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COMPARING FACE-TO-FACE AND TECHNOLOGY-BASED TRAINING TO EVALUATE ITS PERCEIVED EFFECTIVENESS IN IMPROVING EMPLOYEE PERFORMANCE

by

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DECLARATION

I declare that "*Comparing face-to-face and technology-based training to evaluate its perceived effectiveness in improving employee performance*" is my own work, that it has not been submitted before for any degree or examination in any other university, and that all the sources I have used or quoted have, to the best of my knowledge, been indicated and acknowledged as completed references.

Shandré Meyer

November 2023

ABSTRACT

For several decades, the ideal and preferred traditional training delivery in organisations mainly comprised in-person, face-to-face training, and engagement. The twenty-first century introduced the Fourth Industrial Revolution, which witnessed great strides in technology and introduced technology-based and online training. This online method of training and development surged when the global COVID-19 pandemic came about in 2020 and made it necessary and imperative due to social distancing protocols. This foresaw the emergence of technology-based training within several organisations' training environments globally, enabling and increasing flexible learning for employees. Although technology-based training is considered a desirable and revolutionary training method, its efficiency is based on individuals' perceptions thereof, with many still favouring the traditional face-to-face training approach as part of their preferred learning style. This has raised the debate on whether organisations can transition from the traditional face-to-face training approach to a technology-based training approach and still enable staff to perform at an optimal level. The purpose of the research is to, therefore, understand the perceived effectiveness of technology-based training in comparison to face-to-face training provided to employees by organisations. It may facilitate the reason for which training method works best and assist organisations in understanding whether to adapt their face-to-face training environment to technology-based training. The research was conducted using a qualitative study, therefore, the thematic approach was used to analyse the data. A non-probability, purposive sampling method was used to sample the suitable participants for the study. Twelve participants—financial sales advisers working in the financial industry in the Western Cape, were selected to participate in the study. For data collection, semi-structured interviews were held with each participant. Based on the research findings and discussion, participants showed benefits in both training methods; however, it was understood that face-to-face training remains the preferred training method. Due to the continuous technological challenges South Africa faces, such as load-shedding and lack of technological infrastructure, technology-based training may not be as effective. Despite these challenges, technology-based training can still be used to a certain extent along with face-to-face training to provide trainees with the most effective training experience; therefore, it was recommended that face-to-face training and technology-based training should be used concurrently through a blended training approach. The results of the study and the recommendations made may be useful to training and development professionals, corporate organisations who aim to improve their training and development programmes, and researchers interested in training and development.

KEYWORDS

Face-to-face training

Technology-based training

Training method

Training effectiveness

Employee performance

Training and development

ABBREVIATIONS

AI	Artificial intelligence
BBBEE	Broad-Based Black Economic Empowerment
CIRO	Context, Input, Reaction, Outcome
CPD	Continuous professional development
F2FT	Face-to-face training
HCBP	Human Capital Business Partner
HEI	High education institutions
HRD	Human resource development
HRM	Human resource management
HSSREC	Human and Social Sciences Research Ethics Committee
ICT	Information and communication technologies
ILO	International Labour Office
ILT	Instructor-led training
IPA	Interpretivism phenomenological approach
KLSI	Kolb's Learning Style Inventory
KSA	Knowledge, skills, and ability
MOOC	Massive open online courses
PGM	Provincial general manager
ROI	Return on investment
SARS	South African Revenue Services
SLM	Senior learning manager
T&D	Training and development
TAM	Technology Acceptance Model
TBT	Technology-based training
TNA	Training needs analysis
VR	Virtual realities
SDA	Skills Development Act

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CHAPTER 1: INTRODUCTION OF THE RESEARCH

1.1 Introduction and background

Organisations globally continuously aim to remain relevant and competitive to survive and thrive within the rapidly changing corporate environment (Madaan & Bhatnagar, 2021; Rožman et al., 2023; Saha, 2017; Sri Divya & Gomathi, 2015). The focus of organisations has increased exponentially on improving and preserving their productivity, efficiency, and effectiveness, highly influenced by their workforce (Abdelwahed & Doghan, 2023; Obiekwe & Nwaeke, 2017; Singh et al., 2016; Sunny & Yajurvedi, 2022). This foresaw a critical dependency on employees' competence through their performance levels, knowledge, skills, and ability (KSA).Employees are one of the most significant organisational assets who work towards achieving organisations' set objectives (Adamu et al., 2022; Obiekwe & Nwaeke, 2017; Rodriguez & Walter, 2017; Samwel, 2018; Tan & Olaore, 2022). Therefore, organisations with more significant reason have recognised the importance of a well-established training and development (T&D) system responsible for expanding, enabling, and empowering a highly enriched and skilled workforce (Mehale et al., 2021; Rodriguez & Walter, 2017). T&D became even more crucial in 2020 when organisations were forced to implement a remote work policy for employees due to the COVID-19 pandemic (Kurdy et al., 2023; Mikołajczyk, 2021).

Remote work is a flexible working arrangement allowing an employee to work from a remote location outside the corporate office (Kurdy et al., 2023). According to Saurombe et al. (2022), remote work impacts productivity as employees are not exposed to face-to-face interactions and cannot receive immediate guidance and support from other employees. This concurrently disrupted employees' ability to execute their deliverables effectively. Before the pandemic, remote work was not a common practice for South Africa's organisations (Nkate, 2020). In response, organisations provided technological equipment to employees so they could communicate with their colleagues from afar and continue to perform as effectively at home as when working from the office. T&D had a crucial role in ensuring an efficient transition into the new remote working arrangement.

Employees needed technical upskilling in using the different information and communication technologies (ICTs) to remain connected to their colleagues. They also needed to know how to balance their work and personal life to maintain their well-being (Saurombe et al., 2022; Shirmohammadi et al., 2022). Therefore, T&D played an integral part in sustaining several workforces (Mikołajczyk, 2021). T&D is an essential human resource management (HRM) requirement of an organisation's efforts to compete in the new economy and meet the ever-

changing challenges (Adamu et al., 2022; Wärnich et al., 2018). This is achieved through the human resource development (HRD) function, a subset of HRM.

HRD is mainly responsible for establishing and implementing the most appropriate T&D interventions to develop employees' skills and confidence to perform well in their jobs (Grobler & Wärnich, 2016). Over the years, T&D evolved significantly due to various influencing factors. The dynamic impact of globalisation on national economies, production, trade, and the world of work has consistently challenged T&D strategies within organisations (Mavunga & Cross, 2015; Tshilongamulenzhe & Coetzee, 2012). Moreover, T&D has experienced a remarkable transformation to fulfil and support the continuous expansion and change in the nature of jobs (Bell et al., 2017), especially during the current twenty-first century that introduced the Fourth Industrial Revolution (4IR) and progressed the digital era, but more so due to the COVID-19 pandemic (Mikołajczyk, 2021; Ramraj & Marimuthu, 2019).

Within the South African context, the reality of T&D and upskilling individuals has progressed significantly since the country achieved its democracy status in 1994. The then newly appointed South African government imposed various new legislations to restore and rectify the imbalance of skills development within the country caused by the apartheid government (Ryklief & Tengeh, 2022). Of the several legislative and policy frameworks introduced, the Skills Development Act 97 of 1998, as amended to Act 37 of 2008 (SDA) was made specific for workplace-based learning to compensate and address the challenges of skills shortage, poverty, unemployment and inequality, especially among the previous racially disadvantaged groups.

The SDA aims to develop and expand the skills among the South African labour force to improve productivity and employment within organisations. This is achieved through investments in education and training in the labour force, and by encouraging organisations to allow employees to learn and acquire new skills by using the workplace as an active learning environment (Tshilongamulenzhe & Coetzee, 2012). Although the SDA is most applicable to workplace-based learning, additional legislative frameworks are also crucial for T&D in South Africa:

- The Skills Development Levies Act 9 of 1999 (SDLA)
- The Broad-Based Black Economic Empowerment Act 53 of 2003 (BBEEE)
- Employment Equity Act 55 of 1998 (EEA)

While it is essential to implement specific T&D interventions to improve productivity and performance within organisations, it is further important to determine the effectiveness thereof (Mehale et al., 2021). When evaluating and determining the efficacy of any T&D intervention, the method(s) of training delivery plays a highly crucial role as it influences the level of engagement and interest received from trainees, which affects their perception and attitude towards the training (Abudlhabib & Al-Dhaafri, 2020; Bell et al., 2017; Jevana, 2017). Jevana (2017) state that for the employer, the training method needs to be cost-effective, satisfy employee expectations, and yield a high return on investment (ROI). For the employee, the training method should simultaneously support the theory and practice of the job nature.

Additional studies have also been conducted regarding the influence of training methods. For instance, Abudlhabib and Al-Dhaafri (2020) conducted a study on *the impact of training methods on the effective training process in Ajman Police* and the results uncovered that the type of training methods selected are vital for an effective training process. Another study by Haji, Yussuf and Hamad (2021) on *the effects of training materials and methods on the performance of employees of the commission for land in Zanzibar* also established that it had a significant impact specifically on the result and outcomes of employees' level of performance. Unfortunately, within the South African context, there is a lack of studies on the concept of training methods and how it influences employee performance; however, research exists on the benefits and shortfalls of specific types of training methods within South African organisations.

Based on various study findings, organisations have positioned the HRD function under pressure to find the best-suited training method and interventions for its workforce, especially with the demands of globalisation, economic pressures, and work-life concerns (Bell & Kozlowski, 2007; Mavunga & Cross, 2018; Okana et al., 2018). In organisations, face-to-face training (F2FT) and technology-based training (TBT) are alleged to be the two main training methods from the overarching on-the-job and off-the-job training processes (Jevana, 2017). This will be further discussed below.

1.1.1 Face-to-face training

Although learning has taken various forms over the years, F2FT has been the standard and most popular training method for corporate learning, occupying 49% of all learning content (Akpoviroro & Adeleke, 2022; Okana et al., 2018). Broadwell of 1976 (Torraco, 2016) concurs by stating that the traditional F2FT, which mainly includes instructional classroom and on-the-job training, was considered the most popular training method as it was considered more

efficient and minimised interference with workplace production; however, Akpoviroro and Adeleke (2022), go on to counter-argue that F2FT has recently been observed as impractical due to its administrative requirements, for instance, the scheduling and travelling issues and increased cost implications. Akpoviroro and Adeleke (2022) further contend that F2FT requires more manpower and resources, which could lead to slower business activities.

The COVID-19 pandemic affected F2FT tremendously. In December 2019, the pandemic spiralled across Wuhan, China, and later worldwide. This left several countries to enforce a hard lockdown in 2020 to contain the spread of the virus as it was contracted through human transmission (Kaushik & Guleria, 2020). Organisations were forced to implement a remote work policy among their workforces. Although remote work existed long before COVID-19, it was only due to the pandemic that several organisations were forced to adopt the practice among their workforce (Saurombe et al., 2022). For workplace T&D, this had a significant implication. With the enforcement of lockdown and travel restrictions, it was impossible to host F2FT and instead, remote and hybrid learning needed to become the new norm (CIPD,2021).

Therefore, the pandemic has significantly increased online learning and TBT (Mhlanga & Moloi, 2020; Mikołajczyk, 2022; OECD, 2020; Rigolizzo, 2022). Several organisations that used the F2FT method were now pressurised to adopt the TBT approach to avoid any disruptions in the continuity of upskilling and developing their employees. This ultimately anticipated and enhanced the exposure of TBT within organisations. For instance, a study by Stefan, Seit-Amet, Dascalu and Lazarou (2021) to examine e-learning within organisations amid the COVID-19 pandemic established there was a significant increase in using e-learning during the lockdown, compared to previous years. As of today, post the pandemic, several organisations continue to use TBT as their main T&D method to upskill employees (CIPD, 2021).

1.1.2 Technology-based training

As organisations advance in the current 4IR digital era, people aim to optimise training to the most significant degree. Some barriers that prevent and demotivate employed individuals from participating in training interventions include lack of time due to work commitments, scheduling conflicts, distance constraints and family responsibilities (OECD, 2020). This introduced new challenges for organisations to select the most suited training delivery method to accommodate these barriers (Jevana, 2017). Fortunately, organisational training has evolved concurrently with the advances in technology. This allowed organisations to uncover better integration between training methods and the desired training outcomes, especially with TBT,

which has made remarkable progress since the late 1980s (Chen, 2008; Kim, 2022; Maxwell, 2012; Torraco, 2016; Żur & Friedl, 2021).

TBT, often interchangeably called e-learning, online learning, or web-based learning, combines technology with learning and is delivered using ICTs (Żur & Friedl, 2021). According to Lands and Pasha (2021), TBT started to replace traditional F2FT within the corporate training environment at a lower cost, allowing trainees more flexibility in their learning (Kim, 2022; OECD, 2020; Okana et al., 2018). Moreover, TBT is alleged to be more effective, especially for dispersed workforces, as it allows distant training to be available to employees almost anywhere and everywhere and to be more responsive in today's fast-paced business environment (Pandeani et al., 2022; Sharma et al., 2021).

In 2015, several companies made the shift and converted 41% of all their learning content to TBT delivery, a statistic that approached the amount of traditional F2FT delivery (at 49%) (Okana et al., 2018); therefore, using TBT was amplified during the COVID-19 pandemic in 2020. This is also where the credibility of TBT was tested (Żur & Friedl, 2021), and several organisations that used F2FT as their primary mode of training were now exposed adequately to TBT and experienced the benefits first-hand. It is alleged that the pandemic motivated a faster, widespread shift in digital learning (CIPD, 2021).

Despite research outlining the several benefits that TBT offers, such as Kim (2022); OECD (2020); Pandeani et al. (2022); Sharma et al. (2021), there remains a debate on which training method is considered more effective. Researchers have contended that although TBT offers several benefits, F2FT remains necessary (Gayed, 2019; Kim, 2022). The study, therefore, aimed to compare traditional F2FT and TBT to understand the perceived effectiveness of each better, from employees' perspective, in improving their performance. According to various researchers, when evaluating the effectiveness of the selected training method, it is highly influenced by individuals' self-owned perceptions, as this determines what they can achieve through the learning approach. This may determine whether they will accept and adopt the method (Chen, 2014; Jency, 2016; Makgato & Bankole, 2016; Sharma et al., 2021). Several factors may influence an individual's perception of the training method (Abudlhabib & Al-Dhaafri, 2020; Chen, 2008; Cheng et al., 2012; Kim, 2022; Martins et al., 2019). This includes but is not limited to:

- The trainee's characteristics and motivation level.
- The trainee's reaction and attitudes to the training method.
- The level of learning, such as KSA, acquired at the specified training method.

- Training transfer, such as the behavioural change to allow the trainee to transfer the KSA back into their job performance.
- The organisational results of the training method and its ROI, post implementing the training intervention, such as whether the productivity and profit margin have increased due to and after training has occurred.

Additional researchers have also identified other factors that may correspondingly influence individuals' perceptions of the effectiveness of a training method (Baherimoghadam et al., 2021; Loeng, 2020; Rothwell, 2020; Sharma et al., 2021). This includes:

- Multigenerational differences
- Adult learning and self-directed learning
- Technologically inclined (ease of use)
- Learning styles

By understanding how these factors influence individuals' perceptions and experiences regarding TBT and F2FT, researchers may make sense of why one training method is considered better than the other. With the aforementioned benefits and challenges, these factors may also emphasise what organisations and T&D professionals should consider when implementing each training method as part of their training interventions.

1.2 Problem statement

Research over the years uncovered extensive benefits of TBT, which motivated organisations globally to transform their current training methods; however, as innovative as TBT may be, it is not yet certain whether this training method is sustainable, especially in third-world developing countries, such as South Africa, where the digital state faces several challenges (Aruleba & Jere, 2022). For TBT to work effectively, it depends heavily on solid Internet connectivity and efficient technological infrastructure to enable it. In 2003, van der Spuy and Wöcke stated that reliable technological infrastructure must support TBT learning systems in South Africa. This includes accessibility to a fixed line bandwidth and a satellite bandwidth to enable a seamless Internet connection, access to quality content, and limited customisation of learning management systems. Although improvements were made over the years, this remains a concern in South Africa. Moonasamy and Naidoo (2022) state that South Africa faces a digital divide among the population where, in certain parts of the country, there is a lack to hardware access, understanding of digital means of communication and Internet

affordability. The lack of these three factors restricts South Africa's chance at development and equality.

According to Aruleba and Jere (2022), rural communities, especially, struggle to maintain the pace of digital connectivity due to the lack of Internet and broadband infrastructures. While it was established that the number of Internet users across South Africa had increased from 5.3 million to 38.13 million between 2009 and 2021, only 1.7% of those users are from rural communities (Aruleba & Jere, 2022). South Africa's ongoing load-shedding crisis has also been a further technological disrupter. Since 2008, the country had experienced a significant electricity crisis that worsened in 2022 (Mamphogoro et al., 2022; Nkosi & Govender, 2022). This constitutes a considerable threat to technological infrastructure and ultimately affects the usage capacity of TBT methods. Consequently, the traditional F2FT cannot be ruled out as a training method, which impacts how the country can benefit from TBT methods (Moonasamy & Naidoo, 2022).

Apart from the technological and electricity challenges within South Africa, the country continues to suffer from the apartheid aftermath of socioeconomic inequalities despite the country's legislative frameworks (Mavunga & Cross, 2015). Millions of previously disadvantaged racial groups have reached adulthood without having the ability to read in any language, which led several to become uneducated and unskilled (Mavunga & Cross, 2015). Observing the acceptance of TBT methods specifically, 2016 data suggested that adopting TBT in South Africa grew at 36.2% annually; however, the actual acceptance of this technological innovation remains low (Gcora & Cilliers, 2016). This statistic was established before the COVID-19 pandemic and has presumably changed since. Yet it is rather challenging to find recent statistics for South Africa as current research focuses mainly on high education institutions (HEIs), as opposed to corporate and organisational environments. Where research exists, its relevance is outside the parameters of South Africa.

Based on the benefits TBT offers, especially the flexibility and cost savings benefits, it is not unexpected for several organisations to consider a potential move to make TBT their primary method of employee training (Clapper & Greyling, 2022; Kim, 2022; OECD, 2020; Okana et al., 2018). In the South African context, this method started a few years before COVID, even though it was not as popular as the traditional F2F method. For instance, a study by Msomi and Munapo in 2016 on *the conceptualisation of e-learning in the public sector* outlined how the South African government had implemented e-learning to upskill workers within the public sector, due to the skills shortages. Not only did the government choose e-learning to minimise

training costs, but they also believed that F2FT would have decreased productivity as this method required workers to be away from their day-to-day duties to attend the training. It was also mentioned that the Department of Health in Free State and The National Treasury replaced their F2FT with e-learning within their organisations and succeeded in increasing the number of trained employees at less cost (Msomi et al., 2016).

Nonetheless, based on the mentioned existing challenges encountered by the South African population, it remains uncertain whether every other organisation across the country that may consider a move to make TBT their main training method can do so successfully; therefore, understanding employees' perceptions and experiences of both training methods amid the current challenges and the mentioned influencing factors may help uncover which method is best suited to the current environment.

1.3 Research questions

1.3.1 Main research question

What are employees' perceptions of the effectiveness of TBT compared to traditional F2FT training to improve their workplace performance?

1.3.2 Research sub-questions

The following research questions guided the study:

1) Do employees perceive F2FT as an effective method to be upskilled and improve their workplace performance?
2) Do employees perceive TBT as more effective than the traditional F2FT method to upskill and improve their workplace performance?
3) Does TBT have the potential to replace the traditional F2FT method? Would it be an effective training substitute?

1.4 Research objectives

1.4.1 Main research objective

The study aimed to explore the perceived effectiveness of TBT compared to traditional F2FT among financial employees to highlight the most preferred training method. This is achieved through the feedback provided by financial employees based on their experiences around which method they perceived to work better to help improve their workplace performance.

1.4.2 Research sub-objectives

The research questions are translated to the following research objectives:

1) To explore employees' preferences regarding F2FT to be an effective method and its perceived association as a way to upskill and improve employee workplace performance.
2) To explore whether TBT is more effective than the traditional F2FT method to upskill and improve employee workplace performance.
3) To identify whether TBT can replace traditional F2FT and if it will be an effective substitute.

1.5 Significance of the study

Organisations are aware of the importance of implementing well-established T&D programmes. Every year, a large amount of capital is invested into T&D to improve the performance and productivity of the workforce. Consequently, organisations rely on the most recent literature to provide clarity and guidance around the best T&D practices. This is conducted to avoid implementing poor T&D interventions that may be a detriment to them; therefore, training methods have a significant influence in determining the effectiveness of training interventions, and for several years, F2FT and TBT have been a topical discussion within the T&D domain (Akpoviroro & Adeleke, 2022; Beinicke & Bipp, 2018; Bell & Kozlowski, 2007; Gayed et al., 2019; Jevana, 2017; Lewis, 2006; Okana et al., 2018). Although literature existed on the benefits of each training method, there was a limited amount of research regarding the comparison between the two. It is only recently that a vast amount of literature exists due to the significant development of research during and after the COVID-19 pandemic (Mhlanga & Moloi, 2020; Mikołajczyk, 2022; Rigolizzo, 2022; Żur & Friedl, 2021). This prompted organisations to explore the offerings of TBT among their workforce and allowed researchers to uncover the personal perceptions of individuals regarding their experience with the transition from F2FT to TBT.

It motivated several organisations to consider a shift from their traditional F2FT to the modern TBT method, especially due to the cost efficiency and flexibility of TBT (CIPD, 2021; Clapper & Greyling, 2022; OECD, 2020; Mikołajczyk, 2022; Stefan et al., 2021). Researchers provided numerous arguments about whether TBT can replace F2FT within organisations; however, as it stands, it remains a debate. All studies conducted, such as by Akpoviroro and Adeleke, 2022; Beinicke and Bipp, 2018; Bell and Kozlowski, 2007; Clapper and Greyling, 2022; Kim, 2022; Lewis, 2006; Mikołajczyk, 2022; Żur and Friedl, 2021, provided various perspectives before and post the COVID-19 pandemic and it is challenging to discredit the arguments put forth

without researching the study first-hand; therefore, the study aimed to explore the perceived effectiveness of TBT in comparison to F2FT based on employee feedback. This will provide insight into which method they feel is more suitable and favourable in assisting them in upskilling and potentially improving their workplace performance. The study also aimed to guide organisations on whether the traditional F2FT method is replaceable with TBT. Obtaining these insights may help organisations to make an informed decision on the best way forward.

Last, the study findings intend to contribute to the literature of the I/O psychology field to broaden the insights and understanding of the current topic. Investigating the perceived effectiveness of F2FT and TBT may also enable I/O psychologists and human resource professionals, specifically T&D professionals, to use the information efficiently to improve employees' performance and organisations' productivity. Although current literature exists regarding how traditional F2FT and TBT improve employee performance and which method is considered more significant through its offerings, there is limited research conducted within the parameters of South Africa primarily, from a corporate context. As it stands, there is a broad research divergence on corporate learning in the digital age (Żur & Friedl, 2021).

1.6 Scope of the research

1.6.1 Delineation

Research for the present study was conducted in Cape Town, South Africa. The boundaries of this study were kept in the financial industry parameters. The financial industry was chosen because it is one of the main industries to digitally transform, adapt, and accelerate its work operations, especially during the COVID-19 pandemic. It is also a fast-paced, competitive and rapidly changing industry where employees require training to remain relevant and educated about the latest trends to service the market more efficiently.

1.6.2 Delimitation

As the study has adopted a qualitative approach, it makes it challenging to generalise the results. The data collected is restricted to one organisation from the financial industry, specifically an insurance company. The sample selected comprises only financial advisers who have been employed before and post the COVID-19 pandemic, as they would have been exposed to both training methods and experienced the transition from one training method to the next. The financial advisers are at the same organisational level, which means they would have received the same training. A variety of training methods exist; however, the focus of this

study is to explore and understand individuals' perceptions and experiences regarding F2FT and TBT methods.

