

4.3 | Analyze: Context Analysis Scenario

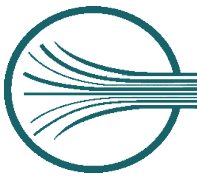
The following scenario is one that you can “solve” to gain practice in context analysis. The scenario ends with a link to our solution, but we recommend that, to increase your understanding, you attempt to solve the scenario first before viewing our thoughts on it.

If you read through the website Needs Analysis examples for Chapter 2, you are familiar with Andy Farmer, a sales trainer for the multi-national organic fertilizer company Dyna-Grow (*Needs Analysis Case #4, Handling Global & Knowledge Discrepancies*). You'll recall that Andy was tasked with designing training for newly-hired sales employees from several different time zones (on the east and west coasts of the U.S., in Germany, and in China). Well, you'll be happy to know that the new hire training went quite well. It was so successful, in fact, that his boss now wants Andy to train the sales force in online sales techniques. Dyna-Grow management wants to remain competitive by educating its sales force on how to expand their marketing efforts to the online environment, maximizing the benefits of connecting with existing and new customers through the Internet. This would enable them to extend their reach and provide more prompt service to loyal customers.

From experience, Andy knows that the Dyna-Grow senior management is generally more comfortable with training programs that require associates to take a test to demonstrate mastery of the content. This fact, coupled with the issues of time zones, was what prompted Andy to use an asynchronous online solution with mastery tests for his previous training program for Dyna-Grow. Management once again expressed a desire to have the sales associates demonstrate mastery of the content, and during his preliminary meeting with them, some stakeholders went so far as to ask Andy how he was going to observe the learning and reinforce it. However, this time some stakeholders also indicated a desire to establish a community of practice where sales associates could continue to interact after completing the training to share successful sales strategies and helpful resources. They were also interested in fostering the associates' ability to address problems with creative solutions, and to expand their own horizons by considering the perspectives of different cultures.

Andy's learner analysis indicated that the sales force in China was diverse with respect to the ethnic groups represented. The sales associates in Germany were ethnically and nationally similar, while in the U.S., there was a mix of ethnicities that represented the customer base in the different locations. In general, the sales associates were aware of the move to online marketing activities and realized that they could increase sales by maintaining an online business presence. Andy identified a preliminary list of topics for the training:

- Local Internet sales tax rules
- Differences in definitions for "company physical presence," which in many cases determine whether taxes must be collected;
- Applicable exemptions from sales tax for certain products and customers;
- Local tax "holidays;"
- Customer responsibilities regarding the payment of sales tax or use taxes when they are not collected through online sales;
- How agricultural export laws apply to Internet sales;
- Setting up sales websites; and



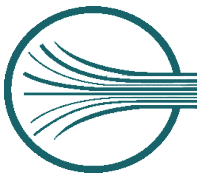
- Effective use and management of social networking for sales.

Andy knows that there will be common elements to cover, as well as topics that must be customized by location. For example, the customer base in China is significantly different from that in the U.S. Most U.S. sales are made to individuals on a retail basis. Individual sales are less common for the Chinese subsidiary, which acts as a wholesaler to individual customers. Its main customers are farming supply bureaus and cooperatives under the State Internal Trade Bureau of the People's Republic of China. State-owned farms and plantations also represent major accounts. Due to these many differences in topics and treatments, Dyna-Grow Management proposed that the initial training program be offered to U.S. and German sales associates. A revised version of the training would then be offered to the Chinese sales force within two years of the U.S./German implementation.

Andy's needs and learner analysis activities have revealed that the target learners in the U.S. and Germany are eager to expand their online operations, and in fact, several sales associates have already set up informational websites and have been sending out marketing newsletters to their customer base. Because of this, he realizes that the experience level concerning online sales in the current learner audience (U.S. and Germany) probably varies widely. Those sales personnel with the Chinese subsidiary (future audience) are aware that the company will be requiring them to take this training, but their customer contact remains predominantly face-to-face. They are, however, generally very career-focused and Andy does not anticipate a problem with motivating them to engage fully with the training materials.

