emotions and creating a feeling of belonging i.e., starting the process of organizational socialization. Existing studies point to the following key emotions:

- Feeling of understanding and fitting into the organizational culture.
- Feeling of knowing people.
- Feeling of being able to perform according to set expectations.
- Feeling of being able to do one's work without too many mistakes.
- Feeling of working towards a common goal.
- Feeling of contributing to the organization.

(Harpelund et al. 2019, 49)

Harpelund et al. (2019, 50) summarize, that the key to good onboarding lies in the psychology of it. The authors have established a starting point for systematic and structured onboarding which they call 'the three tracks': These three tracks are three processes that the new hire goes through regardless of the details of the onboarding program. The first track, titled 'the forming track', is about integrating the new hire into the culture of the organization, and vice versa. The second track, titled 'the connecting track', is about connecting the employee with other members of the organization. Track number three, 'the unfolding track', is about finding ways for the employee to use their skills and deliver value. (Harpelund et al. 2019, 50-51.)

In addition to delivering a good onboarding experience for new hires, onboarding should support business needs behind recruitment and enhance engagement and retention. Determining onboarding ambitions is usually done through workshops with relevant managers and onboarding personnel using feedback from new hires and evaluation of current onboarding. (Harpelund et al. 2019, 180-181.)

Harpelund et al. (2019, 182-183) list five types of onboarding activities:

1. welcome activities (meeting the new team member)
2. information activities (supplying them with information)
3. learning activities (acquiring competence)
4. support activities (standing by and being ready to support the new hire) and
5. output activities (delivering or achieving something).

The above-mentioned list a highlight the important notion, that even though onboarding is an important are of L&D, it is also about many other things, and not just learning. One could argue that onboarding overlaps with L&D, not entirely fitting inside it. The combining element for L&D (or more specifically for individual learning) and onboarding is the holy trinity of performance management, employee experience and retention, as they both deal with these three aspects. Figure 13 below describes onboarding as an emotional process.

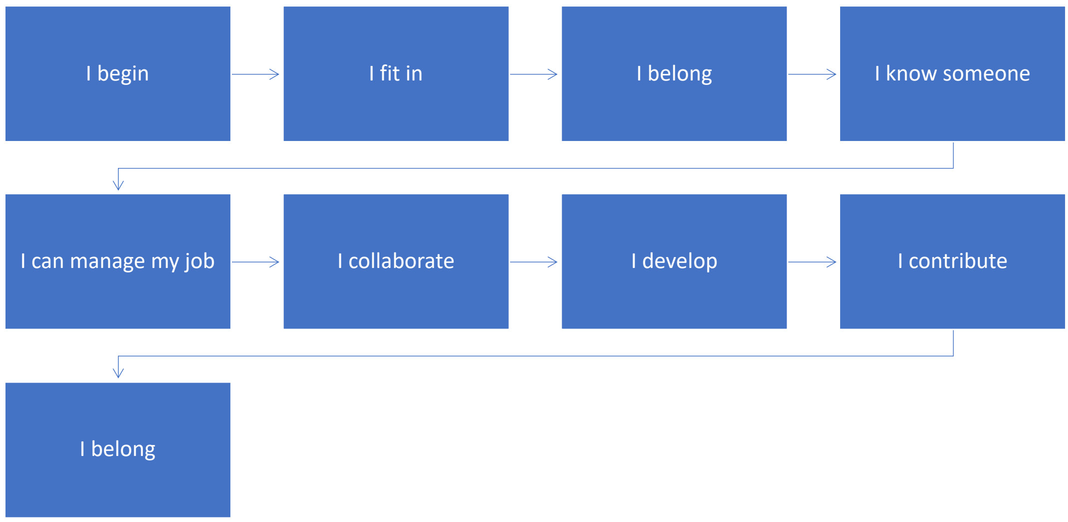

Figure 13: Onboarding as an emotional process (adapted from Harpelund et al. 50)

3.5.6 Designing learning solutions

Parry-Slater (2021, 242, 257) introduces a high level, overarching framework for developing learning solutions for business environments, titled ‘the 3Rs, which consists of the following three components:

1. Required – the minimum that a learner need to solve their problem, reach necessary capability, pass a qualification, or address any other driving need for the learning.
2. Resourced – the additional assets and resources to promote wide thinking and learning, preferably while the learner is doing their job.
3. Referred – the things to be shared with the learner’s learning community to challenge thinking and promote a genuine learning culture.

Not to miss the opportunity to improve, Parry-Slater adds a fourth component of reflection to her model (2021, 261) and encourages practitioners to personally reflect during the development process as well as encourage learners to reflect as well. While Parry-Slater acknowledges that some learners will only engage in passing a test, she advocates for a community-based, holistic, and whole framework learning.

For designing these kinds of strategies, Armstrong (2020, 240) suggests the following building blocks, that will act as a good guideline also for this thesis:

- A structure to identify learning needs (for example a systematic program).
- Understanding of the different ways that people learn.
- Understanding that most of the learning happens on the job and needs to be encouraged, and that training has only a complimentary role in learning.

Blended learning i.e., mixing different ways of learning will help get the best results.

Thanks to digitalization, e-learning was already a thing before the pandemic, but now, as all the world has gone maybe from 10 % online to 100 % online, e-learning, and digital LXP's are absolutely the way to go for any organization. It is fair to say, that the pandemic has boosted the e-learning industry quite a bit. Making L&D digital also means making L&D more accessible and inclusive: it can be made available for anyone, anywhere in the word, at any time. (Go1 2020.)

3.6 Case examples for modern Learning and Development in practice

Chapter 3.5 presented the theory around doing L&D in practice, and in this chapter the topic is looked at from the perspective of some real-life examples. Different ways of practicing L&D are presented from a global corporation in the manufacturing economy to a Finnish-born SME in the technology industry.

3.6.1 Creating transparency on career opportunities – case BMW

A global talent trends study report by Mercer (2021, 60) lists four trends guiding companies' talent and workplace strategies now and in the near future:

- Focus on futures – Making it priority to ensure that people can excel in their work now and later.
- Race to reskill – Transforming the workforce for the fourth industrial revolution.
- Sense with science – Taking advantage of AI and supplementing it with human intuition.
- Energize the experience – Redeciding the whole experience of work for added inspiration and engagement.

Overall, the study report puts great emphasis on L&D, as the above-mentioned trends imply. According to the report (Mercer 2021, 16), talent practices need to be radically redesigned to keep up with the rapidly changing business environment that requires talent to move quickly from existing opportunities to new ones as they emerge. Mercer's report calls for proactive action on the disruption that we recognize, and thus 'fluid talent structures'.

The report also digs a bit deeper addressing the two core areas of this thesis, individual learning and the designing of learning programs, by suggesting that organizations should "enable employees to see shared futures" (Mercer 2021, 16). The report calls for career management that connects the employee's talent plans with the overall business plans and suggest that co-creating careers not only conveys shared futures but also creates them. However real-life examples often tell another story: The link between these career plan and business plan is often missing or not strong enough.

The report gives great insight into real-life career management by providing an example from the automotive industry and BMW where technological advances are a major disruptor along with 3D printing and robotics, and thus, a major driver for transformation. The challenge is the same as for many other industries as well: How can the organization attract, motivate, and retain people with digital dexterity. (Mercer 2021, 17.)

The solution that BMW came up with is anything but original as they decided to address the challenge by offering compelling career paths to people. However, what makes BMW's approach exceptional is this:

- They make it transparent and employee-centric – BMW aims to create transparency and visibility around opportunities and thus help employees take responsibility for their own development. Career paths are available for everyone, and everyone is allocated to a job architecture.
- They offer high-rated opportunity also outside the traditional people-leader role – The 'expert path' is a flexible alternative, and people can even shift between these two.
- They communicate about it – BMW has invested in making sure that all paths are equal in the eyes of the employees and prospects, and thus promoted the available opportunities.
- They aim for consistency – BMW plans to make the new architecture the backbone of core HR processes such as recruitment, performance management and L&D.

(Mercer 2021, 17)

3.6.2 Competency management in a self-managing organization – Case Vincit

Vincit Plc is a Tampere based company in the software development industry. For 2020 total turnover for Vincit was 45,6 million euros and it employed 343 people (Kauppalehti

Oy 2021). Leadership at Vincit it not based on traditional methods and beliefs as it gives its employees full freedom and responsibility for their work. At Vincit, there is only one goal: Happy employees and happy customers. Traditional managerial responsibilities have been decentralized to teams, and team are themselves responsible for sufficient competence level. Trust and daring are at the core of Vincit's human-centric culture. (Luukka 2020; Remes 2016; Tampereen korkeakoulut 2020.)

To put it the organizational and HRM terms, the company is a firm believer in self-management (itseohjautuvuus) i.e., people's ability to manage themselves. At Vincit, people are guided by the principles of co-management (yhteisöohjautuvuus), and the selected way of organizing for the company is self-organizing (itseorganisoituminen). (Launonen, Koistinen & Mäkkeli 2020, 31; Martela 2020, 22.)

Ongoing L&D is priority at Vincit. Competence development is backed up with knowledge, as Vincit believes that understanding the relevance of one's own skills and competence level is a major source of motivation for self-development. At Vincit, the employer has the responsibility to enable employee growth but not to the level of holding hands. (Tampereen korkeakoulut 2020.)

The LaaS (Leadership as a Service) model is service for leadership based on self-management that Vincit first developed for their internal use. Instead of trying to guess what their employees need to help them perform well, they decided to ask them. Top leadership at Vincit had a revelation that if people are self-managing, then they are also capable of leading themselves and pick whatever manager services they feel they need. And so Vincit created an environment that makes self-management easy. (Otala 2018, 262.) Today, the LaaS service is being sold and developed through its own spin-off company.

Vincit leads its strategic skills and competencies (strategiset osaamiset) using the LaaS model. At Vincit, it is both a structure for competency management as well as a competency management system. For Vincit's competency management, LaaS is used as a tool for gathering data on in-house competence (via for example surveys), and for visualizing that data. LaaS is also a tool for promoting competence development services available at Vincit. (Pystynen 2021.) To conclude, with the help of the LaaS-tool, Vincit has visibility into the existing skills and competencies inside the company, and the level of it.

As a first step of the competency management process at Vincit, the executive team at Vincit defines a framework and a direction for the management of strategic competencies (strategisten osaamisten johtamiselle). In other words, it determines what kind of competence is needed and why. Next, the experts at Vincit – the employees – define the requires skills and competencies for each role. The following step is crucial: Feedback is gathered for these definitions to include also the relevancy level of each skill and competence as well as the level of interest to obtain it among current employees. Public speaking skills might be required for a software developer but relevancy for it might not be that high. And it might turn out that none of the software engineers are interested in enhancing their public speaking skills. This information would then be used to guide the recruitment of new team members. As a final step of the process, team Vincit would put their heads together to figure out how to gain the business-critical competence needed.

At Vincit, the team comes before the individual, and this applies to learning as well. Whatever skill or competence the team needs is a priority over the personal growth of an individual. At the individual level, the process described above would result into a personal development plan. And at the team level, into discussions about the team strengths and skills gaps, teamwork planning, discussion around motivation, retros, and so on. At the unit level, it would spark dialog about the future direction of the unit, a shared understanding of the common goals and for example a need to recruit new team members. For HR, the process acts as a model for ongoing learning and development and the possibility to target individual support. For the executive team, the process gives insight into what kind of competence Vincit has and what kind of competence might be needed down the line. (Pystynen 2021.)

To facilitate the growth of each employee, Vincit has established an internal L&D unit called Univincity. The learning offerings, described below in figure 14, are impressive, considering the size of the company, and vary from hard skills to soft skills and from formal to informal. They include study groups, formal training, level-up training, support for self-managed learning, mentoring programs, trainee programs, onboarding, and non-conference. Since L&D is approached from a very holistic perspective at Vincit, it is possible for the employee to even get compensated for L&D activities performed during their free time.

Figure 14: Learning offerings at Univincity (Isohanni 2020)

3.6.3 A framework for company-wide knowledge sharing – Case Silo AI

Silo AI Ltd is a Helsinki based company in the software development industry. For 2020 total turnover for Silo AI was 5,9 million euros and it employed 70 people. (Suomen Asiakastieto Oy 2021) L&D is high rated at Silo AI, as the company values demonstrate: Keep learning is one the four core values. Continuous development of AI competence around areas such as computer vision, machine learning and NLP are at the heart of L&D at Silo AI. (Silo AI 2021, 9.)