1.7 Key terms

Technology-based training (TBT): Technology-based training is defined as the learning of content using various technology devices and includes computer-based methods, web-based training or e-learning, interactive multimedia and virtual reality training. This can occur through the Internet, intranets, satellite broadcasts, audio and video tape, video and audio conferencing, Internet conferencing, chat rooms, e-bulletin boards, webcasts, computer-based instruction, and CD-ROM (Coetzee & Botha, 2012).

Face-to-face training (F2FT): Face-to-face training is one where participants, instructors, and facilitators meet at the same place and time. It refers to seminars, conferences, lectures and on-the-job training sessions that are ultimately part of direct instruction (Kiley & Coetzee, 2012).

Employee performance: Employee performance is characterised as employee productivity and output because of employee development. Employee performance will ultimately affect organisational effectiveness as it is the level of success of employees in performing their duties and responsibilities (Hameed & Waheed, 2011).

Employee perception: Employee perception is defined as the process where an employee organises and interprets their impressions to provide meaning to their environment, and therefore, it significantly influences their workplace behaviour (Katsaros et al., 2014).

Training effectiveness: Training effectiveness refers to the extent to which the programme's training objectives are achieved and benefited by the trainees and organisation. It can be evaluated by measuring trainee satisfaction and reaction, learning performance, individual and organisational performance (Kirkpatrick & Kirkpatrick, 2016).

Training and development (T&D): Training and development concerns the improvement and development of the skill base of an organisation by considering the knowledge, skills, capabilities, behaviours and attitudes of its workforce (Bangura, 2017).

1.8 Outline of the chapters

Chapter 1 introduces the study by summarising the research topic through its background, problem statement, research objectives and questions. It outlines the study's significance and scope and defines key terms crucial to the study.

Chapter 2 discusses existing literature and knowledge around the study and elucidates the variables in more detail. It further outlines the theoretical framework supporting the research.

Chapter 3 outlines the research methodology used in the study. This includes discussions of the research plan and design, the population and sample of the study, the research setting, the instruments used to collect data and the data analysis procedure. Last, it details the ethical considerations adhered to during the data collection procedure.

Chapter 4 presents the findings and results provided by the selected participants for the study. It further incorporates data analysis.

Chapter 5 is the final and concluding chapter. It discusses the findings. The discussion also integrates various recommendations for the study and the limitations encountered during the research process. Last, it suggests future research.

1.9 Chapter summary

In this chapter, the importance of T&D is discussed. Organisations continuously aim to optimise their T&D programmes by making them more efficient and cost-effective. Various studies established that the training method(s) significantly influence the effectiveness of training interventions within an organisation. For several years, the training methods chosen to deliver training have been debated through various studies, specifically F2FT and TBT. Current research suggests that several organisations globally are choosing TBT to keep up with the digital transformation of the twenty-first century; however, there is also an argument as to how the traditional F2FT method cannot be ruled out as a training method, especially in third-world countries, such as South Africa where social inequality and technology infrastructure remain an issue, as outlined by the chapter's problem statement.

Therefore, the chapter discusses how the study explored employees' personal experiences of F2FT in comparison to TBT in anticipation that it will emphasise their training method preferences and the reason behind them. As organisations often rely on literature to help guide their decision on the best T&D practices, the chapter mentions how the significance of the

study aimed to contribute to the literature based on the research objectives and questions. This will also contribute to the limited credible research around the perceptions of F2FT compared to TBT, especially in South African organisations. The chapter identifies the research, which includes the limitations. Last, the chapter includes the key terms and definitions used throughout the study and an overview of the remainder of the chapters.

CHAPTER 2: LITERATURE REVIEW

2.1 Introduction

This chapter reviews and provides literature on the importance of T&D and how it improves employee performance, which further details and discusses the effectiveness of traditional F2FT compared to TBT. The theoretical framework that guides and supports the study combines existing learning evaluation theories presented below. The literature will also discuss the context of T&D within South Africa and expand on adult learning. The literature also holistically discusses the factors influencing the success and effectiveness of training methods. Last, to conclude, a chapter summary is provided.

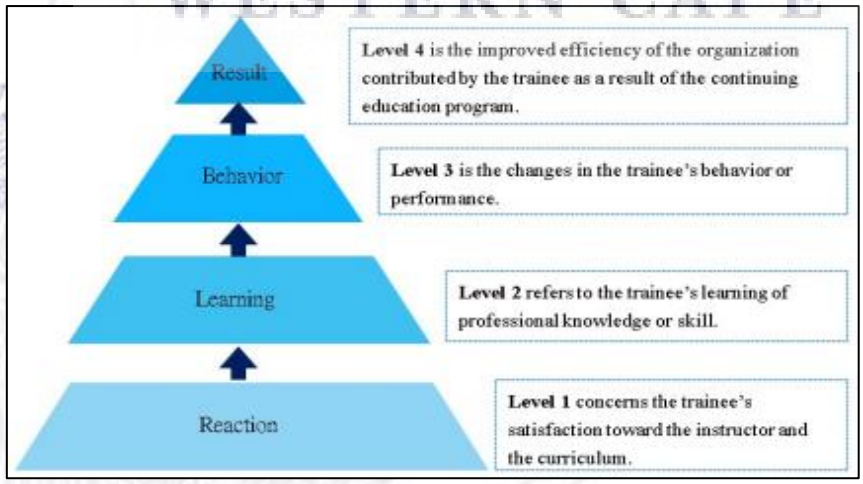
2.2 Theoretical framework

2.2.1 Kirkpatrick's four-level training evaluation model

Donald L. Kirkpatrick (1959) has been recognised as the father of training evaluation and created a model based on four levels intending to clarify the concept of training evaluation (Kiley & Coetzee, 2012; Kirkpatrick, 1998; Urbancová, Vrabcová, Hudáková & Petru, 2021). These levels include reaction, learning, behaviour and results. The levels are shown in Figure 2.1 below.

Figure 2.1

Kirkpatrick's Four-Level Training Evaluation Model



Note. Adapted from "Evaluating a continuing medical education program: New World Kirkpatrick Model Approach" by S. Liao, and S. Hsu, 2019, *International Journal of Management, Economics and Social Sciences, 8*(4), p. 268 (https://doi.org/10.32327/IJMESS/8.4.2019.17).

According to Alsalamah and Callinan (2021); Reio et al. (2017), the model is easily understood and became the most influential evaluation model in the HRD field, enhancing training assessment thinking and practice. Kirkpatrick (1959) emphasised that all four levels are essential and should be understood by all HRD and T&D professionals. The levels are further explained below.

2.2.1.1 *Level 1: Reaction*

Reaction measures and describes the trainee's feelings, impressions and satisfaction regarding the training programme, such as whether they enjoyed it based on the programme's pace, format, organisation, content relevance and delivery quality. Evaluation of this level is usually conducted after the training programme through questionnaires where trainees can rate their level of satisfaction. This provides information on whether trainees established it as valuable (Kiley & Coetzee, 2012; Liao & Hsu, 2019; Martins et al., 2019).

2.2.1.2 *Level 2: Learning*

According to Kirkpatrick, even though trainees might positively react to the training programme, it does not warrant that learning was successfully ensured; therefore, the learning level evaluates whether there has been a significant change in the adoption levels of knowledge, skills, attitudes, and behaviour (Kiley & Coetzee, 2012; Liao & Hsu, 2019).

2.2.1.3 *Level 3: Behaviour*

At this level, they were evaluating whether the knowledge, skills, attitudes and behaviour acquired during the training have been transferred to the workplace. It evaluates whether employees can apply what they learnt to their jobs (Kiley & Coetzee, 2012; Liao & Hsu, 2019). Evaluating this level is crucial and the most relevant to the study as it focuses on improving employees' performance based on the training programme. According to Kirkpatrick and Kirkpatrick (2005), evaluating and measuring the behaviour after training is conducted is completed not only to see if behaviour has changed but also to determine the reasons change has not occurred. If employees do not or cannot implement what they have learnt back into their jobs, the training intervention has ultimately failed.

2.2.1.4 *Level 4: Results*

Evaluating results determines and measures how training contributed to the organisation's success, such as the ROI (Kiley & Coetzee, 2012; Liao & Hsu, 2019). The level of employee

performance correlates with the success of the organisation and contributes to its productivity. Because the main objective of the training is to improve employees' performance, it is reasonable to evaluate the effectiveness of a training programme by measuring the improvement in the organisation's success (Adamu et al., 2022; Obiekwe & Nwaeke, 2017; Rodriguez & Walter, 2017).

Although Kirkpatrick's four-level evaluation model has been the preferred framework for evaluating training effectiveness by researchers and practitioners, they have also recognised specific shortcomings of the model over the years (Alsalamah & Callinan, 2021). Critics of Kirkpatrick's model contend that it is oversimplified and, therefore, claim to fail to adequately acknowledge the role of intervening and external variables, which may influence training outcomes (Bhuiyan, 2017). Various scholars have proposed alternative models over the last fifty years, intending to expand and improve on the shortcomings of Kirkpatrick's four-level training evaluation model while still using its framework as a basis. This includes the five-level approaches by Hamblin (1974), the CIPP evaluation model (1983), Kaufman's five levels of evaluation (1995), the CIRO (Context, Input, Reaction, Outcome) model, and Phillips's five-level training evaluation model (Choudhury & Sharman, 2019; Saha, 2017; Triphati & ArtiBansal, 2017).

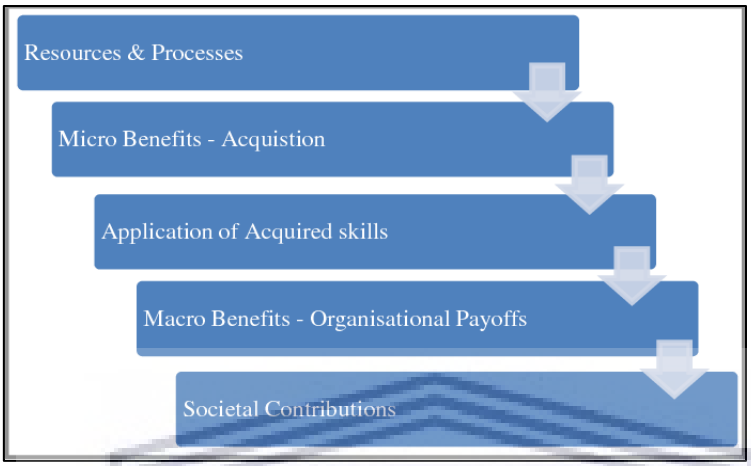
While all these models offer something unique to training evaluation, Kaufman's five level evaluation model is the most relevant to the study and will be discussed further in more detail.

2.2.2 Kaufman's five-level evaluation model

Also known as Kirkpatrick plus, Kaufman's five level evaluation model was developed in 1995 by Kaufman, Keller and Watkins, intending to evaluate not only the training delivery but also the impact thereof and connect performance to expectations (Choudhury & Sharman, 2019; Saha, 2017). The five levels are resources and process, acquisition, application, organisational payoffs, and societal contributions (Choudhury & Sharman, 2019; Sachdeva, 2014; Saha, 2017; Triphati & ArtiBansal, 2017). The levels are displayed in Figure 2.2 and further explained below.

Figure 2.2

Kaufman's Five-Level Evaluation Model



Note. Adapted from "Effectiveness Evaluation of Behavioural Training and Development Programmes" by S. Sachdeva, 2014, *The Standard International Journals, 5*(6), p. 11 (https://doi.org/10.9756/sijasree%2Fv5i6%2F0204510202).

2.2.2.1 *Level 1: Resources and process*

The first level of Kaufman's model is derived from Kirkpatrick's first level of reaction, which divides into two sub-levels: resources or input (1a) and process (1b). Resource evaluates the quality, usefulness and appropriateness of the training resources and materials required for the training programme. Processes, such as Kirkpatrick's reaction level, extend from the input level and evaluates the trainee's satisfaction with whether the training method and intervention were appropriately implemented and whether its resources were efficient enough to achieve the learning objectives, based on their learning experience (Choudhury & Sharman, 2019; Saha, 2017; Singh & Ramdeo, 2020; Triphati & ArtiBansal, 2017).

According to Triphati and ArtiBansal (2017), the division and expansion of Kirkpatrick's first level of reaction is the most practical and useful suggestion by Kaufman, separating and questioning resource availability (resources) versus the delivery experience (process) of the training. By separating resources from delivery, Kaufman's model makes it far easier to identify which factor was responsible for the success or failure of training. It is important to assess the quality of resources; otherwise, a well-delivered training programme could fall short due to low quality or insufficient resources. For instance, the course material could be at the wrong level for the trainees. Simultaneously, a training programme with robust materials could be poorly delivered.

2.2.2.2 *Level 2: Acquisition (Micro)*

Like Kirkpatrick's second level of learning, acquisition evaluates whether the trainee or small group has successfully acquired the learning material from the training to enhance the required competencies. Kaufman's model categorises this as a micro level (Srivastava, 2017).

2.2.2.3 *Level 3: Application (Micro)*

Level 3 of application is simultaneously similar to Kirkpatrick's Level 3 of behaviour. The application evaluates whether the learning from the training programme has been applied by the trainee and to what extent. It evaluates how much and how well knowledge is implemented on the job. Kaufman's model categorises this as a micro level alongside Level 2 of acquisition (Srivastava, 2017).

2.2.2.4 *Level 4: Organisational payoffs (Macro)*

Organisational payoffs are equal to that of Kirkpatrick's Level 3 of results where the overall performance and ROI at the organisation level are evaluated and measured. Kaufman's model categorises this as the Macro level (Saha, 2017; Srivastava, 2017).

2.2.2.5 *Level 5: Societal contributions (Mega)*

The societal contributions level is the final and additional level added by Kaufman, Keller and Watkins (1995) that differentiates and surpasses Kirkpatrick's four-level training evaluation model. This level examines how much the organisation contributes to its clients and societal needs. It stems further from the organisation and assesses how expected improved performance has enhanced society and the environment surrounding the organisation (Saha, 2017; Srivastava, 2017).

While Kaufman's evaluation model measures key elements based on the five levels discussed above, Bloom's taxonomy contains certain aspects that complement and are similar to Kaufman's model; therefore, discussing Bloom's taxonomy to further expand on Kaufman's model could assist in enhancing the study's theoretical framework.

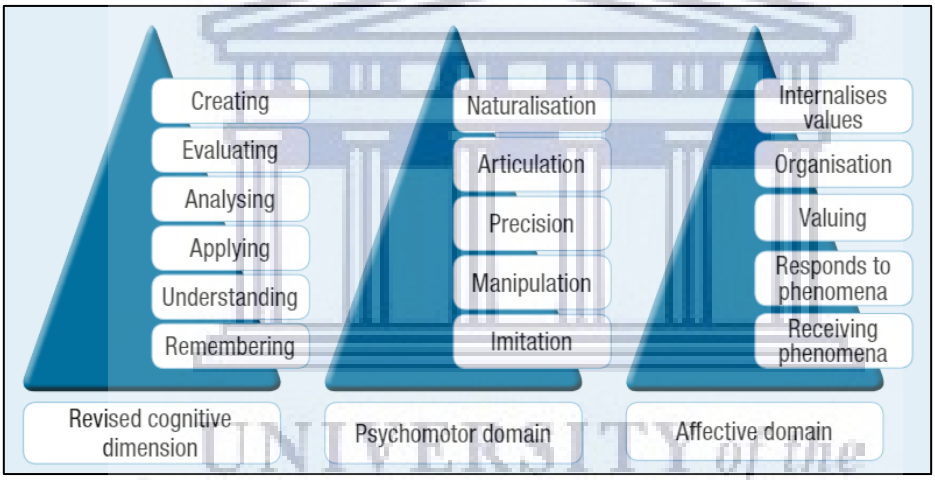
2.2.3 Bloom's taxonomy of learning

Bloom's taxonomy was developed in 1956 by educational psychologist Benjamin Bloom and his colleagues Max Englehart, Edward Furst, Walter Hill and David Krathwohlput (Chandio et al., 2016). Bloom's taxonomy began with the cognitive domain but later expanded and

introduced the affective domain in 1964 and the psychomotor domain in the 1970s (Hoque, 2016). The cognitive domain was later revised in the mid-nineties, which reflects a more active form of thinking and is perhaps more accurate (Hoque, 2016). The revised version of the cognitive domain will be discussed below. Although used mainly to evaluate educational learning within academic institutions, Bloom's taxonomy of learning can also apply and relate to all types of learning, which includes adult learning and evaluation (Grebin et al., 2020; Miller, 2018). Each domain is presented through a hierarchy divided into various levels. The levels are displayed in Figure 2.3 and further explained below.

Figure 2.3

Bloom's Taxonomy: Cognitive, Psychomotor and Affective Domains



Note. Reprinted from *Defining, writing and applying learning outcomes: A European handbook* (p. 34) by Cedefop, 2017, Luxembourg.

The cognitive domain evaluates the learners' development of mental and intellectual skills to acquire knowledge (Chandio et al., 2016; Grebin et al., 2020; Miller, 2018). It is divided into six levels where the first level of remembering (identified initially as knowledge in the original version) must be mastered before the learner can move to the final level of creating.

1. **Remembering**: the ability to recall relevant knowledge and information from long-term memory
2. **Understanding**: making sense of what was learnt by understanding the meaning through reciting in one's own words
3. **Applying**: the ability to apply and use an abstraction or newly acquired knowledge in a new situation

4. **Analysing**: breaking down concepts and understanding how each relates to one another
5. **Evaluating**: making judgements about the importance of concepts learnt based on a set of guidelines or criteria requiring understanding of values
6. **Creating**: the ability to combine and arrange information to form a unique and new structure

The second domain presented by Bloom's taxonomy is the affective domain (1964), which relates to the emotional component of learning, student motivation, personal values, and attitudes (Cedefop, 2017; Hoque, 2016). The affective taxonomy contains five levels of learning behaviours.

1. **Receiving**: involves the awareness of feelings and emotions, the ability to use selected attention and willingness to listen. This includes listening to others with respect and attentiveness.
2. **Responding**: involves the learner actively participating in the class or training session, such as asking follow-up questions, entering enthusiastically into activities and sharing ideas in group discussions.
3. **Valuing**: Valuing is based on internalising a set of specified values expressed and identifiable in the learner's behaviour. It includes the worth or value the learner attaches to a particular object, idea, phenomenon, or behaviour. The learner can decide the worth and relevance of information and experiences, which ranges from simple acceptance of the value to the more complex state of preference or commitment to the value.
4. **Organisation**: ability to prioritise a value over another and create a unique value system. The emphasis is on comparing, relating, and synthesising values.
5. **Characterisation**: this involves the learner becoming self-reliant and behaving consistently, based on a personal internalised value set.

The third and last domain Bloom's taxonomy presents is the psychomotor domain (1970s). There are three versions of the psychomotor domain; however, Dave's (1975) version is most suitable for corporate development. This domain includes the evaluation of physical movement, coordination, and use of the motor-skill areas (Cedefop, 2017; Hoque, 2016). It comprises five levels and is listed from the simplest behaviour to the most complex.

1. **Imitation**: includes observation and imitation or copying someone else.
2. **Manipulation**: this is where the individual is guided through instruction to perform a specific skill.

3. **Precision**: involves accuracy in the skill performance without the presence or guidance of the source, such as a trainer, facilitator, or coach.
4. **Articulation**: involves two or more skills combined, sequenced, and performed consistently.
5. **Naturalisation**: this is an extension of articulation, involving two or more skills combined and performed not only consistent but also with ease. The performance is automatic, with little physical or mental exertion.

For this study, Kaufman's five-level evaluation model is the most relevant to the study and, therefore, has been chosen to create and underpin its theoretical framework. To strengthen the theoretical framework, certain levels, such as receiving and responding from the affective domain; and remembering, understanding, applying, analysing, evaluating and creating from the cognitive domain, have also been selected from Bloom's taxonomy of learning to incorporate within Kaufman's five levels.

Kaufman's first level evaluates not only the learner's reaction or perception of the training material but also the training method and process, such as the TBT or F2FT method. As discussed within the literature, it is not only important to evaluate how the training material was received, but also how it was delivered based on the selected training method (Triphati & ArtiBansal, 2017). This level aligns well with the study's main objective to explore the perceived effectiveness of TBT compared to traditional F2FT among employees to emphasise the most preferred training method.

To further align and strengthen Kaufman's first level with the study, Bloom's taxonomy's first two levels of the affective domain and the psychomotor domain can be incorporated here, namely receiving and responding (affective domain) and imitation and manipulation (psychomotor domain). Receiving evaluates whether learners are attentive and willing to listen to what is being shared in the training programme (Cedefop, 2017; Hoque, 2016). Imitation determines whether the learner can observe and copy someone else. This may pose a challenge or benefit based on the specific training method, ultimately affecting how the learner absorbs information. It is important to consider to what extent the particular training method enables learners to receive and imitate the training content. Responding evaluates whether the learner can engage and actively participate in the discussions (Cedefop, 2017; Hoque, 2016). Manipulation is where the trainer can guide and instruct a learner to perform a new skill effectively. Once again, depending on the training method and environment, it may

accommodate and allow learners to participate and be guided easily, or it may constitute a challenge for them.

Kaufman's second and third level, like several other training theories and models, evaluates how and whether learners acquired the KSA from the training programme and whether they can transfer that KSA back into the workplace and their performance (Srivastava, 2017). This will influence individuals' perceptions on whether they felt the training programme and method (technology-based or face-to-face) was effective. As the second and third level assesses the cognitive perspective of training, it is fitting to incorporate Bloom's taxonomy of the cognitive domain here and the last three levels of the psychomotor domain. This includes:

- Can the learner remember by memorising, recognising, and reproducing the basic elements of the training information?
- Can the learner understand by interpreting the training material and transferring the acquired knowledge to a similar problem-based situation? Whether they can apply the acquired knowledge in practice?
- Can the learner analyse and systematise elements, establish relationships between them, and synthesise ideas?
- Can they evaluate information through critical thinking and judgement?
- Can the learner create something unique from that information?
- Can the learner accurately perform the newly acquired skill without the assistance and presence of the trainer?
- Can the learner consistently articulate the newly acquired skills and behaviour naturally?

The fourth and fifth level of Kaufman's model evaluates organisational payoffs and societal contributions. The best way to determine whether the training programme was effective is to evaluate the organisation's overall productivity levels based on employee performance. For the purpose of the study and the population included in the study, this can be determined through the societal level. As the population constitutes that of financial sales advisers, their performance is measured on the number of clients' needs they can meet through the financial products they can offer and sell—the organisation's profit margins and productivity increase.

Kaufman's five-level evaluation model, incorporated with certain levels of Bloom's taxonomy, was a suitable and relevant theoretical framework for the study.

2.3 The influence of training and development on employee performance

Employee performance is known as the quality and quantity of work produced by an employee whilst carrying out their function according to their respective job responsibilities (Hermina & Yosepha, 2019). It depends on the result, achievement and level of success of the employee's expected work standards and their predetermined targets met (Hermina & Yosepha, 2019). Several factors influence employee performance, such as the level of motivation, leadership, job satisfaction, rewards and recognition, and so forth (Dahkoul, 2018; Maleka, 2020). However, among these factors, T&D plays an essential role in employee performance as it aims to strengthen individuals' KSA to enable them to perform their job duties (Hermina & Yosepha, 2019; Kuruppu et al., 2021; Mehale et al., 2021).

According to Mdhlalose (2020); and Haji et al. (2021), training not only enables employees to improve their KSA specific to their role but also develops their potential and allows them to perform their tasks more efficiently and effectively and creatively and innovatively. Rothwell (2020) state that, although training and learning are used interchangeably, as both intend to promote improved employee performance, they differ to a certain extent. Training is conducted to impart the KSA to individuals so they can improve work results in a short timeframe. It usually always has a training facilitator involved in the process . Learning, on the other hand, is something that individuals need to do on their own. The individual acquires KSA by working through learning content in their own capacity without the necessary presence of a training facilitator. It is more of a pull strategy than the push strategy that training has and is a continuous process (Rothwell, 2020). Learning is always needed within the training process. Although research has shown that training positively impacts employee performance, it is also imperative that employees are fully motivated to attend the training and be willing to learn for the training intervention to be effective and successful (Mehale et al., 2021).

