

Contextual Inquiry / Field Research Results

Contents

Contents.....	2
Introduction	3
User Profiles	4
User Matrix.....	8
Work Flow.....	11
Task Flow.....	12
Appendix.....	13

Introduction

Preface

To preserve the privacy of the organization being interviewed, the company will be referred to as RD. The individuals interviewed will be identified by their acronyms and/or their in the process.

Organization Profile

Company Name: RD Inc.

Multinational Professional Services Company

Locations: Canada, Jamaica, and USA

Employees: 150~

Purpose


This field study addresses the administration of a learning fund initiative within RD known as RD Learns. The study takes place at the Jamaican (JA) office. The aim is to understand how this coherent task is executed as it is handled by various roles, with the end goal to produce useful documentation that can be utilized to produce a web application.

What is RD Learns?

RD believes in the development of their workforce, both to enhance employee engagement and commitment to RD as an employer and to ensure the continued excellence of the organization. Learning is an essential business investment that enables RD to maintain and extend employee's knowledge and skills as the business environment evolves.

RD is committed to creating and fostering an environment that facilitates and enhances the skills training and career development of our employees. Employees will be provided with opportunities so that they may maintain and develop their skills, adapt to changing workplace needs and fulfill their employment potential within RD.

User Profiles


<ul style="list-style-type: none"> ▪ Name: T.D. ▪ Position: Web Application Developer ▪ Age: 22 ▪ Background: First job, recruited from University, 1 Year 3months at RD Inc. 	
---	--

- Typical day description:
 - Backend software development for enterprise applications.
 - Software documentation.
 - Application testing, demo's and code reviews.
 - Create and respond to emails.
- Goals: complete daily task list to meet iteration deadline.
- Specific Goal: obtain approval for use of staff learning fund
- Narrative: T.D. utilizes RD Learns as an applicant. He accesses the process from the application form which is a MS Excel document stored on a networked drive. This networked drive is hosted at the Head Office in Canada.
- Economic factors: Jamaican staff members are more likely to utilize RD learns by having the company pay for a learning opportunity, as opposed to being reimbursed for the payment they made.
- Physical Environment: RD JA utilizes an "Open Plan" office format within five work groups.
- Key Findings: T.D. had a smooth application process, as he performed a guided application with the People and Learn (P & L) manager next to him.

- Name: A.D.
- Position: Team Development Manager (TDM)
- Age: 29
- Background: IT Dept Manager at previous organization, 1 Year 6 months at RD. Began as a Technical Lead, and transitioned into this role as a part of Company strategy.



- Typical day description:
 - Plan training.
 - Suggest career options.
 - Staffing: Ensure people are on desired projects.
 - Risk mitigation
- Goals: coaching, staffing, career management.
- Specific Goal: Approve RD Learns applications.
- Narrative: The TDM approves RD learns applications. He conducts formal and informal dialog with applicants prior to application process to get an idea of what they may want to apply to do. With this background information, the TDM reviews the content of the compulsory fields and researches the learning opportunity to decide on approval. The available balance for the employee is also a factor in the approval process.
- Economic factors: N/A.
- Physical Environment: RD JA utilizes an “Open Plan” office format within five work groups.
- Key Findings: None.

<ul style="list-style-type: none"> ▪ Name: M.B. ▪ Position: People and Learning Manager (P & L) ▪ Age: 30 ▪ Background: First HR role since completing Masters in HRM, 10 months at RD. 	
---	--

- Typical day description:
 - New projects issued by P & L VP
 - Handle attendance (who is sick, late, away, etc).
 - Managing payroll.
 - Informal employee coaching
 - Performance reviews.
- Goals: I care about people, and their learning path. I seek to ensure they are comfortable in their role.
- Specific Goal: Tracking and Reporting on RD Learns activity.
- Narrative:
 - The P&L Manager provides advice to managers and employees regarding learning and personal development.
 - She plays a role in approving requests over the fund limit and ensures that it meets the RD Learns Program criteria.
 - P & L is also responsible for the archival of Learning Request Forms and Proofs of completion. As well as keeping an inventory of all RD owned learning materials, both physical (library) and digital.
 - She facilitates the transfer of learning materials between offices as requested and collecting RD owned learning materials, both physical and digital, from employees upon termination.
 - P&L supplies managers and the P&L VP with remaining employee balances monthly.
- Economic factors: N/A.
- Cultural factors: originally from Trinidad; attended University in Jamaica and has settled here since then.
- Physical Environment: RD JA utilizes an “Open Plan” office format within five work groups.
- Key Findings: P & L utilizes a Spreadsheet stored on a remote network drive. Opening the file is slow as it is large, compiles data from each application form, and is stored on a remote network drive at RD HQ in Canada. There is also no Inventory system to collate assets obtained via the program.

