

**How are hotel managers utilizing the training evaluation tools available  
to them?**

by

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**ABSTRACT**

Training is one human resources development practice found in most organizations, however, studies showed that little attention was given to the importance of training evaluation in practice. This study is an exploration of the practices and perceptions of hotel managers in training evaluation using Kirkpatrick's and Phillips' models. In-depth interviews were conducted with six hotel managers; and paper-based questionnaires were sent out to 361 hotel managers in Iowa. The findings indicated that hotel managers viewed training evaluation activities as important, and observation was rated the most important and the most frequently employed training evaluation method. The findings contribute to literature by providing researchers with insights into how hotel managers evaluate training, and what a practical training evaluation process should possess. It also gives researchers an understanding of the perceptions of managers from different sized hotels.

## **CHAPTER 1. INTRODUCTION**

It is common for Human Resource (HR) practitioners to focus efforts on costs and processes rather than measuring the value added from HR practices (Ramlall, 2003). Because cost effectiveness is essential for business success, it is important for HR managers to establish their value to the organization in ways that are easy for top-level managers to understand. Traditional ways to show the value of HR departments have included demonstrating financial results of HR practices in relationship to the organization profitability (Ramlall, 2003; Ulrich, 1997). Training is one HR development practice found in most organizations, but it is often complicated to determine its measurable financial results. With the focus on evaluating and demonstrating training effectiveness, studies have been done on training evaluation concepts, models, and applications in different industries (Bartel, 2000; Chang, 2010; Holton, 1996; Kearns, 2005; Kirkpatrick, 1959a, 1959b, 1960a, 1960b; Kline & Harris, 2008; Phillips, 1996a; Pine & Tingley, 1993; Russ-Eft & Preskill, 2005). Despite the vast amount of research done on training evaluation, Bersin (2006) noted that managers and practitioners had given little attention to the impact of training on business and overall return on investment (ROI). Swanson (2005) stated that there was a gap between the literature and HR development evaluation (including training) as a result of HR practitioners and researchers different perspectives.

### **Research Questions**

The purpose of this research was to examine the training evaluation processes and practices used by managers in hotels as well as their perceptions of a practical evaluation process. Specific research questions include:

1. How are hotel managers perceiving and using training evaluation activities in their hotels?

2. How do the hotel managers' perceptions of training evaluation activities affect their usage of those activities?
3. What are the reasons hotel managers are or are not applying the available training evaluation models or processes?
4. What do hotel managers perceive as the practical characteristics in a training evaluation process?

### **Significance of the Study**

This study was an exploration of the practices and perceptions of hotel managers. Understanding managers' usage of available evaluation tools and their perceptions of practical characteristics will provide researchers with valuable knowledge to develop applicable training evaluation tools for hotel managers, which they can utilize effectively in their operations.

### **Definitions of Terms**

*Customer service*: "management strategy that focuses on meeting customer expectations"  
(Wagenheim & Reurink, 1991)

*Evaluation*: a process that usually involves decision-making. "Evaluation is a statement of quality, goodness, merit, value, or worthiness about what has been assessed"  
(Morrow et al., 2010, p.6)

*Measurement*: "the act of assessing" (Morrow, Jackson, Disch, & Mood, 2010, p.5).

Usually involves quantifying, or assigning numbers to the variables being assessed  
(Morrow et al., 2010).

*Return on investment (ROI)*: a value acquired by comparing the costs of a program against its benefits. The two common measures for ROI are the cost/benefit ratio (program's benefits divided by its costs) and the ROI formula (program's benefit minus program's costs, and then divided by program's costs) (Phillips, 1997).

*Training*: defined as “organized activity aimed at imparting information and/or instructions to improve the recipient’s performance or to help him or her attain a required level of knowledge or skill” (Training, n.d.). Most training in the hospitality industry was unstructured and occurred on the job (Clements & Josiam, 1995).

### **Thesis Organization**

This thesis uses the manuscript format and it includes a manuscript instead of a traditional results section (Chapter 4). After this introductory chapter, the review of literature follows in Chapter 2 and a detailed methodology in Chapter 3. Chapter 4 is the manuscript, and Chapter 5 includes general conclusions and study limitations. References cited in this thesis follow Chapter 5, and appendices are found at the end of the thesis.

## **CHAPTER 2. REVIEW OF LITERATURE**

### **Introduction**

Many researchers have studied the topic of training measurement and evaluation over the years. This review of literature begins with a summary of training measurement and evaluation history, including the significance of each historical stage. It will be followed by a review identifying the gap between theoretical models and practices. Then, the role of training evaluation in the hotel industry will be presented. The last section discusses the significance of customer service in the hotel industry.

### **History of Training Measurement and Evaluation**

#### **First Stage**

The gap between theory and practice is still an ongoing problem for researchers and practitioners, despite the large amount of research done during the long history of training measurement and evaluation study. Wang and Spitzer (2005) divided the history of training measurement and evaluation into three stages.

The first stage, from around 1950 to 1987, was defined as the practice-oriented atheoretical stage. This was the start of the unconscious efforts of practitioners to understand training measurement and evaluation. The most significant outcome of this stage was Donald Kirkpatrick's four-level evaluation model, proposed in 1959 (Wang & Spitzer, 2005). Kirkpatrick's model divided training evaluation into four steps: reaction, learning, behavior and results (Kirkpatrick, 1959a, 1959b, 1960a, 1960b). In the first step, reaction, Kirkpatrick (1959a) recommended training directors evaluate participant reaction with emphasis on anonymity (to get honest feedback) and the possibility of quantifying collected data. The second step, learning, refers to the amount of knowledge participants get from training (Kirkpatrick, 1959b), while behavior, the third step, is focused on how participants apply the absorbed knowledge in their jobs (Kirkpatrick,

1960a). Kirkpatrick recommended the use of before-and-after measurement, a control group, and statistical analysis for both these steps. Paper-and-pencil test or classroom performance could be used to measure learning, while for behavior, the performance assessment should be done by others (e.g. superiors, subordinates, peers) rather than by the training participants themselves (Kirkpatrick, 1959b, 1960a). For the last step, Kirkpatrick (1960b) stated that business results are the best way to evaluate a training program, but that they are also very complicated to measure.