How employees perform their job roles directly affects organisational success, as it reflects overall organisational performance and profit margins (Kuruppu et al., 2021; Zondi et al., 2021). Employees unable to perform optimally and lack the skills required for their job struggle to assist the organisation in achieving their strategic goals and objectives (Maleka, 2020; Ryklief & Tengeh, 2022). Changes in the global environment, such as technology and economic and political transformation, influenced the need for the blend of KSA required from employees to achieve organisational objectives (Els & Meyer, 2023). A highly skilled workforce also increases organisational competitiveness and profitability (Aboyassin & Sultan, 2017; Inuwa, 2016; Maleka, 2020).

Continuous training to develop and upskill employees through systematic training programmes is, therefore, essential to an organisation's development and success (Batool et al., 2021; Mikołajczyk, 2022). Campbell and Kuncel (2001) support this and remark that T&D is one of the most effective interventions of HRD. Beyond the acquisition of KSA and performance improvement, training also encourages greater job engagement and organisational commitment among employees, resulting in a lower turnover rate (Zondi et al., 2021). Organisations increase their training investment with the aim that it will improve the performance of the workforce and ultimately improve the overall organisation's performance (Aboyassin & Sultan, 2017).

T&D is contextualised differently across the globe, with third world developing countries experiencing continuous challenges (Mdhlalose, 2020). The South African context is explicitly unique based on its history of apartheid and the aftermath thereof, such as inequality, and its current state of digital divide, which makes it challenging to keep up with the latest T&D trends, especially since the trends are integrated and aligned with technological advances (Aruleba & Jere, 2022; Suhasini & Suganthalakshmi, 2015).

2.3.1 The context of training and development in South Africa

As a developing country, South African organisations are the most significant contributors to transforming society on an economic level (Oosthuizen et al., 2019); therefore, they are continuously focused on enhancing its operational, functional and human resource components to increase organisational productivity that will help boost the country's economy. This is achieved by improving their workforce through developing skills and knowledge within important areas (Luthuli et al., 2019). By ensuring proper transformation and economic development in South African organisations, skills development has been recognised as a critical component for the country's development, especially with a lack of required skills in almost every sector due to the aftermath of the apartheid era (Aigbavboa et al., 2016).

South African organisations have experienced tremendous challenges, changes, and improvements since establishing the country's democratic status in 1994 (Mehale et al., 2021). During the apartheid era, education and training within the workplace were primarily designed to serve different racial groups based on the existing ideological premise of the racial and gender divide (Clapper & Greyling, 2022; Oosthuizen et al., 2019). Individuals who were not of the white race were deprived of basic education and training, which saw a class of white relatively trained, educated and skilled employees but untrained, unskilled black, people of colour, and other non-white racial employees. This notion led to the belief that low educational

attainment among the disadvantaged racial groups increased the rate of poor relevant employee skills owing to a poorly skilled foundation, inefficiency in work performance and low morale in employment. (Clapper & Greyling, 2022; Kum et al., 2014; Gcezengana, 2022).

Post the apartheid era in 1994, the political and socioeconomic changes necessitated continuous T&D within organisations to ensure their employees are competent and possess skills aligned with organisational transformation (Mehale et al., 2021); however, the country experienced a vast shortage of skills due to the gross inequality conditions concerning workforce development posed by apartheid (Gcezengana, 2022). This prompted the democratic government to introduce the Skills Development Act (SDA) 97 of 1998, with the overall motive of developing the skills of the South African workforce, encouraging employee and employer participation in learning programmes and improving the employment prospects of persons previously disadvantaged by unfair discrimination through training and education (Skill Development Act, 1998).

Although the SDA is the main South African legislative framework controlling T&D within organisations, it is not enough to only have this law when inequality and prejudice may remain; therefore, in addition to and supporting the SDA, the government has also implemented other legislative frameworks to ensure justice and equality were reached and sustained within organisations regarding the training and development of employees. For instance, the Skills Development Levies Act 9 of 1999 enforces organisations to contribute a 1% levy of their total wage bill to the South African Revenue Services (SARS) to train and develop employees in South Africa (Skills Development Levies Act, 1999). The Broad-Based Black Economic Empowerment Act 53 of 2003 (BBEEE) requires organisations to invest in skills development opportunities for black employees to increase their BBBEE scorecard (Shai et al., 2019). Finally, The Employment Equity Act 55 of 1998 (EEA) ensures that employees from disadvantaged and designated groups are retained, developed and trained by their employees so they have equal employment opportunities as others (Employment Equity Act, 1998); therefore, South Africa promotes T&D within organisations through its various legislative frameworks.

Despite the implementation and enforcement of legislation to promote skills development within South Africa, another crucial element that organisations need to consider is the state of adult learning. This is discussed further below.

2.3.2 Adult learning

An adult is known as a person who is mentally mature and beyond the traditional school age of seven to twenty-one. They are usually employed (Rothwell, 2020). Adult learning is a fundamental strategy for improving employees' skills and employability and occurs primarily through informal learning (Marcaletti et al., 2023). Although several individuals may observe a difference between the world of schooling and the world of work, lifelong learning remains a reality in both (Rothwell, 2020). Adult learning is a big priority in South African organisations in the public and private sectors. According to Joubert and Sosibo (2020), adult learning is not only critical in achieving organisational and national transformation goals, but it also constitutes a key element in the pursuit of achieving organisational objectives. Desired adult learning results must be strategically directed at interventions that can serve as systemic levers of change supporting the overall organisational objectives (Joubert & Sosibo, 2020); therefore, it is vital that the conditions of adult learning within organisations continuously improve to keep up with the pressures of a fast-changing socioeconomic world that may affect their employment (Boateng et al., 2021). The concept of adult learning is better understood within the adult learning theory and aims to help organisations understand how adults learn so they can create and offer the most suited T&D programmes (Lewis, 2006).

Adult learning theory, also formally known as Andragogy, was introduced by Malcolm Knowles in the early 1970s (Knowles et al., 2020). It focuses on how adults learn, as opposed to Pedagogy, focusing on how children learn. It aims to display how adult learning is compelled more by active learning and recognises the learning styles which suit them best (Bear, 2012; Knowles et al., 2020). This is based on the assumption that as adults develop, their learning becomes more self-directed, continuous and independent as they are more in charge of their own learning; experiences begin to embed within the memory as a frame of reference to access during learning, learning readiness adapts to the developmental tasks of social roles, and knowledge adaptation becomes immediate and their orientation shifts from subject-centeredness to performance-centeredness (Bear, 2012; Boateng et al., 2021; Loeng, 2020). Table 2.1 presents the six fundamental adult learning principles proposed by Malcolm Knowles (1998).

Table 2.1

Adult Learning Principles

Learning principle	Description
Learners need to know	If learners are aware of the 'what, why and how' factors of a topic, this will be a strong motivator to their learning.
The learner's self-concept	Adult learners take responsibility for their own learning, i.e., autonomous, and self-directed learning. Placing the learners in dependent situations may promote resistance and conflict.
The role of the learner's experience	The learners become a valuable resource for learning. Their experience is an important motivator.
Readiness to learn	Adults are ready to learn about topics that become useful to them as they develop personally.
Orientation to learning	This implies that adults learn more effectively when presented with real-life situations.
Motivation	Intrinsic motivation to keep growing and developing should be fostered here. This is perceived as a personal payoff by adults.

The above principles are vital when establishing and implementing T&D interventions within organisations. Mehale et al. (2021) support this by stating that T&D is much more successful in adults when they receive the required motivation to learn, when they perceive and are exposed to a work environment supporting their learning journey, and when they can practically use and apply their newly acquired KSA to their job responsibilities. Employees are upskilled through several training methods most suitable for that specific training intervention. Training methods are best referred to as a set of training practices organisations used to educate, train and develop the workforce (Alshawabkeh, 2020). Recently, in adult learning, the two main organisational training methods used to upskill adults/employees are F2FT and TBT (Jevana, 2017).

2.4 Traditional face-to-face training

Before the progression of technology, F2FT was the primary form of training for employees and was a method used to provide technical training specifically to those working in factories, so they kept up with the increased production rate (Kiley & Coetzee, 2012; Torraco, 2016). Back when F2FT was first introduced in the early 1900s (Torraco, 2016), there was minimal variability in the training methods available (Bell et al., 2017). Training was typically conducted on the job by a supervisor or a more experienced worker and involved demonstrating and explaining the steps until the trainee could perform them correctly. The expansion of training methods only occurred in the 1960s and remained prominent in the domain of F2FT (Bell et al., 2017). Table 2.2 depicts the main F2FT modes.

Table 2.2

Types of F2FT Modes

F2FT Mode	Description
Instructor-led training (ILT)	This occurs through a classroom setting where trainees are gathered into one common location and offered training based on the training need. The format of this mode mainly includes a lecture style coupled with interactive approaches, such as group work and peer discussions, case studies, role plays, and assessments.
Flipped classroom	This mode of F2FT occurs mostly in HEI contexts but can also be adopted within a corporate T&D. Flipped classroom is where trainees can independently go through the training material and content and video lectures. When they attend ILT, they engage in collaborative learning through active problem-solving or discussions during classroom time. The concept of flipped learning originates from the idea that classroom time is better spent actively discussing the content rather than passively listening to a trainer, instructor, or facilitator.

F2FT Mode	Description
On-the-job training	This mode includes methods, such as mentorship and coaching, job rotation and job instruction training. With mentorship and coaching, trainees learn directly on the job from their mentor/coach through instructions and observation and can apply the learning immediately. Job rotation is a form of cross-training where trainees are shifted onto various tasks in the same job process so they can learn the entire process. Last, with job instruction training, trainees are taken through the job step by step by trainees to understand better the overview, purpose and results expected of that specific job. This allows the trainees to have a practical hands-on experience on the job.
Vestibular training	This method includes a prototype environment of the real working environment. This is created to minimise any risks to trainees during their learning experience. Here, trainees are exposed to real-time experience in learning about the job. This method is used mainly for technical professionals who use tools and machinery in their jobs.

Note. Adapted from R. J. Jevana (2017), and from K. Okano, J. R. Kaczmarzyk and J. D. E. Gabrieli (2018).

F2FT methods are still prominently used within numerous organisations across the globe (Okano et al., 2018). According to Ahadi and Jacobs (2017), 2015 statistics found that F2FT, in the form of corporate ILT, such as classroom training, was the most frequently used training approach. This, however, was before the COVID-19 pandemic (Kleinert et al., 2021; OECD, 2020). The International Labour Office (ILO) also found that approximately 92 countries across all continents rarely used distance learning before the pandemic and mainly delivered training via the F2FT method (ILO, 2021). F2FT offers employees and organisations various benefits but simultaneously has shortfalls.

2.4.1 Benefits of face-to-face training

Talati et al. (2018) state that one of the main benefits of F2FT is that it enables greater engagement and socialisation between the learners and the trainer, such as facilitator, mentor, or coach. Kim (2022) supports this by mentioning that the human factor of training is essential. It also increases engagement with the learning content and eases group interaction, allowing for better problem-solving skills between trainees. Baber (2021) expands on this, stating that for humans, social engagement is more of a need than a desire. F2FT creates a conducive environment for practical training, where trainees can actively apply what they have learnt via practical activities, such as role plays and real-time simulations. This is best for occupations that require technical skills (Kim, 2022).

Trainees have the opportunity to observe, collaborate, and learn from each other when they cannot grasp learning content individually (Lewis, 2006). The trainer can also observe trainees' body language and facial expressions, use this to recognise whether trainees understand what is being taught, if they are providing their undivided attention and adapt their training style in real-time to suit the trainees' needs. Trainees can easily ask questions and receive feedback in real-time (Rad et al., 2022). Lewis (2006) further explains that F2FT is a useful way to introduce and onboard trainees to the organisation's norms and culture so they can feel part of the company. Apart from the benefits that F2FT offers, it has shortfalls as well.

2.4.2 Shortfalls of face-to-face training

Whilst F2FT became the traditional learning method, over time, various factors affected how training was delivered. One of the main shortfalls of F2FT is that it has the potential to be expensive and logistically challenging to deliver to a dispersed workforce expected to attend the training intervention (Beinicke & Bipp, 2018; Gayed et al., 2019). Gayed et al. (2019) also state that, with time pressures and financial constraints, based on the capacity of the training group, F2FT may not be a viable option. The larger the group of employees that require training, the more impractical F2FT becomes, as it could delay the upskilling process for employees.

According to Lewis (2006), F2FT is also easily prone to disruption, decreasing the pace of the learning process. Likewise, F2FT may be a challenge regarding the notion of continuous learning. Due to the pressures and complexity of a fast-changing socio-economic world of work, organisations have promoted continuous learning significantly amongst their workforce; however, it is unfeasible to remove employees from the field to attend F2FT training when they

could proactively upskill themselves in their own capacity (Boateng et al., 2022; Meyer et al., 2016).

Trainees are expected to grasp learning content in a restricted time frame and cannot have the flexibility to pace themselves during the training session. Although a trainer can adapt the training according to a trainee's unique needs, trainers are also conscious of completing the required training timely for the rest of the trainees (Lewis, 2006; Meyer et al., 2016). Recently, F2FT has not been as frequently used as before owing to the emergence of technology within T&D and several other factors challenging the effectiveness and efficiency of F2FT.

2.5 The emergence of technology-based training

TBT started as distance learning in the late 19th century via the postal system (Bartley & Golek, 2004). As distance learning evolved with technological advances, the concept of TBT was manifested in the late 1980s (Torraco, 2016). It began with the introduction of radio programming and progressed to local television, telephone and video-based courses (Bartley & Golek, 2004). Within the twenty-first century, the rapid development in information and communication technology (ICT) and the availability of internet access and computers have made TBT more prominent (Ergüzen et al., 2021; Torraco, 2016). According to Żur and Friedl (2021), digital technologies have often reshaped and disrupted the T&D environment within corporate organisations. Digital learning has several advantages over traditional ones and helps to explain the growth of corporate online learning as a promising field for both research and practice; therefore, the demand for TBT formats is rising rapidly (Żur & Friedl, 2021). Table 2.3 depicts the two main overarching TBT modes and details the different sub-modes under each main mode.

Table 2.3

Types of TBT Modes

F2FT Mode	Description
Synchronous	Synchronous learning occurs in real-time and provides immediate interaction between the individual and the training facilitator, making it more collaborative and requiring both a trainee-facilitator presence. Synchronous learning resembles that of an

F2FT Mode	Description
	F2FT/classroom session using webcams and videoconferencing; however, as it takes virtually, individuals access it remotely through the Internet and require a solid bandwidth for avoid connectivity concerns. It is more convenient than actual F2FT as individuals are not concerned with travelling or the distance barrier between them and the training location. Various mediums allow for videoconferencing to occur, such as Zoom, Microsoft Teams, and Skype. Synchronous learning can also occur through voice or text chat rooms and web-conferencing through surveys, polls and question-answer sessions.
Asynchronous	Asynchronous differs slightly from synchronous and does not occur in real-time but provides more flexibility by allowing individuals to work through their learning content at the comfort of their own pace. It is not time-bound, and a facilitator or teacher is not required. The asynchronous learning mode provides individuals with readily available online learning content, such as audio and video lectures, e-learning, gamification, massive open online courses (MOOC) and handouts, articles and PowerPoint presentations accessible anytime. This mode of learning encourages self-paced and independence and is trainee-centred. Motivation, however, may decrease within asynchronous learning environments as individuals are not provided with real-time feedback based on their performance.

Note. Adapted from "Synchronous and Asynchronous E-Language Learning: A Case Study of Virtual University of Pakistan" by A. Perveen, 2016, *Open Praxis, 8*(1), p. 21-39. (http://dx.doi.org/10.5944/openpraxis.8.1.212).

Another and possibly more effective approach is to combine and offer training through both synchronous and asynchronous learning modes, known as a hybrid online environment (Perveen, 2016). Providing training through this approach allows each mode to cover the other's potential shortfalls and accommodates a wider variety of individuals with different learning styles (Kim, 2022; Perveen, 2016).

Since training has evolved as technology has advanced over the years, it has become necessary for organisations to train technologically to have a workforce updated with the technological era (Masa'd, 2017). TBT has become more common in organisational settings because of the quick development of information and communications technologies (ICT). It has become a revolutionary method of learning in most organisations attributable to the recent interest in using electronic training techniques in both developed and developing countries. (Masa'd, 2017). TBT has become a critical topic in both commercial and non-commercial organisations, more so with the influence of globalisation, the 4IR, and the COVID-19 pandemic (Kalio, 2019; Mohamad et al., 2020; Okano et al., 2018).

2.5.1 Globalisation

According to Sharma (2019), the term 'globalisation' describes the expansion of foreign trade and capital flow through exchanging resources and goods across national boundaries. The concept of globalisation dates back to the second half of the twentieth century, when transportation, communication, and infrastructure improved (Kalio, 2019; Sharma, 2019). This prompted the development of international social and economic relationship networks. Several countries realised that operating solely within national and local parameters restricted and stifled economic activity internally (Kalio, 2019).

Kalio (2019); and Milenković et al. (2022) explain that globalisation has become a necessity as it significantly influenced and increased innovation globally. Since countries created a closer working relationship, it enabled the spread of different ideas, knowledge, processes and practices from a political, cultural, economic, ecological and technological perspective. This accelerated economic development and productivity within developed and developing countries, but has also intensified global competitiveness (Sharma, 2019). As a response, it motivated organisations to ensure that their workforce is highly skilled through continuous training to function and cope effectively with the changing and competitive demands that would warrant ongoing organisational development within the competitive environment (Urbancová et al., 2021). As discussed previously by researchers, this has ultimately placed HRD under pressure to find the best-suited training method and interventions to help upskill employees

more efficiently, such as TBT (Bell & Kozlowski, 2007; Mavunga & Cross, 2018; Okana et al., 2018).

According to Milenković et al. (2022), globalisation is made possible, easier and sustainable through technology and vice versa; therefore, globalisation has created an upsurge in the 4IR across the globe through the exposure of technology-enhanced economies, where it has increased production of customised mass goods because of the worldwide dispersion of value chains and the removal of borders between producers, sellers and consumers (Ivaldi et al., 2022). From a learning perspective, it enabled most of the world's population to use social media platforms to connect, learn, and share information (Kalio, 2019).

2.5.2 The Fourth Industrial Revolution

Building on the Third Industrial Revolution (3IR), which introduced the digital era of the Internet and personal computing (Waghid et al., 2019), the 4IR realised innovative ways technology embeds itself within societies. It transformed the technologies and infrastructure of the third industrial revolution by blurring the lines and combining the digital, physical, and biological worlds (Kalio, 2019; Mhlanga & Moloi, 2020). Various technical elements formulate the 4IR, such as artificial intelligence (AI) and robotics; ubiquitously linked sensors; virtual realities (VR); additive manufacturing; blockchain and distributed ledger technology; advanced materials and nanomaterials; energy capture, storage, and transmission; and new computing technologies, biotechnologies, geoengineering technologies, neurotechnology, and space technologies (Mhlanga & Moloi, 2020). Successful adoption of the 4IR is not only dependent on the digital capabilities and advanced technical knowledge among the workforce, but also on the willingness and readiness of employees to support digital transformation within organisations (Maisiri & Van Dyk, 2021; Mikołajczyk, 2022).

Digital technologies introduced by the 4IR have significantly reshaped the T&D environment within several organisations, allowing them to deliver traditional training interventions and programmes online (Żur & Friedl, 2021). According to Batool et al. (2021), technology plays an essential role in T&D, making training easier and more convenient for employees by using various tools and functionalities, such as simulations, motivational videos, and online tutorials. Mhlanga and Moloi (2020) further explain that the advancement in the 4IR ultimately affected every aspect of an individual's daily life and changed how we work and relate to technology. The 4IR expanded and accelerated further during the COVID-19 pandemic when organisations shifted to a remote work paradigm requiring technological devices (Ivaldi et al., 2021).

2.5.3 The COVID-19 pandemic

The COVID-19 pandemic transformed several organisations' traditional T&D practices. When organisations across the globe were forced to work remotely, this not only altered their way of work but also shifted how employees had to be upskilled and trained (Hoq, 2020). Due to the restriction of social distancing, F2FT could not proceed (Shahriar et al., 2023). Organisations feared that the problematic situation brought on by the pandemic might impact employee performance and disrupt the T&D plans they had for their workforce (Urbancová et al., 2021). According to Kim (2022); Mikołajczyk (2022); and OECD (2020); fortunately, TBT became a reasonable alternative training solution allowing the continuity of development initiatives among employees under isolated situations caused by the pandemic; therefore, TBT amplified dramatically within several organisations (Żur & Friedl, 2021). TBT allowed several individuals to adopt the ability and use of new technologies (AL-Rawahi, 2022).

AL-Rawahi (2022) contends that even before the COVID-19 pandemic, skills development and lifelong learning processes within organisations were already experiencing increased difficulties because of the rapidly changing labour market demand. The pandemic was a forced situation enabling organisations to consider alternative solutions to their traditional learning systems, and this resulted in a faster widespread in digital learning (CIPD, 2021). Hughes (2021) mentioned how trainers believed that certain forms of training would be impossible to conduct remotely; however, this perception was dismissed during the pandemic as it was revealed that training can be conducted remotely using technology. It has ultimately motivated T&D professionals and organisations to rethink their understanding and attitudes towards TBT (Hughes, 2021). The COVID-19 pandemic had a major influence on organisations' work and practices. The functional and strategic job positions in the corporate world have and will change further in the years following COVID-19 to assure organisational effectiveness and productivity (Shahriar et al., 2023).

2.5.4 Benefits of technology-based training

TBT formats have advantages over traditional training methods (Żur & Friedl, 2021). The overall benefits of TBT can be grouped into three broad categories, such as flexibility, cost efficiency, and scalability. Regarding flexibility, Joshi and Rocque (2022) remark that using technology within T&D allows trainees to take ownership of how they learn, as most TBT is self-directed. As mentioned in the adult learning theory, adults prefer to take charge of their learning through self-directed learning (Boateng et al., 2021; Knowles et al., 2020; Loeng, 2020). TBT is also perceived as an easily accessible training technique aiming to create a

more conducive, dynamic and flexible learning environment to improve employees' performance quality. TBT not only ensures the standardisation of training content, but it also makes it easier for the content to be re-examined and tailored over time according to individual employee needs, the changing external environmental and market trends (Hoq, 2020; Żur & Friedl, 2021). It allows training to occur at a time and place that suits the trainees' needs.

By creating flexibility, it decreases training delivery costs by reducing travel, accommodation and employee time away from work, as learning content and material will be accessible to trainees on demand from anywhere, using various technological devices (Aspeling & Mason, 2020; Fake & Dabbagh, 2020; Martins et al., 2019; Mohamad et al., 2020; OECD, 2020). Talati et al. (2018) coincide by stating that TBT includes lower cost with greater convenience as it can reach a wider/scalable audience in dispersed geographical locations all immediately, therefore decreasing the time required for the training intervention. Aspeling and Mason (2020) mention that these benefits are confirmed globally and within the South African context; however, there are several shortfalls for TBT.

2.5.5 Shortfalls of technology-based training

One way TBT needs to succeed is through strong Internet connectivity and bandwidth (Hoq, 2020). According to Hughes (2021), this presents a considerable challenge to countries that lack efficient technological infrastructure. Technological infrastructure includes network and connectivity needed for Internet and electricity, data centres and technology devices, such as computers, laptops, and tablets crucial for TBT (Faloye & Ajayi, 2021). Insufficient infrastructure ultimately results in a digital divide and may lead to the detriment of TBT.