- Name: M.P.
- Position: Business Manager
- Age: 29
- Background: Veteran employee at RD JA, recently appointed as Business Manager.



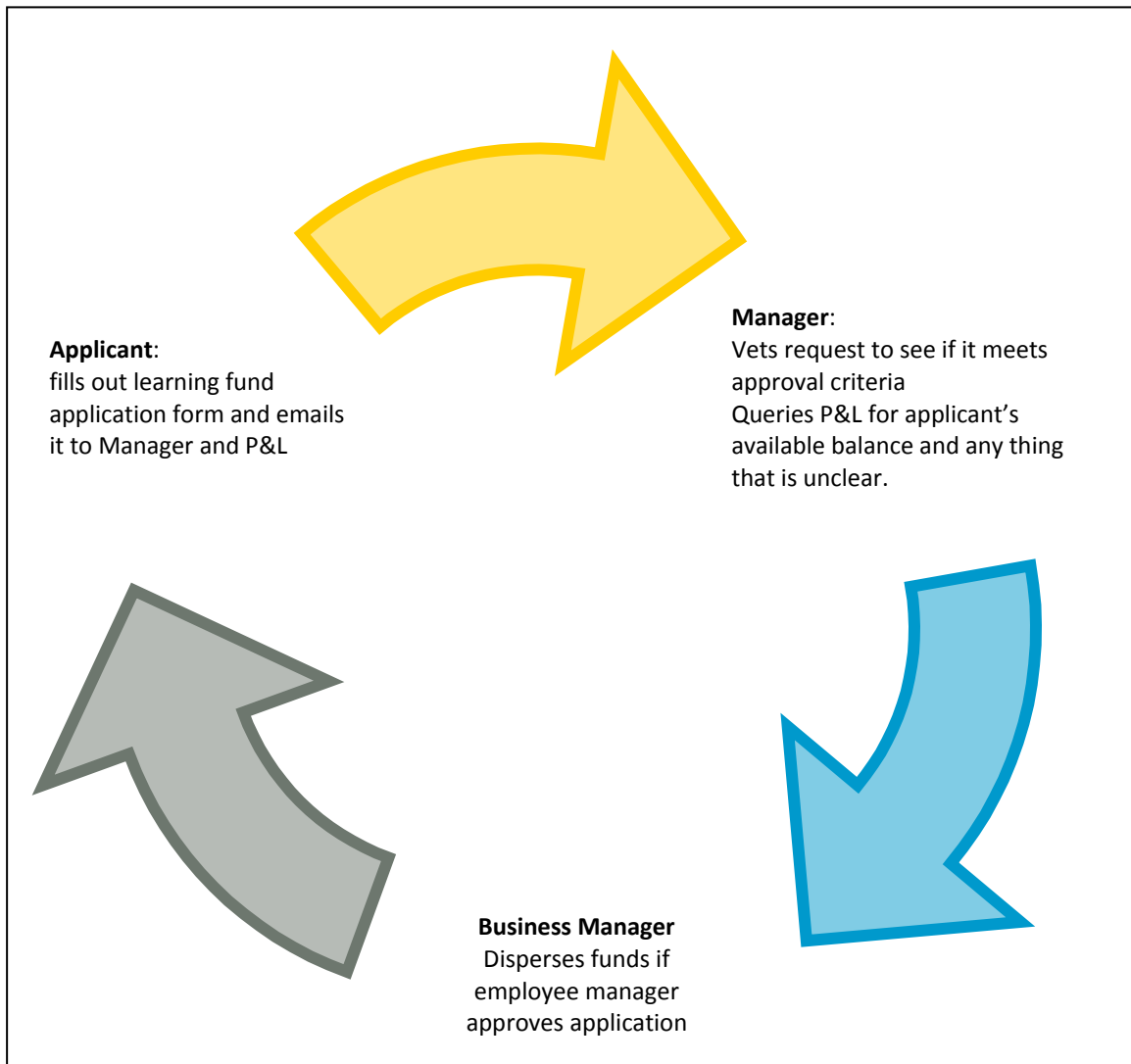
- Typical day description:
 - ensure books are accurate for financial year
 - handle pay roll issuance
 - source and obtain office supplies
 - organize repairs
 - Handle Jamaican regulatory tasks for running a company.
- Goals:
 - Managing facilities: ensure office runs smoothly.
 - Managing finance: accurate accounting, with long term aim to dismiss external accountant services.
- Specific Goal: Performing RD Learns payments and related accounting.
- Narrative:
 - Maintain a separate bank account in Jamaica exclusively for the RD Learns Program.
 - Processing pre-payment for learning opportunities when needed by writing a cheque/sending a manager's cheque to the learning provider directly.
 - Managing expense reports.
 - Updating RD Learns Canada Tracking Spreadsheet with employee's new balance.
- Economic factors: N/A.
- Physical Environment: RD JA utilizes an "Open Plan" office format within five work groups.
- Key Findings: The business manager utilizes a spreadsheet stored on a remote network drive. Opening the file is slow as it is large, compiles data from each application form, and is stored on a remote network drive at RD HQ in Canada. She also manages expenses reports for applicants.