Kirkpatrick's four-step-model popularized training evaluation concepts and has been used as the foundation for many later models (e.g. Kearns, 2005; Phillips, 1996a; Wang & Spitzer, 2005). It was acknowledged as a standard in the field (Holton, 1996) and has been widely used by researchers and organizations in a diverse range of industries (e.g. Chang, 2010; Kline & Harris, 2008; Pine & Tingley, 1993). The model was not only used in hard skills training, but was also applied to evaluate soft skills training. Latham and Saari (1979) conducted a study to assess a training model on supervisors' interpersonal skills in working with their employees. Managers were randomly selected and divided into a training group and a control group. Reaction questionnaire, paper-based tests, role-playing, and superintendents' evaluations were used respectively to evaluate participants' reaction, learning acquired from training, behavior changes from training, and job performance as a result of training (Latham & Saari, 1979). The study demonstrated a successful application of the four-step evaluation in evaluating soft skills training, using assessment methods similar to what Kirkpatrick recommended in his model.

### **Second Stage**

The second stage, from approximately 1987 to 2000, was called the process-driven operational stage and was marked by the large amount of research done on ROI (Wang &

Spitzer, 2005). This arose from the business environment, at the time, which experienced greater global competition, pressure from economic conditions and higher demands for management accountability (Wang & Spitzer, 2005).

A milestone of this stage was the development of Phillips' model, which added a fifth level to Kirkpatrick's model (Phillips, 1996a; Wang & Spitzer, 2005). This fifth level of evaluation focuses on ROI and compares training benefits, expressed in financial terms, with training costs. Phillips assumed that there were also intangible benefits attached to training, and that those could be converted into easy-to-understand values. He believed that the beneficial effects of training may diminish after the first year, and therefore a conservative approach to evaluation would not consider long-term benefits in the calculation (Phillips, 1996a). Phillips (1996b) discussed several ways to isolate training effects for evaluation, including the control group method, trend-line analysis, forecasting, and taking input and estimation from different sources (such as participants, supervisors, or managers). Combining more than one method increases the credibility of training effect measurement. He also established the five steps required to convert both hard and soft data into monetary terms: identifying each unit, assigning a value to each unit, calculating performance change as the result of training for each unit, determining the annual amount for each change, and finally calculating the annual value of improvement by multiplying performance change by unit value (Phillips, 1996c). Table 1 shows the steps in Kirkpatrick's model and the additional step from Phillips.

Table 1

*Steps of Kirkpatrick's and Phillips' Models*

	Step	Brief Description
Kirkpatrick's model (1959a, 1959b, 1960a, 1960b)	1. Reaction	Evaluate participants' reactions
	2. Learning	Evaluate what and how much participants learned from the training
	3. Behavior	Evaluate how training affects participants' behavior in their jobs
	4. Results	Evaluate business results of training
Phillips' addition (1996a)	5. ROI	Measure training results in monetary terms

The significance of this stage was the increase in managers' and practitioners' awareness of the importance of measurement and evaluation given the emphasis on ROI. It also motivated researchers and practitioners to search for better approaches to measure and evaluate the effects of training (Wang & Spitzer, 2005).

During this second stage, several studies were done on Kirkpatrick's four-level model. These provided a deeper understanding of the role and function of the model in training measurement and evaluation development. Alliger and Janak (1989) examined the accuracy of three common assumptions made by researchers and practitioners when using Kirkpatrick's model: "1) the levels are arranged in ascending order of information provided; 2) the levels are causally linked; 3) the levels are positively intercorrelated" (p. 331). They found that the first two assumptions were not always correct. The first assumption failed because the highest level (level 4, business results) was not always the

most informative one, because, in some cases, monetary estimation was not suitable. The second assumption was not always correct because, in some cases, the levels were negatively correlated (for example, learning also occurred when there were negative reactions to training). The researchers also explored the relationship between levels and found that level 1 (reaction) was not related to the others, level 2 (learning) was somewhat related to level 3 (behavior) and level 4 (business results), and levels 3 and 4 had a causal interdependence relationship. For the last assumption, they looked in the available literature for evidence of relationships between the four levels. Among 203 articles that reported training evaluation results, 12 articles included a total of 26 correlations between the levels. From these findings, the researchers concluded that the three assumptions regarding the four-level model were problematic and that the model could be viewed only as the first initiative for understanding organization training evaluation (Alliger & Janak, 1989).

Holton (1996) pointed out that Kirkpatrick's model lacked proper criteria to act as a complete model, which is necessary for evaluation. He cited literature to prove that Kirkpatrick's model lacked causal relationships between the levels, boundaries for generalization, and other components required for a complete model. Holton proposed a conceptual model that measured three outcomes: learning, individual performance, and organizational results. His model took into account primary and secondary influences that affect the training outcomes. The three primary influences are: ability, motivation, and environment. These three influences, in different forms, affect each of the three primary outcomes. Secondary influences affect primary influences, and therefore indirectly affect the primary outcomes. The complete model, with all primary and secondary relationships, can be difficult to validate due to the requirements of large amount of data, big sample size, and sophisticated statistical techniques (Holton, 1996). Based on these analyses, the

four-level model came to be viewed as a taxonomy and an evaluation communication tool rather than a method or set of techniques to measure and evaluate training (Wang & Spitzer, 2005).

### **Third Stage**

The third stage, which Wang and Spitzer called the research-oriented comprehensive stage, emerged around the year 2000. The dot-com bubble and subsequent recession drove the development of this stage. It started with the search for research-oriented, practice-based comprehensive methodologies carried over from theory inquiry made during the second stage. Research during this stage was based on existing theories but more comprehensive, and with the intent of developing stronger evaluation methodologies (Wang & Spitzer, 2005).

Kearns (2005) stated that training evaluation should be planned out before the training actually takes place, and evaluation criteria should be determined before designing training to achieve a clear measurement. He proposed an additional step for training evaluation, which included establishment of the value added to the organization and the development of specific measures to assess the effectiveness of training before it starts. Before that, Spitzer (1999) had proposed six similar principles for encouraging practitioners to adopt training evaluation. The first principle was “evaluation begins at the beginning” (p. 43), not after training is completed, and it should support the whole development process of the training program. The second principle was that organizational values should be the foundation of training evaluation. The third principle stated that business impacts were present not only in financial ROI but also in other business indicators such as manufacturing efficiency and inventory level. For the fourth principle, he stated that evidence, not proof, was needed to show training’s effect; therefore practitioners should not be worried about having to prove that training caused a

particular business result. In the fifth principle he recommended using “causal chains” to locate the actual impact of training, arguing that it was hard to find direct relationships but that once one understood how training indirectly affects business, it would be easier to trace the relationships and maximize training impact. Lastly, in the sixth principle, Spitzer suggested that trainers work as real partners with managers in a mutual relationship to bring benefits to both sides.