South Africa has and continues to experience a digital divide among its population, especially within rural communities (Aruleba & Jere, 2022; Moonasamy & Naidoo, 2022). The digital divide refers to the inequality of access to the Internet and other ICTs that promote globalisation and the usage and skills needed for technology (Arubela & Jere, 2022; Faloye & Ajayi, 2021). According to Adeleke (2020), Western Cape, Northern Cape and Gauteng are the only provinces within South Africa with sufficient infrastructure to allow digital development and the use of technology devices to be facilitated. This constitutes a challenge for organisations across other provinces to implement and use TBT in their T&D process. The country also suffers from an electricity crisis through load-shedding. Without electricity, technology cannot work (Moonasamy & Naidoo, 2022).

Apart from the technological and connectivity challenges, other TBT shortfalls include the lack of human interaction and engagement with the trainer and other trainees, and immediate guidance or support when needed (Hoq, 2020). Trainees would also need high self-efficacy and technical skills to navigate and complete TBT (Areiqat & Al-Doori, 2018). Trainees may also experience low motivation and discipline to complete training in their own capacity due to busy schedules and the potential belief that traditional methods are more effective as they can learn better in a familiar environment (Akpoviroro & Adeleke, 2022). According to Mohamad et al. (2020), TBT can only succeed when managers provide sufficient morale support, such as encouragement, enthusiasm and communication, to their employees so they will undertake the training; therefore, managers must constantly check in with their employees, put policies in place that will allow employees to take time from work to attend to their training, and ensure they have a positive attitude towards TBT (Mohamad et al., 2020).

Although cost-efficient over time, TBT may be expensive when the organisation purchases, implements and maintains various e-learning platforms if not created in-house (Hoq, 2020). TBT is only as proficient as the trainers and facilitators using it. Some training professionals are reluctant to adjust to TBT not only because they prefer F2F interaction with their trainees but also because they lack the technical and digital skills to operate through TBT (CIPD, 2020; Hughes, 2021). Lack of sufficient digital skills or opportunities to develop such skills makes it challenging and unlikely to foster independent, meaningful integration of TBT into a training programme (Janse van Rensburg & Oguttu, 2022). This makes it challenging for trainees and trainers. Last, with TBT, organisations are more at risk of cybersecurity threats as everything is online (CIPD, 2020; Hoq, 2020; Li, 2022). Organisations would need to put extra measures in place to prevent cybersecurity attacks from occurring.

2.6 Comparisons between face-to-face and technology-based training

Based on various research conducted, some have established TBT as a favourable training method, while others remain optimistic about F2FT and continue to find value in it. As discussed, both F2FT and TBT methods display unique benefits but also shortfalls (Akpoviroro & Adeleke, 2022; Aspeling & Mason, 2020; Beinicke & Bipp, 2018; Fake & Dabbagh, 2020; Hoq, 2020; Joshi & Rocque, 2022; Martins et al., 2019; Mohamad et al., 2020; Talati et al. 2018; Żur & Friedl, 2021).

Traditional training methods are supposedly no longer able to satisfy the demand for continuous staff development and re-skilling (Li, 2022). Provided the rapid development of digital and instructional technologies, the dynamic changes in the business world, and the

unprecedented amount of innovation, it seems essential for corporations to use various digital learning formats to provide their staff with current knowledge in practical, flexible and affordable ways that will support the encouragement of lifelong learning (Li, 2022; Torraco, 2016; Żur & Friedl, 2021). Kalio (2019) also state that training has taken a different dimension over time as it becomes more systematic in its processes and methods.

Jevana (2017), however, explains that there has been a slow transition from the traditional F2FT to TBT, regardless of the changes in training methods that technological advancements have influenced. This notion was made before the COVID-19 pandemic, when digital learning was less prevalent. Nevertheless, compared to F2FT, TBT requires different abilities and resources from trainees (Martins et al., 2019). This is mainly because TBT demands that the trainee have more self-regulatory resources and motivation to persist. The trainees must plan and organise themselves in a more relevant way (Martins et al., 2019).

Kim (2022) explains that although TBT has noticeably been replacing traditional F2FT, a single use of a training method, be it TBT or F2FT, may be challenging to satisfy every trainee's learning need and preference. According to Maxwell (2018), it is challenging to determine whether TBT is equally, more or less effective than traditional F2FT, as both methods have their inherent benefits and shortfalls and should be used depending on the training need. It is vital to consider that different learning outcomes and needs require diverse learning and training methods (Maxwell, 2018; Sheeba & Christopher, 2020).

Alsalamah and Callinan (2021) also state that each training method can potentially convey specific KSA to trainees; however, certain training methods may be more effective based on the particular task or training content. TBT is not always the best option, especially when trainees can only acquire the relevant KSA through hands-on training, such as medical practitioners; therefore, the combination of TBT and F2FT could increase learning satisfaction significantly and alleviate the shortfalls that TBT and F2FT have when used on its own. This practice is better known as blended or hybrid training and learning (Kim, 2022).

2.6.1 Blended training

The concept of blended training can be dated back to the 1960s and 1970s, when technology was incorporated into training for distant learning to occur (Batista-Toledo & Gavilan, 2022). It officially started acquiring interest in the early 2000s (Hewett et al., 2019). Formally defined, blended training is an instructional method that includes the efficiency and socialisation opportunities of the traditional F2FT with the digitally enhanced learning of TBT delivery (Singh

et al., 2021). It is acquiring KSA through F2F, computer-based, distance, mobile and e-learning, creating an environment allowing for incorporating and combining any technology and F2FT methods (Batista-Toledo & Gavilan, 2022). By maintaining elements of mainly traditional training methods while also harnessing the benefits of technology, it has increased the access, flexibility and learning effectiveness of training interventions, which has optimised the developmental cost and time of training (Hewett et al., 2019).

Using diverse instructional methods is considered an effective strategy for training design that leads to successful training transfer (Alsalamah & Callinan, 2021). Providing trainees with learning experiences in various ways keeps them interested and engaged, and they can master the training content theoretically and practically. Diverse learning cues also significantly aid in understanding and memory retention. It benefits those who learn in various ways (Alsalamah & Callinan, 2021). Blended training will also allow employees to comfortably transition from a wholly traditional training environment to a combination of conventional and a modernised technological training environment instead of a fully-fledged TBT environment (Batista-Toledo & Gavilan, 2022).

In contrast to blended training, incorporating both methods may have specific implications for T&D professionals responsible for designing the training intervention. Several trainers may find it overwhelming for various reasons. For instance, Abudlhabib and Al-Dhaafri (2020), indicate that an effective trainer ensures that the training design is well organised and combines training material offering ideal and conceptual learning with trainee engagement that will stimulate new ideas; therefore, considering these factors, they are not only concerned with the need to be competent and proficient in both methods, but also the increased time and capacity of preparing the training material and design for F2FT and TBT. That is why trainees often perceive blended training as a rigorous process (Alvarez, 2020).

2.7 Training effectiveness

Training effectiveness is known as the extent to which the training programme objectives are successfully achieved and benefited by the trainees (Kirkpatrick & Kirkpatrick, 2016). Sheeba and Christopher (2020) state that training effectiveness also depends on the transfer of training by which trainees practically apply the acquired KSA back to their jobs. According to Martins et al. (2019), training transfer includes the employee's ability to effectively apply the new KSAs in the workplace to improve performance. For HRD to ensure that training is effective, the training plan and process needs to adhere to and meet the requirements of systematic training design and development; effective facilitation, presentation and

management support through a suitable training environment; and a valid and reliable training assessment and evaluation to determine the success of the intervention (Aboyasin & Sultan, 2017).

- To determine the appropriate design and development of a training programme and intervention that can meet and fulfil the required training needs and performance gap, a training needs analysis (TNA) is conducted (Farouk, 2022; Sheeba & Christopher, 2020). TNA is by which information and data are collected and analysed to identify the performance gap concern that needs to be addressed (Meyer et al., 2016). The information will then determine the appropriate training delivery method and environment, the duration of the training, and the learning outcomes and goals that all form part of the design and development of a training programme (Aboyasin & Sultan, 2017).
- The training environment contributes to and potentially enhances the effectiveness of training (Aboyasin & Sultan, 2017; Saini, 2016). The training environment not only covers the physical elements, such as the appropriate facilities, layout of the site, hardware and software mechanisms, trainee involvement, and training methods, but it also emphasises the collaboration and support of HRD, line managers and trainers to facilitate an optimum learning atmosphere for trainees (Abudlhabib & Al-Dhaafri, 2020).
- Training assessment and evaluation is the final step in achieving training effectiveness and contribute to the continuity of improving a training programme based on the evaluation results (Kim, 2022). According to Saha (2017), evaluation is a systematic process of measuring the learning and practical application of the new KSA in the workplace. Choudhury and Sharma (2019) explain that any attempt to obtain feedback on the effects of the entire training programme, including the training methods and aids, training environment, presentation style, facilitator, and programme schedule. Training evaluation occurs during the training (formative evaluation) to acquire information that will help improve instruction and enhance the learning experience and post the training programme (summative evaluation) through tests and assessments to identify whether training transfer occurred (Kirkpatrick & Kirkpatrick, 2016).

As discussed above, within the study's theoretical framework, there are various training and learning evaluation models for assessing and evaluating training effectiveness. The evaluation occurs at each level. The factors stipulated in each level of the theoretical framework include trainees' reaction and satisfaction with the training material, content and delivery method based on their emotion and willingness to receive the training content and their active participation (level 1 of input and process); trainees' learning and whether it enhances their

knowledge and skills based on their cognitive ability to remember and understand the learning material (level 2 of acquisition); trainees' behaviour and whether there has been an enhancement in their level of practical skills since they attended the training programme (level 3 of application); the organisation's ROI based the performance level of trainees since they participated in the training programme (level 4 of organisational payoffs); and lastly, the ability of trainees/employees to accommodate customers' needs based on their expected improved performance since attending the training programme (level 5 of societal contributions).

2.8 Factors influencing the success of training methods

Several factors may influence an individual's perception of the training method, which determines the success thereof (Abudlhabib & Al-Dhaafri, 2020; Chen, 2008; Cheng et al., 2012; Kim, 2022; Martins et al., 2019). This includes and can be categorised under trainee's characteristics, the organisation's learning culture and a multigenerational workforce. Each factor will be discussed further below.

2.8.1 Trainee characteristics

The transfer of training and its results is significantly influenced by trainees' characteristics. Bell et al. (2017) explain that trainee characteristics are influenced by factors, such as an individual's capabilities, personal traits, attitudes and emotions, and perceptions. Trainee characteristics also include aspects, such as an individual's learning style and motivational constructs, such as values, interests, expectations, and ambitions, which can all affect how they acquire new skills during training and, ultimately, how they practically apply it in the workplace (Martins et al., 2019).

2.8.1.1 Learning styles

Learning styles are known as an individual's preferred learning method of collecting, processing, interpreting, organising, and analysing information and experiences (Amponsah, 2020). It is how they perceive, interact and respond to the learning environment (Muijsenberg et al., 2023). T&D professionals and facilitators need to have a significant understanding of adults' different learning styles so they can tailor their method of instruction to suit adult learners' individual characteristics (Amponsah, 2020). According to Muijsenberg et al. (2023), achieving a match between adults' preferred learning styles and the training method has positively influenced their learning experience. An individual's learning style is influenced by their cognitive, behavioural, and self-regulatory procedures (Martins et al., 2019). Based on

the adult learning theory explained above, adults are autonomous learners and, therefore, may prefer a self-directed, active learning method where learners are continuously engaged throughout the learning process, which increases motivation to learn among individuals (Bear, 2012; Knowles et al., 2020; Rothwell, 2020).

Theoretically, several learning models exist; however, Kolb's learning style model/inventory (1976), proposed by David Kolb, is the most popular, especially in adult learning (Menaka & Nandhini, 2019). Table 2.4 depicts the learning styles, such as divergent, assimilator, convergent and accommodator, based on Kolb's model and the appropriate training method of F2FT or TBT that matches the learning style.

Table 2.4

Kolb's Learning Style Model (1976)

Learning style	Description	Training method
Divergent	Individuals with this learning style prefer visual stimuli, concrete situations, combined with diverse information and reflective observation. They feel comfortable with group work, discussion, and constant feedback to explore alternative ideas.	F2FT - to enhance the opportunity for observation and group discussions.
Assimilator	Individuals with this learning style deal more efficiently with analysis, explanations, theories, texts and all material, allowing for analysis and reflection.	TBT - where individuals have access to the theoretical and visual training content.
Convergent	Individuals with this learning prefer to learn through and work with practical tasks and deductive reasoning to solve a problem. These learners prefer direct and practical guidance and learning tasks.	F2FT - to enable a practical training environment for the individual.

Learning style	Description	Training method
Accommodator	Individuals with this style handle challenging activities easily, take risks, and solve problems intuitively. They prefer making plans, projecting the future, and creating prospects for situations from stimuli involving thinking and doing. They thrive in active and hands-on activities centred on intuition over logic.	TBT and F2FT - both methods can incorporate interactive problem-solving activities for the individual.

Note. Adapted from J. A. Cohen (2022), and from L. A. Dantas and A. Cunha (2020).

Identifying and accommodating employees' learning styles and adapting the training intervention by incorporating the appropriate training methods will improve the trainee's reaction to the training intervention. This can potentially increase their motivation to partake in the intervention and will help ensure that training effectiveness is achieved (Martins et al., 2019; Noesgaard, 2016).

2.8.1.2 Motivation

Motivation to learn plays a critical role in the training environment, as it is the key to successfully triggering proactive behaviours to promote the actual transfer of training (Alsalamah & Callinan, 2021). According to Abudlhabib and Al-Dhaafri (2020), if trainees experience low motivation to learn, this may prevent them from actively participating in the training programme and fail to achieve the KSA required. Adults are motivated to learn for various reasons. This includes meeting the performance expectations of the line manager, advancing their careers through promotional opportunities based on their improved performance and newfound expertise, meeting perceived social obligations to other people, such as customers (Rothwell, 2020). In a TBT environment, because of its autonomous and self-directed nature, individuals require self-motivation to attend and complete the training through this method (OECD, 2020). Noesgaard (2016) outlines four steps to complex human motivation, learning, and action. This is displayed in Table 2.5 below.

Table 2.5

Motivational Steps to Embed Changed Behaviour into Work Practices

Motivational step	Description
Step 1: motivation to enrol	The employee enrols in a training intervention based on their interest in the learning content and sense of urgency to increase their competency.
Step 2: motivation to engage and complete	The employee engages and completes the training programme. This requires dedication and prioritisation from employees based on their level of interest in the training intervention. This relates to the first level in the study's theoretical framework, which includes the trainee's reaction and satisfaction with the training content and training method. If the trainee is unsatisfied with either, it can decrease their motivation to persist with the training intervention.
Step 3: motivation to transfer and initiate change	The motivation to transfer the acquired KSA and initiate changed behaviour within the workplace. Employees must practice their new skills during and after the training intervention as this will assist them to act on the new learnings instantly.
Step 4: motivation to sustain the change	The fourth and final step includes motivation to sustain the changed behaviour.

2.8.2 Organisational learning culture

For T&D to thrive within an organisation, it needs to promote a learning culture by encouraging its workforce to learn within the work environment actively and continuously, therefore creating a learning organisation (Rothwell, 2020). Organisational culture refers to the shared values and beliefs enabling members of an organisational community to understand how things work and operate. It ultimately guides organisational members thinking and behaviour (Mavunga & Cross, 2015).

According to Meyer et al. (2016), a learning organisation can not necessarily be supported by traditional training methods and requires a new dynamic approach to lifelong continuous learning in the workplace; however, this new approach not only necessitates the change within learning and T&D interventions but also requires a new way of managing employees, processes and systems (Meyer et al., 2016). A change in organisational culture is, therefore, needed to transform into a learning organisation. Mavunga and Cross (2015) add that to create a continuous learning culture, organisations must adapt their policies and programmes to cultivate the desired culture. According to Rothwell (2020), if employees feel that learning is not encouraged within the workplace, they are less motivated to engage in it; therefore, executives, managers and supervisors must create a learning culture supporting learning to solve practical work-related problems and seize competitive opportunities.

2.8.3 Multigenerational workforce

Organisations comprise a multigenerational workforce, where employees are of varied ages. Table 2.6 outlines the diverse generations.

Table 2.6

The Diverse Generations in the Workforce

Generation	Year of birth
Baby Boomers	1946 – 1964 (near retirement)
Generation X	1965 - 1976
Generation Y/Millennials	1977 - 1996
Generation Z	After 1996 (new entrance to corporate)

Note. Apated from “Improving workforce experiences at United States Federally Qualified Health Centers: Exploring the perceived impact of generational diversity on employee engagement” by V. Bachus, L. Dishman and J. W. Fick, 2022, *Patient Experience Journal, 9*(2), p. 17-30 (https://doi.10.35680/2372-0247.1715).

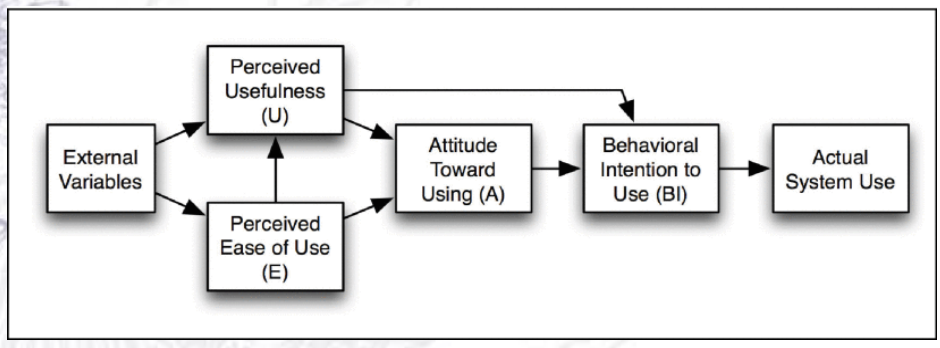
The effect of employee training methods is significantly influenced by employee age. According to Alshawabkeh (2020), compared to younger employees, older employees take longer to complete training tasks and may be less proficient at grasping the training content.

More senior employees favour on-the-job learning over traditional training methods like ILT. Younger employees prefer TBT. Rothwell (2020) concurs by stating that young adult employees are more willing to learn online, whereas older adult employees are sceptical of any learning or training method that minimises face-to-face interaction; therefore, employees categorised under Baby Boomers and Generation X perceive TBT as a threat to human interaction and have less affinity to use it (Faloye & Ajayi, 2021). It is anticipated that employee ageing will reduce the impact of employee training techniques that has evolved with the twenty-first century and 4IR by incorporating technology into its process (Alshawabkeh, 2020).

In addition to the negativity around the lack of human interaction, Faloye and Ajayi (2021) remark that Baby Boomers and Generation X are less inclined to use modern technologies simply because they may find it too challenging. Whereas individuals categorised under Millennials and Generation Z, who were born and grew up in the digital age, are more tech-savvy and are, therefore, comfortable and confident in using different technologies (Fayloye & Ajayi, 2021; Kaifi et al., 2021). According to Harrati et al. (2016), the ability to use technology with ease, in the sense that the individual can use it to achieve specific goals with effectiveness, efficiency and satisfaction, is a key factor in gaining acceptance from the user. Davies (1980) created the technology acceptance model (TAM) to explain that the user's approach towards technology was influenced by their perceived ease of use and perceived usefulness of technology. Depending on their perceptions and experience, it would predict the user's attitude and satisfaction towards using technology (Salloum et al., 2019; Su & Li, 2021). This is displayed in Figure 2.4 below.

Figure 2.4

Technology Acceptance Model (TAM)



Note. Adapted from "Exploring Students' Acceptance of E-Learning Through the Development of a Comprehensive Technology Acceptance Model" by S. A. Salloum, A. Q. M. Alhamad, M. Al-Emran, A. A. Monem and K. Shaalan, 2019, *IEEE Access*, *7* (https://doi.org/10.1109/ACCESS.2019.2939467).

Based on this information, one can infer that the TBT method is more suited for the younger generations, such as Generation Y/Millennials and Generation X. In contrast, the F2FT method is suited by the older generations, such as Baby Boomers and Generation X. This constitutes a new challenge for organisations who aim to transform and align their T&D process with the latest digital and technological trends.

2.9 Chapter summary

In this chapter, various learning evaluation models are discussed and used to create the study's theoretical framework. To provide background to the study's topic, the chapter contextualised the concept of T&D and its influence on employee performance, specifically within a South African context. As the study focuses mainly on employees, it also clarified the adult learning theory to better understand what motivates and drives adults to learn. Since the study objective compares F2FT and TBT, the chapter also included background information on F2FT and TBT, its benefits, and its challenges. This was once more related to the South African context. Provided the circumstance of South Africa, a developing country that continues to suffer the aftermath of apartheid and the digital divide, the chapter depicted how effective each training method would be within organisations across the country. With F2FT and TBT, the chapter also included information on the concept of blended training to explore how it can compensate for the shortfalls of F2FT and TBT; however, the challenges of blended training also needed to be considered. The chapter concludes with a broad discussion of training effectiveness and the factors influencing the success of training methods that organisations need to consider and be mindful of when implementing F2FT and TBT.

CHAPTER 3: RESEARCH METHODOLOGY

3.1 Introduction

Research methodology is known as the path where researchers must conduct their research. It demonstrates how these researchers define their problems and objectives and then provide their findings based on the data and information gathered over the study period (Bryman et al., 2014). This chapter discusses the chosen research paradigm and design that will guide the study, the preferred population and sample, and its techniques. It explains the data collection and analysis procedure employed during the research and the trustworthiness of the process. Finally, it outlines the ethical considerations and guidelines the researcher followed throughout the research.

3.2 Research paradigm

According to Rehman and Alharthi (2016), researchers need to comprehend and express beliefs about reality, what can be known about it, and how we attain this knowledge. This is what a research paradigm entails. Bryman et al. (2014) further explain that a research paradigm describes a collection of assumptions and norms influencing what should be studied, how research is conducted, how results should be interpreted and how problems should be solved. Researchers use different paradigms depending on the objective of their research (Pervin & Mokhtar, 2022). For this study, an interpretivism phenomenological approach (IPA) was chosen for the research paradigm. According to Bonache and Festing (2020), an interpretivism paradigm is based prominently on phenomenology. Its objective is to make sense of the meaning and subjective intentions of individuals in a specific context or phenomenon. It requires that the phenomenon be understood through the eyes of the participants rather than the researcher. Interpretivism rejects the notion that a single, verifiable reality exists independent of our senses (Rehman & Alharthi, 2016).

The motivation for the selection of the IPA is that it can identify individuals' in-depth personal life experiences. By analysing the data collected, the researcher can explore, explain and attempt to position themselves in the place of the participants so they can better understand the participant's perceptions (Pervin & Mokhtar, 2022). Despite the notions surrounding TBT and F2FT, as discussed in the literature, individuals may disagree or agree based on what they experienced with the two training methods; therefore, within this study, the IPA will assist the researcher in achieving the research objective of exploring employees' preferences regarding TBT and F2FT based on how they subjectively experienced the two training

methods during their upskilling in the workplace. It will also uncover the reasons and unique situations of participants that influenced their experiences, opinions, and preferences.

3.3 Research design

A research design provides a framework and plan for collecting and analysing data so the researcher can obtain the relevant responses to the research problem and questions that will lead to achieving the overall research objective (Asenahabi, 2019). The choice of the research design reflects decisions about the importance attached to various dimensions of the research process (Bryman et al., 2014). Before selecting the specific research design, the researcher must determine the research approach. Provided the study at hand, a qualitative research approach was chosen.

According to Bryman et al. (2014), qualitative research usually emphasises words rather than quantification in the collection and analysis of data. Asenahabi (2019) explains that qualitative research aims to explore and understand the meaning of a social problem that an individual or group of people ascribe to. It also aims to generate meaning, purpose, or reality from the opinions and experiences of participants (Asenahabi, 2019). This study aimed to explore the perceived effectiveness of TBT compared to F2FT to emphasise the most preferred training method. This is achieved through the feedback provided by participants based on their experiences around which method they perceived to work better to help improve their workplace performance; therefore, the selection of the qualitative approach is most suited for the present study as it will allow the researcher acquire access to participants' personal experiences with TBT and traditional F2FT.