To facilitate internal knowledge sharing, Silo AI has created a framework that they call ‘the Learning Lab’. It consists of four different areas: 1) Research 2) Workshops for soft and hard skills 3) On-demand talent coaching and 4) Business and projects, which uses all-hands meetings and the internal newsletter as media. (Silo AI 2021, 23.) Figure 15 below is an overview of the Silo AI Learning Lab framework.

SILO LEARNING LAB
wiki.silo.ai/learninglab

	WHAT?	WHY?	HOW?
RESEARCH	Research Club	Sharing academic research topics and papers	When: Approx twice a month, on Fridays Where: Google Meet, calendar invite Who runs: Kaj-Mikael Björk
WORKSHOPS	Training on 'hard skills' Various topics	Professional development, competence sharing	When: Approx every other month Where: Google Meet, calendar invite Who runs: Silo people or external experts
	Training on 'soft skills' Various topics	People skills development, personal growth, wellbeing	When: Approx every other month Where: Google Meet, calendar invite Who runs: Silo people or external trainers
ON-DEMAND SESSIONS	Talent Coaching	Personal development and growth plans	When: On-demand, whenever needed Where: F2F or Google Meet, book via Google Form Who runs: Site Leads (experts), Tuuli Suominen (ops)
BUSINESS & PROJECTS	All-Hands	Information sharing on business, projects and AI topics in general	When: Every Friday Where: Google Meet, calendar invite Who runs: Different presenters (Tuuli hosts)
	Silo Insider	Business and people updates	When: Once a week Where: Email newsletter Who runs: Tuuli Suominen
SELF-LEARNING	Self-development benefit	Individual learning interests	What: Allocated time & budget for self-learning When: When not fully occupied in a client project Details in wiki.silo.ai/payroll-and-benefits

Figure 15: Silo AI Learning Lab framework (Silo AI 2021, 23)

3.7 Flowhaven business landscape

Flowhaven's product ('the Flowhaven platform') is a brand licensing management platform (LRM) which enables licensing professionals to automate every phase of the brand licensing workflow process providing a single solution for planning and strategy, account and agreement management, content distribution, design approvals, royalty reporting etc. The product is built on Salesforce, the leading customer relationship management (CRM) platform. Flowhaven enables licensing professionals to automate every phase of the brand licensing workflow process within a single solution, including planning and strategy, account and agreement management, content distribution, design approvals, royalty reporting and more. (Flowhaven 2021a.)

The fact that the Flowhaven product is built on Salesforce platform, sets a requirement for Flowhaven talent management: Thorough knowledge of this technology is needed. If the talent does not have previous experience of operating a platform built on Salesforce, then this knowledge will have to be gained through an internal learning program. This sets one fundamental element to learning at Flowhaven.

In simplified terms, brand licensing is a form of 'renting' out well-known brands to use them for another company's product. An example could be the clothing company H&M using toy manufacturer Mattel's Barbie doll -brand on their t-shirts. In 2020, the industry reached almost 300 billion dollars globally (Informa Markets 2021). Flowhaven is a market leader in the industry with a number of Fortune 100 companies as customers and a list of the most prominent brands and agencies globally, including Nintendo, LAIKA and Rovio (Cicion Distribution 2021, Flowhaven 2021a).

One of the key business roles at Flowhaven is the Customer Success Manager (CSM) role. CSMs are account managers, focused on supporting sales and managing the post-sale client integration and onboarding processes, developing customer relationships through weekly calls and meetings, learning to know the customers' business practices and workflows and identifying how the Flowhaven solution may deliver operational efficiencies. (Flowhaven 2021b). Customer Success is a term often used to describe Account Management in organizations.

4 Methodology

Empirical information is knowledge gathered either through observation, experience or experiment, and the gathering of such information is often referred to as either scientific or **social scientific research**. Scientific often refers to research applied to physical areas, such as chemistry or biology whereas social scientific refers to the study of people and their interaction with environments in areas such as psychology and sociology. Scientific studies are often performed in highly controlled and laboratory-like environments, whereas social scientific research is more often carried out in real-life environments with the aim of observing events as they naturally unfold. (Lapan, Quartaroli & Riemer 2011, chapter 1.)

Whereas quantitative research aims to remain independent from the research subject to generalize the findings, **qualitative research** immerses the researcher and view meaning as something context- and time specific, and often ungeneralizable. Qualitative research emphasizes the insider perspective of the object of the study and uses interpretive frameworks. The qualitative methodologies must remain open to change during investigations given the view that reality is complicated and socially constructed. The research work in this thesis belongs to the area of social science and will be carried out using qualitative research methodologies i.e., designs and frameworks used in investigations. (Lapan et al. 2011, chapter 1.)

From the main **paradigmatic choices** or research perspectives held by qualitative researchers, this thesis holds the **perspective of interpretivist** over the critical which focuses on the ways that power is embedded in society or the positivist which is driven by theory. Interpretive researchers take the assumption that there is no single "true" and shared reality because everything is interpretation: people form their own reality in interaction with the world around them. And this notion applies to the researcher themselves also, and therefore the effect of the researcher on the research itself is acknowledged. Interpretive researchers ask open questions allowing even new questions to emerge as they seek to understand the phenomena through understanding the meaning and the value that the research participants give to it. (Lapan et al. 2011, chapters 1 & 4.)

4.1 Strategic approach

The selected research approach (or research strategy) is **service design** which is traditionally known as a customer-oriented approach for product and service development. According to Lawrence, Hormess, Schneider & Stickdorn (2019, chapter 1), service design is a highly collaborative and pragmatic approach to innovative improvement, and is characterized by the following features:

- It can be applied to both physical as well as digital products and intangible services.
- It is increasingly adopted by organizations as connected with business success and shorter and cheaper projects.
- By offering a common language, it allows cross-silo collaboration.
- Is also referred to as design thinking and draws from the same principles as Agile and Lean processes.
- Is most commonly known as a workshop format but is actually a project management and a leadership method.
- Uses research as aims to thoroughly understand the problem before trying to come up with answers.
- Focuses on lightweight methods for idea generation and selection to decide what solution to try next.
- Involves a lot of iterating and prototyping that allow progressing with low risk.
- Also considers implementation of the new product or service, and by principle, the future iteration.

(Lawrence et al. 2019, chapter 1.)

According to Lawrence et al. (2019, chapter 2) and Stickdorn Hormess, Lawrence & Schneider (2018a, chapter 2), service design can be defined in many different ways, for example as a mindset, a process or a tool. For this thesis, service design is first and foremost a process but also a mindset and a tool. In the service design process solutions are built through iterative cycles of research and development. These iterative cycles are characterized by early user feedback, early prototyping, and early experimenting, and the iteration never ends – the prototypes just develop into pilots and the pilots develop into implementation. (Lawrence et al. 2019, chapter 2.)

However, the service design process requires a service design mindset to drive it. According to Lawrence et al. (2019, chapter 2), this mindset is a collection of attitudes determining how we respond to different situations. A person or a team with this mindset puts users first, wants to put assumptions to the test, and tackle endless flow of discussion and opinions with prototype testing and does not consider anything finished until it has been implemented. Instead of stopping at implementation they will already be gathering new insight to start the next round of iteration. Service design mindset is pragmatic, co-creative and hands-on. (Lawrence et al. 2019, chapter 2.)

Lawrence et al. (2019, chapter 2) use a customer journey map – or even simply just some sticky notes on the wall – as a common idea of service design as a tool, toolset or a template. They note that if used well, these kinds of tools can indeed create common understanding, help explicit knowledge and opinions, or spark meaningful discussions. However, they are not enough on their own and need to be combined with service design thinking and process, to produce high quality results. (Lawrence et al. 2019, chapter 2.)

There are four main areas of application for the activities of service design: research, ideation, prototyping, and implementation. Research is used to "understand people and their behavior in relation to a service or product" allowing the designing team build genuine understanding of the customers problems by empathizing with them. The design work is labeled with a human-centric approach and can also include people from the research phase to ideate or prototype concepts. (Lawrence et al. 2019, chapter 2.)

Since the aim for the development work carried out in this thesis is to design new processes and structures in collaborative and pragmatic manner, together with the commissioning party and the end users (Flowhaven employees), service design approach is a justified and sensible choice for the research strategy of this thesis.

4.2 Design of the development work

The core of the development work in this thesis is collaborative iteration of pre-built prototypes of the outcome items presented in detail in chapter 2.1. However, the first and very important step of the development work is to explicitly define the problem to be addressed and the outcomes to be achieved with this project. Because this project is carried out as a commission and using the service design approach, determining the above-mentioned information is done in collaboration between the commissioning party and the author. Figure 16 below visualizes the design of the development work in this thesis.

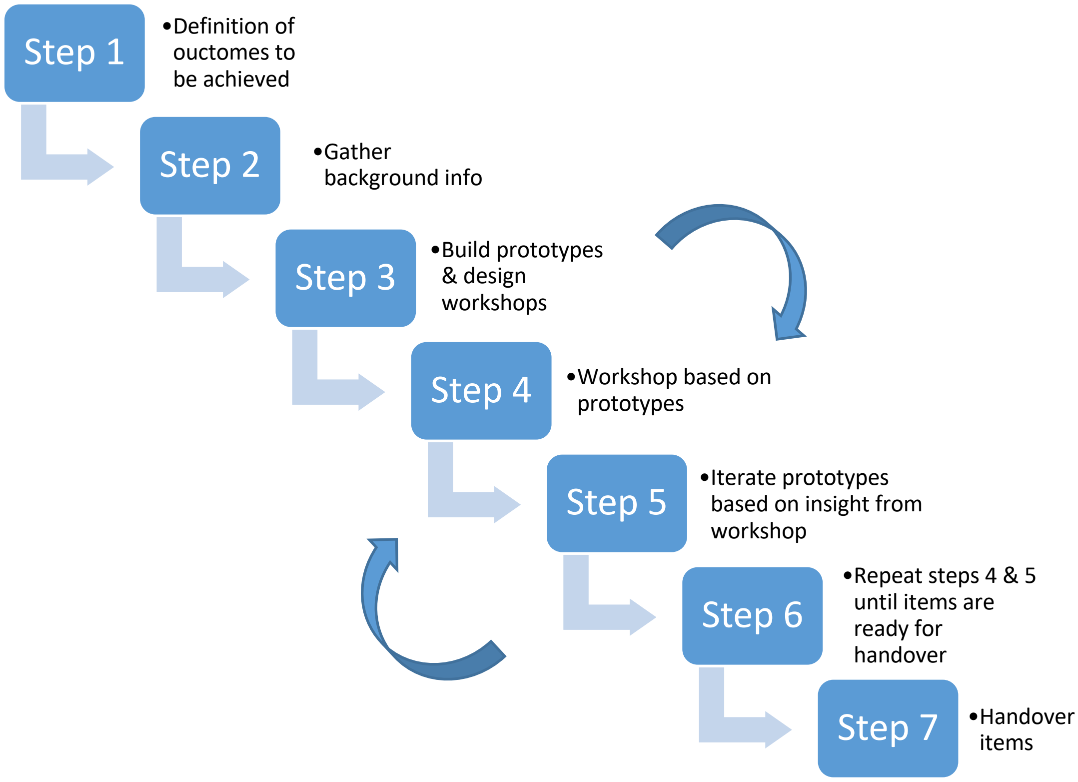

Figure 16: Design of the development work

4.3 Methods for data collection and analysis

Research method refers to **the tools used to collect data**. (Lapan et al. 2011, chapter 1) According to Lapan et al. (2011, chapter 4), the primary means of qualitative data collection **at the individual level** include interviews and observations. To identify differences and similarities across respondents it is necessary to gather these interviews from more than one participant. The primary data collection tools also at **the cultural level** are observations and interviewing - the building blocks of qualitative data collection. At the cultural level, qualitative researchers try to obtain data on community- or systems-level phenomena such as activities in which majority of the people in this community participate. (Lapan et al. 2011, chapter 4.)

As highlighted in chapter 4.2, service design is highly collaborative approach, and requires collaborative methods in addition to the traditional methods mentioned above. As it often is with service design, research and development in this thesis are so closely intertwined, that it is impossible to always make a clear distinction between the two. For example, during collaborative workshops data is collected and analyzed simultaneously as workshop participants share their feedback and the prototypes are iterated in a collaborative way right then and there.