Besides ROI and business impact, other measurements should also be considered during training evaluation. Russ-Eft and Preskill (2005) emphasized that ROI may not be what organization always want. They proposed a systems framework for evaluation, in which the evaluation process should be aligned with organization’s infrastructure (systems and structures, mission, visions, strategic goals, leadership, culture, communication system). The framework also recognized external factors (competition, customer expectation, workforce diversity, legal requirements, technology, global environment) that affect how the organization operates, and in turn affect the evaluation process. Three other factors that impact the development and implementation of an evaluation process are: the political context of the evaluation, reasons for the evaluation, and characteristics of the evaluator (e.g., expertise, credibility) (Russ-Eft & Preskill, 2005).

### **The Gap Between Theoretical Models and Practices**

Despite the large amount of research done during the long history of training measurement and evaluation, studies show that a gap still exists between expected and actual training measurement in the business world (Bersin, 2006; Kline & Harris, 2008; Phillips, 1996a). Bersin (2006) conducted a survey with training managers at more than 140 companies (all sizes and types) about their training measurements. The most commonly measured factors and the percentage of companies measuring them were:

completion (88%), enrollment (86%) and training participant's satisfaction with the program (81%). In contrast, training managers viewed those factors as less valuable compared to other factors. Seventy-six percent of the managers surveyed valued job impact, 72% valued business impact, and 65% valued business metrics. However, those measurements were used in a limited manner within the surveyed companies, with 14% and 10% for job impact and business impact, respectively; whereas ROI was the lowest with only 5%. Organizations were spending about 2.6% of their training budget on measurement and 82% of the participating managers thought their organization should allocate more funds.

One of the reasons for the gap between theories and practices was because training professionals did not believe in evaluation, or they thought that evaluation was too difficult to conduct (Swanson, 2005). Another reason might be a lack of confidence that the training program could add value to the organization (Spitzer, 1999). Moreover, many companies lacked the resources or processes needed to conduct the evaluation. In other cases, it was hard for companies to acquire meaningful business measures when they had very little alignment between learning acquired from training and job performance (Bersin, 2006).

Even with many models cited in the literature, managers and practitioners were still only using the first step of Kirkpatrick's model, reaction, to evaluate training (Spitzer, 1999). The different mindsets and interests of HR researchers and practitioners contributed to widen the gap between theory and practice. While researchers were motivated to study and explore new understandings and explanations, practitioners were focused on ensuring organizational processes and outcomes (Swanson, 2005). Understanding the perceptions of both groups, especially practitioners who will be

applying the models, will contribute to the development of a more practical, usable training evaluation model or process.

### **Training Evaluation in the Hotel Industry**

As an industry that had total revenue of \$137.5 billion and employed 1.8 million workers in 2011 (American Hotel & Lodging Association, 2012), the hotel industry has contributed significantly to the US economy. With a high level of customer interaction, training is an essential tool for hotels to ensure their employees provide quality customer services. Chang (2010) examined the effectiveness of Kirkpatrick's model in hotel sales training evaluation and found that the model could be employed effectively to assess training in hotels. She recommended that hotels collect performance data on both the individual and organizational level to enable comprehensive training evaluation.

Kline and Harris (2008) examined the approaches used by leading lodging organizations to measure the costs and outcomes of training. They conducted in-depth, semi-structured interviews with individuals responsible for training at six hotel companies, which had received training awards, to see whether ROI was used for training evaluation. Interview questions were developed through literature review and based on Kirkpatrick's and Phillips' models. Managers of the six hotels were asked whether they measured ROI for training and how they measured the benefits and costs of training.

Two themes emerged from the data analysis: training needs were considered first before the training budget was prepared, and the training budget was reviewed at the top management level. For training benefits and ROI measurements, the main findings included these: business impacts were measured by easy to acquire data (e.g., employee turnover) and other informal methods such as employee feedback sessions; managers believed that measuring training benefits still needed improvement; and ROI was not formally measured. The researchers concluded that although controlling cost and

tracking training investments were important to the hotels, most of them did not commit to developing or using a system to measure these criteria. They suggested that training managers needed to be equipped with techniques and suitable tools for measuring training ROI (Kline & Harris, 2008).

### **Customer Services in the Hotel Industry**

Customer service is important in the hospitality industry because the hospitality business involves a large number of interactions with customers. Researchers have been studying the relationship between customer service and customer satisfaction for many years. Cronin and Taylor (1992) conducted a study of customers in four service industries (banking, pest control, dry cleaning, and fast food) and found empirical evidence that perceived service quality could lead to customer satisfaction. Additionally, the researchers noted that the scale to evaluate service quality might differ by industry, depending on the amount of service involved in each industry.

Oh (1999) conducted a study on customers of two luxury hotels over a period of four weeks to test a model of service quality, customer value, and customer satisfaction. He found that “service quality and customer value in combination may completely mediate perceptions towards customer satisfaction” (Oh, 1999, p.78). Furthermore, Kandampully and Suhartanto (2000) found that customer satisfaction and hotel image played important roles in establishing customer loyalty. Considering the demonstrable effect of service quality on customer satisfaction, and eventually customer loyalty, it is essential for hotel managers to put an emphasis on customer-service training for their employees.

### **Summary of Literature Review**

The long history of research on training evaluation was marked by the development of numerous theories and models. However, a gap remains between the theories and real-

world applications of training evaluation models and processes. Attempts to understand the reasons for that gap are necessary as they will benefit both researchers and practitioners in any industry.

## **CHAPTER 3. METHODOLOGY**

### **Introduction**

The purpose of this chapter is to discuss the procedures used in the present study, including research design, participant selection, research instruments, data collection, and data analysis.

### **Research Design**

This research was designed to study hotel managers' perceptions, awareness and usage of training evaluation models and tools. A mixed methods approach was employed for this study, including two parts: in-depth interviews and a questionnaire. The purpose of the in-depth interviews was to elicit valuable information about hotel managers' perceptions, awareness, and reasons for utilizing or not utilizing training evaluation models. The information was used to develop a questionnaire suitable for collecting empirical data from hotel managers in Iowa and to determine the importance and usage of each aspect involved in evaluating training. Another purpose of the questionnaire was to determine managers' opinions about a practical training evaluation model applicable to their organizations. Furthermore, data from hotel managers representing various hotel sizes were analyzed and compared.