User Matrix

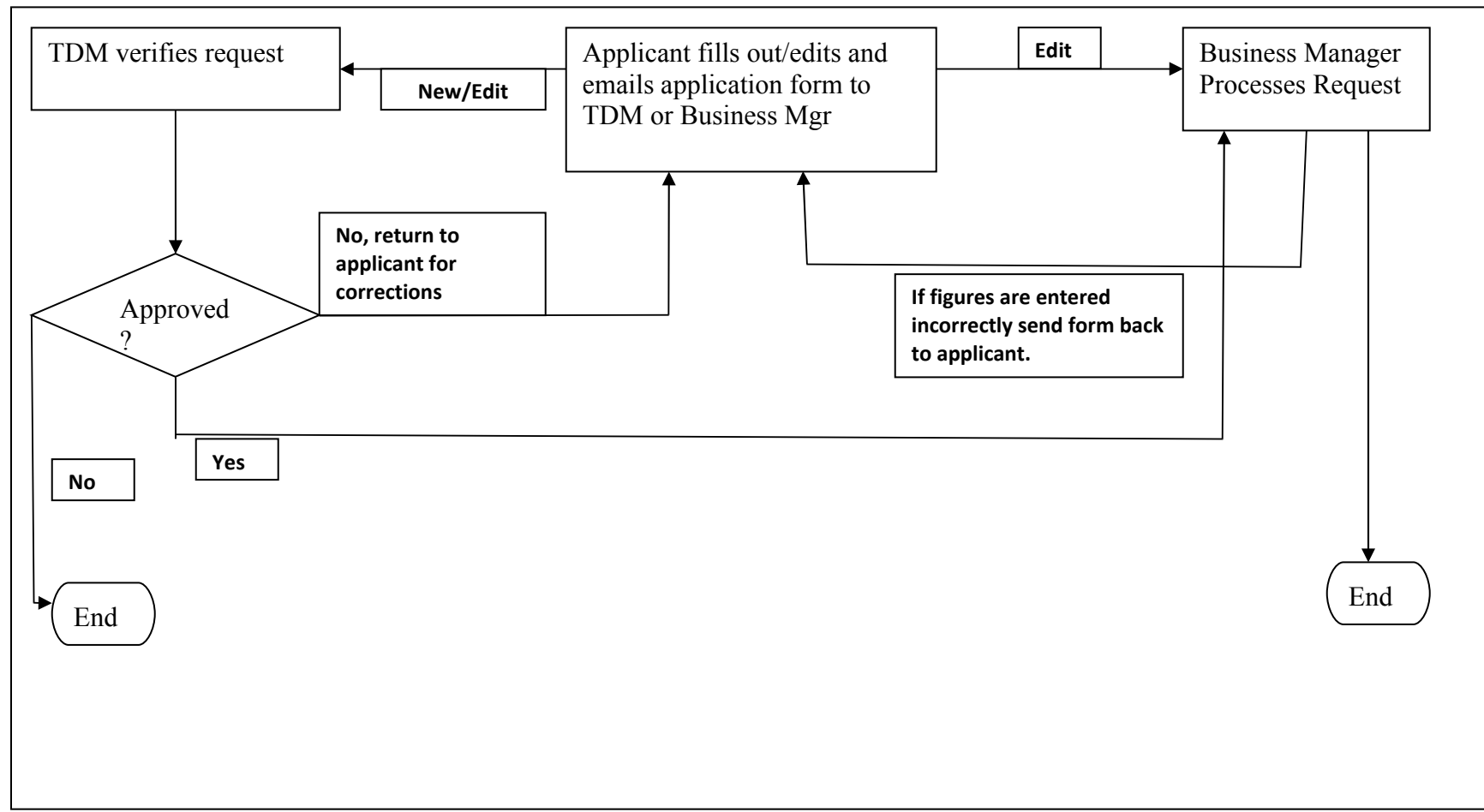
Question	Applicant	TDM	P&L	Business Manager
What are the user's goals?	Apply for RD learns funding.	Approve RD Learns applications.	Provide reports on the RD Learns program.	Pre-pay/reimburse RD Learns purchases.
What do they currently do to achieve these goals? (task list)	Fill out form.	Dialog with applicant and P&L to determine approval.	Provide advice to managers and employees regarding learning and personal development.	Receiving expense reports, receipts and copies of proof of completion from managers on behalf of employees, processing those reports and issuing a cheque to employees following their expense report submission.
What are the user characteristics that might affect their relationship with the Web?	Slow or unavailable internet service. Required file(s) are stored at remote network locations.	Slow or unavailable internet service. Required file(s) are stored at remote network locations.	Slow or unavailable internet service. Required file(s) are stored at remote network locations.	Slow or unavailable internet service. Required file(s) are stored at remote network locations.
What is the user's physical environment?	Open Plan work area within workgroup.	Open Plan work area within workgroup.	Open Plan work area within workgroup.	Open Plan work area within workgroup.
What tools does the user have?	Desktop computer.	Laptop computer and docking station.	Laptop computer and docking station, scanner for digitizing receipts and/or documents showing completed	Laptop computer and docking station, scanner for digitizing receipts and/or documents showing completed