However, some distinctions can be made. Stickdorn, Hormess, Lawrence & Schneider (2018b, chapter 1), list the methods of data collection in service design and divide them into the following five categories:

- Desk research
    - Preparatory research
    - Secondary research
- Self-ethnographic approaches
    - Autoethnography
    - Online ethnography
- Participant approaches
    - Participant observation
    - Contextual interviews
    - In-depth interviews
    - Focus groups
    - Non-participant approaches
- Non-participant observation
    - Mobile ethnography
    - Cultural probes
- Co-creative workshops
    - Creating personas
    - Journey mapping
    - System mapping

Stickdorn et al. (2018b, chapter 1) note that the categorization is not based on any academic standard and that there are numerous variations when it comes to naming each method. They also conclude that boundaries between different categories are fluid and suggest that the researcher use at least one method from each category to ensure sufficient method triangulation.

Stickdorn et al. (2018b, chapter 1), present another list for the methods of data visualization, synthetization, and analyzation (or 'sensemaking') in service design:

- Building a research wall
- Creating personas
- Mapping journeys
- Mapping systems
- Developing key insights
- Generating jobs-to-be-done insights
- Writing user stories
- Compiling research reports

Again, the authors highlight that the list is not complete but merely a brief overview (Stickdorn et al. 2018b, chapter 1). Stickdorn et al. (2018a, chapter 5) offer the following definitions for the different methods:

- Contextual interviews are interviews with employees, or any other relevant stakeholders in a situational context relevant to the research question.
- Preparatory research often includes digging deeper into an industry, an organization, similar products, etc., and the client's perspective of what the research problem is, their context, perceptions, internal conflicts, and so on.
- Focus groups is a method in which a researcher invites a group of people and asks them questions on for example specific products, services, or concepts.
- Creating personas means creating a description of a specific fictional person as an archetype to exemplify a group of people, such as a group of employees.
- Mapping journeys is visualizing specific experiences of a main actor (often a persona).
- Mapping systems is visualizing the ecosystem around services and physical or digital products.

The methods described in both of the lists above correspond well with the methods used in the research work for this thesis. The data collection and analysis methods used for this thesis are listed in detail in appendix 1 and the above-mentioned categorization by Stickdorn et al. has been implemented into this listing.

Each method for data collection and analysis will be further examined in chapter 5, Implementation and outcomes. Table 1 below is a brief summary of appendix 1 and presents the data collection and analysis methods used in this thesis.

Table 1: Summary of data collection and analysis methods

Category for data collection method	**Method for data collection**	**Primary method for sensemaking**	**Expected output**
Participant approaches	Contextual interviews	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes
Desk research	Preparatory research	Compiling research reports	Text
Desk research	Preparatory research	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes
Participant approaches	Focus groups	Writing user stories	Text, mind maps, first draft of prototypes

Desk research	Preparatory research	Creating personas Mapping journeys Mapping systems	Text, mind maps, first draft of prototypes
Co-creative workshops	Creating personas Mapping journeys Mapping systems	Creating personas Mapping journeys Mapping systems	Text, mind maps, first draft of prototypes

Table 1 supports the above-mentioned view that with service design it is not always possible, or sensible, to separate data collection method form analysis method. For example, mapping journeys can be both a data collection as well as a data analysis method. In this thesis, it is used as a data analysis method when designing the initial prototypes for workshopping, and then as a data collection method when workshopping and collaboratively ideating and iterating the prototypes.

4.4 Method for collecting feedback

When using the service design approach, not only data collection and analysis are intertwined but also feedback. The collaborative approach allows for constant and timely feedback that can be implemented immediately. For example, when developing an artifact through workshopping and using a prototype as the basis for the workshop, the workshop participants deliver their feedback and ideas while workshopping and iterating the prototype. This way feedback is given and implemented although the workshop. For the project in question, co-creative workshopping together with the representatives of the commissioning party allows for this form of feedback giving.

Due to the fact the project is commissioned, is decision-making related to the outcome items also serves as an important form of feedback. The commissioning party's mentor will guide the project through weekly status update meetings with the author and provide their feedback on steps taken as well as next steps. This way, the commissioning party has a visibility into the turns and developments of the project, as well as opportunity to frequent feedback giving.

Third form of feedback giving is the feedback collected from end uses after launching the outcome items. This feedback will serve as the basis of continuous iteration after launch and will add another layer of collaboration into the already collaborative and human-centered approach for developing L&D related or any other HR processes.

5 Implementation and outcomes

This project started with the search for a commissioning party and thesis topic without a specific organization or a SHRM topic in mind. The high-level topic for the thesis – L&D – was easily decided already within the first discussions between the author and the commissioning party. The final scope for the thesis were decided after some follow-up discussions. Figure 17 below visualizes the research process that will be presented in detail in this chapter.

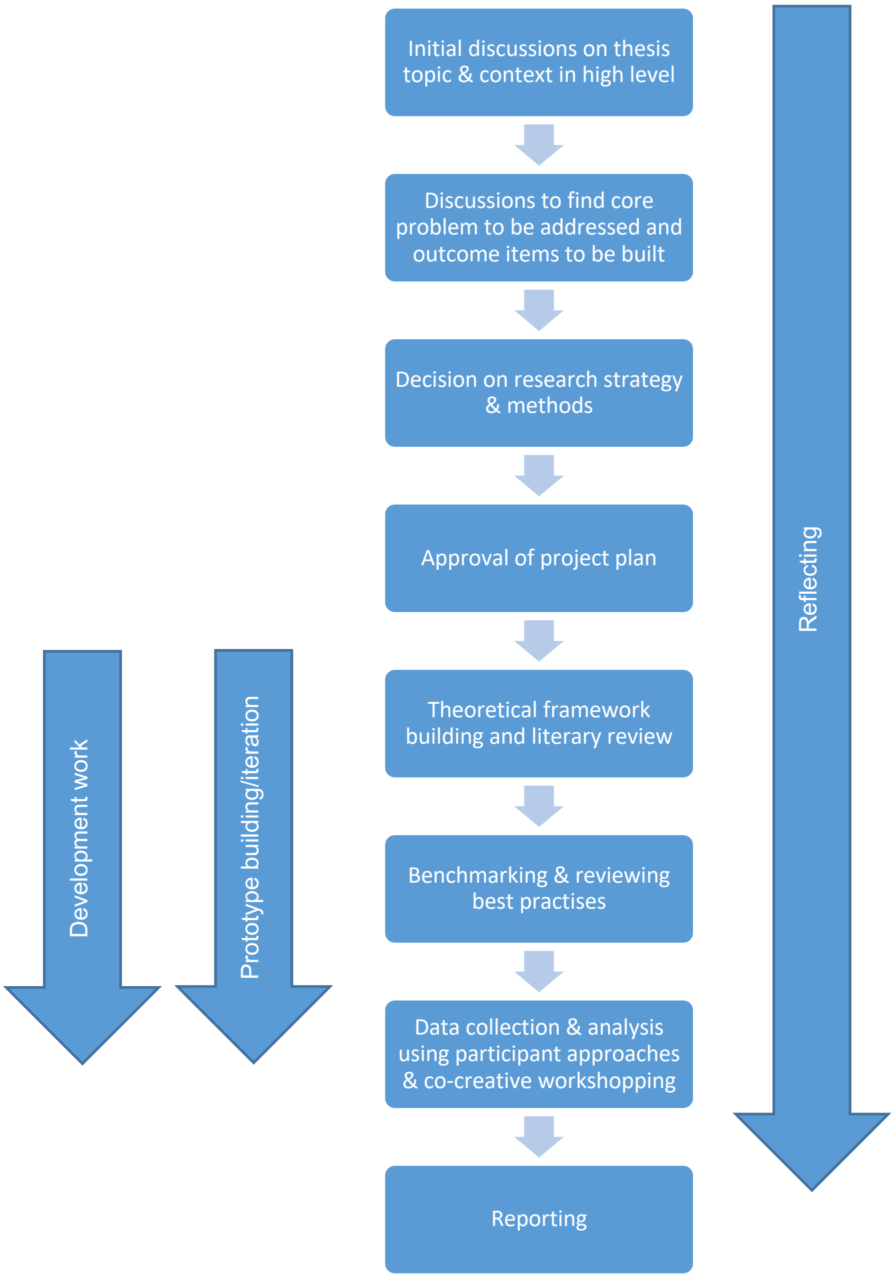

Figure 17: Description of the research process

5.1 Description of the data collected and data analysis

Contextual interviews were first used for gaining basic understanding of the current status of commissioning company, specifically on existing SHRM structures. These loosely structured interviews were conducted between the author and the HR & Administrative Director at Flowhaven with the purpose of sharing knowledge about company and team, company goals, leadership philosophy, competence building, learning needs, existing SHRM structures, etc. and to provide the author a basic understanding the current status of commissioning company in relation to the context of this thesis. A list of discussion topics can be found in appendix 2.

Contextual interviews were also used for gaining basic understanding of the current status of learning inside Flowhaven. These interviews as well were also loosely structured, and also served as introductory meetings between the author and the Customer Success team members relevant to the project. The author had individual meetings with the CS Lead, as well as the two CS Team Leads at Flowhaven, to present the project, generate understanding of current status of learning inside the CS team, to and to gather CS team's view on the goal and outcomes for this project as well as ideas for the development work. Agenda for these meetings can be found in appendix 3.

The data collected includes interview notes, and the primary method for data analysis for these interviews was to generate ideas about the end goals and end products for this project, generate ideas about the tasks at hand and start drafting the first versions of the porotypes.

This knowledge sharing via interviews was supported by a lot of internal documentation that was shared with the author, such as materials concerning existing HR processes and practices, existing onboarding plan and training material for CS and access to Flowhaven intranet. The author made notes of the interviews, studied the internal documentation, and raised follow up questions to create an overall understanding of the current situation. The primary data analysis method for all the interviews was to generate ideas about the end goals and end products for this project, generate ideas about the tasks at hand and start drafting the first versions of the porotypes presented later in this chapter, for example the learning path.

Preparatory research was first used as a method for data collection for gaining knowledge and understanding of L&D in the organizational context, and in practice, specifically on individual learning and designing learning interventions. Related literature and research were studied to gain basic understanding of the theory of L&D, as well as best practices.

The primary method for data analysis here was the compiling of this thesis report, especially writing chapter 3, Theoretical framework.

Data for the preparative research was also collected by studying the information found in HR and L&D focused networks, for example ‘HR ammattilaiset Suomi’ and ‘Learning at Work Finland’ Facebook groups. These groups provided some insight into how Finnish HR professionals and L&D practitioners approach L&D in practice and what kind of solutions their organizations have built or are building around L&D.

With the help of these networks, it was possible to do some benchmarking via studying real-life examples. One of these examples is presented in chapter 3.6.3. The networks also provided a possibility to connect with other L&D practitioners in person to discuss the L&D efforts of their organization in more detail, and to ask follow-up questions about the information shared within the network.

Preparatory research was used also for data collection to gain basic understanding of the current status of learning inside Flowhaven Customer Success team and to gather ideas for the development work. Data was collected by reviewing the existing material concerning L&D inside Flowhaven CS team. This material included the current onboarding plan and current training material (recorded sessions, documents, discussions on intranet and a learning platform for Flowhaven product). The data was analyzed by reviewing it against theory, best practices, and benchmark information to generate jobs-to-be-done insights. The main output for the data collection and analysis were drafts for prototypes.

For the third time, preparatory research was used for data collection on carrying out the development work i.e., designing the co-creative workshops and building prototypes of the expected outcome items (listed in chapter 2.1). As a method of data analysis, employee personas and journeys were drafted, and processes mapped around HR and L&D producing output such as mind maps and drafts or prototypes and process descriptions.

Also, a form of focus groups was used for data collection to gain basic understanding of the current status of learning inside Flowhaven Customer Success team and for gathering ideas for the development work. Selected members of the CS team were interviewed to gather end-user feedback about the existing onboarding practices as well as development ideas.

Four separate loosely structured interviews were conducted with four recent new joiners from the CS team: Three CS Specialists and one CS Manager. The interviewed team members had 6-9 months of experience of working at Flowhaven. A list of interview questions can be found in appendix 4.

The primary data analysis methods for the focus group interviews were transcribing interview notes, creating a summary of the interview results and drafting user stories (or in this case ‘employee stories’) to help build the learning path prototypes.