Although hotels have different methods of operating, employees' service skills are universally paramount. Therefore, evaluation of customer-service skills training was the focus of the study.

### **Use of Human Subjects**

The researcher completed the Human Subjects Research Assurance Training offered by Iowa State University. The study was reviewed by the Iowa State University Human Subjects Institutional Review Board (IRB) and approved. Approval letters appear in Appendix A.

## **In-depth Interviews**

### **Research Instrument**

In-depth interviews were conducted with general managers of six hotels in Iowa to determine the approaches they used in evaluating customer-service training, and their awareness and perceptions of the Kirkpatrick's and Phillips' models.

Open-ended questions were designed to elicit information about managers' approaches to evaluating customer-service training in their organizations, and their awareness and perceptions of steps described in the two models. Interview questions were developed and customized using information from these two models, including the four steps of Kirkpatrick's model (reaction, learning, behaviors, and business results) and the fifth step (ROI calculation) from Phillips' model. Model names were not mentioned in the interview, and model steps served as training process elements in interview questions. To avoid confusion, model steps were described in layman's terms and model-specific terminology was avoided in questions. Interview questions are presented in Appendix B.

### **Participant Selection**

A combination of purposive and snowball sampling was employed for the in-depth interviews. Managers from two hotels of less than 100 rooms, three hotels of 100 to 300 rooms, and one hotel of more than 300 rooms in Iowa were selected for the interviews. The participants were selected because they were managers with training responsibilities in hotels having some type of evaluation process for customer-service training, and also because they had years of experience in the field. Various size hotels were selected to study the similarities and differences between processes and perceptions of their managers. Hotel size classifications were based on the number of rooms (Hiemstra & Ismail, 1992; Wei, Ruys, Van Hoof, & Combrink, 2001), and for this study, sizes were defined as follows:

- small: less than 100 rooms;
- medium: from 100 rooms to 300 rooms;
- large: from 301 to 600 rooms; and
- major: more than 600 rooms.

The study was conducted in Iowa where there were no hotels of major size (more than 600 rooms); therefore the “major size” category was not included. The researchers’ initial plan was to conduct interviews with two managers from each of the other three categories (two from small size hotels, two from medium size hotels, and two from large size hotels). However, the limited number of large Iowa hotels (301-600 rooms) necessitated using a hotel at the upper room limit of the medium size category (285 rooms) as a proxy for the large size category. This is considered a reasonable substitute for a large size hotel as the number of rooms approximated 300.

### **Data Collection**

Prior to commencing interviews, the researcher contacted five potential participants using an email invitation (Appendix C), and followed-up with a phone call for confirmation -either upon receiving their response or one week after the email. The researcher contacted the last participant via phone because no email address was available.

The 50 to 80 minute interviews were conducted face-to-face in managers’ hotels and were audio recorded for transcribing purposes. The managers were briefed about the study’s purposes and given time to read and understand the consent form before interviews began. After managers indicated a clear understanding of the study’s purposes and their rights, they were asked to sign the consent form (Appendix D).

## **Data Analysis**

The researcher transcribed and hand coded interview data without using qualitative research software. In addition, the researcher's major professor independently reviewed the first transcript and analyzed it. Following this first transcript analysis, a meeting took place between researcher and major professor at which time codes, categories, and interpretations were agreed upon. The remaining transcripts were coded and categorized using this system. After transcribing and coding, 416 codes were used, and 31 categories emerged from those codes. With further analysis, 12 themes surfaced from those categories; four of them are discussed in Chapter 4. For lists of codes, categories, and themes, refer to Appendix E.

The interview transcripts were emailed to all six managers who were then asked to give transcript accuracy feedback. Four managers confirmed accuracy and two did not reply.

## **Questionnaire**

### **Research Instrument**

The questionnaire was developed based on a review of literature and on findings from in-depth interviews. Steps and methods used to evaluate training were taken from Kirkpatrick's (1959a, 1959b, 1960a, 1960b) and Phillip's (1996a, 1996b, 1996c) models. Identification of other methods used to evaluate training was obtained during in-depth interviews. To avoid confusion, the model names were not mentioned in the questionnaire, and no model-specific terminology was used in interview questions. Open- and closed-ended questions identified managers' perceptions of the training evaluation, and the training evaluation processes in their hotels. The questionnaire had two sections: the first, demographics, included hotel information and personal information questions,

while the second consisted of training evaluation questions. The questionnaire appears in Appendix F.

### **Participant Selection**

The questionnaire was pilot tested and subsequently distributed to training managers, or managers with training responsibilities at selected hotels. Hotels meeting the criterion were selected from the 2011 edition of the AAA TourBook (AAA, 2011). The questionnaires were sent to 361 hotels in Iowa that met the criterion of more than 30 rooms. This criterion is based on the assumption that hotels with 30 rooms or fewer are less likely to conduct formal employee training programs. Jameson (2000) found that small hospitality firms (with less than 50 employees) primarily conducted recruitment and training on an informal basis. In addition, many hotels with 30 rooms or less were bed and breakfasts managed by an owner rather than a general manager (AAA, 2011); hence, it is less likely bed and breakfasts have formal employee training.

### **Pilot Study**

Before distributing the final questionnaire, a pilot test was conducted with four hotel managers who participated in in-depth interviews, and five graduate students in hospitality management. The group was asked to complete the questionnaire and evaluate its length (it was expected to take 20 minutes or less) and clarity. Thesis committee members also reviewed the instrument. Based on their feedback, only a few minor wording changes were made to improve the questionnaire. A copy of the pilot test evaluation form can be found in Appendix G.

### **Data Collection**

After pilot testing, the paper questionnaires were distributed through U. S. mail with return postage included. Mailing addresses were obtained from the 2011 AAA TourBook (AAA, 2011). Managers who participated in the in-depth interviews were

excluded from this sample. Distributed questionnaires were number coded for follow-up purposes and the codes were kept separate from the responses, preventing participants' answers from being linked to identifying information.

Before mailing questionnaires, phone calls were made to approximately 200 hotels to obtain managers' names so envelopes could be personally addressed. Reminder postcards (Appendix H) were mailed to managers two weeks after the questionnaires were sent. Follow-up phone calls were made to 70 randomly selected hotels one week after reminder postcards were sent to increase response rate. The process, to maximize response rates, was consistent with that recommended by Dillman, Smyth, and Christian (2009).