Based on selecting a qualitative approach and the study's aim, an interpretative phenomenological research design was chosen to guide the present research. Neubauer et al. (2019) describe the interpretative phenomenological design as a design of inquiry as it explores the essence of a phenomenon through the perspective of those with direct lived experience to discover how they interpret their experiences and make sense of their world. Its main objective is to understand and describe the reality from individuals' narratives of their experiences influenced by their perceptions, opinions, beliefs, feelings, attitudes and ideas to produce in-depth descriptions of the phenomenon (Alhazmi & Kaufmann, 2022; Neubauer et al., 2019). By adopting the interpretive phenomenological research design, the researcher must isolate (bracket) their personal preconceived beliefs and opinions concerned with the phenomenon and refocused on its attributed meaning (Greening, 2019).

3.4 Population

Bryman et al. (2014) remark that population refers to the universe of units, such as people, nations, cities, regions, and firms, from which a sample is to be selected. The organisation of choice is a financial insurance and investment company in South Africa. The company has branches across all provinces, with the head office in the Western Cape. The entire population included all financial sales advisers within the Western Cape, approximating to 400 advisers. The target population focused mainly on those who had worked for the company before the year 2020 when the COVID-19 lockdown was entrenched, as they have been exposed to F2FT and TBT. The researcher can also acquire insights into the participants' transition experience from F2FT to TBT during the pandemic and its impact on them.

3.5 Sample

According to Bryman et al. (2014), a sample is the segment or subset of the population selected for investigation. As the population approximates 400 financial sales advisers, 12 participants have been sampled for the study to manage the complexity of data analysis. Research also recommends that data saturation within qualitative studies may be achieved from 9-17 participants (Hennink & Kaiser, 2022). The sample technique used for the study was non-probability, purposive sampling. Non-probability sampling is where not all individuals from a target population will have an equal chance to participate in the study; instead, it selects participants based on non-random selection criteria (Elfil & Negida, 2017). Therefore, the motivation of the non-probability sampling technique was to ensure that the sample was made up specifically of individuals who have been exposed to and experienced TBT and F2FT to understand participants' perceptions of each. Thus, the study's sample size comprised 12 financial sales advisers employed within a financial institution in the Western Cape.

3.5.1 Sampling design

The purposive sampling technique was chosen not only because it is often used in phenomenon-based qualitative research (Stratton, 2023) but also because it involves purposefully selecting participants who meet specific criteria under the relevance and study objective (Andrade, 2020). The researcher received assistance from the Human Capital Business Partner (HCBP) in the Western Cape region. The HCBP established meetings with sales managers who then assisted and provided the researcher with willing participants for the study, specifically those who had worked for the organisation before the COVID-19

pandemic. Those who only had exposure to only one training method, such as traditional F2FT or TBT, were excluded from the study.

3.5.2 Demographic characteristics of the study sample

The biographical information relating to the participants is presented in Table 3.1. The sample comprised ten sales advisers working in a financial institution within the Western Cape.

Table 3.1

Biographical Details of Participants

Participant	Gender	Age group	Job title	Education
Participant 1	Female	21-30	Financial sales adviser	Matric
Participant 2	Female	31-40	Financial sales adviser	Matric
Participant 3	Male	31-40	Financial sales adviser	Diploma
Participant 4	Female	31-40	Financial sales adviser	Matric
Participant 5	Male	31-40	Financial sales adviser	Certificate
Participant 6	Female	31-40	Financial sales adviser	Matric
Participant 7	Male	Over 50	Financial sales adviser	Matric
Participant 8	Female	31-40	Financial sales adviser	Matric
Participant 9	Male	41-50	Financial sales adviser	Matric
Participant 10	Male	31-40	Financial sales adviser	Certificate
Participant 11	Female	21-30	Financial sales adviser	Degree
Participant 12	Female	31-40	Financial sales adviser	Certificate

3.6 Data collection

Bryman et al. (2014) define data collection as the process of gathering the basic information the researcher used to conclude from. In this study, the data was collected through semi-structured interviews with participants. The purpose of a semi-structured interview was to gather information from key participants able to share their personal experiences, attitudes, perceptions and beliefs related to the topic of interest (De Jonckheere & Vaughn, 2019), comparing TBT and F2FT. Semi-structured interviews also allowed the researcher to probe the participants on responses where necessary. The semi-structured interviews followed an interview guide (APPENDIX A) that was created by the researcher with the support of by the supervisor.

3.6.1 Data collection procedure

A data collection process was followed to collect the data required for this study. First, ethical clearance was obtained (APPENDIX B) from the Human and Social Sciences Research Ethics Committee (HSSREC) (reference number: HS22/10/5) to conduct the study. Before the researcher approached the participants, she needed to obtain permission from the selected organisation. The main stakeholders were the senior learning manager (SLM), the HCBP and the provincial general manager (PGM) of the Western Cape region. These stakeholders were provided with evidence that the researcher's study received ethical clearance and a permission letter (APPENDIX C) to inform them of the purpose and procedure of the research and the benefits the research may have for the organisation. After the researcher received permission and support from the main stakeholders, the HCBP set up meetings with various sales managers where the researcher could present the details of her study and the selection criteria of the participants.

Certain sales managers agreed to assist. They approached their financial sales advisers to inform them about the study and asked if they would participate. Once the financial advisers decided to volunteer, the sales manager provided the researcher with the names of the willing financial sales advisers, and she then contacted them individually. Before the interviews, an information letter (APPENDIX D) was sent to participants, which thoroughly explained the purpose and study's objectives. A consent form was also included within the information letter, which participants needed to sign before the interview. Once participants provided consent to partake in the study, interviews were established by the researcher with each participant based on their availability. All interviews were conducted through an online platform called Microsoft Teams.

The decision to conduct the interviews virtually made the process convenient, especially for the participants, as they had limited capacity to spare time for the interview, which would have made a face-to-face interview challenging due to time constraints. Microsoft Teams was chosen because it is the primary online platform used within the selected organisation and is easily accessible by the participants and researcher. Fortunately, the online platform has video capability and ultimately mimicked a face-to-face interview, making it possible for the researcher to identify nonverbal cues and gestures. Field notes were taken during the online interview. According to Sutton and Austin (2015), field notes are informal notes that the researcher writes down during the interview to emphasise the nonverbal cues, gestures, and facial expressions of the participants. The researcher did this to complement and provide context to the interpretation of the online video and audio interview, making the process more reliable when she needed to transcribe the interviews. With participants written and verbal consent, all interviews were screen-recorded with a transcription capability provided by Microsoft Teams. The interviews took approximately 30 to 60 minutes.

The interview was directed by the interview guide, comprising 12 questions with probing questions. The questions were formulated according to the research questions and objectives and the theoretical framework outlined in the literature review to create a logical flow. Examples of questions include: *"Describe your experience with face-to-face training. What did you enjoy about it, and what was challenging about it?" "What was your experience like in adapting to technology-based training? What did you enjoy about it, and what was challenging about it?" "How would you describe your learning style?", "Which training method enabled you to effectively transfer your acquired knowledge, skills and attitudes back into your job?"*. All interviews followed the same process for each participant to ensure the reliability and validity of the study. Once the interviews were completed, the researcher transcribed the interviews based on the recordings and the transcription dialogue provided by Microsoft Teams. After the interviews were conducted, the data derived from the interviews was analysed.

3.7 Data analysis

Data analysis is defined as the process of converting the data collected into meaningful information (Taherdoost, 2020). There are various data analysis techniques; however, for this study, thematic analysis was chosen to analyse the collected data. Thematic analysis, as described by Braun and Clarke (2006), aims to systematically organise the data collected by identifying, analysing, and describing patterns or themes across a data set. It is also a preferred and popular method used in qualitative research and is an effective way of acquiring

qualitative data insight into participants' views, opinions, knowledge, and experiences about a particular phenomenon (Braun & Clarke, 2006); therefore, thematic analysis is appropriate for the chosen phenomenological approach as it focuses on a participant's subjective view and experience of a phenomenon of the study. According to Braun et al. (2016) and Dawadi (2020), thematic data analysis comprises six phases:

- Familiarisation with the data
- Generating initial codes
- Searching for themes
- Reviewing themes
- Defining and naming themes
- Writing the report

3.7.1 Familiarisation with the data

In the first phase, the researcher must familiarise themselves with the data. This will assist the researcher in uncovering the different themes that may emerge through the data. The researcher began the process by transcribing the interviews verbatim. With the transcription, the researcher also noted the nonverbal cues that participants made during the interview to provide a deeper understanding of their reactions to the questions that potentially influenced their responses. Once the interviews were transcribed, the researcher took some time to examine, read, and objectively re-read the data to become immersed and engaged in the information thoroughly and carefully. While examining the data, points of interest, ideas and concepts that could help the researcher address the research question and objective were highlighted.

3.7.2 Generating initial codes

Once the researcher familiarised themselves with the data and highlighted points of interest, ideas and concepts, she coded the data. Braun et al. (2016) explain that coding systematically and rigorously identifies and labels something of interest in the data to create the foundation for theme development; therefore, the researcher systematically examined the transcripts and, emphasised points of interest again and allocated relevant codes to the data. The researcher used a system called ATLAS.ti to assist her when generating the codes. ATLAS.ti is a qualitative tool to assist researchers in coding and analysing transcripts and field notes. Once codes were allocated, the researchers inspected the codes and made the necessary changes

and tweaks. Finally, the codes and the data (participants' responses) that shared meaning and relate to each code were grouped within ATLAS.ti.

3.7.3 Searching for themes

After codes were generated and grouped, the researcher organised the grouped codes into themes and subthemes. This was also conducted through ATLAS.ti. According to Braun and Clarke (2006), a theme captures essential aspects of the data regarding the research question and represents some patterned or typical response and meaning within the data set. The process began with the researcher analysing and recognising patterns in the grouped codes based on the similar responses provided by the participants. The researcher then identified the relevant themes and subthemes. Where possible and relevant, the researcher also linked the themes to what was discussed in the literature review. The themes were summarised according to the research question and objective.

3.7.4 Reviewing themes

After identifying themes and subthemes, the reviewing and refinement process occurred. Braun and Clarke (2006) suggest that themes and subthemes require review to ensure that they are coherent and consistent and whether there is a clear distinction between the themes. In this phase, the researcher revised the coded data and compared it to the identified themes to ensure it was well connected, so the themes were clear of misrepresentation. The researcher examined whether the themes identified were coherent with the research question. The themes were then sent to the researcher's supporting supervisor for evaluation.

3.7.5 Defining and naming themes

When the themes were finalised, the researcher defined and named the themes by identifying its essence. In other words, the researcher determined what each theme was about and what aspect of the data each theme captured.

3.7.6 Writing the report

The final phase is for the researcher to write the report of the findings. To convince the reader that the report is of merit and validity, the researcher provided a concise and coherent discussion of the findings, which include the researcher's interpretation and the participant's experiences in their own words. It includes relevant parts of the literature review to evidently support the discussion. The researcher also related the discussion to the research question(s).

3.8 Trustworthiness

Trustworthiness is known as the degree of confidence in data, interpretation, and methods used to ensure the quality of the study (Connelly, 2016). According to Nowell et al. (2017), for qualitative research to be accepted as trustworthy and reliable, the researcher must prove to the reader that all protocols, procedures, and processes undertaken during the study are credible. The researcher does this, accurately demonstrating that the data analysis was conducted in a precise, consistent and thorough manner through recording, systematising and disclosing the methods of analysis with enough detail. Lincoln and Guba (1985) introduced specific criteria for achieving trustworthiness. The criteria include credibility, reflexivity, dependability, confirmability, and transferability (Connelly, 2016; Nowell et al., 2017; Korstjens & Moser, 2018).

3.8.1 Credibility

Credibility equals internal validity in quantitative research (Korstjens & Moser, 2018). It involves the accurate connection between participants' original views and the researcher's interpretation and representation of those views (Nowell et al., 2017). The researcher had to guarantee that the study is conducted using standard procedures as indicated within the research approach (Lynee, 2016). To ensure credibility, the researcher took the time to establish rapport with participants through prolonged engagements and persistent observation during the interviews to better understand their worldviews and contexts that support their experiences and perceptions. Based on the sample, the researcher also ensured a broad representation of participants, such as different age groups, cultures, and environments.

According to Stahl and King (2020), another way to ensure credibility is through triangulation, which includes using multiple sources of information to establish identifiable patterns in the study's findings; therefore, the researcher incorporated various theoretical orientations to link the findings to direct research. Another way to check credibility is to include informants to verify the researcher's interpretation (Stahl & King, 2020). To achieve this, the researcher had her research process and data analysis externally checked by the supervisor and co-supervisor, so they could provide their objective reviews. To limit the researcher's potentially biased interpretation and representation, reflexivity was exercised.

3.8.2 Reflexivity

Reflexivity includes the process of critical self-reflection about one's own potential bias, preferences and preconceptions, and the researcher's relationship with the participant and how it may affect the participant's responses (Korstjens & Moser, 2018). To ensure this criterion was met, the researcher acknowledges that the world is multifaceted and accepts that everyone's perception is uniquely based and influenced by their context.

3.8.3 Dependability

Dependability refers to the stability of the data and research findings over time (Connelly, 2016). It demonstrates how dependable your findings and results are. Similar to credibility, ensuring dependability can be achieved through peer debriefing and peer scrutiny (Stahl & King, 2020); therefore, the researcher's data analysis and interpretation of the study's findings were reviewed carefully by other researchers, namely her supervisor and co-supervisor who examined and objectively confirmed the accuracy of the researcher's interpretations.

3.8.4 Confirmability

Confirmability is the extent to which other researchers can confirm the research findings. It requires the researcher to remain neutral and objective regarding the data, so the study findings reflect only the participants' shared opinions, experiences and perceptions and are free from any potential biases, motivations, or interests from the researcher. (Korstjens & Moser, 2018; Kyngäs et al., 2019); therefore, the researcher's interpretation was purely based and grounded in the data collected from the participants and not based on her perceptions, experiences, and preferences.

3.8.5 Transferability

Transferability refers to the extent to which findings are useful to researchers in other settings and differentiate from other aspects of research in that readers determine how applicable the findings are to their situations (Connelly, 2016). In other words, it is the degree to which the research results can be transferred to other contexts or settings with other respondents (Korstjens & Moser, 2018). Transferability equals generalisation in quantitative research. Nowell et al. (2017), mentions that a researcher may not know the context that other researcher may wish to transfer the findings; however, the researcher is responsible for providing extensive and thick descriptions of their study.

For the current study to be transferable, the population or audience must include individuals who have been exposed to both F2FT and TBT methods to improve their employee performance. The study was employed in an organisation from the financial industry. The researcher chose an industry that is fast-paced and prone to environmental or market changes. This would almost warrant that training occurs frequently within the organisation to ensure the workforce is equipped to deal with the fast-paced environment and constant changes. The sample was financial sales advisers, not on a management level. The study was conducted across the Western Cape, including urban and rural areas.

3.9 Ethical considerations

Of utmost importance during the research, the researcher ensures the protection of participants by adhering to and applying appropriate ethical principles (Mohd Arifin, 2018). Due to the in-depth nature of qualitative research, ethical issues may be more prominent, especially while conducting face-to-face interviews with potentially vulnerable participants who may become stressed while expressing their emotions and experiences (Mohd Arifin, 2018); therefore, the participants' rights, values, and desires were considered throughout this process. After the researcher received ethical clearance from the HSSREC (reference number: HS22/10/5) to commence the study and collect data, the researcher adhered to the ethical guidelines discussed below.

3.9.1 Informed consent

According to Bryman et al. (2014), informed consent requires the researcher to inform the participants about the research process and the expectations from the participants. Before approaching the participants, the researcher received informed consent from the selected organisation after providing a permission letter that detailed the study and evidence that she received ethical clearance. The researcher was supported by the HCBP to obtain consent from the PGM and selected sales managers to interview their financial sales advisers. The researcher sent each participant an email and an attachment of a detailed information sheet and consent form in a language that they understand. The researcher requested that each participant peruse the information sheet and sign the consent form before the interviews. Once the researcher received the signed consent forms, she arranged the interviews based on their availability. At the start of the interview, the researcher briefly went through the information sheet again with the participant to remind them of the research details, the procedure of the research, and the confidentiality and anonymity of their identity and responses. Finally, the

researcher allowed participants to ask clarifying questions and asked the participants to confirm that they understood all the details shared with them.

3.9.2 Confidentiality and anonymity

Confidentiality is known as maintaining the privacy of information that another person or participant does not want the research to reveal publicly (Bryman et al., 2014). This ethical principle is linked to anonymity, where participants' identities are kept private (Saunders et al., 2015). Maintaining confidentiality and anonymity was in the information sheet. The researcher kept the participants' identities and the nature of their contributions protected. This was achieved by not including participants' names in the data collected or the discussion/write-up. The recordings and transcripts of the interview were also safeguarded and stored on a password-protected computer file. Only the researcher had access to the data.

3.9.3 Voluntary participation

Participants were made aware that partaking in the study was purely voluntary. The information sheet sent to participants clarified that once they volunteered to participate, they were free to withdraw at any point if they felt the need to, without consequence. The researcher also assured them they had the right to refuse to answer questions they were uncomfortable with.

3.9.4 No harm to participants

According to Bryman et al. (2014), harm is classified as physical harm, harm to participants' development or self-esteem, stress, harm to career prospects or future employment, and forcing participants to perform reprehensible acts. To guarantee no harm or deception to the participants, the researcher ensured that she behaved ethically and honestly to prevent any harm imposed on the participants partaking in the study. The researcher treated each participant with respect and dignity, listened carefully to participants' opinions, and respected their understanding. Participants were not required to commit an act that might diminish their self-respect or cause them to experience shame, embarrassment, or regret.

3.10 Chapter summary

The chapter outlines the holistic research methodology the researcher followed while conducting the study. It explains the selected and most appropriate research design and paradigm. The study's population, sampling, data procedure, and data analysis methods are

all aligned with the research design and study objective. The chapter also outlines the trustworthiness of the study. Finally, the ethical considerations are discussed.

CHAPTER 4: RESEARCH FINDINGS

4.1 Introduction

In the following chapter, the research findings are presented and discussed according to the research questions. Based on the findings uncovered through the data collection and analysis procedure, specific themes and sub-themes have emerged and are broadly outlined below. The chapter concludes with a chapter summary.

4.2 Research findings

The study objective was to answer the following sub-research questions:

1) Do employees perceive F2FT as an effective method to be upskilled and improve their workplace performance?
2) Do employees perceive TBT as more effective than the traditional F2FT method to upskill and improve their workplace performance?
3) Does TBT have the potential to replace the traditional F2FT method? Would it be an effective training substitute?

To answer the stipulated research questions, semi-structured interviews were conducted with 12 participants to understand better their experiences and perceptions of F2FT and TBT and how it has affected their employee performance. Based on the data findings, the researcher uncovered and identified themes and sub-themes. These themes have emerged:

- F2FT experience
- TBT experience
- Employee performance impacts
- Training preferences

Each theme emerging from the data findings also includes and expands into several sub-themes. This is displayed in Table 4.1 below.

Table 4.1

Themes and Sub-Themes

Themes	Sub-Themes
Theme 1: F2FT experience	Human interaction and guidance
	Customary
	Away-from-job training
Theme 2: TBT experience	Flexible training environment
	Connectivity challenges
	Remote learning challenges
	Adapting to technology/age
Theme 3: Impact on employee performance	The impact of COVID-19
	Motivation to learn
	Behavioural shift post-training
Theme 4: Training preferences	Facilitator experience
	The future of training
	Preferred training method

4.3 Face-to-face training experience

Each participant confirmed that, before the COVID-19 pandemic, their primary training mode was the F2FT method. Participants were requested to describe their experience with F2FT from a positive and challenging perspective. This included classroom-based training sessions and coaching and mentoring sessions with their manager. Based on the data findings, the following sub-themes are presented below that expand further on participants' F2FT experience.

4.3.1 Human interaction and guidance

Regarding one of the positive experiences, most of the participants had very similar views where they indicated that they enjoyed the ease of human interaction that F2FT allowed them to have with the facilitator and with their colleagues or other trainees within the training session. It was easy for them to ask questions and receive immediate guidance and assistance from the facilitator and other training members. It was also easier to observe and gauge the body language of others. Below are some responses from the participants:

> *"In face-to-face training, as a team, as a group, as colleagues, you encourage each other. You can see how each one develops, so I would say that is the pro", "We have to interact with people...you need to have human interaction." (Participant 1, female).*

> *"The face-to-face training was much better because you can interact and you also can ask questions or afterwards, you can just go and ask the facilitator to explain it more for me because I don't understand, I put some questions on my paper so I can just go back" (Participant 4, female).*

> *"In a classroom environment, you can feed off your peers and maybe their reactions to certain questions.", "You could kind of learn what other people do and say and how they react in terms of their body language to get the point across." (Participant 5, male).*

> *"I feel that face-to-face allowed you to get to learn and know more about your colleagues. So, for me it was more of a bonding situation because you are more interactive, you learn the other teams because, at the end of the day, you get the top-performing teams in the same training session, now you can interact with them. You can learn tips. So, for me it was a very productive event, being face-to-face." (Participant 10, male).*

> *"If you don't understand your facilitator and you don't want to ask, it's quite easy to just ask someone sitting next to you. She or he should be able to explain it to me, or rather when you are out for tea break, you are busy discussing what you've been taught in class. So, it's quite easy and nice to catch other things from the other individuals." (Participant 11, female).*

> *"You're looking at the person that is facilitating and you are able to stop the person immediately and everyone can see that you have a question to ask." (Participant 12, female).*

This is supported by Talati et al. (2018), who explains that having the ability to interact and engage is one of the main benefits that F2FT offers. It enables greater engagement and social interaction between the trainees and facilitator. Everyone can see each other; they can recognise body language and facial expressions. Kim (2022) and Lewis (2006) also support the importance of the human factor and observation of body language, stating that it also increases engagement with the learning content, eases group interaction and collaboration, helps the facilitator and trainees to understand each other concerning their facial expressions better, allowing for better problem-solving skills to occur between trainees.

When elaborating on their F2FT experiences, participants indicated appreciation in their responses to the human interaction, asking questions and receiving immediate guidance from the facilitator and other trainees. Participants 3 and 5 indicated that they enjoyed the enthusiasm their facilitator showed during the F2FT.

> *"Face-to-face, I would say. When we got inducted into [the company] and the training, our trainer at that time made it very interactive. She kind of enforced that…So, for me, in terms of training, she changed everything about training and when you go to other training sessions, you can guide that session with your questions that you're asking based on how you have been brought into the business which is very important. (Participant 3, male).*

> *"I enjoy face-to-face training because I'm big on body language. You can tell if your trainer or your facilitator is enthusiastic about the subject that they are training by seeing them. I mean they can read from a manual, but you can tell whether this person is passionate about what they do when they're standing in front of a class." (Participant 5, male).*

4.3.2 Customary

Customary includes how comfortable participants felt with F2FT, especially since it has been their main training method. Participants 5, 7, and 9 indicated that they were most comfortable with F2FT, as it is the main method of training to which they are accustomed. According to Akpoviroro and Adeleke (2022), trainees often believe that training methods they are accustomed to are considered more effective, as they can learn better in a familiar environment.

> *"I guess like 15 years ago when I started in this business, that's what I was exposed to you know, the face-to-face training. There was no other training that was ever virtual back then…that's all I knew.", "I think being in a face-to-face environment, in the first*

few days, you don't have that confidence to speak up. But once you see your colleague putting their hand up and, you know, people getting to know each other, you kind of gain that confidence. I mean, I was always a very, very shy person. I'm still very, very shy. But I think that face-to-face interactions kind of aided in getting me out of my shell and meeting new people." (Participant 5, male, 31-40).

"I was trained like that from my primary school day, you know. Having someone in front and then high school as well of course. So, it was a norm." (Participant 7, male).