As can been seen from appendix 1, data collection and analysis for the development work in this project was conducted alternating between designing the co-creative workshops and building prototypes (preparatory research), and co-creative workshopping to ideate and build ready-to-launch outcome items based on the prototypes (creating employee personas, mapping employee journeys and mapping HR & L&D processes).

Altogether three workshops were designed and conducted during the project, duration alternating between 1,5 to 2 hours at a time. The workshop participants included the HR & Administrative Director, the HR & Recruitment Specialist, the CS Lead, the two CS Team Leads and one person from Flowhaven Sales responsible for developing L&D efforts for their team. This list of people is referred to as the project team later in the report. Agenda for each workshop can be found in appendix 6.

5.2 Answers to research questions

RQ1: What is the current status of Flowhaven regarding kick-starting strategic L&D efforts? For example, the status of HR philosophy, HR system, HR resources and HR activities.

Based on the data analysis, HR has a very proactive and important role within Flowhaven, and it is concluded that Flowhaven’s approach to HRM is that of the RBV presented in chapter 3.1.1: Competitive advantage can only be achieved through internal resources, and the resources are a source of sustained competitive advantage, because they are valuable, rare, hard to imitate and hard to substitute.

Based on the data gathered from the interviews conducted with the HR & Admin Director, and preparative research that included an overview of the internal material, it is concluded that Flowhaven has taken a strategic, integrated, and coherent approach to HR, and thus is practicing HRM as defined in chapter 3.1.2. It is further concluded that there is a strong link between HR operations and overall business strategy, and therefore it is justified to say that Flowhaven is practicing SHRM as defined in the before mentioned chapter. The before-mentioned is supported by following observations:

- Leadership philosophy at Flowhaven is very human-centric and recognizes the fact that employees are its greatest asset.
- Systematic effort is being placed on leadership and management training to deliver a coherent employee experience when it comes to leading people.

- Even though the company is very young and employs under 100 people, there is already a very business-led and systematic approach to developing HR operations.
- HR operations, processes and practices are built to support the achievement of business targets.
- HR operations, processes and practices are built and developed to form a coherent and integrated entity reflecting the leadership philosophy and the desired company culture.
- Approach to developing HR operations, processes and practices is agile and thus allows constant iteration as the business strategy evolves.

Based on the data analysis, it is also concluded, that Flowhaven HR operations have not yet evolved from SHRM into HCM as defined in chapter 3.1.3., as could be expected from a company that has existed less than five years. However, a key next step towards HCM can already be in sight by investing in building some people analytics.

From the data analysis, it is also concluded, that Flowhaven HR operations are well on their way from the third wave to the fourth, as presented by Ulrich & Duleboh in chapter 3.1.3. Even though HR operations are still very much responding to the pressing needs of the business and therefore represent the inside/outside approach, the outside/inside approach is also visible to some extent: For example, the data gathered from the interviews with the HR & Administrative Director shows that the client’s requirements and preferences are guiding the recruitment of CS team members. CS team at Flowhaven knows their customer and can therefore give priority to potential talent if they reflect the client’s expectations of excellent account manager skills.

Regarding HR system and HR philosophy as presented in chapter 3.2, it is concluded that already many elements exist for this young company and that Flowhaven is well on its way of creating a strong HRM system. This conclusion is backed by the following observations from the interviews with HR leadership:

- Policies and practices for a part of key HR activities such as onboarding and offboarding exist and are continuously developed.
- Policies and practices for remaining HR activities such managerial training is on the to do -list. Available resources are allocated to creating the missing pieces from the basis of careful prioritizing based on pressing business needs.
- Great emphasis is put on leading company culture with for example promoting company values in order to create awareness of expected attitude and behavior.

Written HR strategies do not exist because formulating such documents is not seen as something that would bring great value. Instead, strategies are expressed and formulated in meetings, discussions and everyday decisions within the HR team, the leadership team, and the line managers, as well as the cross-collaborations of all these three teams.

Chapter 3.3 touches on the growing interest toward employee experience as a driver for modern HRM, and this is definitely the case for Flowhaven. There is simply no way that Flowhaven with their triple niche, as presented in chapter 1, can be successful in attracting, hiring and retaining key talent, unless employee experience is at heart of all HRM. Because there is such a strong link between employee experience and business success at Flowhaven, it is concluded that in this case HRM has significant impact on organizational performance.

Based on the data analysis from the interviews with the HR & Administrative Director, it is concluded that HR philosophy, HR practices and HR processes at the company align very well with the AMO model presented in chapter 3.3. All the HR initiatives of the AMO model either exist or are under development – such as a sophisticated recruitment and selection model and leadership development – or are on the roadmap for the near future – such as extensive L&D processes. Overall, it is concluded, that the maturity of HRM is on a good level considering company maturity, and this lays a good foundation for kick-starting strategic L&D efforts.

RQ2: What is the current status of L&D at Flowhaven, and especially at Flowhaven CS? For example, existing and missing key elements.

The hypothesis at the start of this project was that the project would kick-start strategic L&D efforts at Flowhaven, and the insights gathered from the data analysis support this hypothesis. Overall, it is concluded that there is yet very little structure for the L&D part or the HR system at Flowhaven, and therefore this project can be considered as a kick-start to those efforts.

Chapters from 3.4.2 to 3.4.6 describe the different dimensions of L&D and based on the data analysis it is concluded that some structure already exists mainly regarding individual learning – such as the onboarding plans – and performance management – such as the personal development planning process – while organizational learning, management development and knowledge management remain almost entirely untouched at this point. Company L&D maturity and CS L&D maturity are very much in line, as the little structure that exists, is made available throughout the company.

The most mature structure seems to be the structure for performance management, which includes monthly one-on-ones between employees and managers as well as an annual development discussion. Performance management is reported and tracked through the company general HR management system.

Chapter 3.4.1 presents the building blocks for strategic L&D philosophy. From the basis of data analysis against these building blocks, it is concluded that Flowhaven has a good level of strategic L&D philosophy at this stage, which provides an excellent starting point for strategic L&D efforts. Figure 18 below visualizes the building blocks of strategic L&D philosophy at Flowhaven.

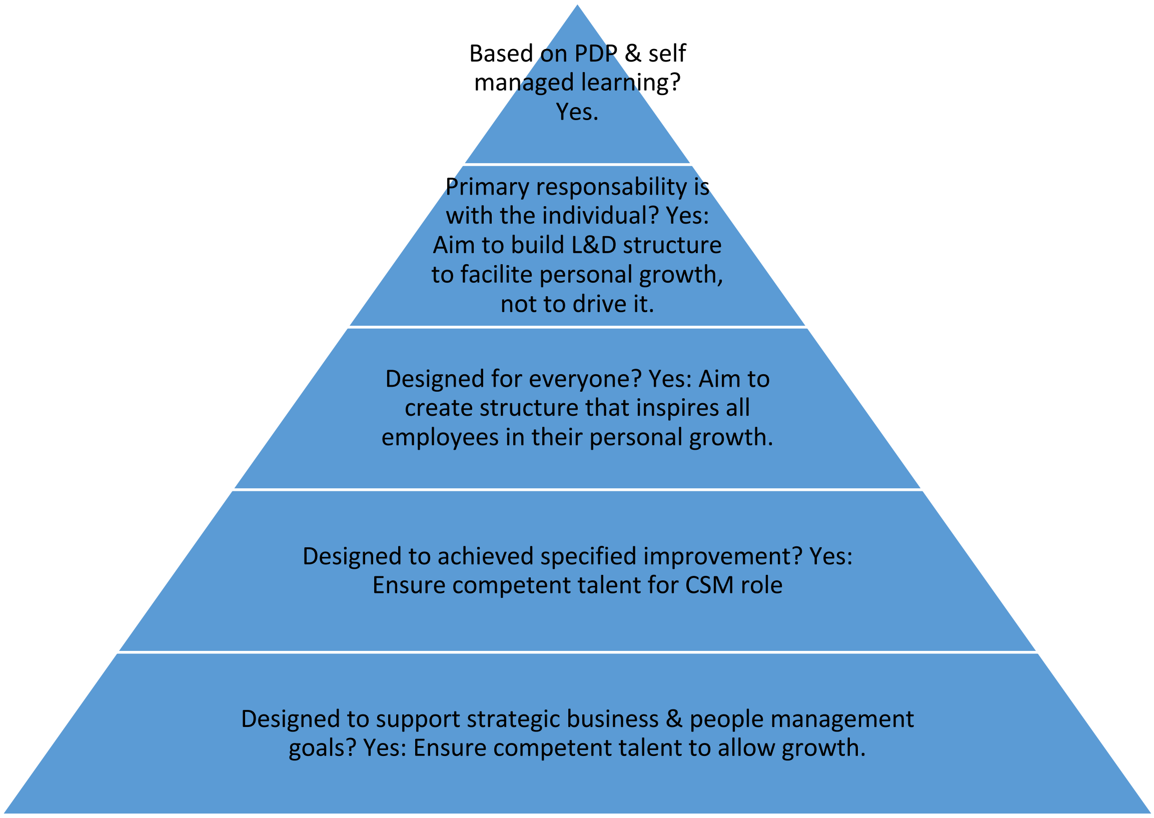

Figure 18: The building blocks of strategic L&D philosophy at Flowhaven

The research data was compared against the ACADEMIES framework presented in chapter 3.5 as one way to exemplify the current status of L&D activities at Flowhaven. Also based on this analysis, it can be concluded, that the foundation for starting strategic L&D efforts is strong because all efforts are derived directly from business strategy and there is a co-ownership between the business units and HR. However, as already highlighted earlier, the only structure that currently exists, are the onboarding plans which are quite narrow in content, do not cover all essentials areas, and do not extend over the first few weeks, and the personal development planning, which lacks visibility toward employees about growth opportunities.

RQ3: What would a high-level L&D strategy look like for Flowhaven and especially for Flowhaven CS?

Based on the current status analysis mentioned in the previous chapter, it is concluded, that the starting point for strategic L&D efforts at Flowhaven is somewhere between dimension two and three of before-mentioned ACADEMIES framework, i.e., establishing ownership between business units and HR and assessment of capability gaps. There is an immediate need for developing onboarding as well as building other comprehensive competence building programs and for creating transparency toward employees about career and growth opportunities at Flowhaven. The overall company L&D strategy and the CS L&D strategy can be considered the one and the same, since the existing L&D structure is available throughout the company, and CS is in the frontline of L&D by participating in this project.

Based on the insights derived from the data analysis, it is concluded that the key next steps for Flowhaven L&D are 1) establishing a cross-functional L&D team 2) designing and implementing key learning interventions and 3) developing competency-based performance management. Even though ownership between business units and HR already exists, establishing a more comprehensive, cross-functional L&D function is recommended to leverage the importance of L&D internally, share roles and responsibilities and succeed in creating company-wide, coherent L&D strategy and L&D initiatives. Also, due to the strategic importance of effective competence building at Flowhaven, it is crucial to include top leadership in the L&D team and add strategic competence building into the management team agenda.

Designing and implementing key learning interventions is a key area of individual learning. For individual learning, Flowhaven has one existing element which is the six-month long onboarding period during which efforts are made to help the new hire build necessary competence. However, based on the data analysis, both the company general onboarding as well as the role specific onboarding at Flowhaven do not cover all essential areas, and need to be develop further. For example, the CS onboarding plan only stretches one week-long while including both general company onboarding as well as role-specific onboarding such as product training. For example, there is very little or no learning at all focused on industry knowledge (brand licensing) or mastering the profession (Customer Success). As already mentioned, building systematic, comprehensive learning programs, such as onboarding plans, are key areas to focus on, and thus make individual learning a current key dimension of L&D at Flowhaven.

Based on the data analysis, it is concluded that efforts for management development have been started by, for example, creating guideline documents and setting uptraining sessions, but no systematic management development program yet exist. This is a key area for development since a layer of line-managers has been recently added, and thus it is concluded that it should be a part of Flowhaven short-term L&D strategy. Developing the existing structure for performance management to support the building of identified key competencies is essential for the success of any learning program or competence building program.

Chapter 3.4.7 lists global megatrends as the drivers for L&D. Flowhaven is very much affected by the trends: Since operating in the technological industry, it's experiencing the labor shortage, and because of the generation gap, its forced to invest in personal development if it wishes to retain talent. Based on the interviews with the HR & Administrative Director, talent at Flowhaven is on average very young, which furthermore highlights the importance of addressing personal growth. The young generations expect the employer to support and facilitate their personal growth in exchange for their loyalty and engagement. Based on the data analysis, creating visibility into career and grow opportunities is a key area for Flowhaven people leaders but no material for this exists yet. Therefore, it is concluded that this a key area of the short-term L&D strategy.