At the end of the survey, participants were invited to provide their names, phone numbers and email addresses if they wished to enter a drawing for one of two \$50 gift cards. This identifying information was also kept in a separate file to ensure anonymity and confidentiality.

### **Data Analysis**

The Statistical Package for the Social Sciences (SPSS) program (version 20.0) was used for questionnaire data analysis. Data coding, data entry, and data validation were completed using procedures recommended by Groves et al. (2004). The researcher's major professor reviewed the data coding, and double-checked data entry on a random proportion to ensure all data were entered correctly. Cronbach's alpha was used to measure questionnaire reliability, and descriptive statistics were run on all variables. A t-test was used to analyze differences in importance and evaluation-usage ratings between different hotel sizes, and regression analysis was employed to determine the relationship between perceived importance and usage of training evaluation activities.

**CHAPTER 4. EXPLORATION OF HOTEL MANAGERS' TRAINING  
EVALUATION PRACTICES AND PERCEPTIONS UTILIZING  
KIRKPATRICK'S AND PHILLIPS' MODELS**

A paper to be submitted to *Human Resource Development Quarterly*

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**Abstract**

Training is one human resources development practice found in most organizations, however, studies showed that little attention was given to the importance of training evaluation in real life practices. This study is an exploration of the practices and perceptions of hotel managers in training evaluation using Kirkpatrick's and Phillips' models. In-depth interviews were conducted with six hotel managers; and paper-based questionnaires were sent out to hotel managers in a Midwestern state. The findings indicated that hotel managers viewed training evaluation activities as important, and observation was rated the most important and the most frequently employed method for managers in evaluating training. The study's findings contribute to literature by providing researchers with more insights into what hotel managers were employing to evaluate their training, and what they believed a practical process should possess. It also gives researchers a brief understanding of the different perceptions of managers from different hotel sizes.

**Introduction**

It is common for Human Resource (HR) practitioners to focus efforts on costs and processes rather than measuring the value added from HR practices (Ramlall, 2003). Because cost effectiveness is essential for business success, it is important for HR managers to establish their value to the organization in ways that are easy for top-level managers to understand. Traditional ways to show the value of HR departments have

included demonstrating financial results of HR practices in relationship to the organization profitability (Ulrich, 1997; Ramlall, 2003). Training is one HR development practice found in most organizations, but it is often complicated to determine measurable financial results of training. With the focus on evaluating and demonstrating training effectiveness, studies have been done on training evaluation concepts, models, and applications of these in different industries (Bartel, 2000; Chang, 2010; Holton, 1996; Kearns, 2005; Kirkpatrick, 1959a, 1959b, 1960a, 1960b; Kline & Harris, 2008; Phillips, 1996; Pine & Tingley, 1993; Russ-Eft & Preskill, 2005). Despite the vast amount of research done on training evaluation, Bersin (2006) noted that managers and practitioners had given little attention to the impact of training on business and overall return on investment (ROI). Swanson (2005) indicated that there was a gap between the literature and HR development evaluation (including training) as a result of HR practitioners' and researchers' different perspectives. Understanding the perceptions of both groups, especially practitioners, will contribute to the development of a more practical, usable training evaluation model. Therefore, the purpose of this research was to examine the training evaluation processes and practices used by managers in hotels as well as their perceptions of a practical evaluation process.

This study was an exploration of the practices and perceptions of hotel managers. Understanding why managers are or are not utilizing available evaluation tools and what they view as practical tool characteristics will provide researchers the ability to develop applicable and effective training evaluation tools for hotel managers to utilize in their operations.

## **Review of Literature**

### **Theoretical Framework**

The theoretical framework for this study was the training evaluation model originally developed by Kirkpatrick (1959a) and later expanded by Phillips (1996). The two models were selected because of their significance in the literature and application to training evaluation. Kirkpatrick's model divided training evaluation into four steps: reaction, learning, behavior and results (Kirkpatrick, 1959a, 1959b, 1960a, 1960b). In the first step, reaction, Kirkpatrick (1959a) recommended training directors evaluate participant reaction with emphasis on anonymity (to garner honest feedback) and the possibility of quantifying collected feedback. The second step, learning, refers to the amount of knowledge participants get from training (Kirkpatrick, 1959b); while behavior, the third step, is focused on how participants apply the new knowledge in their jobs (Kirkpatrick, 1960a). Kirkpatrick recommended the use of before-and-after measurement, a control group, and statistical analysis for both these steps. Paper-and-pencil test or classroom performance could be used to measure learning, while for behavior, the performance assessment should be done by others (e.g. superiors, subordinates, peers) rather than by the training participants themselves (Kirkpatrick, 1959b, 1960a). For the last step, Kirkpatrick (1960b) indicated that business results are the best way to evaluate a training program, but are also complicated to measure.

Kirkpatrick's four-step-model popularized training evaluation concepts and has been used as the foundation for many later models (e.g. Kearns, 2005; Phillips, 1996; Wang & Spitzer, 2005). Kirkpatrick's model has been acknowledged as a standard in the field (Holton, 1996) and has been widely used by researchers and organizations in a diverse range of industries (Bartel, 2000; Chang, 2010; Kline & Harris, 2008; Pine & Tingley, 1993; Russ-Eft & Preskill, 2005).

Phillips' model added a fifth level to Kirkpatrick's model (Phillips, 1996). This fifth level of evaluation focuses on ROI and compares the training benefits, as expressed in financial results, with training costs. Phillips assumed that there were also intangible benefits associated with training, and that those could be converted into easy-to-understand financial values. He believed that the beneficial effects of training may drop off after the first year, and therefore a conservative approach to evaluation would not consider long-term benefits as part of the calculation (Phillips, 1996).

### **The Gap Between Theoretical Models and Practices**

Despite the large body of research during the long history of training measurement and evaluation, studies show that a gap still exists between expected and actual training measurement (Bersin, 2006; Kline, 2008; Phillips, 1996). Bersin (2006) conducted a survey with training managers at more than 140 companies (all sizes and types) about their training measurements. The most commonly measured factors and the percentage of participating companies measuring these factors are as follows: completion (88%), enrollment (86%) and training participant's satisfaction (81%). In contrast, training managers viewed completion, enrollment, and satisfaction factors as less valuable compared to other factors. Seventy-six percent of the managers surveyed valued job impact, 72% valued business impact, and 65% valued business metrics. However, those valued measurements were used minimally within the surveyed companies, with 14% and 10% measuring job impact and business impact, respectively; whereas ROI was even less with only 5% of the companies measuring and using ROI. Organizations were spending about 2.6% of their training budget on measurement and 82% of the managers thought their organizations should allocate more funds to training and measurement.