"It's better to sit in the classroom because you can engage better, you're comfortable to engage, you can ask questions face-to-face, you know who the person you are engaging with.", "you feel more free." (Participant 9, male).

Conversely, Participant 1 mentioned that she was not always comfortable within F2FT due to a language barrier; however, she needed to adapt. This can be a potential challenge for others, too. Participant 10 also mentioned that he was not as confident in an event when he needed to present in front of others potentially.

"The cons are I would say you always not maybe like comfortable like me that is an Afrikaans person that's supposed to be English but through that, you also learn to adapt." (Participant 1, female).

"For me, I'm not confident speaking in front of people or a whole crowd, you understand. Like even my training I did with my higher certificate, I had to do a presentation, but if it was face-to-face, that means I would have had to do it in front of my big bosses live, you know, compared to being able to do it online. And that for me, worked out because I can't present face-to-face, I get nervous." (Participant 10, male).

4.3.3 Away-from-the-job training

Regarding F2FT, Participants 3, 6, and 8 mentioned that they travelled away from home and were provided with a luxury opportunity to stay in a guest house during the time of their training. Based on their responses, the participants explained that they enjoyed travelling for training, mentioning that they enjoyed being "spoiled" and were "away from distractions."

"I would say that's a great positive and also the nice food because you get booked out at a guest house (laughs)." (Participant 3, male).

"I think before COVID, I enjoyed training because it was either done at head office or those times it was at a bed and breakfast, so normally at the conference room or so.",

"I always enjoyed the venue or the location or where it was at or held at. We used to get spoiled a lot when it comes to the food and teatime etc." (Participant 6, female).

"You are a few days in Cape Town, you are away from home and all the distractions, the kids, everything which is better." (Participant 8, female).

Although participants established this as a benefit, according to Beinicke and Bipp (2018) and Gayed et al. (2019), this is a shortfall of F2FT. Providing accommodation is expensive and logistically challenging, especially for those from a dispersed location. When it came to travelling to the F2FT venue, Participant 10 identified this as a challenge. Participants 1 and 6 also mentioned that "traffic" from home to the training location was also challenging. Besides these challenges, most of the participants' experiences seemed to have a positive outcome.

4.4 Technology-based training experience

Each participant confirmed that during the COVID-19 pandemic, their main training mode switched from the F2FT method to virtual and online training. This was conducted mainly through Microsoft Teams and e-learning modules. Based on the data findings, the following sub-themes are presented below that expand further on participants' TBT experience.

4.4.1 Flexible training environment

Many participants indicated that they enjoyed the convenience and flexibility that TBT offered, especially joining the training in the comfort of their homes while doing it at their own pace. They could also access recordings and e-learning. Some responses from the participants are:

"The fact that you can do it whenever you want to do it. So, there isn't a time-based. You can learn whenever you want to learn. You can learn by listening to the recordings whenever you have time while still being able to do your job." (Participant 2, female).

"You are in the comfort of your home; you have your privacy. And yeah, in the time frame, you can work maybe in the morning, then the virtual class will start from four to six or three till six, "What they also did if you couldn't attend the training, they would record it for you. So, you can always go back and just reflect." (Participant 4, female).

"I enjoyed the convenience and the fact that I didn't have to go anywhere. I could just wake up and click join." (Participant 5, male).

"I like these online modules also. I mean, especially for me that's been working now for over a decade with the company, but you forget. You forget maybe some information

about FICA [compliance] I mean they taught me about FICA how many years ago… So, it's good to have these refreshers also when it comes to these online modules." (Participant 6, female).

> *"I like the fact that I could access the recordings. And you're at home, you're more relaxed and more chilled, and now you can just go back to the recording at your own pace and refresh yourself on the training content." (Participant 11, female).*

The notion that TBT is convenient and flexible is supported by various researchers, such as Boateng et al. (2021), Knowles et al. (2020) and Loeng (2020). They explain that TBT is perceived as an easily accessible training technique aiming to create a more conducive, dynamic and flexible learning environment to improve employees' performance quality. Talati et al. (2018) also mentioned that TBT includes lower costs with greater convenience, as it can reach a wider/scalable audience in dispersed geographical locations simultaneously. Participant 3 added to this by explaining that having the ability to access e-learning modules has empowered him.

> *"It was more empowering for me, I would say, because I could now do Udemy [learning platform] modules on my own, you know, assessments I feel would be interesting. So, it was more empowering yeah. I wouldn't think that any individual would think that it would be a negative because I mean it's something you're reading, you are gaining knowledge about and that just depends on you as the individual to use the platform that's available to you."*

As mentioned by the adult learning theory, adults prefer to take charge of and ownership of their learning through self-directed learning (Knowles et al., 2020); however, Akpoviroro and Adeleke (2022) emphasise that for self-directed learning to succeed, trainees require discipline to complete training in their capacity, especially during their potentially busy schedules. This is evident from Participant 3, who comments that he did not attend specific training because he had parental obligations and was expected to make sales, according to his role as a financial sales adviser.

> *"Sometimes I just simply didn't have time. Also, I'm a parent now. We also have to bring in 10 clients a week and I can't sit for two hours…and my manager is going to ask me about the 10 clients…at the end of the day, cut off at half past two and you got to bring in what you need to [clients]…You have to understand and decide what is important. Are you going to join the session or are you going to bring in business."*

Participant 7 also mentioned that he sometimes does not necessarily read through the learning content when completing the training and e-learning.

> *"Personally, with the online training, I hardly read the stuff, I just went straight to the assessment and completed it based on general knowledge [laughing]. So, I don't really read the stuff, I just pass."*

Yet, Participant 3 believes that before you can assess that is part of e-learning, you need to read all the learning content.

> *"You have to read the whole thing before you can go over to the next tab, so it's not just something that you can just click yes, no or maybe. You actually have to read it. You know, so when you are reading it, you are understanding it. So, the virtual thing for me that's a positive."*

An interesting perspective was introduced by Participant 6, who claimed that she had to work beyond her regular working hours due to the easy access and flexibility that TBT allows, where her colleagues contacted her at *"9 pm to assist them"*. This may also potentially impact employees' well-being and work-life balance.

> *"If it was done face to face, it would have been done within that allocated time and the facilitator would have given you time to practice and they would have assisted me or assisted my other colleagues. But during COVID, I had to use my own personal time to try and assist and help my colleagues. I had my colleagues call me after 9 p.m. to assist them, and that's tiring."*

4.4.2 Connectivity challenges

When describing the challenges of TBT, several participants shared the same sentiment that they struggled with connectivity due to network issues or load-shedding. Participant 7 also mentioned that owing to connectivity issues, it felt as though he missed out on the training content. This is a concern, as Hoq (2020) remarks, that for TBT to be efficient, it requires strong Internet connectivity and bandwidth. Below are some participants' responses.

> *"The challenge is the network. That was a big problem. I am now on MTN, but when we're offline, I must put in my Vodacom sim for network because network is a big problem.", "Load-shedding is also a big problem because when it's load-shedding, then everything is cut off. I don't have Wi-Fi." (Participant 4, female).*

"So, you basically have two days within this connectivity issue time and whatever to try and focus. You don't know what could go wrong. Now we are experiencing load-shedding also, and these tablets that we received, don't last the whole day." (Participant 6, female).

"The challenge was the connectivity and I felt that I always missed out, because of load-shedding that was also always a problem…I felt that I was missing out on things and not getting the full benefit of the training that I normally get when I have someone in front of me." (Participant 7, male).

"Definitely, the connectivity, because especially now with the load-shedding and so on, it's been difficult. Sometimes you miss the training that is online because of load-shedding or connectivity problems." (Participant 10, male).

Based on the feedback received from participants, they have ultimately confirmed what researchers have stated on how connectivity issues remain a significant concern within South Africa, primarily due to poor networks (Arubela & Jere, 2022) and load-shedding (Moonasamy & Naidoo, 2022). Adeleke (2020) claims that provinces, such as the Western Cape, Northern Cape, and Gauteng, are the only provinces within South Africa with sufficient infrastructure to allow digital development and use of technology devices to be made possible; however, all participants are within the Western Cape region and some have claimed that they still experience network concerns. Although not each participant struggles with this, it remains evident that it concerns some individuals in the Western Cape.

Faloye and Ajayi (2021) also mention that efficient technological devices, such as computers, laptops and tablets, are crucial for TBT. This is supported by Participant 3, who noted that he struggled with connectivity, not because of network and load-shedding issues, but because he was not equipped with an effective laptop.

"I had a device from 2016, a laptop that was very outdated. I wouldn't have been able to have this MS Teams meeting with you, the RAM, the CPU, all of that was outdated…For logging into MS Teams and for doing exams. I couldn't do it with my work device, I actually had to use my own personal laptop sometimes. I've logged it numerous times, IT has reports about it….connectivity isn't even the issue.", " You have to understand, the thing [laptop] is old…From an IT perspective, you look at how the computer operates and from there you must know."

4.4.3 Remote learning challenges

As TBT allows the trainee to attend and complete training remotely, such as in their capacity and any location, it can also disadvantage trainees, where they may struggle to concentrate or feel too isolated without human interaction and guidance. Participants 1, 6, 7, 8, and 9 felt they experienced this challenge.

> *"The challenging part for me is that really, I struggled to concentrate because it is like, I want to say in the environment world, you get your breaks, you liaise with other people quickly and then you're done. Now it's just the whole time behind the screen. Your attention gets away quickly because you're not concentrating. Maybe the person is not showing visual things like in the classroom.", "You're at your house, in a closed-door room all alone." (Participant 1, female).*

> *"I think for some it might have been difficult because you would have your other relatives in the same household as you. And if you have kids and so forth, it could be a bit difficult.", "You need to get to a quiet place. Previously, we didn't have meetings at home via MS Teams…now where am I going to sit now so that there's quietness.", "You could get distracted with something else. So, your full focus is not always on what is being displayed or the actual training session that you have." (Participant 6, female).*

> *"It's having that personal or private space in our homes because my home is not designed so that I can have my own personal space because I share it with lots of people. So yeah, in that regard, yes, I had lots of problems." (Participant 7, male).*

> *"Doing the training on your own doesn't always help…The challenge for me was to focus., you can't focus during virtual training. I didn't enjoy anything about it. It's challenging because now you are at home, your focus is nowhere, and you don't make notes.", "See on MS Teams, they [facilitator] is talking, but you're in the background, you're maybe busy on your phone and you're not listening to them.", "my brain doesn't work during virtual." (Participant 8, female).*

> *"When you're on your own, you can do what I do and just lay back, relax and not pay attention, not actually read through the content. For the assessment, I don't care how much I get, if I just pass, then that's fine." (Participant 9, male).*

Participants have noted that they have struggled with privacy, mainly because they attend training while at home they share with others, ultimately hindering their focus or concentration. The feedback from participants 6, 8, and 9 around how they are distracted by other tasks in the background during the training session can be linked back to the point made by Akpoviroro

and Adeleke (2022) where they emphasise that flexibility requires discipline from trainees when they complete training in their own capacity. With concentration, participants 1 and 8 also mentioned feeling alone during TBT training, stating that "you're at your house, in a closed-door room all alone" and "doing the training on your own doesn't always help". Participants have noted that TBT lacks the human interaction trait offered by F2FT, and this is perceived as a challenge. For instance, see below a response from Participant 5:

> *"I find it difficult to articulate what I'm trying to say when I can't see you or I struggle to express myself…you're just seeing this grey block in front of you and it's like it's so impersonal. So, I mean that was maybe a challenge of mine."*

Baber (2021) expands on this notion by stating that, for humans, social engagement is more of a need than a desire. There are several opportunities for social interaction between the facilitator and trainees in a traditional F2FT setting; however, when trainees participate in TBT remotely, interaction may not be as efficient due to the technological limitations. This may create an *"impersonal"* feeling, as mentioned by Participant 5.

4.4.4 Adapting to technology/age

Due to the participants being accustomed to F2FT before moving to TBT, they had to adapt to technology. This was potentially challenging, especially for those less technologically inclined/savvy. Participants 2, 5, 7, 8, 11 and 12 stated that they initially found it challenging. Participant 3 mentioned that he did not have a challenge; however, he needed to help others adapt. Below are the responses.

> *"In the beginning, it was a bit difficult to adapt because I didn't know how to navigate it. They did give a platform where they showed you how to navigate MS Teams, but it was still nerve-wracking. But in the end, it was very, how can I say, I'm comfortable now." (Participant 2, female).*

> *"All of them are not computer savvy. They don't have the background, you know, they started a bit late with computers and for them, it's not easy. You know, they struggle with these things and it's frustrating maybe for you to help these individuals, but you have to obviously understand that because who else is going to help this person." (Participant 3, male).*

> *"Prior to COVID we as advisers, never used Teams before. There was no need for us to use Teams because you were seeing clients in person, your manager was there*

every day, and your colleagues were there. So, I mean I've never used Zoom or Teams before and it felt like we actually were forced into it." (Participant 5, male).

"I didn't get to grips with it at the start, it took me a while before I got used to the new way of doing things, so yeah, it was, for me, a struggle. And I felt at times that I wanted to give up." (Participant 7, male).

"Most of us were not like computer-wise. So, we needed to call one another and ask each other, 'how does that work and what is this?' and... it was not nice.", "Maybe I'm still like the older people that prefer face-to-face and not technology." (Participant 8, female).

"I was not used to MS Teams. Even if I'm logged in, I don't know where to go or how to navigate the platform." (Participant 11, female).

"I personally didn't know how to get into MS Teams, I didn't know how to share screen and stuff like that. So yes, I did need some help." (Participant 12, female).

Areiqat and Al-Doori (2018) explain that trainees require high levels of self-efficacy and technical skills to navigate and complete TBT. If they are not technically inclined or competent, they may find it challenging to adapt to technology and TBT. For instance, Participant 7 elaborated that he felt he wanted to give up. Some participants also elaborated that their age affected their adaptation process. Participant 1 mentioned that due to her young age, she adapted; however, this was not the case with participants 7, 8, and 12. Participant 7 elaborated that he was grateful to have his younger colleagues guide him.

"I think we as youngsters adapt quickly. So, it's not a strange or new thing to us. As soon as we get hold of the thing, I think it just goes as supposed to." (Participant 1, female).

"I've learned from my colleagues that was a little bit or a lot much younger than what I am…so they are more clued up when it comes to these new technology things… And I still have a problem with connecting with someone on MS Teams even for a meeting." (Participant 7, male).

"I personally, especially with my age, I'm not really technology savvy." (Participant 12, female).

In addition to Participant 8 acknowledging that older individuals do not like technology in her statement above, Participant 6 also witnessed this with their more senior colleagues.

"So, there were a lot of older colleagues of mine, and I mean they're not all equipped with these "raise your hands" and "react" functionalities or whatever, you know it's easier to raise your hand than to do all this funny stuff… I'm sure until now, they probably still don't know how to dial in [On MS Teams]."

Alshawabkeh (2020) confirms the above by stating that compared to younger employees, older employees take longer to complete training tasks and may be less proficient at grasping the training content. More senior employees favour on-the-job learning over traditional training methods like ILT. Rothwell (2020) concurs by stating that young adult employees are more willing to online, whereas older adult employees are sceptical of any learning or training method that minimises face-to-face interaction. Most participants also mentioned that they received support from their line manager, a facilitator, or their colleagues to help them adapt to TBT and grasp the technological world.

4.5 Impact on employee performance

Part of the research questions and study was to uncover and understand the impact F2FT and TBT had on employee performance. T&D plays an essential role in employee performance as it aims to strengthen individuals' KSA to enable them to perform their job duties (Hermina & Yosepha, 2019; Kuruppu et al., 2021; Mehale et al., 2021). Participants were requested to describe how training affected their employee performance and whether they still achieved their performance goals after shifting to TBT. Several participants specified that it was not necessarily the training method that affected their employee performance directly, but during and in the aftermath of the COVID-19 pandemic. These responses are evident below.

4.5.1 The impact of COVID-19

In the COVID-19 pandemic, several organisations implemented a remote work policy to protect their employees from the virus. Within the financial industry, financial sales advisers' employee performance and goals are compelled by their required targets. During the pandemic, they were expected to continue with sales; however, this was challenging for them, especially because they could not visit their clients. Post the pandemic, consumers continue to suffer the financial aftermath of potentially losing their jobs or taking a salary cut during the pandemic. This is supported by Andrade et al. (2022), who remark that the pandemic affected lower-income families, families from ethnic minorities and vulnerable groups. In South Africa, it had a significant impact on low-income and disadvantaged communities in urban and rural areas (Schotte & Zizzamia, 2023). This ultimately decreased the market for financial sales

advisers. Participants 1, 6, 8, and 11 agreed that the COVID-19 pandemic has affected their performance goals.

> *"It wasn't that easy to achieve my targets. People are still struggling to get their feet to be on par because of COVID." (Participant 1, female).*

> *"It was really challenging. I mean during COVID time, a lot of clients lost their jobs, etc. But I was still able to service the customers that I got." (Participant 6, female).*

> *"I won't say it was because of the training, it was just, after COVID, everything is a mess still. Unfortunately, we don't reach targets, personal targets. It is very hard to get to. Our branch will make the required target, but as for our own personal targets and goals, we can't reach them. So, whether it be face-to-face or virtual training, it won't help, because of what COVID did to our market." (Participant 8, female).*

> *"At first, when it comes to targets, we were not able to reach our targets during or after COVID. The first few months you know, it was a difficult time." (Participant 11, female).*

In contrast, Participant 3 mentioned that he still achieved his targets and credits TBT for this. Participant 5 mentioned that only during the COVID-19 pandemic, he could not meet his targets; however, pre- and post-pandemic, he can. He also mentioned that due to a new product launch during the pandemic made it challenging for him. Participant 7 shared the same sentiment regarding the new product.

> *"I would say I could achieve my goals better with the virtual thing because I can study at night and during the day, I can focus on doing my thing and being a dad. So, it kind of helped me plan what I needed to do in a full-day space and not just 8 hours." (Participant 3, male).*

> *"Post and pre-COVID, yes, I'm achieving my goals. But during COVID…I wasn't meeting my targets. Besides the circumstances, it was also the vast amount of information that we needed to absorb around a new product. And then also, not seeing the customer in person." (Participant 5, male).*

> *"The previous products and ways were better…the structure has changed, the prices also increased. So, if I had to compare myself and my performances prior to 2019 and post-2019, then I would say no, the performance is not the same…it wasn't because of the training itself, it was because of the different structure in ways of working and the new product." (Participant 7, male).*

4.5.2 Motivation to learn

Motivation plays a big part in behavioural change based on the training intervention. According to Abudlhabib and Al-Dhaafri (2020), if trainees experience low motivation to learn, this may prevent them from participating in the training programme and fail to achieve the KSA required. Participants were requested to explain whether their motivation to learn was affected during the shift from F2FT to TBT. Most of the participants explained that their motivation was not significantly affected when they shifted to TBT. Some responses are:

> *"I was still willing to learn, like sit down and study. But I think the mental shift thing was impacted.", "In this environment, you can't tell them you don't want to adapt. This is an adapting world environment that we work in, and we adapt the whole time, for instance, we launched a new product over MS Teams, so everything is adapting in this world of ours." (Participant 1, female).*

> *"You do realize I'm in sales hey [laughs] so I'm supposed to keep my performance up there, no matter what. So whatever changes is happening or whatever new things is coming out, they will teach me about it, and I just need to take it and implement it.", "I was the same person basically, whether it's face to face or whether it's online." (Participant 6, female).*

> *"I actually like learning and studying so for me, it was fine." (Participant 9, male).*

> *"No never, I never felt like that. I don't know how other people feel, but for me, I adapt quickly so that wasn't an issue for me. Change is not an issue for me, so no, motivation and willingness were still the same." (Participant 10, male).*

> *"Not me, no, it was the same. I was still willing to learn."(Participant 12, female).*

Only Participant 1 indicated this change in learning required a mental shift for her. Participant 3 explained that it was empowering for him, explaining, "I could now do Udemy [learning platform] modules on my own…I wouldn't think that any individual would think that it would be a negative because it's something you're reading; you are gaining knowledge". Participant 6 explained that her motivation was compelled by the expectation of meeting performance targets to remain within the sales business. This notion is supported by Rothwell (2020), who mention that adults are motivated to learn for various reasons, such as meeting the performance expectations of the line manager.

Participant 5 mentioned that although his willingness to learn was not affected, he sensed that other trainees may have felt differently.

"I wouldn't say there was no willingness to learn, but I just don't think everybody was on the same page in terms of when you join a meeting or training session. So, MY willingness was there, but I just felt like when you were IN the meeting, not everybody was on the same page."

Participant 5's observation is evident in Participants 7 and 8, who mentioned that they felt an impact on their motivation to learn when they moved to TBT training; however, this is due to adapting to technology and connectivity issues discussed above.

"I felt as if I wanted to give up during that time of virtual training because the thing that I had in my mind is that whether I like it or not, this is going to be the future. And I didn't get to grips with it at the start…then it was load-shedding while it's training." (Participant 7, male).

"Yeah, the only time that we all had a problem with virtual was when we did [new product] training. We couldn't adjust…because then there was a lot of people online, there was connectivity problems, then the person's voice goes away and then they come back and that was our problem." (Participant 8, female).

4.5.3 Behavioural shift post-training

For a training intervention and method to be considered successful, it needs to enable the trainee to effectively transfer and practically apply their acquired KSA from training back into their jobs (Martins et al., 2019; Sheeba & Christopher, 2020). Participants were requested to identify which training method (F2FT or TBT) enabled them to transfer their acquired KSA back into their jobs effectively, resulting in improved performance. They were also requested to explain how it helped them and whether they received this feedback from their line managers. Based on the feedback received from participants, participants 4, 5, 7, 8, and 10 explained that F2FT enabled them better. everything

"With the face-to-face. I learnt a lot more because we have the time now to speak a lot and ask questions…the facilitator said to us 'this is how it is and how you do it in your workplace. You can do this in your workplace, you can do that in your workplace.' Every time she said something that is in your workplace or referred back to the workplace, but now with online training, they might also put it like that but in face-to-face training, they make more examples, and you can see it from a broader view because they link all the information together." (Participant 4, female).

"You can take aspects from both, from the face-to-face and from the virtual, technology-based training. But I think I'm always going to sway towards the face-to-face because

I mean, that's what I'm most comfortable with. I thrive on face-to-face interactions." (Participant 5, male).

"The face-to-face training helped me the most. Like I said at the start of the session, it's something that I'm used to…I would rather prefer writing or scribbling something down on a piece of paper and getting it in my head than to be on a laptop…I'm still old school.", "I was more confident with regards to face-to-face specifically." (Participant 7, male).

"Via face-to-face, there were changes and I felt I was now able to perform my job better. Yeah, because like I said, the support was there, the stuff you learned in the training is what you remember when you have to go and deal with clients." (Participant 8, female).

"Face-to-face, like I said. You're more interactive, you learn more.", "But whether it be online training or face-to-face training, it's never the same when you get into the real world…the training and knowledge that they provide, it does help, but there's only so much they can teach you in training and show you how to apply it, but when you're on your own, it's different…But I can say, you'll have the guys' attention way more in face-to-face training." (Participant 10, male).

The explanation provided by Participant 10 that training can only assist trainees to a certain degree was an intriguing point. He explains that the real working environment is different compared to the training environment and may feel different when the trainee practically applies what they have learnt; however, he is motivated by the F2FT method as he feels it captures the trainees' attention more than TBT. Participant 5 also explains that one can take aspects from F2FT and TBT, but he mentions he will always sway towards F2FT. This is similar to participants' 1, 2, 3, 6, 9 and 12 feedback; however, they were motivated that F2FT and TBT helped them. Some responses are:

"Everything we learn is according to our jobs because now we learnt it offline and/or online, it prepped us for our face-to-face engagement with clients. But it's exactly the same job we still have to do. It's just a different learning format we needed to use… so I won't say it [TBT] didn't help." (Participant 1, female).