			learning.	learning.
Where did these tools come from?	Provided by employer.	Provided by employer.	Provided by employer.	Provided by employer.
What kind of access to these tools is available?	User level.	Administrator level access.	Administrator level access.	Administrator level access.
How did the user learn to use these tools?	Previous use, in house training and documentation.	Previous use, in house training and documentation.	Previous use, in house training and documentation.	Previous use, in house training and documentation.
How easy to use are the current tools?	Easy	Easy	Easy	Easy
How do users relate tasks to goals?	Directly	Directly	Directly	Directly
What resources (people, information, artifacts) are available to users as they work?	Senior Personnel	Senior Personnel, Learning Budget.	P&L Coordinator, P&L VP, TDM, Business Manager. Reporting spreadsheet.	Senior and adjacent employees in related roles. Reporting spreadsheet.
What information do users need in order to do their tasks?	RD Learns App form.	RD Learns App form from applicant.		
Where does the information come from?	Employer/Senior Personnel.	Employer/Senior Personnel/Applicant.	Employer/Senior Personnel/Applicant.	Employer/Senior Personnel/Applicant.
What do users do when they get stuck?	Reach out to: TDM, P&L.	Reach out to: P&L, General Manager.	Reach out to: P&L Coordinator.	Reach out to: P&L Coordinator.
How do users interact with other people?	Email, Phone, In person.	Email, Phone, In person.	Email, Phone, In person.	Email, Phone, In person.