There were several reasons why organizations failed to carry out systematic evaluation. One of the reasons was because training professionals did not believe in

evaluation, or thought that evaluation was too difficult to conduct (Swanson, 2005). Another reason was the lack of confidence that training program could add value to the organization (Spitzer, 1999). Moreover, many companies lacked the resources or processes needed to conduct training evaluation. In other cases, it was hard for companies to acquire meaningful business measures when there was little alignment between learning acquired from training and job performance (Bersin, 2006).

Even with these many models, managers and practitioners were still using only the first step of Kirkpatrick's model, reaction, to evaluate training (Spitzer, 1999). The different mindsets and interests of HR researchers and practitioners contributed to widen the gap between theory and practice. While researchers were motivated to study and explore new understandings and explanations, practitioners were focused on ensuring organizational processes and outcomes (Swanson, 2005). Understanding the perceptions of both groups, especially practitioners who will be applying the models, will contribute to the development of a more practical, usable training evaluation model or process.

### **Training Evaluation in the Hotel Industry**

In 2011, the hotel industry had total revenues of \$137.5 billion and employed 1.8 million workers (American Hotel & Lodging Association, 2012), thereby contributing significantly to the U.S. economy. With a high level of customer interaction, training is an essential tool to ensure hotel employees provide excellent customer service. Chang (2010) examined the effectiveness of Kirkpatrick's model in hotel sales training evaluation and found that the model could be employed effectively to assess training in hotels. She recommended that hotels collect performance data on both individual and organizational levels to enable comprehensive training evaluation.

Kline and Harris (2008) examined the approaches used by leading hotel organizations to measure the costs and outcomes of training. They conducted in-depth,

semi-structured interviews with individuals responsible for training at six award-winning hotel companies to determine whether ROI was used. Interview questions were based on Kirkpatrick's and Phillips' models. Two themes emerged from the data analysis; training needs were considered prior to training budget preparation, and training budget was reviewed by the top management level. Regarding training benefits and ROI measurements, business impacts were measured by easy to acquire data (e.g., employee turnover) and other informal methods such as employee feedback sessions. Overall, hotel managers believed that measuring training benefits still needed improvement; and ROI was not formally measured. The researchers concluded that although controlling costs and tracking training investments were important, most trainers did not commit to developing or using a system to measure these criteria. It was suggested that managers needed to be equipped with techniques and suitable tools for measuring training ROI (Kline & Harris, 2008).

### **Customer Services in the Hotel Industry**

Customer service is paramount in the hospitality industry because hospitality business involves multiple and repeated interactions with customers; hotels are a major part of the hospitality industry. Researchers have been studying the relationship between customer service and customer satisfaction for years. In 1992, Cronin and Taylor conducted a study of customers to service industries and found empirical evidence that perceived service quality could lead to customer satisfaction. Additionally, the scale to evaluate hotel service quality might differ by industry, depending on the amount of service involved in each industry.

Oh (1999) conducted a study on customers of two luxury hotels to test a model of service quality, customer value and customer satisfaction. The researcher found that “service quality and customer value in combination may completely mediate perceptions

towards customer satisfaction” (Oh, 1999, p.78). Furthermore, Kandampully and Suhartanto (2000) found that customer satisfaction and hotel image played important roles in establishing customer loyalty. Considering the demonstrable effect of service quality on customer satisfaction, and eventually customer loyalty, it is essential for hotel managers to emphasize customer-service training for hotel employees.

### **Research Questions**

Green and McGill (2011), in a report for the American Society for Training & Development, estimated that U.S. organizations spent about \$171.5 billion on learning and development for employees in 2010. Customer-service training is an essential part of the hotel industry, considering the people-focused nature of the business. With high investments in training, it is evident that hotel managers should evaluate the effectiveness of their customer-service training. Although different hotels have different ways of operating, employees’ service skills are paramount for all hotels. Therefore, customer-service skills training evaluation was the focus of this study. To explore practices and perceptions of hotel managers related to customer-service training, the research questions for this study are as below:

1. How are hotel managers perceiving and using training evaluation activities in their hotels?
2. How do the hotel managers’ perceptions of training evaluation activities affect their usage of those activities?
3. What are reasons for hotel managers applying or not applying training evaluation models or processes?
4. What do hotel managers perceive as the practical characteristics in a training evaluation process?

## **Method**

A mixed methods approach was employed for this study, including two parts: in-depth interview and questionnaire. The purpose of the in-depth interviews was to elicit rich information on hotel managers' perceptions and awareness, and the reasons why they were or were not utilizing training evaluation models. The information obtained from the interviews was used to develop the questionnaire and collect empirical data on the importance and usage of each training evaluation aspect. Another purpose of the questionnaire was to determine managers' opinions of a practical training evaluation process.

### **In-depth Interviews**

#### ***Participant Selection***

A combination of purposive and snowball sampling was employed for the in-depth interviews. Six managers were selected; two from hotels with less than 100 rooms, three from hotels with 100 to 300 rooms, and one from a hotel with more than 300 rooms in the Midwestern. The participants were selected because they were managers with training responsibilities of hotels with an evaluation process for customer-service training. Different sizes of hotel were selected to study the similarities and differences between process and perception based on hotel size.

#### ***Research Instrument***

In-depth interviews were conducted with general managers of six hotels in one U.S. Midwest state to study the approaches used to evaluate customer-service training, and awareness and perceptions of Kirkpatrick's and Phillips' models. Open-ended questions were designed based on the four steps of Kirkpatrick's (1959a) model (reaction, learning, behaviors, and business results) and the fifth step (ROI calculation) in Phillips' (1996) model. The model names were not mentioned in the interview, and the model steps were

used as elements of training process in the interview questions. To avoid confusion, the model steps were described in layman's terms and no model-specific terminology was used in the questions. Questions were reviewed and approved by three researchers expert in training and the hospitality industry.