Based on the research conducted, it is concluded that the key areas for L&D presented in chapter 3.4.8 are also the key areas for Flowhaven L&D. Developing people capabilities is the most important one, because it address the need to grow talent internally. Retaining talent is the second most important area, because it's essential to keep the talent after investing heavily into building the competence. As stated previously in this chapter, some structure for the above-mentioned key areas exists, but a lot of work remains to be done to meet these key needs driving L&D at Flowhaven. However, they are vast entities in the long list of different people strategies and need to be address holistically, not just through L&D, and therefore it is concluded that these should be address with a more comprehensive, long-term strategy.

5.3 Development outcomes

Appendix 7 is a detailed analysis of the current status of Flowhaven HRM against the AMO model. Based on the research finding, the layer of HR analytics has been added as a missing key element. This analysis is an outcome of preparatory research, interviews and co-creative workshops, and is relevant in the following two ways: 1) The AMO model provides a straightforward and coherent framework for building a set of essential performance-enhancing HRM initiatives. Without a framework targeting the right things, the building of HRM initiatives can be random and chaotic and therefore ineffective. The AMO model is simple enough for a hyper-growth startup, and most of the elements in it are also the key areas to address in L&D. 2) The analysis clearly indicates the strengths and weaknesses of Flowhaven HRM, and thus helps identify the most urgent areas for development regarding L&D.

The analysis was developed quite near to the end of the project and presented at the handover meeting as a part of sharing conclusions and outcomes of the project as well as making suggestions for next steps. Appendix 6 is the agenda for this handover meeting. Since the project team included members outside HR, such as CS team leads, the analysis based on a theoretical HR model was received in different ways depending on the recipient. However, the aim of this project being the development of strategic HRM initiatives, it is concluded that suggesting a framework to facilitate this is justified and called for.

Appendix 8 is a detailed analysis of the current status of L&D at Flowhaven against the ACADEMIES framework presented earlier in this report. This analysis also is an outcome of preparatory research, interviews and co-creative workshops, and was developed quite near to the end of the project and presented at the above-mentioned handover meeting.

This analysis would serve as a “health check” for a more mature organization regarding the status of L&D, but for Flowhaven at the beginning of their L&D journey it serves as a road map indicating the starting point as well as next steps. It is practical and simple enough to be grasped by the project team that is new to almost all aspects of strategic L&D, and who do not have resources to invest in broadening their knowledge any more than is absolutely necessary.

The analysis is very much in line with what has been discussed with the project team during the development work, for example the workshopping. The workshopping has been focused on steps three and four, and thus there was already a shared understanding of the way forward before the handover meeting. Therefore, it is concluded that the suggestions of the analysis can be implement as such by Flowhaven when going forward.

Appendix 9 is the suggestion for Flowhaven L&D short-term strategy i.e., immediate next steps. This strategy also is an outcome of the entire research spectrum including preparatory research, interviews, and co-creative workshops, and was developed near to the end of the project and presented at the above-mentioned handover meeting.

It was the wish of the Flowhaven project team that next steps be listed, and suggestions made for going forward, and this strategy is the answer to this wish. This short-term strategy includes only three steps, since based on insight from research data, the resources for building L&D are currently very limited at Flowhaven. The collaborative workshopping was focused only on item number two (Design and implement key learning interventions according to the FH L&D processes), so putting it on the priority list was merely a reminder for the Flowhaven L&D team of the focus area going forward.

Unfortunately, no feedback was received about the other items of the strategy. The reason for this could be that the suggestions made require extensive internal discussion before going forward, and therefore no comments were yet made about them. Also, HR leadership did not attend the handover meeting, the one of the most relevant sources for feedback was missing.

Appendix 10 includes two separate processes for Flowhaven L&D: 1) L&D process for strategic competence building and 2) L&D process for individual learning (as the basis of FH PD planning). These items are for the most part outcomes of the co-creative workshopping and they were created after their importance become evident quite organically during the development work. First drafts were developed early in the project, and then iterated throughout the project as new insight was gained. Different versions of the processes were presented along the way.

Key processes for L&D are necessary for effective and systematic development and implementation of L&D initiatives and learning interventions. They also help with organizing work when there is a considerable amount of backlog. The processes serve as roadmaps or workflows on the otherwise quite chaotic task of building HRM structure from scratch in an extremely busy business environment where the number of staff is growing exponentially. The process descriptions were used to guide the development work already during the project, for example during the workshopping. Based on the feedback from the workshops, it is concluded that the project team at Flowhaven will use the process descriptions as guidelines also when going forward.

Appendix 11 is the prototype for Flowhaven CS learning programs i.e., capability-building programs. This prototype is an outcome of preparatory research, interviews, and co-creative workshops, and was developed as well as presented throughout the project involving numerous iteration rounds. Developing these role-specific learning programs was the center of the co-creative workshopping in this project and for the people participating in the workshops, developing, and implementing them was a key target of their managerial responsibilities.

At the end of this project, the prototype is not a ready item but still needs a lot of internal work from Flowhaven to serve as a comprehensive and complete learning program. But the key elements are there, and the prototype also serves as a framework to all learning programs across different departments at Flowhaven.

The feedback on these prototypes was very encouraging and based the feedback as well as motivation shown towards completing and implementing the items, it is justified to say that the building of these prototypes was a significant step forward in L&D activities at Flowhaven. Therefore, it is justified to assume that the items will be finished and launched by the internal L&D team at Flowhaven.

Appendix 12 includes prototype templates for Flowhaven CS learning paths as well as career path examples. Also these prototypes are an outcome of preparatory research, interviews, and co-creative workshops, and were developed and presented early on in the project. These items can be considered finished, as long as they are viewed as templates for designing the paths, not as launch-ready paths. During the project, the focus of the workshops organically focused more on building outcome five, and only some progress was made in developing the path prototypes based on the templates.

Since there is a strong need for L&D structure such this, finishing and launching the learning paths and the career paths is a key priority for Flowhaven. Based on this and the feedback from the workshops, it is justified to assume that Flowhaven L&D team will continue working on the paths and get them launched, and therefore there is value in the templates as a process starter.

6 Conclusions

The objective of this thesis was to kick-start strategic L&D efforts by first establishing an understanding of the current status of HRM at Flowhaven, and any existing L&D structure inside the HR system framework, and then creating a short-term strategy including immediate next steps. The expected outcomes included an analysis of the current status of Flowhaven HRM, an analysis of the current status of Flowhaven L&D and a short-term L&D strategy for Flowhaven.

All of the above-mentioned outcomes were achieved, and three additional outcomes were developed a result of this project. Based on the feedback from Flowhaven, especially the development work on the learning program prototype as well as the learning and career paths had a great impact on creating much needed L&D structure inside the company as well as generating knowledge and understanding of the task at hand. For these reasons, it is concluded that the project was successful in reaching its goals.

6.1 Suggestions for further development work

Due to the three different niche areas at Flowhaven and the combination of them, the focus of L&D in the long-term is on knowledge sharing, and the company culture needs to promote this. As the competent talent will need to be grown inside the organization, those who *can* have to train and support those who *can't* for the organization to be able to reach its goals. And, because most of the learning happens on the job, and training has merely a complimentary role, day-to-day internal resources are key (managers, buddies, HR, leadership, etc.). Therefore, it is suggested that further research is conducted on how to best promote knowledge-sharing and the building of a learning organization at Flowhaven. Could it, for example, be promoted by including it in the job descriptions, target setting & performance review, and rewarding it? Could it be made into a friendly competition of "who shares most knowledge" or "who enables most competence-building"?

Another suggestion for further research is to diversify the ways of learning and integrate blended learning into the existing learning programs. Based on the data analysis, it is concluded that the existing learning interventions at Flowhaven, the onboarding plans, are very much based on self-directed learning, and therefore promote employee taking ownership of their own learning. Also, the personal development planning process at Flowhaven supports this. One L&D trend presenting big potential but not currently implemented at Flowhaven is blended learning. The existing onboarding plans are very much focused on traditional training session that are done online using recorded training material. Connecting these training sessions with practical output, for example completing tasks in the demo environment are a low effort and scalable way to implement blended learning.

As described in chapter 3.4.6, technological tools are a key part of knowledge management. But considering the maturity of the company, this is not a key current priority. However, as the L&D function gets more established, a learning experience platform (LXP) could be one option to consider to help facilitate knowledge management. Thus, it is suggested to do further research on finding the right digital tool them.

6.2 Self-reflection by the author

In addition to diving deep into the previously quite unknown territory of L&D, the author also dived into the unfamiliar waters of external HR consulting, service design for HR and workshop facilitation. A vast amount of learning occurred a result of this dive, for example on topics such as the business case and the importance of L&D in general, the challenges of growing talent internally, L&D strategy and L&D in practice.

Since they were almost all new, not a single one of these topics felt easy, and carrying out the project often demanded perseverance. And for this reason, the author gives herself most credit for trying and for not giving up. At least service design for HR and workshop facilitation are in the list of future learning objectives for the author.

In addition to new knowledge and skills, this project has also provided the author with understanding towards her own interests and abilities. Thanks to this project, the author has increased her understanding of where to go next. And if the author should ever go into developing strategic L&D, she feels she would have good basic understanding of merely the tip of the iceberg on this vast subject and would go on in humble and ready to learn more.

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Attachments

Appendix 1. List of methods for data collection and sense making (analysis)

Appendix 2. List of discussion topics for interview with HR & Admin director

Appendix 3. Agenda for introductory meetings with CS

Appendix 4. List of questions for onboarding experience interview

Appendix 5. Agendas for workshops

Appendix 6. Agenda for handover session

Appendix 7. Analysis of the current status of HRM at FH against the AMO model

Appendix 8. Analysis of current status of L&D at FH against the ACADEMIES framework

Appendix 9. Short-term L&D strategy for FH

Appendix 10. Processes for FH L&D

Appendix 11. Prototypes for FH CS learning programs

Appendix 12. Prototype templates for FH CS learning & career paths

Appendix 1

LIST OF METHODS FOR DATA COLLECTION AND SENSE MAKING (ANALYSIS)

Week	Category for data collection method*	Method for data collection*	More detailed description of method for data collection	Flowhaven participants	Duration	Primary method for sensemaking*	Expected output*	Related appendix
24/2021	Participant approaches	Contextual interviews	Interview with representative of commissioning company	HR & Administrative Director	1 h 45 min	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
25/2021	Participant approaches	Contextual interviews	Interview with representative of commissioning company	HR & Administrative Director	1 h 45 min	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
35-38/2021	Desk research	Preparatory research	Study related literature & research. Study best practices	N/A	N/A	Compiling research reports	Text	N/A
35-38/2021	Desk research	Preparatory research	Benchmarking via studying real-life examples	N/A	N/A	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	N/A
35/2021	Desk research	Preparatory research	Benchmarking via interview	N/A	45 min	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
39/2021	Desk research	Preparatory research	Benchmarking via interview	N/A	45 min	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
36/2021	Participant approaches	Contextual interviews	Introductory meeting & interview with representative of commissioning company	CS team lead	30 min	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
37/2021	Participant approaches	Contextual interviews	Introductory meeting & interview with representative of commissioning company	CS lead	30 min	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
37/2021	Participant approaches	Contextual interviews	Introductory meeting & interview with representative of commissioning company	CS team lead	30 min	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
39/2021	Desk research	Preparatory research	Review of existing content: Learning inside Flowhaven CS team	N/A	N/A	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	N/A
39/2021	Desk research	Preparatory research	Review of existing content against theory, best practices & benchmark information	N/A	N/A	Generating jobs-to-be-done insights	Text, mind maps, first draft of prototypes	N/A
40/2021	Participant approaches	Focus groups	Interview with member of focus group	New hire, CS Specialist	45 min	Writing user stories	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
40/2021	Participant approaches	Focus groups	Interview with member of focus group	New hire, CS Specialist	45 min	Writing user stories	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
40/2021	Participant approaches	Focus groups	Interview with member of focus group	New hire, CS Specialist	45 min	Writing user stories	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda

Appendix 1

40/2021	Participant approaches	Focus groups	Interview with member of focus group	New hire, CS Manager	45 min	Writing user stories	Text, mind maps, first draft of prototypes	Appendix X: Interview questions and/or meeting agenda
40-44/2021	Desk research	Preparatory research	Designing workshops & prototypes of outcome items	N/A	N/A	Creating personas Mapping journeys Mapping systems	Text, mind maps, first draft of prototypes	N/A
41/2021	Co-creative workshops	Creating personas Mapping journeys Mapping systems	Workshop with commissioning party - Workshop I for Helsinki: CS onboarding & CSM learning path	HR & Administrativ e Director, HR & Recruitment Specialist, CS team lead Europe	2 hours	Mapping journeys	Drafts of journey maps	N/A
40-44/2021	Desk research	Preparatory research	Designing workshops & iterating prototypes of outcome items based on last workshop	N/A	N/A	Creating personas Mapping journeys Mapping systems	Drafts of personas, journey maps & system maps	N/A
41/2021	Co-creative workshops	Creating personas Mapping journeys Mapping systems	Workshop with commissioning party - Workshop I for US: CS learning programs, learning paths & career path examples	CS lead, CS team lead US, Sales Enablement Manager	2 hours	Mapping joyrneys	Drafts of journey maps	N/A
40-44/2021	Desk research	Preparatory research	Designing workshops & iterating prototypes of outcome items based on last workshop	N/A	N/A	Creating personas Mapping journeys Mapping systems	Drafts of personas, journey maps & system maps	N/A
42/2021	Co-creative workshops	Creating personas Mapping journeys Mapping systems	Workshop with commissioning party - Workshop II: CS learning programs	CS lead, CS team lead Europe, CS team lead US, Sales Enablement Manager	1,5 hours	Mapping systems (or in this case processes)	System maps	Appendix X: Template for FH CS learning programs
40-44/2021	Desk research	Preparatory research	Designing workshops & iterating prototypes of outcome items based on last workshop	N/A	N/A	Creating personas Mapping journeys Mapping systems	Drafts of personas, journey maps & system maps	N/A
43/2021	Co-creative workshops	Creating personas Mapping journeys Mapping systems	Workshop with commissioning party - Workshop III: CS learning paths & career path examples	CS lead, CS team lead Europe, CS team lead US, Sales Enablement Manager	1,5 hours	Mapping joyrneys	Drafts of journey maps	Appendix X: Templates for FH CS learning & career paths

*Stickdorn et al. 2018b

Interview with HR & Admin director at Flowhaven 18th & 21st June 2021

List of discussion topics

Basic knowledge of company, for example
- Team size & structure
- Business model
- Leadership
- Culture
- Current status & future plans

Basic knowledge of HR, for example
- Team & responsibilities
- HR philosophy
- Existing structure, practices & policies
- HR tools such as software
- Status of personal development planning
- Status of L&D efforts
- Status of managerial training
- Pressing issues

Appendix 3

Agenda for intro meetings with CS

- Meet & greet, Sanni's background
- About the studies, the thesis project and the project plan
- About the R&D
- Comments, ideas and suggestions
- Existing plans & structures at Flowhaven CS regarding the thesis topic

Appendix 4

Interview re: onboarding experience

Interview date:
Interview location: Online meeting

Background information on interviewee

Date of joining Flowhaven:
Position when joining:
Current position:

Interview questions

1. Expectations

Could you please describe your expectations and motivation for joining Flowhaven, prior to your onboarding?

2. Experience as a whole

Could you please describe your onboarding experience as a whole? You can rate it from 1-5 if you like, 1 being the lowest and 5 being the highest rating.

3. Content

The current onboarding plan covers the first week, rest of the onboarding is planned and agreed together. Thinking especially about the **content** of onboarding, could you please describe your experience in more detail? Starting from the first day, the first week and month, and moving on until the end of the probationary period.

For example:
How did the content match your expectations?
What was good and useful about the content?
Did you feel like there was some important content missing?
Was there some un-useful content included?
Was there something in the content that increased your motivation to learn?
Was there something in the content that decreased your motivation to learn?
Do you have any other suggestions on how to improve the content for onboarding?

4. Schedule

Thinking especially about the **schedule** of onboarding, could you please describe your experience in more detail? Starting from the first day, the first week and month, and moving on until the end of the probationary period.

For example:
How did the schedule match your expectations?
How did you feel that you were able to process the information during onboarding?
Was the schedule at some point too tight or too loose?
Was there something in the schedule that increased your motivation to learn?
Was there something in the schedule that decreased your motivation to learn?
Do you have any other suggestions on how to improve the schedule for onboarding?

5. Ways of learning

The current onboarding plan includes face-to face training sessions and different forms of independent learning, such as watching videos and demos, studying documents, and doing self-assessment. How do you feel that the different ways of learning benefitted you?

Was there some form of learning that was used too much or not enough?

Was there some form of learning missing?

6. Managerial and team support

How did you feel about the managerial support, was it sufficient or non-sufficient? Starting from the first day, the first week and month, and moving on until the end of the probationary period.

How about the team support?

7. Information sharing & feedback

Do you feel like you received enough information / not enough information on the onboarding process when you joined Flowhaven? Content, schedule, duration, etc.

How did you feel about the amount and frequency of feedback on your progress? Was it sufficient during the different phases of onboarding?
Did you feel like you had a chance to give feedback and be heard?
Do you have any other suggestions on how to use feedback to improve the experience?

8. Belonging

Do you feel like the onboarding helped you feel part of Flowhaven? Or did something else facilitate this?

What would you say have been the key things in making you feel a part of the Flowhaven team?

Is there something that you feel hindered / is hindering the feeling of belonging?

9. Importance of developing the onboarding experience

How do you feel about the importance of onboarding and the development of it? How relevant do you think it is for new joiners and their retainment and personal growth?

10. Plans for personal growth at Flowhaven

Please share any information about your plans & wishes for personal growth at Flowhaven (totally optional)

Appendix 5

Agenda for workshop I

1. Sanni's intro for getting us all on the same page:
    - Recap of the end goal for this project
    - Why invest in onboarding?
    - Onboarding as an emotional process
    - Aligning onboarding with L&D
    - The idea behind learning paths
    - Detailed suggestions re: FH onboarding
    - The different dimensions of onboarding
    - Sum up of the OE interviews
    - Presenting the onboarding plan prototype
    - Presenting the CS learning paths prototypes
2. Fill in the blanks –exercise
3. Conclusions of this workshop & intro to workshop II

Agenda for workshop II

1. Overview of iterated protos (Sanni)
2. Agree on definition for different items (together)
3. Define default starting & finishing point per role (together)
4. Continue work according to the process in the last slide (together):
   3. Define required skills & competence per role & 4. Create role specific, systematic learning programs (or focus on CSM only?)
5. Agree on next steps:
   1. Finalize learning programs regarding role competence (see spreadsheet)
   2. Finalize min. CSM learning path (see slide 2)
   3. Finalize career path examples for CSM (see slides 11-13)
   4. Launch ready items how?

Agenda & way of working for workshop III

Agenda:

1. Continue work according to the process in the next slide: Design CSM learning path (+ others?)
2. Agree on next steps, for example

   - Finalizing items
   - Launching items, at least CSM learning path & get ”end user” feedback

Way of working:

Collaborate & edit templates on Google Drive

Job ladder + Development plan

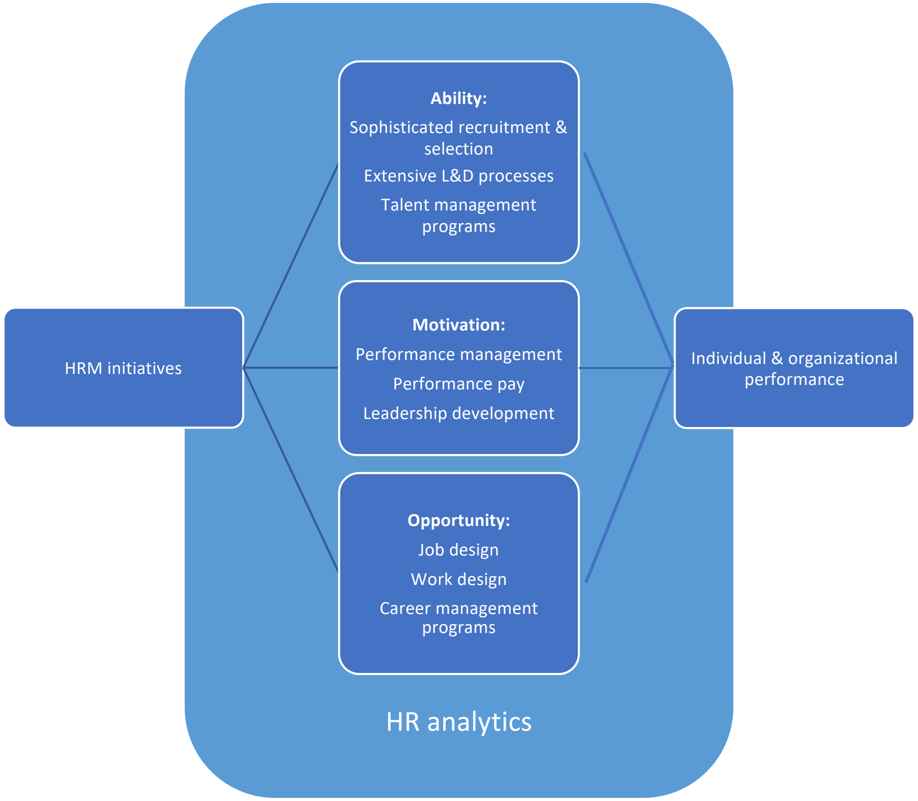
Appendix 6

Agenda for today: Overview & conclusion of the project

- Expected outcomes vs. actual outcomes
- Suggestions for next steps for FH L&D
- Reflection on learning achieved
- Feedback from FH

Appendix 7

The AMO model for performance-enhancing HRM



Adapted from Purcell & Boxall 2008

Analysis of the current status of FH HRM against the AMO model

Ability

- Sophisticated recruitment & selection (candidate experience, referrals, etc.)
  - On a good level considering company maturity.
  - Development ongoing.
  - Key area for development before next ramp-up.
- Extensive L&D processes (onboarding, inboarding, performance management, etc.)
  - On a good level considering company maturity.
  - Development ongoing, this project being a part of it.
  - Key area for development before next ramp-up.
  - Key for development to enable competent talent & growth.
- Talent management programs (employer branding, employer reputation, engagement, retention, succession planning, etc.)
  - Not a key area considering company maturity and limited resources?
  - Key area after next ram-up?

Analysis of the current status of FH HRM against the AMO model

Motivation

- Performance management (goal setting, performance review, performance improvement planning)
  - On a good level considering company maturity.
  - Key area for L&D (competence building)!
- Performance pay
  - ?
- Leadership development
  - Started & development ongoing.
  - Key area for L&D (competence building)!

Analysis of the current status of FH HRM against the AMO model

Opportunity

- Job design (creating a job that enables the organization to achieve its goals while motivating and rewarding the employee) &
- Work design (same as above on team, unit or organizational level)
  - Both organically ongoing.
  - Not key areas considering company maturity and limited resources?
  - Key areas for L&D (competence building) & retention!
- Career management programs (developing Employee Career Paths and Ladders to motivate, engage & retain employees)
  - Key area for L&D (competence building) & retention!

Appendix 8

Analysis of current status of L&D at FH

1. Alignment with business strategy	•Very strong! L&D initiatives are built from the basis of the business strategy.
2. Co-ownership between business units and HR	•Very strong! HR is supporting business unit leaders in addressing L&D.
3. Assessment of capability gaps and estimated value	•Very organic. A more systematic approach could lead to more timely & effective solutions.
4. Design of learning journeys	•Not started. This development project is meant to address this issue.
5. Execution and scale-up	•Onboarding plans are the only learning program being implemented at the moment. This project is mean to address this. Scale-up will be relevant only after some piloting.
6. Measurement of impact on business performance	•Not started. Focus area for a more mature L&D function.
7. Integration of L&D interventions into HR processes	•The outcomes of this project provide the first opportunity to do this as it kick-starts L&D activities. For example, any learning paths developed can act as the basis for personal development plans.
8. Enabling the 70:20:10 learning framework	•Not started. Focus area for a more mature L&D function.
9. Systems and learning technology applications	•Not started. Focus area for a more mature L&D function. For now, L&D is supported with existing systems such as intranet.