The U.S. and German sales associates have participated in a series of Dyna-Grow company trainings involving experiential team-building activities. About 75% of them have also taken advantage of self-paced, online training materials on various sales and marketing enrichment topics available through the company knowledge management system. To-date, the Chinese sales associates have not had access to those enrichment materials, but in the past week the company has extended access to the Chinese sales force and has engaged a company to translate some of the materials to make them more accessible for that audience. The U.S. and German associates have indicated that they appreciate the variety of topics and flexibility available through the knowledge management system training modules. They also gave high marks to the “*Guide to Success with Dyna-Grow*,” a diagnostic tool on the company intranet that suggests training topics based on an associate's performance on brief knowledge checks and his or her experience level. In answer to a question concerning the type of training experiences preferred, the Chinese associates indicated that they favored a very set program of advancement that identified the training modules that they should complete, accompanied by competency-based self-tests. This was, in part, due to a competitive promotional policy established by the Chinese subsidiary to “weed out” low performers in the sales force by comparing training scores as well as sales figures.

For sales positions, Dyna-Grow hires only those with a university-level degree and an academic record that indicates their ability to succeed in learning experiences. However, Andy is aware that the majority of the Chinese associates have likely experienced a more instructor-centered education than the western associates. In addition, for the past year, many of the U.S. and German associates have collaborated in work groups to explore new markets using multimedia resources and a common set of online tools. On Andy's learner survey, the U.S. and German sales associates were able to clearly articulate their preferences concerning learning experiences and the type of activities that help them learn best. In contrast, the Chinese associates indicated a less varied experience of online learning experiences and also indicated that they



frequently chose to view websites in the text-only mode rather than try to view images, citing issues with bandwidth and data limits. As a result, Andy suspects that the Chinese associates may not have been exposed to the variety of learning experiences that U.S. and German associates have likely encountered.

Since many of the U.S. and German associates set their own schedules, they indicated that they usually pursue professional development after traditional work hours. When asked if they anticipated having difficulty finding the time to complete the training program, they overwhelmingly agreed that it would be hard, citing both professional and personal demands on their time. Although the response of the Chinese associates to this survey question was mixed, Andy assumed that they would likely have similar demands on their time.

Finally, Andy's survey results and a study of regional sales office locations revealed that the sales associates in the U.S. and China were located across a wide territory, at least five to 15 hours driving distance from a division office or from Dyna-Grow headquarters. Since the German Dyna-Grow office is centrally located in Kassel, Germany, all sales associates are within a five-hour drive of a potential training event.

Andy decided to use data from the learner analysis in conjunction with the needs information he had been given to inform his decisions about the learning context. He reviewed what he knew about the learners from his surveys and analysis activities, and he used the following chart to summarize it. He considered each statement and rated his agreement with each using a scale from 1 to 5 (1 = completely disagree, to 5 = completely agree). He rated the statements for the current targeted learner audience (U.S. and German associates), and then again for the future learner audience (Chinese associates).

Based on what you know of the situation, how do you think Andy should have rated the statements in the following chart? What implications would the data have for decisions about the following aspects of the learning context?

- Pedagogical approach
- Type of instruction (instructor-led, self-paced, synchronous, asynchronous, knowledge management system, etc.)
- Recommendations regarding an instructor, facilitator, and/or grader
- Learning processes, activities, outcomes and assessments
- Delivery, delivery method and technology
- Instructional technology
- Support required

If you were Andy, how would you complete the columns in the chart below, and what recommendations would you make regarding the bulleted items above? (We recommend using Tables 4.4 and 4.5 in *Streamlined ID* as a guide when addressing these factors.) After you complete the following chart and record your recommendations, compare your answers to the [context analysis scenario answer key](#) for Andy's design challenge.



The learners...	How do you think Andy rated his agreement with these statements? (use 0 to 5)		What are the implications for the design of the learning context?
	Current Audience	Future Audience	
...know they need the knowledge/skills that will be covered in the proposed instruction.			
...all possess about the same amount of prior knowledge and experience with the content.			
...have clear goals in mind for pursuing education/additional knowledge and skills.			
...believe in the value of self-improvement and lifelong learning.			
...prefer learning environments in which they have a lot of choice and control.			
...prefer learning environments in which the path to success is very clear.			
...are confident in their abilities to learn.			
...are self-aware and understand the type of activities that help them learn best.			
...will participate in this learning experience because they want to rather than because they are required to.			
...are under external pressure to succeed in this instruction.			
...have intense demands on their time, professionally and personally.			
...live within driving distance of the organization, facilitator and/or instructor.			
...live within driving distance of each other.			
...are comfortable with technology.			
...have access to technology and sufficient bandwidth.			
...have previously taken instruction at a distance.			

Chart adapted from information in:

Neidorf, R. (2006). *Teach beyond your reach: An instructor's guide to developing and running successful distance learning classes, workshops, training sessions and more*. Information Today, Inc.