Work Flow



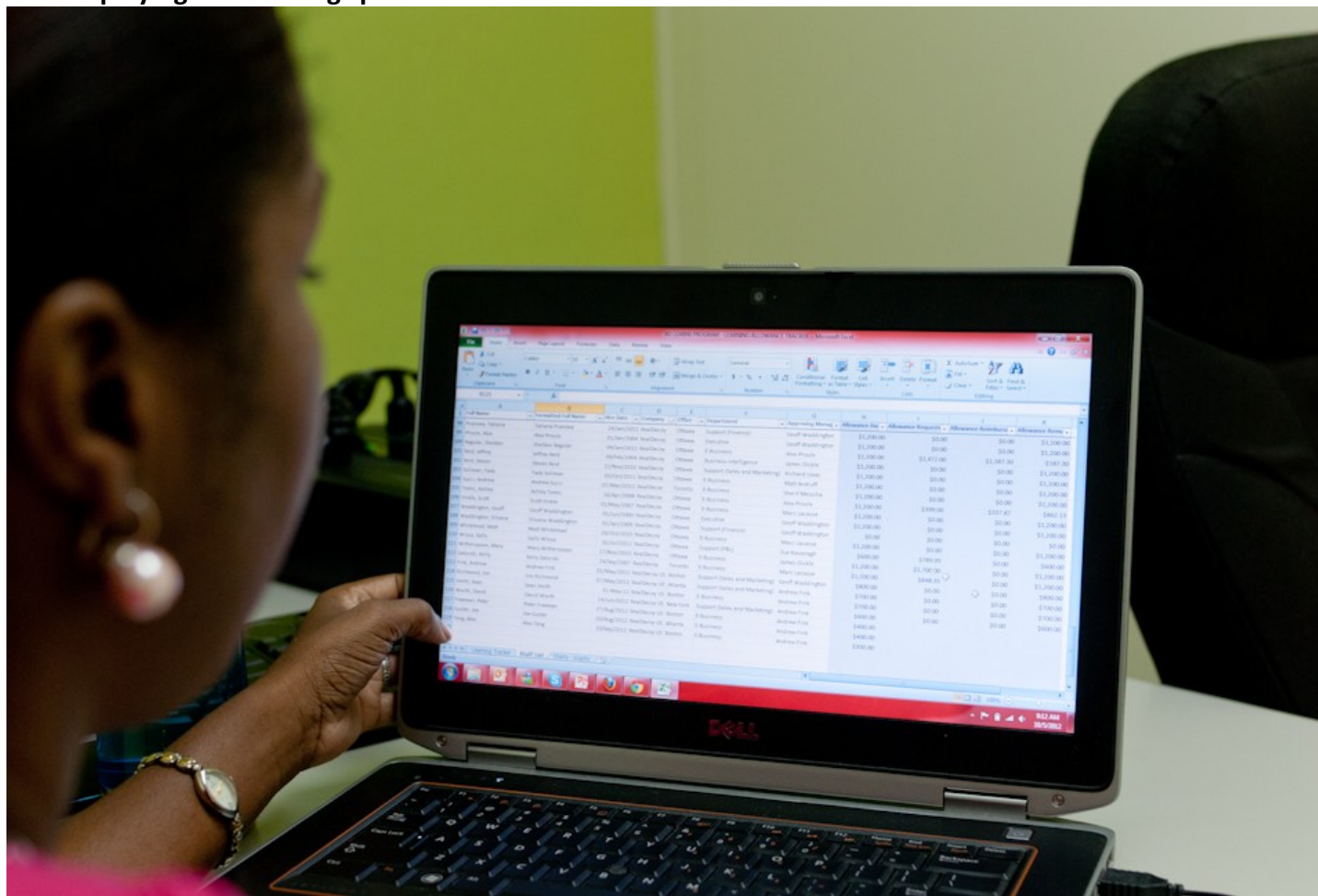
Task Flow



Approval Process

Appendix

P&L Displaying the tracking spreadsheet.



Applicant displaying how the RD Learns form is populated.

RD Learns Program : Learning Request
 To request funds under the RD Learns Program to attend learning opportunities and/or events, or to purchase learning tools, employees fill out and submit this request to their manager for approval before enrolling and/or purchasing.

Name of Learner: [Redacted] Date: 02/Oct/2012 Learning Req # [Redacted]

Name of Learning Opportunity: Purchasing Laptop

Name of Learning Provider: Dell Inc

Location of Learning Opportunity: Not Applicable

Start Date: 02/Oct/2012 End Date: 02/Oct/2012

Cost Breakdown:	Item:	Amount:
1.	Dell 15 Z laptop	\$ 746.00
2.	Notebook Sleeve	\$ 15.00
3.	Wireless mouse	\$ 20.00
4.	Shipping and Handling	\$ 200.00
5.	[Redacted]	
Total Cost:		\$ 981.00
Amount Requested:		

Answer the questions below:

1. What knowledge/skills are you interested in developing for your own personal growth and development?

2. What specific learning objective(s) do you hope to achieve?

3. When and how do you intend to share/apply knowledge/skills gained from the learning opportunity?

R.D. Learns Application Form

RD Learns Program : Learning Request

To request funds under the RD Learns Program to attend learning opportunities and/or events, or to purchase learning tools, employees must fill out and submit this request to their manager for approval before enrolling and/or purchasing.



Save

Name of Learner: Date: Learning Request #

Name of Learning Opportunity:

Name of Learning Provider:

Location of Learning Opportunity:

Start Date:

End Date:

Cost Breakdown: Item:		Amount:
1.	<input type="text"/>	<input type="text"/>
2.	<input type="text"/>	<input type="text"/>
3.	<input type="text"/>	<input type="text"/>
4.	<input type="text"/>	<input type="text"/>
5.	<input type="text"/>	<input type="text"/>
Total Cost:		\$ -
Amount Requested:		<input type="text"/>

Please answer the questions below:

1. What knowledge/skills are you interested in developing for your own personal growth and development?

2. What specific learning objective(s) do you hope to achieve?

3. When and how do you intend to share/apply knowledge/skills gained from the learning opportunity?