### ***Data Collection***

Prior to the interviews, the participants were contacted via an invitation email and a follow-up phone call (within one week after the email). The interviews were conducted through face-to-face meetings at the managers' hotels and were recorded for transcribing purposes. The interviews lasted from 50 to 80 minutes.

### ***Data Analysis***

The interview data were transcribed and hand coded by the primary researcher. The coding, categorizations, and interpretation were reviewed by another qualitative researcher to increase trustworthiness. The interview transcripts were emailed to all six managers and managers were asked to give their feedback on transcript accuracy. Four managers confirmed transcript accuracy and two did not reply.

### **Questionnaire**

#### ***Participant Selection***

The questionnaire was distributed to managers with training responsibilities at the selected hotels. Hotels were selected from the 2011 AAA TourBook and all hotels meeting the criterion of more than 30 rooms were included (AAA, 2011). This criterion is based on the assumption that with 30 rooms or less, the hotel is less likely to have formal customer-service training for employees. Jameson (2000) found that small hospitality firms, those with less than 50 employees, conducted training on more of an informal basis. In addition, the majority of hotels having less than 30 rooms were bed and breakfast types and managed by owners rather than general managers (AAA, 2011);

therefore, it is unlikely these bed and breakfast types have a formal employee training program. The questionnaires were sent to 361 hotel managers, responsible for training activities, in one Midwestern state that met the criterion. The managers that participated in the in-depth interviews were excluded from this sample.

### ***Research Instrument***

The questionnaire contained both open-ended and closed-ended questions to study the managers' importance rating of training evaluation, and the usage of training evaluation process in their hotels. The questionnaire was comprised of two sections. The first section, demographics, included hotel information and personal information questions. The second section consisted of questions about training evaluation. At the end of the questionnaire survey, participants could choose to enter a drawing for two \$50 gift cards.

### ***Pilot Study***

Before the questionnaire distribution, a pilot test was conducted with four hotel managers who completed the in-depth interviews, and five graduate students in a university's hospitality management program. This group was asked to complete the questionnaire and evaluate its length and clarity. The instrument was also reviewed by three professionals in the field. Based on feedback, minor wording changes were made to improve the questionnaire.

### ***Data Collection***

After pilot testing, the paper-based questionnaire was distributed through mail with paid return postage included. The mailing addresses were obtained from the 2011 AAA TourBook (AAA, 2011). The distributed questionnaires were number coded for follow-up purpose. The record of returned/unreturned questionnaires and the responses were kept in

two separate data sets, so the participants' responses and identifying information could not be linked.

Before mailing questionnaires, phone calls were made to approximately 200 hotels to obtain the managers' names so envelopes could be personally addressed. A reminder postcard was sent to the managers via mail two weeks after the questionnaire was sent. Follow up phone calls were made to 70 randomly selected hotels one week after the reminder postcards to increase response rate. This process, to maximize response rates, was consistent with that recommended by Dillman, Smyth, and Christian (2009).

### ***Data Analysis***

The Statistical Package for the Social Sciences (SPSS) program (version 20.0) was used for questionnaire data analysis. Data coding, data entry, and data validation were done using the procedures recommended by Groves et al. (2004). Descriptive statistics were run on all variables, and Cronbach's alpha was used to measure questionnaire reliability. The Cronbach's alpha coefficient for each of the factors (importance rating, usage rating, practical characteristic and information source) ranged from 0.71 to 0.83, indicating a relatively high internal consistency (McMillan & Schumacher, 2010). A t-test was used to analyze differences in importance and evaluation-usage ratings between different hotel sizes, and regression analysis was employed to determine the relationship between perceived importance and usage of training evaluation activities.

## **Research Findings and Discussions**

### **Participants' Profiles**

All six interview participants had at least one and a half year of experience in the industry, and three had been in the industry for more than 10 years. Four participants had been in their positions for less than two years, while the other two had been for more than

five years. Regarding training experience, four managers had more than 10 years of experience, and the other two had at least six months of experience.

A total of 361 questionnaires were sent out, and 61 were returned. One questionnaire was returned with less than half of the questions answered so it was omitted from the analysis. With 60 usable questionnaires, the response rate was 16.6%, which was consistent with a similar previous study (Paez & Arendt, in press). Among the 60 returned and analyzed questionnaires, 39 (65%) were from managers of hotels with less than 100 rooms, 17 (28.3%) were from managers of hotels with 100 to 200 rooms, and 4 (6.7%) were from managers of hotels with 201 to 300 rooms. Due to the small number of participants from large hotels, the two later categories were grouped together as one group for data analysis. Therefore, two groups are presented for the t-test analysis: small-sized hotels with less than 100 rooms ( $n = 39$ ) and medium-sized hotels with between 100 and 300 rooms ( $n = 21$ ).

There were 26 males (44.1%) and 33 females (55.9%) who completed the questionnaire; one respondent did not complete the gender question. Most of the participants were White/Caucasians (91.5%), and more than half had at least a Bachelor's degree (53.3%). Almost 80% of the participants had at least five years hotel industry experience, and 75% had at least 5 years of training experience. All demographic information of interview and questionnaire participants are presented in Table 1.

Table 1  
*Demographic Characteristics of Hotel Managers*

Characteristic	Questionnaire <sup>a</sup>		Interviews <sup>b</sup>	
	Frequency (n)	Percent (%)	Frequency (n)	Percent (%)
<b>HOTEL INFORMATION</b>				
Number of room				
< 100 rooms	39	65.0	2	33.3
100 – 200 rooms	17	28.3	2	33.3
201 – 300 rooms	4	6.7	1	16.7
> 300 rooms	0	0	1	16.7
Hotel type				
Independent hotel	10	16.9	0	0
Chain hotel	10	16.9	3	50.0
Franchised hotel	39	66.1	3	50.0
<b>PERSONAL INFORMATION</b>				
Gender				
Male	26	44.1	2	33.3
Female	33	55.9	4	66.7
Age <sup>c</sup>				
< 30 years old	9	15.3	--	--
30-40 years old	19	32.2	--	--
41-50 years old	13	22.0	--	--
51-60 years old	13	22.0	--	--
> 60 years old	5	8.5	--	--
Ethnicity <sup>d</sup>				
Asian/Pacific Islander	4	6.8	--	--
Black/African-American	0	0	--	--
Hispanic/Latino	1	1.7	--	--
Native American Indian	0	0	--	--
White/Caucasian	54	91.5	--	--

<sup>a</sup>n=58-60

<sup>b</sup>n=6

<sup>c,d,e</sup>Age, ethnicity, and education were not obtained for interview participants

Table 1 (cont.)