Adapted from Brassey et al. 2019

Appendix 9

Next steps for FH L&D: A short-term strategy

1. Establish a cross-functional team to lead, design and implement strategic L&D and provide them with basic understanding of the subject:
   - Leadership team + L&D leader per function + HR L&D leader
   - Provide bite-size learning on the purpose, goals & benefits of strategic L&D

2. Design and implement key learning interventions according to the FH L&D processes:
   - Company general onboarding plan.
   - Role-specific onboarding plans & other learning programs (the CS learning programs)
   - Management development plan for creating effective managers
   - Career management programs (learning paths & career path examples)

   -> COMPETENCY-BUILDING PROGRAMS.

   -> VISUALIZE & SHARE WITH EMPLOYEES. GATHER FEEDBACK & ITERATE IN COLLABORATION WITH EMPLOYEES.

3. Develop competency-based performance management:
   - Create competency models for all jobs and assessing employees against those during performance reviews.
   - Reward employees who meet or exceed competency requirements (promotion or other growth opportunity).

   -> TOTAL TRANSPARENCY IS KEY HERE.

Appendix 10

FH L&D process for strategic competence building

L&D TEAM FOR L&D FUNCTION:

1. Identify business need
   - From the basis of the business strategy
2. Create role definition
   - Include key targets, KPIs & what success looks like
3. Define required skills & competence per role
   - Included in the role definition & make visible to employees
4. Design learning interventions
   - For example, role specific, systematic learning programs (6 month onboarding plan and/or other) or one-off training
5. Design & create or purchase learning content
6. Implement the learning interventions
7. Measure effectiveness & gather feedback
8. Analyse, iterate & implement changes

L&D TEAM FOR EMPLOYEES:

1. Design learning paths
   - Based on learning interventions
   - At least for key roles
2. Design examples of FH career paths
   - To increase visibility on growth opportunities towards employees
3. Visualize items
   - Into easy to digest format
4. Share & promote internally
   - Add transparency towards employees about career opportunities

FH L&D process for individual learning (as the basis of FH PD planning)

MANAGER + EMPLOYEE:

1. Map new hire competence & identify individual learning needs	2. Create a detailed, personalized learning program	3. Follow up according to FH PD process	4. Use examples of FH career paths to facilitate career planning
• Kick start personal development (PD) planning	• From the basis of the role specific learning program • 6 month onboarding plan and/or other	• Monthly 1-on-1's & annual personal development discussion (PDP) • Or FH follow up process for onboarding	• Use examples to support career planning (part of FH PD planning)

ROLE SPECIFIC LEARNING PROGRAMS FOR FLOWHAVEN CUSTOMER SUCCESS

ROLE COMPETENCE

	Session title	Session agenda	Company-wide or CS specific session	Way of learning	Info / Training session or self-managed	Host / Trainer (responsible person)	Output / Deliverable	Alternate Proof of Learning	When (specific point in the learning path)	Knowledge required for CS Coordinator	Knowledge required for CS Specialist	Knowledge required for CS Manager
Company knowledge: Flowhaven												
Basic knowledge of company & FH team	*According to company-wide general onboarding plan (learning program)*		Company-wide					N/A		Yes	Yes	Yes
	Intro to other business units at FH (for example FH Sales & Marketing)	Overview of the entire salespipeline	Company-wide	Watch recorded session (add link here)	Self-managed		Start self-assesment on basic concepts (add link here)	N/A		Yes	Yes	Yes
	Refresher on sales pipeline	Go-back to session materials	Company-wide	See material per session	Self-managed		Start self-assesment on basic concepts (add link here)	N/A		Yes	Yes	Yes
Industry knowledge: Licensing												
Basic knowledge of licencing industry	**Basics I of licencing industry**	- General overview of the industry: How Licensing Works + Key players - Q&A	Company-wide	Live: Face-to-face & online	Training session		- Q&A at the session - Reflect using self-assesment document - Proactively seek information	Previous experience in the industry	1st week of onboarding	Yes	Yes	Yes
	Basics II of licencing industry	- General Overview of Specific Departments in the Industry (Product Approvals, Contract Mngmt, Finance/Account) - Q&A	Company-wide	Live: Face-to-face & online	Training session		- Q&A at the session - Reflect using self-assesment document - Proactively seek information	Previous experience in the industry	1st week of onboarding	Yes	Yes	Yes
	Basics III of licencing industry	Basic Challenges in the Licensing Industry	Company-wide	Live: Face-to-face & online	Training session		- Q&A at the session - Reflect using self-assesment document - Proactively seek information	Previous experience in the industry	1st week of onboarding	Yes	Yes	Yes
	Refresher on Basics I-III of licencing industry	- Recap of basics of licencing industry 1-3 - Q&A	Company-wide	Live: Face-to-face & online	Training session		- Q&A at the session - Reflect using self-assesment document - Proactively seek information	Previous experience in the industry	4th month of onboarding	Yes	Yes	Yes
	Add session title	Add session agenda	Company-wide									
Reoccurring	**Industry update at Flowhaven**	General update on the industry - key deals	Company-wide	Live: Face-to-face & online	Info session		N/A	N/A	Reoccurring (quarterly)	Yes	Yes	Yes

Expert knowledge of licencing industry	**Deep dive I into licencing industry: Industry event**	?	Company-wide	Attend an industry event	Self-managed	Make notes of key insight to share with your team	Previous experience in the industry	After covering basics of licencing idustry	No	No	Yes
	Deep dive II into licencing industry: Sales discovery meetings	Watch Sales Discovery meeting recordings	Company-wide	Live: Face-to-face & online	Self-managed	Make notes of key insight to share with your team	Previous experience in the industry	After covering basics of licencing idustry	No	No	Yes
	Refresher on Deep dive I-II into licencing industry	Team members present key insights of their deep dive sessions to the rest of the team + discussion	Company-wide	Live: Face-to-face & online	Training session	Present key insights of your deep dive sessions to your team	Previous experience in the industry	After covering basics of licencing idustry + deep dive	No	No	Yes
	Add session title	Add session agenda	Company-wide								
Reoccurring	**Industry update through an event**	?	Company-wide	Attend an industry event	Self-managed	N/A	N/A	Reoccurring (quarterly)	No	No	Yes
Business knowledge: SW development & SaaS business											
Basic knowledge of SW development & SaaS business	**Intro to DevOps**	Definition, process, benefits vs. traditional SW development	Company-wide	Study info on AWS website	Self-managed	Start self-assesment on basic concepts (add link here)	Previous experience in SW industry	2nd week of onboarding	Yes	Yes	Yes
	Intro to cloud computing	Definition, benefits vs. traditional SW models, case examples	Company-wide	Study material on Salesforce website	Self-managed	Start self-assesment on basic concepts (add link here)	Previous experience in SW industry	2nd week of onboarding	Yes	Yes	Yes
	Intro to SaaS business	Definition, benefits vs. on-premises solutions, case examples	Company-wide	Study info on Salesforce website	Self-managed	Start self-assesment on basic concepts (add link here)	Previous experience in SaaS business	2nd week of onboarding	Yes	Yes	Yes
	Intro to SaaS metrics	Get to know the basic consepts & terminology of SaaS metrics	Company-wide	Study the guide on Silo website	Self-managed	Start self-assesment on basic concepts (add link here)	Previous experience in SaaS business	2nd week of onboarding	Yes	Yes	Yes
	Refresher on intro sessions: DevOps, cloud computing & SaaS	Go-back to session materials	Company-wide	See material per session	Self-managed	Complete self-assesment on basic concepts as applicable (add link here)	Previous experience in SW business / SaaS / Salesforce	2nd month of onboarding	Yes	Yes	Yes
	Other basic knowledge of SaaS business required?	Add session agenda									
Expert knowledge of SW development & SaaS business	**Deep dive I into SaaS business**	Add session agenda							No	No	Yes
	Deep dive II into SaaS business	Add session agenda							No	No	Yes
	Deep dive I into SaaS metrics	Add session agenda							No	No	Yes
	Refresher on Deep dive I-II into SaaS business & metrics	Add session agenda							No	No	Yes
Team knowledge: FH CS + CS tech											

Basic knowledge of FH CS + CS tech team	**Intro to CS + CS tech team (local & global)**	- Share info on CS + CS tech team structure & way of organizing. - Meet & greet	CS specific	Live: Face-to-face & online	Info session		N/A	N/A	1st week of onboarding	Yes	Yes	Yes
	Intro to CS + CS tech team internal comms	Share info on internal comms inside CS: - preferred ways of comms - comms tools - time zone challenges with comms - reocurring meetings + agendas	CS specific	Live: Face-to-face & online	Info session		N/A	N/A	1st week of onboarding	Yes	Yes	Yes
	Intro I to FH SW development process & tools	- Overview of the dev process - Overview of Jira & Confluence	CS specific	Watch recorded session (add link here)	Self-managed		Start related self-assesment (add link here)	N/A		Yes	Yes	Yes
	Intro II to FH SW development process & tools	Watch intro to CS Tools - Salesforce, Jira, Confluence, Google, Honey, Slack - Search, documents, forms, calendar, etc.	CS specific	Watch recorded session (add link here)	Self-managed		Start related self-assesment (add link here)					
	Refresher on intro sessions regarding team knowledge	Go-back to session materials	CS specific	See material per session	Self-managed		Complete related self-assesment (add link here)	N/A	2nd month of onboarding	Yes	Yes	Yes
	Best practises on calendar management											
Expert knowledge of FH CS + CS tech team												
Product knowledge & product related technology skills: Salesforce & FH platform												
Basic knowldge of Salesforce & FH platform	**Intro to Salesforce**	Intro & use cases	Company-wide	Study info on Salesforce website	Self-managed		Start related self-assesment (add link here)	Previous experience in Salesforce (other than customer side)	2nd week of onboarding	Yes	Yes	Yes
	Intro I to Salesforce Platform	DevOps on Salesforce Platform	Company-wide	Watch SF demo of SF Platform (add link here)	Self-managed		Start related self-assesment (add link here)	Previous experience in Salesforce Platform from product side	2nd week of onboarding	Yes	Yes	Yes
	Intro I to Flowhaven product	Customer demo	Company-wide	Watch recorded session (add link here)	Self-managed		Access demo environment & start related self-assesment	Previous experience of FH platform from customer side	1st week of onboarding	Yes	Yes	Yes
	Intro to FH business model & subscription plans		Company-wide	Watch recorded session (add link here)	Self-managed		Complete related self-assesment (add link here)	N/A	2nd week of onboarding	Yes	Yes	Yes
	Intro I to Salesforce learning platform "Trailhead"	Get to know Trailhead & find information	CS specific	Platform	Self-managed	Ashleigh	Access Trailhead & browse the Trailblazer Community	Previous experience in Trailhead	2nd week of onboarding	Yes	Yes	Yes
	Intro II to Salesforce learning platform "Trailhead"	Complete "Find Your Way Around Trailhead" Trail in Trailhead: Get started with Trailhead in just a few minutes	CS specific	Trail in Trailhead	Self-managed		Access Trailhead & browse the Trailblazer Community	Previous experience in Trailhead	2nd week of onboarding	Yes	Yes	Yes