"For me, it's both. Maybe if I'm older, 50-something, I might have a different answer where some people would prefer maybe the face-to-face instead of this whole technology thing because they just old school like that, but for me, there's no difference." (Participant 6, female).

"I would then definitely say both." (Participant 9, male).

"Both because they train the same thing whether it's online or face-to-face…If they train you on how to use the ruler, for example, it's the same as when you are face-to-face or when you are online. So, you have to apply what they said whether it's face-to-face or online, it's exactly the same for me. There's no difference." (Participant 12, female).

Participant 11 was the only participant to comment that TBT helped her more to transfer the acquired KSA back into the job. She explains that accessing the training material and recordings after the training played a significant role in assisting her to remember and practically apply what she learnt.

"As much as online seems to be difficult, it can also be nice in terms whereby you would like to go back to the sessions, you also want to go back to the recordings, you want to recap from those, rather than if it was face-to-face, you only have your notes, there's no recording that you can go back to. So, on that one, I'm going to go with online training, because with me, I have to grasp the information before I can practically apply it, so online allows you to revisit that training. It's then easier than face-to-face where you only have your notes. The face-to-face conversation is not being recorded."

4.6 Training preferences

To better understand participants' training preferences, they were requested to describe their learning styles. They were also asked to provide their experience with the support received when they needed to transfer to TBT from F2FT to understand whether the level of support affected their perception and experience of TBT. They were also asked to provide their opinions on the future of training methods.

4.6.1 Facilitator experience

According to Amponsah (2020), individuals have a preferred learning method of collecting, processing, interpreting, organising, and analysing information and experiences known as their learning style. T&D professionals and facilitators need to understand adults' different learning and training preferences so they can tailor their method of instruction to suit adult learners' characteristics (Amponsah, 2020). Participants 1, 4, 5, 6, 7, 10 and 12 mentioned that they prefer a facilitator during training. Some responses are:

"In this insurance industry, we need a facilitator. I would say I prefer a facilitator. I mean you can read through something now, but you might understand it a different way. So, I just like some clarity or just to double check am I understanding it correctly" (Participant 6, female).

"I prefer someone to help me and facilitate the training material. I'm not so good with doing something virtually and just reading through it on my own. I still prefer someone who can assist me with anything that I need to learn, yes." (Participant 7, male).

"I would actually prefer for someone to facilitate. I think it's much easier and better. Because I'm seeing now with the RE [adviser regulatory accreditation] guys, they are half basically facilitating for themselves because they get the modules that they have to do on their own, and I can see how they are struggling." (Participant 10, male).

"To be honest, I have never really done much training without a facilitator before, so I can't really say how it would be if there's no one facilitating. Because whether it was face-to-face or online, there was always a facilitator, I never had to go and do training all by myself. So, I won't know how that feels, so I'll have to go with facilitated." (Participant 12, female).

Participant 6 elaborated that she needed someone to provide her with clarity. This can be connected back to human interaction and guidance, where participants enjoyed the ability to ask questions and have access to immediate interaction and direction from the facilitator and their colleagues (Talati et al., 2018). Individuals who prefer someone to facilitate the training session may not do well with that e-learning, to require the trainee to work through the training material independently.

Some participants mentioned that F2FT and TBT fall within their learning and training preferences. Participants 2, 8, 9, and 11 mentioned that although they can go through the training material independently, they may still require a facilitator to take them through the training content and provide clarification where necessary. For instance, Participant 8 specified that she prefers F2FT when she needs to be upskilled on something she has not been exposed to before. Participant 9 noted that he has been in the business for a while (twelve years), so he has become used to doing training in his own capacity, but occasionally when he may have a question, he wants to have a facilitator assist when needed. Based on participants 2, 8, 9, and 11's responses, it may be inferred that one training method may not satisfy their learning and training experience and, therefore, finds benefit in both training methods.

"It's both for me, because with the online, yes you can study whenever you want to and still work. But then there are sometimes things that you don't understand that you want more clarity on, and you can also ask the facilitator, so face-to-face will be great in that situation." (Participant 2, female).

"I Like to do it on my own. Like our CPD [continuous professional development] training and hours, I will do that on my own…But if it's something totally new, then I was someone to explain it to me afterwards. I would still read it on my own, but someone has to take me through it afterwards." (Participant 8, female)

"Working through the material on your own is actually fine. But sometimes, there's no one that you can really connect with immediately when you maybe have a question or need assistance on something. With facilitation or face-to-face, there is at least someone you can ask a question if you don't understand or want more knowledge on something. But currently, it's fine to work through it on my own. I've been at the company for ages and training is more or less the same." (Participant 9, male).

Participant 3 was the only individual to comment that he prefers working through training material in his own capacity and had a somewhat similar response to Participant 9, mentioning that he has also been in the business for nine years. He acknowledges that if he were younger, he would not be as disciplined to complete the training in his own capacity.

"I would say now that I'm at this older stage, I would prefer a more 'on my own' learning style than to a face-to-face. But if I was a little bit younger, my answer would maybe be face-to-face because at home I wouldn't be as disciplined as what I am now." (Participant 3, male).

Most participants preferred a facilitator to facilitate their training session, whether it be solely a facilitated session or a partially facilitated session with online training. This contrasts with the adult learning theory notion that adults are autonomous learners and, therefore, may prefer a self-directed, active learning method (Bear, 2012; Knowles et al., 2020; Rothwell, 2020). The feedback received from participants 2, 8, 9, and 11 correlates with the blended training approach. Blended training is acquiring KSA through F2F, computer-based, distance, mobile and e-learning, creating an environment allowing for incorporating and combining any technology and F2FT methods (Batista-Toledo & Gavilan, 2022).

4.6.2 The future of training

Participants were asked whether they believed that TBT could replace F2FT. Due to globalisation, the 4IR and the COVID-19 pandemic, TBT has been on the rise within organisations. According to Żur and Friedl (2021), digital technologies have often reshaped and disrupted the T&D environment within corporate organisations. Masa'd (2017) explains that since training has evolved as technology has advanced over the years, it has become necessary for organisations to train technologically to have a workforce updated with the

technological era. This was supported by participants 2, 3, 7, 10, 11, and 12. Some responses are:

"For me personally, yes. Although face-to-face is better (for me) to interact and ask questions whenever, online is better in the category [sales] that we work in because you can learn by listening to the recordings whenever you have time while still being able to do your job." (Participant 2, female).

"Yes, I positively and 100% feel like it could replace it. You can have more learners from different provinces attend one session. The business can look at saving money that way… the whole world is transitioning. It's not just our company, you know, and that is the way forward for us. So yeah, thumbs up." (Participant 3, male).

"Yes, I think so. It's going to happen whether we like it or not. That is the future. This new technology and way of doing things, that is going to be what we need to adapt to." (Participant 7, male).

"You see, we are already going in that direction. I feel we shouldn't replace it. I think we should still have training face-to-face and interact because that's the best. Look at all the advisers now, they are struggling, going forward with this online training thing. But future, it's all about technology, it's all about online, we are already somewhat paperless at the moment, so yeah. I'm going to say no, we shouldn't replace it, but I can't stop it, I think it's already somewhat in motion, it's how it's going to be. (Participant 10, male).

Yes. The reason why I am saying so is because the world has changed, especially after COVID-19. Everything just became digital. For example, interviews are still being done online, jobs can be done on a work-from-home basis now, and there are quite a few jobs where you can work from home. So yes, the world has changed, we have moved to digital." (Participant 11, female).

In contrast to this, Participants 1, 4, 6, and 8 alleged that they do not believe that TBT can replace F2FT.

"Not at all… like I said earlier, you need to have human interaction. You have to have a safe space where you know this is your working environment." (Participant 1, female).

"No. Face-to-face is much better because you have the time, you have the calmness, you don't have to rush everything, you don't have to work AND learn, that's why that is a bonus for us." (Participant 4, female).

"Oh, please don't let it…virtual is too challenging especially when it comes with time. I had my colleagues call me after 9 p.m. to assist them, and that's tiring. So yeah, do not replace face-to-face. I need my sleeping time; I need my family time. Also, if training is done, training is done for the day. Unless we need to study for something or so on then I don't mind putting that extra in also. But remember, everybody, doesn't learn or catch on to things as fast as I might. So, everybody is different, man. So, some people pick up things a bit slower, you know, so they cannot do only the virtual training." (Participant 6, female).

"No…doing the training on your own doesn't always help and the issue with trying to focus during virtual. Face-to-face is better because of the concentration. And you know, people are failing RE [regulatory adviser accreditation] over and over again because it's now completely virtual training. And they give virtual reference guides, which for me isn't always good. They don't give books anymore, they don't print it, the advisers don't print it so they can't really make nice notes. It doesn't help them." (Participant 8, female).

Based on the feedback, most participants believe that TBT can replace F2FT. Although some may still prefer the F2FT, they explain that owing to the digital transformations occurring; they foresee that TBT may become the preferred future training method. Several researchers support this notion. Ergüzen et al. (2021) and Torraco (2016) explain that the twenty-first century created rapid development in ICT, and the availability of Internet access and computers have made TBT more prominent. Żur and Friedl (2021) also explain that digital learning has several advantages over traditional ones and helps to explain the development of corporate online learning as a promising field for research and practice. The demand for TBT formats is rising rapidly. TBT has primarily been influenced by globalisation, the 4IR and the COVID-19 pandemic (Kalio, 2019; Masa'd, 2017; Mohamad et al., 2020; Okano et al., 2018).

Participant 9 mentioned that it will become a blended training approach. Participant 5 also steered to a blended training approach. He explained that, for him, it is twofold, where TBT can substitute certain F2FT, but it cannot entirely replace the method. He elaborated further through an example of the current new financial sales adviser training conducted in the organisation.

"The question is twofold, yes and no because if technology-based training was a little bit more interactive, then it might be…The new adviser training method here, as of recent is that they do two weeks in person to meet a trainer and then two weeks virtual. If you are starting off training for the month in person, then you've only got my attention

for two weeks. I don't know how the others feel, but you only got my attention for two weeks. The other two weeks that is virtual, if I'm at home, I will be on my cell phone, play music in the background, be myself, get a cup of coffee whenever, I'll listen in the background but you're not my priority when it's virtual. And I've spoken to new advisers, they've told me that in those last two weeks of training, they are lost, they're not present, they are not grasping the information…I just feel like especially new adviser training, I think maybe the current training method should start off two weeks virtual, and end off two weeks face-to-face, or otherwise do the entire training face-to-face. It will give those new advisers the confidence that they need when you end it off in face-to-face. You can cover the practical side, after providing the knowledge part of it virtually." (Participant 5, male).

Alsalamah and Callinan (2021) support this by stating that using diverse instructional methods is an effective strategy for training design that leads to successful training transfer. Providing trainees with learning experiences in various ways keeps them interested and engaged, and they can master the training content theoretically and practically. Diverse learning cues also significantly aid in understanding and memory retention. It benefits those who learn in various ways (Alsalamah & Callinan, 2021).

4.6.3 Preferred training method

Based on participants' overall perceptions and experience throughout their careers, they were requested to identify which training method they felt helped upskilled them better. All participants, except Participant 11, stated that the F2FT method upskilled them better. They reiterated the importance of human interaction and support during the training intervention, the ability to learn from those around you, and the comfortability and familiarity of the F2FT method. Some responses are:

"I would say through the face-to-face solely because I got to see other advisers from different areas and we got to share views and things you don't get, it's almost like different cultures being shared at that moment in time. And that is a wealth of knowledge…Totally gives you an open-minded perspective on everything." (Participant 3, male).

"I will say the face-to-face did upskill my knowledge better. The face-to-face also gives you more clarity that helps to improve yourself." (Participant 4, female).

"Online did help me…But I'm always going to go back to face-to-face and that it maybe helped me a little more because of that interaction." (Participant 10, male).

Okana et al. (2018) explain that F2FT methods are still prominently used within several organisations across the globe. According to Ahadi and Jacobs (2017), 2015 statistics established that F2FT as corporate ILT, such as classroom training, was the most frequently used training approach. Based on the participant feedback, human interaction plays an imperative role in their learning and training process.

4.7 Chapter summary

This chapter discussed the data findings based on the interviews conducted by the researcher. After completing the data analysis procedure and coding process, four main themes were identified and were elucidated further through various sub-themes. Where applicable, theory was incorporated into the themes to support the data findings. The themes focused mainly on the perceptions and experiences that participants had within the F2FT method and the TBT method. They also elaborated on the potential impact they experienced on their employee performance. Based on their various training experiences and performance impacts, they provided their final verdict on the future of training and what their training method preference is. Grounded in the data, one may infer that F2FT remains a preferred method among the participants. This is further elucidated and summarised in the concluding chapter.

CHAPTER 5: DISCUSSION, RECOMMENDATIONS, AND CONCLUSIONS

5.1 Introduction

This study explored employees' perceptions and experiences of the effectiveness of TBT compared to traditional F2FT to improve their workplace performance. In this final chapter, further discussions and conclusions are presented based on the research findings under the study's research questions and objectives defined in the first introductory chapter. The chapter outlines the study's limitations and offers recommendations for future research.

5.2 Research overview

The study objective was to answer the following main research question: What are employees' perceptions of the effectiveness of TBT compared to traditional F2FT training to improve their workplace performance? To answer the main research question, it was presented by specific research questions that guided the study.

After contextual information was provided through the review of current literature relevant to the study, the research questions were answered through a qualitative research methodology that guided the data collection and analysis procedure. Semi-structured interviews were conducted with 12 participants who were sampled through the purposive sampling. All participants are employed as financial sales advisers at the same financial organisation and are located across the Western Cape in South Africa. The findings collected from participants through the semi-structured interviews were thematically analysed and produced four main themes: F2FT experience, TBT experience, impact on employee performance, and training preferences.

The first theme, 'F2FT experience', refers to the perceptions employees held about the traditional F2FT method based on their personal experiences, which emphasises the benefits and challenges of F2FT. This included classroom training, coaching, and mentoring sessions received. Participants expressed several advantages of F2FT, such as the human interaction and guidance, the familiarity with the training method, and the opportunity to travel away from work to the training facilities where they felt they were away from distractions. Participants did not express several challenges with F2FT.

The second, 'TBT experience', refers to the perceptions employees held about the TBT method based on their subjective experiences, which also emphasises the benefits and challenges of F2FT. TBT included virtual training (synchronous)and e-learning (asynchronous). Apart from the flexibility benefit provided by TBT, participants emphasised that they experience more challenges than benefits with TBT, such as connectivity issues, remote learning challenges and adapting to technology.

The third theme refers to the 'impact on employee performance' posed by F2FT and TBT. Participants indicated that the COVID-19 pandemic had a significant impact on their performance and not the training itself; however, they elaborated on how their motivation to learn was potentially affected when they needed to transition from F2FT to TBT. Furthermore, they explained how each training method enabled them to make that required behavioural shift post-training.

The fourth theme refers to the 'training preferences' of participants. Based on the future of training, the majority acknowledged that TBT could replace F2FT; however, they also mentioned that they prefer F2FT and found it to upskill them better in their performance.

5.3 Discussion of research findings

Each theme emerging from the research findings is connected to the study's research questions and has aided in answering these questions; therefore, the following discussion of the research findings is outlined according to the research questions posed.

5.3.1 The perceived effectiveness of face-to-face training in improving employee performance

For several organisations across the globe, F2FT was the primary training mode. According to the International Labour Office (ILO), 92 countries rarely used distance learning before the pandemic and mainly delivered training through F2FT (ILO, 2021). Evidently, participants confirmed that F2FT was their primary mode of training before the pandemic, further explaining that it was a training method they were accustomed to and found effective. Akpoviroro and Adeleke (2022) support this notion, emphasising that trainees commonly hold the perception that the training methods they are accustomed to are deemed more effective, as they experience heightened learning in a familiar environment. They expressed great positivity and preference towards the F2FT method because it enables human interaction and immediate guidance among the trainees and with the facilitator. It was also easier for them to

encourage, engage and learn from each other, ask questions and observe the body language and facial expressions of the other trainee members and facilitator. Various researchers have supported human interaction and its importance during the training intervention. Kim (2022) and Talati et al. (2018) explain that human interaction is essential as it eases engagement and socialisation, enabling problem-solving. Two participants also emphasised their appreciation towards the facilitator's attitude, explaining that if the facilitator is "interactive" and "enthusiastic" about what they are training, it enhances the learning experience.

Participants also emphasised that F2FT enables a more significant opportunity to ask questions during the training sessions, making the learning experience more effective because they are almost guaranteed to receive immediate guidance from the facilitator or the other trainee members. It was more accessible for them to stop the facilitator and request clarification on the topic, or based on their facial expressions, the facilitator or other trainees could recognise that they may have a question about the information shared. They further explained that, based on their training preference, they would likely prefer a facilitator to help them through learning content so they can clarify the learning content. This is another benefit supported by Rad et al. (2022), who remark that F2FT enables a conducive environment where trainees can easily ask questions and receive feedback in real-time. Lewis (2006) also mentions that observation of body language and facial expressions helps the facilitator and trainees to understand each other better. Because of receiving immediate guidance, participants elaborated that it made their learning experience more effective, enabled them to grasp the learning material better and therefore established that their performance improved because they retained the information better due to the interaction and immediate guidance, and being able to "feed off and learn tips from others".

Participants also mentioned that they enjoyed the opportunity to receive training in a secluded location from home. This ensured that they were "away from distractions". Beinicke and Bipp (2018) and Gayed et al. (2019), mention that providing accommodation is expensive and logistically challenging, especially for those from a dispersed location. Although it may have a financial implication for the organisation, it can still be identified as a benefit to a certain degree because it may create a more conducive learning environment for employees Chakanika et al. (2016) and Aboyasin and Sultan (2017) remark the adult learning environment must be conducive for adult learning to ensure that the training intervention is more effective. This means it needs to ensure adults feel at ease and supports the basic elements of the adult learning environment, which includes social, emotional, and physical aspects. The social aspect provides interactions between the facilitator and trainees, the emotional aspect

includes self-esteem that trainees have so they feel they can succeed. The physical aspect refers to how the training venue can effectively make trainees feel comfortable to learn, such as room temperature, seating arrangement, noise level containment, refreshments to energise the trainees. A separate training venue is more likely to offer all three aspects for trainees. Participants have explained how they can easily interact with each other (social), and they have mentioned that they can feed off their peers, learn from them and support them when needed (emotional). They also explained being remote from distractions and they are "spoiled" at the training venue (physical). Based on the financial budget the organisation is prepared to contribute to the training programme, it is more likely beneficial to send trainees away to a secluded training venue for training. This may ensure that the training intervention is more effective.

The feedback regarding the overall potential challenges with F2FT was minimal. Several participants explained that they did not find F2FT challenging apart from the potential "traffic" when they travelled to the training venue. There were two participants, however, who mentioned a potential challenge they experienced. The one challenge was the language barrier, where the training was not conducted in the participant's first language but later specified that she adapted. This is still an interesting fact to note, not only for the F2FT method specifically, but training as an overall approach. Due to language barriers, it may disadvantage the trainee from understanding the learning content. Another participant mentioned that he finds it somewhat challenging to present to others in a face-to-face environment or "speak in front of a crowd" due to a lack of confidence and nerves. A different participant had a diverse experience where he felt "aided out of the shell" as he saw his colleagues ask questions within an F2FT environment. The outcome of this is based on the trainee's unique characteristic, and it is something that F2FT does not necessarily have control over (Bell et al., 2017). It can help an individual with their potential social apprehension or increase it.

Based on the overall research findings and discussion, it is suggested that F2FT is perceived as an effective training method to upskill and improve employees' workplace performance, presenting several benefits with minimal challenges.

5.3.2 The perceived effectiveness of technology-based training compared to face-to-face training in improving employee performance

TBT has become more common in organisational settings since training has evolved concurrently with technological advances. TBT has become a critical topic in commercial and non-commercial organisations, more so with the influence of globalisation, the Fourth

Industrial Revolution, and the COVID-19 pandemic (Kalio, 2019; Mohamad et al., 2020; Okano et al., 2018). Participants confirmed that during the COVID-19 pandemic, they switched from F2FT to TBT training to ensure that training proceeded. This included virtual training (synchronous) and e-learning (asynchronous).

The feedback provided by participants confirmed that the main benefit of TBT was a flexible and convenient training environment. Participants could attend the training intervention from the comfort of their homes or any other location while doing it at their own pace. TBT allowed trainees to access and revert to recordings of the training and the potential e-learning available on the training content. This was perceived as an effective way to learn from the participants. They explained that they could "learn whenever you want to learn" and they could "refresh yourself on the training content", especially when they may have forgotten information on something important. Hoq (2020) and Żur and Friedl (2021) acknowledge that TBT is an easily accessible training technique aiming to create a more conducive, dynamic, and flexible learning environment to improve employee performance. Since trainees can revisit training content, there may be a better probability that they remain upskilled in what they were trained. One participant explained that this is an element that F2FT lacks. She elaborated that during the F2FT, she is reliant mainly on the notes she has made during the training session, but TBT offers trainees the entire training session through recordings, which makes it more reliable than the notes made during F2FT.

The flexibility provided by TBT is considered one of the main benefits; however, it requires trainees to take ownership of their learning and necessitates self-discipline (Akpoviroro & Adeleke, 2022). Participants admitted that during virtual training, they often became distracted in the background while training was happening, explaining that when they were in the comfort of their own space behind the computer screen, they could "just lay back, relax and not pay attention". Participants also mentioned that occasionally, they struggled to concentrate due to the lack of privacy at home; therefore, as much as flexibility is an advantage, it may also be a disadvantage based on the self-discipline and circumstances of the trainee based on their training environment and characteristics. This becomes challenging when trainees fail to provide their full attention and focus to the training intervention, as this may prevent proper attainment of the KSAs. At all times, the facilitator or trainer needs to ensure that they have the trainee's full attention so they can grasp the learning content. This is easier to accomplish during F2FT because the facilitator or trainer can recognise the body language and facial expressions of the trainees (Kim, 2022; Lewis, 2006).

Participants identified further challenges experienced with TBT. As they shifted to TBT from F2FT, they confirmed that virtual training specifically was something they were not accustomed to. This required participants to adapt not only to TBT but also to using technological devices. Alshawabkeh (2020) suggests that the effectiveness of training methods is significantly influenced by employee age. Rothwell (2020) concurs by stating that young adult employees are more willing to online, whereas older adult employees are sceptical of any learning or training method that minimises face-to-face interaction. They believe that TBT may threaten human interaction and have less affinity to use it (Faloye & Ajayi, 2021).

Several participants were above 31 years and some specified that they were not necessarily "technologically savvy". They also witnessed their older colleagues struggle during TBT as they were not familiar and comfortable with technology. Those who were uncomfortable with technology and established challenges in navigating TBT explained that they felt disadvantaged and "left behind". Some explained that their motivation to learn was also affected, and they felt as though they "wanted to give up". As a result, trainees may forfeit the full benefit of the training due to these challenges and cannot be upskilled. Another technological challenge affecting TBT's effectiveness was the connectivity challenges due to load-shedding and network concerns. This prohibits the trainee from participating in the training intervention.

Based on the overall research findings and discussion, it is suggested that TBT may not be as effective as F2FT explicitly due to the technological challenges posed on trainees. Although literature perceives TBT to be the preferred training method, TBT requires various aspects to ensure it succeeds. To mention a few aspects—it requires trainees who possess high levels of self-efficacy and technical skills to navigate and complete TBT (Areiqat & Al-Doori, 2018), it requires strong Internet connectivity and bandwidth to be efficient (Hoq, 2020). It requires trainees to have self-discipline and motivation to learn because they are expected to take ownership of their learning when enrolled in a TBT environment (Akpoviroro & Adeleke, 2022). Participants alluded to the importance of human interaction and that TBT fails to provide equal access to this.

5.3.3 The potential of technology-based training replacing face-to-face training as a more effective training method substitute

Traditional training methods can no longer satisfy the demand for continuous staff development and re-skilling (Li, 2022). According to Żur and Friedl (2021), digital technologies have often reshaped and disrupted the T&D environment within corporate organisations.