Intro I to CS Trailmix in Trailhead	Access Philip's trailmix in Trailhead: 'FlowHaven CS Badges' - List of modules that are good for CS to prep for FH product training	CS specific	Trailmix in Trailhead	Self-managed	Philip	N/A	N/A	2nd week of onboarding	Yes	Yes	Yes
Intro II to CS Trailmix in Trailhead	Watch how to use CS Trailmixes in Trailhead	CS specific	Video (10 min)	Self-managed	Philip	N/A	N/A	2nd week of onboarding	Yes	Yes	Yes
Intro to CS Swiss Army Knife sessions	Review of CS Swiss Army Knife Complete Agenda	CS specific	Document	Self-managed	Philip	N/A	N/A	2nd week of onboarding	Yes	Yes	Yes
Intro II to Salesforce Platform	Complete "SF Platform Basics" module in Trailhead: Get introduced to the platform, navigate use cases, and build custom functionality.	CS specific	Module in Trailhead	Self-managed		Complete Hands-on Challenge in the module	Previous experience in Salesforce Platform from product side	2nd week of onboarding	Yes	Yes	Yes
Session I of CS Swiss Army Knife	Watch session I: Users	CS specific	Video (30 min)	Self-managed	Philip	Access demo environment & start reated self-assesment	N/A	2nd week of onboarding	Yes	Yes	Yes
Trailmix on Swiss Army Knife session I	Complete related trailmix	CS specific	Trailmix in Trailhead	Self-managed	Philip		N/A	2nd week of onboarding	Yes	Yes	Yes
Intro to Agreement Management (AM) module	- Introduction to licensing agreement structures and - demo & configuration of FH AM module.	CS specific	Watch recorded session (60 min)	Self-managed	Ashleigh	Access demo environment & start related self-assesment	N/A	2nd week of onboarding	Yes	Yes	Yes
Intro I to Design Approvals (DA) + Content Management (CM) modules	Watch introduction & demo of Design Approval (DA) & Content Management (CM) modules	CS specific	Video (40 min)	Self-managed		Access demo environment & start related self-assesment	N/A		Yes	Yes	Yes
Intro II to Design Approvals (DA) + Content Management (CM) modules	Watch configuration of Design Approvals (DA) + Content Management (CM) modules	CS specific	Video (40 min)	Self-managed		Access demo environment & start related self-assesment	N/A		Yes	Yes	Yes
Intranet "Honey" as a source of information for CS team	Access topics & articles on CS group in Honey - find information - share information	CS specific	Intranet	Self-managed			N/A	2nd week of onboarding	Yes	Yes	Yes
CS onboarding presentation	Access materials on CS onboarding presentation	CS specific	Deck	Self-managed			N/A	2nd week of onboarding	Yes	Yes	Yes
Intro to FH plaform for agents	Watch how agents utilise FH platform	CS specific	Video (60 min)	Self-managed		Access demo environment & start related self-assesment	N/A		Yes	Yes	Yes
Session II of CS Swiss Army Knife	Watch CS Swiss Army Knife Session II: Salesforce side of Flowhaven product	CS specific	Video (35 min)	Self-managed	Philip	Access demo environment & start reated self-assesment	N/A	2nd week of onboarding	Yes	Yes	Yes
Trailmix on Swiss Army Knife session II	Complete related trailmix	CS specific	Trailmix in Trailhead	Self-managed	Philip		N/A	2nd week of onboarding	Yes	Yes	Yes
Intro to customer trials & customer ongoarding	Watch intro to Customer Trials & Customer Onboarding	CS specific	Video (30 min)	Self-managed	?		N/A	2nd week of onboarding	Yes	Yes	Yes

	Intro to intro to Financials Management	Watch intro to Financials Management - demo	CS specific	Video (60 min)	Self-managed	Polina		N/A	2nd week of onboarding	Yes	Yes	Yes
	Intro II to Flowhaven product	Watch Full Product Demo Sample (internal)	CS specific	Video (30 min)	Self-managed	Philip		N/A	2nd week of onboarding	Yes	Yes	Yes
	Session III of CS Swiss Army Knife	Watch CS Swiss Army Knife Session III: FH app	CS specific	Video (20 min)	Self-managed	Philip	Access demo environment & start reated self-assesment	N/A	2nd week of onboarding	Yes	Yes	Yes
	Trailmix on Swiss Army Knife session III	Complete related trailmix	CS specific	Trailmix in Trailhead	Self-managed	Philip		N/A	2nd week of onboarding	Yes	Yes	Yes
		Watch CS Swiss Army Knife Session 3: FH app	CS specific	Video (20 min)				N/A	2nd week of onboarding			
	Session IV of CS Swiss Army Knife	Watch CS Swiss Army Knife Session IV: Intro to Reporting with FH Data	CS specific	Video (45 min)	Self-managed	Philip	Access demo environment & start reated self-assesment	N/A	2nd week of onboarding	Yes	Yes	Yes
	Trailmix on Swiss Army Knife session IV	Complete related trailmix	CS specific	Trailmix in Trailhead	Self-managed	Philip		N/A	2nd week of onboarding	Yes	Yes	Yes
	Intro I to Royalty Reporting (RR) module	Watch intro to Royalty Reports (RR) module & Dashboards - demo	CS specific	Video (45 min)	Self-managed	Louis	Access demo environment & start reated self-assesment	N/A	2nd week of onboarding	Yes	Yes	Yes
	Intro II to Royalty Reporting (RR) module	Watch Royalty Reports (RR) + Dashboards - configuration	CS specific	Video (2 h 10 min min)	Self-managed	Polina	Access demo environment & start reated self-assesment	N/A	2nd week of onboarding	Yes	Yes	Yes
	Session V of CS Swiss Army Knife	Watch CS Swiss Army Knife Session V: Tools & time management - suggestions & best practises for CS team members	CS specific	Video (25 min)	Self-managed	Philip		N/A	2nd week of onboarding	Yes	Yes	Yes
	On-the-job learning	On-the-job learning: - Shadowing a colleague - Attending all customer calls							From 3rd week onwards?	Yes	Yes	Yes
	Refresher on module intro sessions	Go-back to materials	CS specific	See material per session	Self-managed		Complete self-assesment	N/A	2nd month of onboarding?	Yes	Yes	Yes
	Refresher on CS Trailmix sessions	Go-back to materials	CS specific	See material per session	Self-managed		Complete self-assesment	N/A	2nd month of onboarding?	Yes	Yes	Yes
Expert knowldge of Salesforce & FH platform	**SF Administrator certification?**											
Core role competence: CS in Tech & CS at FH												
Basic knowledge of CS in Tech & CS at FH	**Basics of FH CS Onboarding**	- Review CS onboarding presentation - Review onboarding schedule - Review Salesforce trail mix + Swiss Army Knife lessons	CS specific	Live: Face-to-face & online	Training session		Review material on onboarding presentation	N/A		Yes	Yes	Yes

	Customer review	Complete review of customers	Company-wide?	Live: Face-to-face & online	Training session	Jess		N/A	1st week of onboarding	Yes	Yes	Yes
	CS weekly meeting	Update on FH CS current status: Overview of customers & internal projects	CS specific	Live: Face-to-face & online	Attend meeting	Jess		N/A	1st week of onboarding	Yes	Yes	Yes
	Basics I of FH Customer Success	Discussing the basics of CS and what CS means through the lens of Flowhaven's values	CS specific	Watch recorded session (60 min)	Training session	Philip	Start self-assesment on basic concepts (add link here)	N/A	2nd week of onboarding	Yes	Yes	Yes
	On-the-job learning	On-the-job learning: - Shadowing a colleague	CS specific						From 3rd week	Yes	Yes	Yes
	Basics II of FH Customer Success	Learn about the how-to's of FH CS - The tough conversations - Top tips & tricks	CS specific					N/A		Yes	Yes	Yes
	Basics III of FH Customer Success	Training on managing customer expectations	CS specific							Yes	Yes	Yes
	Refresher on Basics I-II of FH Customer Success	Go-back to materials	CS specific	See material per session	Self-managed		Complete self-assesment	N/A	4th month of onboarding?	Yes	Yes	Yes
Reoccurring	**Regular, reoccurring CS case study sessions**	Knowledge sharing inside the CS team on best	CS specific		Live: Online			N/A	Reoccurring	Yes	Yes	Yes
Expert knowledge of CS in Tech & CS at FH								N/A		Yes	Yes	Yes
								N/A		Yes	Yes	Yes
								N/A		Yes	Yes	Yes
								N/A		Yes	Yes	Yes

Appendix 12

Definitions for different items (from high level to detailed)

FH CS career path examples

Examples of possible growth journeys **from position to position** for FH team members.

Aim to inspire personal growth.

FH CS learning paths

Journeys from onboarding team member to fully competent team member through a learning program / selected learning programs. Aim to visualize new hire journey in <u>high-level</u>.

FH CS learning programs (the spreadsheet)

Detailed description of learning needs & ways in order to gain competence for a specific FH role.

Aim to present <u>detailed</u> info on training sessions & other learning (learning path).

Prototype template 1: Learning path from onboarding CSM to fully competent **CSM**

Default starting point

- New to [FH platform, licencing & SaaS].
- Previous experience in [Account Management in tech].

General FH onboarding according to company onboarding plan.

- Gaining basic knowledge of company, culture & ways of working, HR & admin, local office, work equipment, etc.

General CS onboarding according to CS learning program.

- Gaining **basic** knowledge of [licencing industry, SaaS business, FH CS & FH platform].

CSM onboarding according to CSM learning program.

- Gaining **expert** knowledge of [licencing industry, SaaS business, FH CS & FH platform].

On-the-job learning

- Gaining knowledge & skills for full role competence:
- **Ability to [deliver X level tech customer support & solve any ticket independently].**
- **Ability to [manage any account independently].**

6 months

Prototype template 2: Learning path from onboarding CS Specialist to fully competent CS Specialist

Default starting point

- New to [FH platform, licencing, SaaS & Account Management in tech].
- Previous experience in [finance or business management].
- Strong interest in the financial field.

General FH onboarding according to company onboarding plan.

- Gaining basic knowledge of company, culture & ways of working, HR & admin, local office, work equipment, etc.

General CS onboarding according to CS learning program.

- Gaining **basic** knowledge of [licencing industry, SaaS business, FH CS & FH platform].

CSM onboarding according to CSM learning program.

- Gaining **basic** knowledge of [licencing industry, SaaS business, FH CS & FH platform].

On-the-job learning

- Gaining knowledge & skills for full role competency:
- **Ability to [assist CSMs, deliver general level tech customer support & solve selected tickets independently].**
- **Ability to [manage selected accounts independently].**

6 months

Prototype template 3: Learning path from onboarding CS Coordinator to fully competent CS Coordinator

Default starting point

- New to [FH platform, licencing, SaaS & Account Management in tech].
- Previous experience in [finance or business management].
- Strong interest in the financial field.

General FH onboarding according to company onboarding plan.

- Gaining basic knowledge of company, culture & ways of working, HR & admin, local office, work equipment, etc.

General CS onboarding according to CS learning program.

- Gaining **basic** knowledge of [licencing industry, SaaS business, FH CS & FH platform].

CSM onboarding according to CSM learning program.

- Gaining **basic** knowledge of [licencing industry, SaaS business, FH CS & FH platform].

On-the-job learning

- Gaining knowledge & skills for full role competency:
- **Ability to [assist CSMs, deliver general level tech customer support & solve selected tickets independently].**

6 months

Prototype template 4: Career path from new hire to CSM

Identify individual starting point

- New to [FH platform, licencing, SaaS & Account Management in tech].
- Previous experience in [finance or business management].
- Strong interest in the financial field.

CS Coordinator

- Basic knowledge of [FH, licencing industry, SaaS business, FH CS & FH platform] through general FH onboarding, general CS learning program & CS Coordinator learning program.
- Competency in…
- **Ability to [assist CSMs, deliver general level tech customer support & solve selected tickets independently].**

CS Specialist

- Basic knowledge of [FH, licencing industry, SaaS business, FH CS & FH platform]
- Competency in…
- **Ability to [assist CSMs, deliver general level tech customer support & solve selected tickets independently].**
- **Ability to [manage selected accounts independently].**

CS Manager

- Expert knowledge of [licencing industry, SaaS business, FH CS & FH platform].
- Competency in…
- **Ability to [deliver X level tech customer support & solve any ticket independently].**
- **Ability to [manage any account independently].**

1+ months depending on previous experience & performance

6+ months depending on previous experience & performance

Prototype template 5: Career path from CSM to FH Senior People & Business Leader

CS Manager

- Expert knowledge of [licencing industry, SaaS business, FH CS & FH platform].
- Competency in…
- Ability to [solve any ticket independently].
- Ability to [manage any account independently].

CS Team Lead

- Flowhaven People Leader competence (through FH managerial learning programme, on-the-job learning & selected additional learning)
- Ability to…
- Competence in…
  Proven skills in…

Senior FH People & Business Leader

- In-depth knowledge & skills of the independent management of a selected FH business function
- Ability to…
- Competence in…
  Proven skills in…

X+ months/years depending on previous experience & performance

X+ years depending on previous experience & performance

Prototype template 6: Career path from CSM to which position?

CS Manager

- Expert knowledge of [licencing industry, SaaS business, FH CS & FH platform].
- Competency in…
- Ability to [solve any ticket independently].
- Ability to [manage any account independently].

- Ability to…
- Competence in… Proven skills in…

- In-depth knowledge & skills of the independent management of…
- Ability to…
- Competence in… Proven skills in…

X+ months/years depending on previous experience & performance

X+ years depending on previous experience & performance