Rapidly developed digital and instructional technologies, the dynamic changes in the business world, and the unprecedented amount of innovation, it seems essential for corporations to use a variety of digital learning formats to provide their staff with current knowledge in practical, flexible and affordable ways that will support the encouragement of lifelong learning (Li, 2022; Torraco, 2016; Żur & Friedl, 2021).

Various participants believe there is a good possibility that TBT has the potential to replace F2FT as the preferred training method within organisations, not because they favour it but mainly because of the rapid development of digital and instructional technologies, mentioning that “we are already going in that direction” because “the world has changed, especially after COVID-19, everything just became digital”. Participants also alluded to the benefit of flexibility and how TBT can reach a more expansive and dispersed audience with less financial implications to the business; however, some participants did not perceive it to be possible based on their experience with TBT and reiterated the challenges they were confronted with, such as a lack of human interaction, immediate support and concentration, connectivity and technological challenges. Two participants explained that TBT should not replace F2FT in its entirety, but it would instead become a blended training approach where TBT and F2FT are concurrently used within training interventions so trainees can reap the benefits both training methods offer while covering each other’s shortfalls.

This is supported by Alsalamah and Callinan (2021), who contend that using diverse instructional methods is considered an effective strategy for training design that leads to successful training transfer. Trainees are exposed to different learning experiences that will preserve their interest, keep them engaged and enable them to learn theoretical and practical components more effectively. F2FT is more efficient at the practical component of the training, while TBT is more efficient at the theoretical component of the training (Kim, 2022). One participant concurs with this by mentioning that “the current training method should start off virtual and end face-to-face…you can cover the practical side of it, after providing the knowledge part of it virtually”. Diverse learning cues also significantly aid in understanding and memory retention. Kim (2022) also mentions that a single training method, be it TBT or F2FT, may be challenging to satisfy every trainee’s learning needs and preferences. According to Maxwell (2018), it is challenging to determine whether TBT is equally, more or less effective than traditional F2FT as both methods have their inherent benefits and shortfalls and should be used depending on the training need. It is vital to consider that different learning outcomes and needs require diverse learning and training methods (Maxwell, 2018; Sheeba & Christopher, 2020).

All aspects considered, for a training intervention to be effective, it depends on the transfer of training by which trainees can practically apply what they have learnt back into the job to improve their workplace performance (Martins et al., 2019; Sheeba & Christopher, 2020). Several participants explained that in F2FT and TBT, they felt they could still practically apply what they had learnt back into the workplace, motivating that everything they learn is according to their jobs because whether they learnt it offline and online, it prepped them for their face-to-face engagement with clients. However, it's exactly the same job they still have to do. Various participants also explained that when they needed to make the shift from F2FT to TBT, they still had the motivation to learn because of the expectation to maintain a good performance, especially in the industry where they worked. It may be evident that a blended training approach may be a feasible option to upskill employees during training interventions. Although participants have revealed a preference towards F2FT mainly owing to the human interaction and immediate guidance and support, they have also been motivated that TBT has its benefits and that they can still learn the KSA through this training method.

Due to the TBT challenges, specifically that of connectivity issues, TBT likely will not be a more effective substitute compared to F2FT, especially in South Africa, where there is a lack of efficient technological infrastructure and load-shedding remains an immense challenge within the country. Based on the comprehensive research findings and discussion, it is recommended that TBT should not serve as a substitute for F2FT but operate in tandem to deliver trainees with the utmost efficacious training experience. This will ensure that each training method can subsidise each other's shortfalls, allowing the trainees to have the most effective learning and training experience. Maintaining elements of mainly traditional training methods while also harnessing the benefits of technology can increase the access, flexibility and learning effectiveness of training interventions, which has optimised the developmental cost and time of training (Hewett et al., 2019).

5.4 Study limitations

As the study was conducted under the research objectives and questions, it encountered limitations. The first limitation was that a qualitative research methodology guided the study. This methodology was selected for the purpose of better exploring and understanding individuals' lived experiences and perceptions. Although this methodology was considered suitable, it restricts the opportunity to generalise the research findings based on subjective observations and a small sample size. Participants were sampled from the same industry and organisation, which limits the research findings specifically to that industry and organisation.

It may also be prone to potential bias from the researcher. Although the researcher practised trustworthiness to the best of her ability, transparency risks remain as the final interpretation of the findings is based on the researcher's personal perspective. This potentially impacts the credibility of the research.

The second limitation was that semi-structured interviews were conducted through an online platform. Conducting it through an online platform was due to participants being in a dispersed location across the Western Cape, and the researcher could not travel. Participants also had limited capacity as they were expected to meet clients throughout the day; therefore, the online platform was the suitable way to conduct the interviews; however, a few interviews were interrupted by connectivity issues, which could have affected the data collection procedure. Some participants were not interviewed in their first language, which may have affected how they understood the question, ultimately affecting their responses.

The third limitation was that the researcher worked at the same organisation as the participants. The participants were aware of the researcher's role within the organisation. This may have affected how they responded to the questions, and they felt compelled to provide responses they thought would satisfy the researcher rather than provide their genuine experiences. Although they assured the researcher that they were providing their honest opinions and experiences, the risk remains.

5.5 Recommendations

5.5.1 Recommendations to training and development professionals and organisations

The research findings and discussion have presented various potential insights that T&D professionals and organisations may find valuable. It is suggested that F2FT is perceived as the more effective training method, mainly because of participants' positive experience during their F2FT. As per the feedback, TBT can still enable individuals to acquire and apply what they have learnt back into the workplace; however, it does not offer the same positive training experience as F2FT owing to the challenges. Despite the challenges, participants expressed that TBT has its benefits, such as its flexibility. The final suggestion was that T&D professionals and organisations should consider a blended training approach comprising F2FT and TBT.

Incorporating both training methods may have specific implications for T&D professionals responsible for designing the training intervention. Several trainers may find it overwhelming

for various reasons. For instance, Abudlhabib and Al-Dhaafri (2020) indicate that an effective trainer ensures that the training design is well organised and combines training material offering ideal and conceptual learning with trainee engagement that will stimulate new ideas; therefore, considering these factors, they are not only concerned with the need to be competent and proficient in both methods, but also the increased time and capacity of preparing the training material and design for F2FT and TBT. That is why trainees often perceive blended training as a rigorous process (Alvarez, 2020). Organisations need to ensure that T&D professionals are competent in F2FT and TBT so trainees can reap the value of the training intervention. A recommendation is that T&D professionals use TBT for the theoretical component of the training through e-learning so trainees can complete it in their own capacity and at their own pace; after that, they can use F2FT for the practical component of the training intervention.

Where organisations are still adamant about replacing F2FT with TBT, various aspects need to be implemented to ensure the success of TBT. The main feedback is that TBT lacks human interaction and immediate guidance; therefore, apart from the asynchronous element, such as e-learning, T&D professionals should conduct training synchronously, too, through virtual training where everyone has their camera on. When individuals have their cameras on, it is much easier to observe each other's body language and facial expressions so you can acknowledge when someone is providing their full attention (Dailey-Herbet, 2018; Sweetman, 2021; Wang et al., 2023).

It is also recommended that when conducting virtual training, it occurs with a smaller group as it is easier to engage and interact, facilitate, guide and control. Where the training session contains a bigger group, use the small group discussion functionality, best known as the 'break-away room functionality' available on most online platforms; this enables group discussions (Sweetman, 2021). Connectivity can have a significant impact on the effectiveness of TBT; therefore, organisations should also do their best to provide their employees with resourceful technological devices and backup connectivity, such as Mi-Fi, a small portable router, functioning as a mobile hotspot for any technological device. Another recommendation is that all employees, especially more senior employees, be supported and upskilled on effectively using technology so they possess the technical skills and are comfortable enough to navigate TBT (Li, 2022).

During TBT, trainees are also expected to have self-discipline and take ownership of their learning, especially during the asynchronous (e-learning component). A change in

organisational culture is, therefore, needed to transform into a learning organisation. According to Rothwell (2020), if employees feel that learning is not encouraged within the workplace, they are less motivated to engage in it. Executives, managers and supervisors must create a learning culture supporting learning to solve practical work-related problems and seize competitive opportunities. It is therefore recommended that managers support their employees and inform them of the benefits of the training so they are motivated enough to enrol in the e-learning course and have the discipline to complete it.

5.5.2 Recommendations for future research

Based on the limitations of the study, the researcher made these recommendations for future research: future researchers should employ a mixed-method research methodology as opposed to only a qualitative research methodology. A mixed-method research methodology integrates quantitative and qualitative research within a single study (Bryman et al., 2014). This will allow the research to collect in-depth and rich data that comprises individuals' perceptions and experiences while also including objective data. Avoid only sampling participants from one organisation and industry, but expand the sample from various organisations and industries and other provinces across South Africa so the findings are not limited and can be generalised. It is also recommended to sample a larger group (over 12 participants) as this will provide a broader perspective on the research findings. The sample can also comprise various job roles and not only one job role, as conducted within the current study. During the sampling process, avoid sampling participants from the same organisation that the researcher is employed. Participants may be more open and honest during their responses.

5.6 Conclusion

Training methods have had a significant influence in determining the effectiveness of training interventions, and for several years, F2FT and TBT have been a topical discussion within the T&D domain (Akpoviroro & Adeleke, 2022; Beinicke & Bipp, 2018; Bell & Kozlowski, 2007; Gayed et al., 2019; Jevana, 2017; Lewis, 2006; Okana et al., 2018). Researchers provided several arguments around whether TBT can replace F2FT within organisations; therefore, the study aimed to explore the perceived effectiveness of TBT compared to traditional F2FT among employees to emphasise the most preferred training method. This research objective was achieved through the research questions directed and examined by discussing the research findings.

Provided the arguments by current literature and the research findings, F2FT and TBT possess various benefits and shortfalls. Literature provided an extensive review as to how TBT is most likely the future of T&D because of globalisation, the COVID-19 pandemic and the 4IR, which foresaw rapid technology developments (Kalio, 2019; Mohamad et al., 2020; Okano et al., 2018); however, within a South African context, owing to the lack of efficient technical infrastructure and load-shedding issues, TBT may not thrive the way it would in other countries that do not experience these challenges. The research findings also suggested that F2FT is the preferred method of training, as participants found it a more effective and enjoyable experience compared to TBT. Nonetheless, they also acknowledged that despite the several challenges with TBT, it had the potential to be effective.

Research also emphasises that the effectiveness of each training method is highly influenced by various aspects, such as the organisation's culture and how they promote T&D, how adults prefer to learn based on their trainee characteristics and motivation to learn. It also depends on the training needs and environment. Maxwell (2018) supports this and remarks it is challenging to determine whether TBT is equally effective as traditional F2FT as both methods have inherent benefits and shortfalls and should be used depending on the training need. Kim (2022) explains that a single training method is not enough to satisfy every trainee's learning preference, learning style, or motivation. Based on the findings, participants established benefits in both training methods and believe it can work concurrently to achieve an effective training experience.

It can be concluded that although the literature motivates that TBT is the future and more effective training method, the research findings suggest that F2FT remains the preferred training method and should not be replaced. It was established that a blended training approach would be the most effective solution to future training interventions, as trainees will be exposed to the benefits of F2FT and TBT.

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APPENDIX A: INTERVIEW GUIDE

COMPARING FACE-TO-FACE AND TECHNOLOGY-BASED TRAINING TO EVALUATE ITS PERCEIVED EFFECTIVENESS IN IMPROVING EMPLOYEE PERFORMANCE.

Qualitative Approach: Semi-structured Interview Guide

Format: 30 to 60 minutes

Target Audience: Financial Sales Advisers (Advisers that have been employed prior to the COVID-19 pandemic)

Structure per semi-structured interview:

Introduction

- Thank the participant for participating in the research.
- Confirm overview of the research
- Confirmation/finalisation of any (outstanding) Consent Forms and recordings

Participant details:

Job Title: _____

Age: 20 or below ☐ 21-30 ☐ 31-40 ☐ 41-50 ☐ over 50 ☐

Gender: Male ☐ Female ☐ Other ☐

Ethnicity: White ☐ Coloured ☐ Black ☐ Indian ☐ Asian ☐ Other ☐

Education: Primary ☐ Secondary ☐ Certificate ☐ Degree or higher ☐

Employment: Employed ☐ Unemployed ☐

Employment length at current organisation: _____

Standard Questions:

1. Before the COVID-19 pandemic, how was training conducted and how often were you trained?

_____

Probe: Was it mainly a face-to-face training environment?

2. Describe your experience with face-to-face training. What did you enjoy about it and what was challenging about it?

_____

3. Did training still manage to continue, during the COVID-19 pandemic?

_____

Probe: If so, how was the training adapted to suit the needs around social distancing?

4. What was your experience like in adapting to technology-based training? What did you enjoy about it and what was challenging about it?

_____

Probing questions:

i. *Did you feel as though there was a significant difference when you moved to technology-based training?*

_____

ii. *Did you require additional support and guidance from your line manager or training facilitator to help you adapt to technology-based training?*

_____

iii. *Did you have the necessary resources to help you adapt to technology-based training? who provided these resources?*

_____

iv. *How often did training happen?*

_____

5. Was your motivation and willingness to learn affected when you needed to adapt to technology-based training?

_____

6. How would you describe your learning style? i.e., do you prefer to work through training material on your own and at your own pace, or do you prefer someone facilitate and help you through the training content?

_____

7. Which training method (face-to-face or technology-based) enabled you to learn and engage better with the training material?

_____

Probing question: Explain why and how it enabled you.

8. Which training method (face-to-face or technology-based) allowed you to engage and interact effectively with the training facilitator and the other training members?

_____

Probing questions:

i. *How did the XXX training method allow you to engage and interact better?*

_____

ii. *Why could you not equally engage and interact with the training facilitator through the other training method?*

_____

9. Which training method (face-to-face or technology-based) enabled you to effectively transfer your acquired knowledge, skills and attitudes back into your job?

_____

Probing questions:

i. *Were there changes in the way you performed your job role and responsibilities after the training?*

_____

ii. *Did you feel as though your job performance improved via this method? i.e., felt more capable and experienced to do your job, after the training.*

_____

iii. *As per your role, did you feel as though were you able to service your customer better, based on how you acquired the knowledge, skills and attitudes, did your line manager provide you with feedback regarding this?*

_____

10. Have/were you able to achieve your job performance goals after moving to technology-based training?

_____

Probe: Did you achieve more or less of your job performance goals via the face-to-face training method?

11. Do you think that technology-based training can replace face-to-face training?

_____

Probe: Explain why, and what would your preference be?

12. Based on your overall experience and perception, which training method (face-to-face or technology-based) do you feel upskilled you better i.e., so you performed better?

_____

THANK YOU!!!!

APPENDIX B: ETHICAL CLEARANCE FORM

UNIVERSITY of the WESTERN CAPE

50 YEARS of hope, action & knowledge

15 December 2022

Ms S Meyer
Industrial Psychology
Faculty of Economics and Management Sciences

HSSREC Reference Number: HS22/10/5

Project Title: Comparing face-to-face and technology-based training to evaluate its perceived effectiveness in improving employee performance.

Approval Period: 23 November 2022 – 22 November 2025

I hereby certify that the Humanities and Social Science Research Ethics Committee of the University of the Western Cape approved the methodology, amendment and ethics of the above-mentioned research project.

Any amendments, extension or other modifications to the protocol must be submitted to the Ethics Committee for approval.

Please remember to submit an annual progress report by 30 November each year for the duration of the project.

For permission to conduct research using student and/or staff data or to distribute research surveys/questionnaires please apply via: https://sites.google.com/uwc.ac.za/permissionresearch/home

The permission letter must then be submitted to HSSREC for record keeping purposes.

The Committee must be informed of any serious adverse events and/or termination of the study.

Ms Patricia Josias
Research Ethics Committee Officer
University of the Western Cape

NHREC Registration Number: HSSREC-130416-049

APPENDIX C: PERMISSION LETTER

Department of Industrial Psychology

University of the Western Cape

Private Bag X17

Bellville

7535

Tel: 021 959 3184

PERMISSION LETTER TO CONDUCT RESEARCH

Thesis title

Comparing face-to-face and technology-based training to evaluate its perceived effectiveness in improving employee performance.

To whom it may concern

I, Shandré Meyer (3575299), am currently studying towards my Master's degree in Industrial Psychology at the University of the Western Cape. At present, I am in the process of completing my thesis and I would hereby request permission to conduct research and collect data among the sales advisers within Old Mutual, Mass Foundation Cluster. The research is to be conducted in an ethically sound and responsible manner where confidentiality is of utmost importance. All participants willing to volunteer within the research shall do so anonymously and the organisation's name will also remain anonymous.

Purpose of the research

The purpose of the research is to understand the perceived effectiveness of technology-based training regarding face-to-face training provided to employees by organisations. Based on the global pandemic (COVID-19) and the movement of most organisations to an online platform, it has realised the need for organisations, and researchers and training practitioners to better understand individuals' transformation experience of face-to-face training to technology-based training. An understanding of employees training experiences may provide insights on how effective the specific training method enables employees to transfer the newly acquired knowledge, skills and abilities from the learning environment to their jobs, as a means to improve their performance. As a result, it may facilitate the reason for which training method works best.

The procedure of the research

If sales advisers' volunteers to participate in the research, they will be invited to a virtual semi-structured interview conducted by me, the researcher. They will be asked different questions with the aim of reflecting on their own experiences and perceptions of technology-based training

over face-to-face training. The interview will take up to 30-45 minutes of their time. With their consent, the interview will be voice recorded.

The benefits to the organisation

The results of the semi-structured interviews, at the request, can be made available to Old Mutual. Insights of employees' perceptions concerning technology-based training regarding face-to-face training may be invaluable to the organisation, especially the Learning and Development

department as this may assist them to determine whether to adapt their face-to-face training environment to technology-based training.

To conduct the research, I would need to have access to names, email addresses and telephone numbers of all client service employees. This will only be used to introduce myself and explain my research. I will not be using this personal data for any other activities not related to the research requirements for my thesis.

Please advise as to whether you would regard the above arrangements as feasible. Please do not hesitate to contact me at the numbers listed below, should you require any additional information regarding the above.

I look forward to hearing from you and thank you for your kind consideration of my request.

Kind Regards,

Shandré Meyer (researcher)

Tel: 081 764 9337

Email: 3575299@myuwc.ac.za

Research Supervisor:

Mineshree Naidoo-Chetty

Tel: 021 959 3183

Email: minaidoo@uwc.ac.za

APPENDIX D: INFORMATION LETTER AND CONSENT FORM

Department of Industrial Psychology

University of the Western Cape

Private Bag X17

Bellville

7535

Tel: 021 959 3184

INFORMATION SHEET FOR RESEARCH PARTICIPANTS

Thesis title

Comparing face-to-face and technology-based training to evaluate its perceived effectiveness in improving employee performance.

Dear Participant,

I, Shandré Meyer (3575299), am currently studying towards my Master's degree in Industrial Psychology at the University of the Western Cape. At present, I am in the process of completing my thesis and would like to invite you to participate in the research. I believe that because of your professional registration and work, you can make an invaluable and meaningful contribution in this research process.

Before you decide to participate in this study, please take the time to read the following information carefully to understand the reason for the research being conducted and what it will entail. If any of the following information is unclear to you or if you require more information, kindly contact me, as the researcher.

What is the research about?

The purpose of the research is to understand the perceived effectiveness of technology-based training regarding face-to-face training provided to employees by organisations. Based on the global pandemic (COVID-19) and the movement of most organisations to an online platform, it has realised the need for organisations, and researchers and training practitioners to better understand individuals' transformation experience of face-to-face training to technology-based training. An understanding of employees training experiences may provide insights on how effective the specific training method enables employees to transfer the newly acquired knowledge, skills and abilities from the learning environment to their jobs, as a means to improve their performance. As a result, it may facilitate the reason for which training method works best.

What is the procedure of the research if you agree to participate?

If you volunteer to participate in the research, you will be invited to a virtual semi-structured interview conducted by me, the researcher. You will be asked different questions with the aim of

reflecting on your own experiences and perceptions of technology-based training over face-to-face training. The interview will take up to 30-60 minutes of your time. With your consent, the interview will be voice recorded.

What are the risks of this research?

There is no known physical, psychological, social, emotional, legal and financial risks that may result from participating in the research. All human interactions and talking about self or others carry some number of risks. I will, nevertheless, minimise such risks and act promptly to assist you if you experience any discomfort, psychological or otherwise during the process of your participation in this study. Where necessary, an appropriate referral will be made to a suitable professional for further assistance or intervention.

What are the benefits of this research?

This research is not designed to help you personally, but the results may help the researcher understand the perceptions held by employees around technology-based training versus face-to-face training. The findings of the project can be shared with you, should you be interested. There is no financial benefit for research participants.

Would participation in this study be kept confidential?

Your identity and the nature of your contribution will be protected. To ensure your anonymity, your name will not be included in the data collected. To ensure your confidentiality, the recording and transcript of your interview will be safeguarded and stored in a secured environment, or on a password-protected computer file to store data once coded.

Is participation compulsory for this research?

Your participation in this research is completely **voluntary**. You may choose not to participate at all. If you decide to participate in this research, you may stop participating at any time. If you decide not to participate in this study or if you stop participating at any time, you will not be penalised or lose any benefits to which you otherwise qualify. You have the right the refuse to answer any questions that you are uncomfortable with. The researcher may withdraw you from this research if circumstances arise that warrant doing so.

For further questions

If you have any questions about the study itself, please contact me, the researcher, through the details below. Should you have any questions regarding this study and your rights as a research participant or if you wish to report any problems you experienced related to the study, you are welcome to contact the Head of Department or the Ethics committee.

Researcher:	**Supervisors:**	**Head of Department:**
Shandré Meyer	Mineshree Naidoo-Chetty	Prof. Bright Mahembe

Masters student Tel: 081 764 9337 3575299@myuwc.ac.za	MCom Industrial Psychology Tel: 021 9593 183 minaidoo@uwc.ac.za Prof. Bright Mahembe PhD Industrial Psychology Tel: 021 959 2212 bmahembe@uwc.ac.za	Head of Department Industrial Psychology EMS Faculty, UWC Bellville Tel: 021 959 2212 bmahembe@uwc.ac.za

CONSENT FORM

	Kindly respond to the following statements:	**X**
1.	I confirm that I have read and understand the information sheet which explains the research. I have had the opportunity to ask questions about the study.	
2.	I understand that my participation is voluntary and that I am free to withdraw at any time, without providing a reason and with no consequence (If I wish to withdraw, I shall inform the researcher at any time). In addition, if I do not feel comfortable to answer any particular question(s) during the semi-structured interview, I am free to decline.	
3.	I understand that my responses and personal data will be kept strictly confidential. I give permission for members of the research team to have access to my anonymised responses. I understand that my name will not be linked with the research materials, and I will not be identified in the publication results for the research.	
4.	I consent to the data collected from me may be used for future research.	
5.	I agree to participate in the research.	

6	I consent to a voice recording of the semi-structured interview for this study.	

_____	_____	_____
Name of participant (or legal representative)	Date	Signature
_____	_____	_____
Name of researcher (to be signed in the presence of the participant)	Date	Signature

Researcher:	**Supervisors:**	**Head of Department:**	**Ethics Committee:**
Shandré Meyer Masters student Tel: 081 764 9337 3575299@myuwc.ac.za	Mineshree Naidoo-Chetty MCom Industrial Psychology Tel: 021 9593 183 minaidoo@uwc.ac.za Prof. Bright Mahembe PhD Industrial Psychology Tel: 021 959 2212 bmahembe@uwc.ac.za	Prof. Bright Mahembe Head of Department Industrial Psychology EMS Faculty, UWC Bellville Tel: 021 959 2212 bmahembe@uwc.ac.za	HSSREC Research and Development, UWC Tel: 021 959 2988 researchethics@uwc.ac.za

APPENDIX E: TURNITIN ORIGINALITY REPORT

meyer_m_ems_2023

ORIGINALITY REPORT

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