Characteristic	Questionnaire <sup>a</sup>		Interviews <sup>b</sup>	
	Frequency (n)	Percent (%)	Frequency (n)	Percent (%)
Education <sup>c</sup>				
High school	15	25	--	--
Associate's degree	11	18.3	--	--
Bachelor's degree	27	45	--	--
Master's degree	5	8.3	--	--
Unknown Education	2	3.4	--	--
Years working in the hotel industry				
< 1 year	3	5.1	0	0
1 – 2 years	2	3.4	1	16.7
> 2 years, < 5 years	7	11.9	0	0
≥ 5 years, < 10 years	16	27.1	2	33.3
≥ 10 years, < 15 years	12	20.3	1	16.7
≥ 15 years	19	32.2	2	33.3
Years working in the company				
< 1 year	8	13.8	1	16.7
1 – 2 years	10	17.2	2	33.3
> 2 years, < 5 years	11	19.0	0	0
≥ 5 years, < 10 years	12	20.7	0	0
≥ 10 years, < 15 years	10	17.2	1	16.7
≥ 15 years	7	12.1	2	33.3
Years working in the hotel				
< 1 year	10	16.9	2	33.3
1 – 2 years	11	18.6	2	33.3
> 2 years, < 5 years	15	25.4	0	0
≥ 5 years, < 10 years	14	23.7	1	16.7
≥ 10 years, < 15 years	6	10.2	0	0
≥ 15 years	3	5.1	1	16.7

Table 1 (cont.)

Characteristic	Questionnaire <sup>a</sup>		Interviews <sup>b</sup>	
	Frequency (n)	Percent (%)	Frequency (n)	Percent (%)
Years working with training				
< 1 year	1	1.7	1	16.7
1 – 2 years	2	3.4	1	16.7
> 2 years, < 5 years	11	18.6	0	0
≥ 5 years, < 10 years	11	18.6	0	0
≥ 10 years, < 15 years	9	15.3	1	16.7
≥ 15 years	25	42.4	3	50

### Perceived Importance and Usage of Training Evaluation

Managers were asked to rate the importance of different training evaluation activities on a 7-point-scale (1 = *not at all important*, 2 = *very unimportant*, 3 = *somewhat important*, 4 = *neutral*, 5 = *somewhat important*, 6 = *very important*, 7 = *extremely important*). The data from questionnaire analysis indicated managers found all training evaluation activities relatively important to extremely important. The results showed highest ratings on the perceived importance of observation, discussion with employees, and guest comment cards/surveys. Particularly, managers rated discussion with their employees ( $M = 6.48$ ,  $SD = 0.85$ ), as the most important method to evaluate trainees' reactions towards training, while evaluation form ( $M = 4.68$ ,  $SD = 1.60$ ) was perceived as the least important method to evaluate trainee's reaction. Observation was one of the most important ways for managers to evaluate trainee's reaction ( $M = 6.32$ ,  $SD = 0.98$ ), learning ( $M = 6.63$ ,  $SD = 0.64$ ), and behaviors on the job ( $M = 6.60$ ,  $SD = 0.62$ ). Recommended by Kirkpatrick (1959b) as one of the effective methods, test after training, however, was rated as the least important method to evaluate learning acquired from training with the mean score of 4.70 ( $SD = 1.61$ ). This finding could be attributed to the

nature of the hotel industry, with a large amount of on-the-job training (Clements & Josiam, 1995). For customer-service training, training is primarily conducted on-the-job rather than in a classroom setting. This training setting makes it difficult to use paper-based or computer-based methods, such as an evaluation form or test. On the other hand, the manager could conduct formal or informal observations for evaluation without interrupting the trainee's work, which may explain why this method was regarded as highly important by the participating managers.

Guests' opinions through comment cards, surveys, or direct (verbal or through email) feedback were also considered important methods with mean scores of more than 6.0 (descriptive measures are presented in Table 2 for all the variables, and further definitions of variables can be found in Table 3). Considering the customer-oriented nature of the industry, it is logical for hotel managers to pay close attention to their guests' feedback and to use these comments as a tool to evaluate their training.

Managers considered follow-up actions based on training evaluation results ( $M = 6.28$ ,  $SD = 0.94$ ) a very important part of the evaluation process. They thought it was relatively important to link behaviors occurring from training to business results ( $M = 5.88$ ,  $SD = 1.15$ ), to express training results in monetary terms ( $M = 5.63$ ,  $SD = 1.16$ ), and to analyze the outcomes of training against the costs of that training ( $M = 5.28$ ,  $SD = 1.42$ ). These results are consistent with Bersin's finding (2006) that managers regarded business results as one of the most important measures of training.

Table 2

*Importance and Usage Ratings of Training Evaluation Activities*

Evaluation Category Training Evaluation Activities	Importance Rating <sup>a</sup>		Usage Rating <sup>b</sup>	
	Mean	SD	Mean	SD
<b>Reaction</b>				
Observation	6.32	0.98	6.25	1.20
Discussion with employees	6.48	0.85	6.40	0.72
Evaluation form	4.68	1.60	3.53	1.72
<b>Learning</b>				
Observation	6.63	0.64	6.71	0.56
Guest comment cards/surveys	6.07	1.18	5.82	1.32
Test after training	4.70	1.61	3.92	1.92
<b>Behaviors</b>				
Observation	6.60	0.62	6.50	1.00
Guest' direct feedback	6.40	0.83	6.15	1.01
Guest comment cards/surveys	6.18	0.95	5.90	1.23
Business results	5.88	1.15	5.08	1.39
Monetary results	5.63	1.16	4.82	1.63
Outcomes compared to cost	5.28	1.42	4.43	1.90
Follow up actions	6.28	0.94	5.87	1.13

<sup>a</sup>n=60; scale: 1 = *not at all important*, 2 = *very unimportant*, 3 = *somewhat important*, 4 = *neutral*, 5 = *somewhat important*, 6 = *very important*, 7 = *extremely important*

<sup>b</sup>n=60; scale: 1 = *never*, 2 = *rarely*, 3 = *occasionally*, 4 = *sometimes*, 5 = *frequently*, 6 = *usually*, 7 = *every time*

After understanding managers' perception of the importance of each training evaluation activity, it is important to learn about the application by managers. The first three steps of Kirkpatrick's model (reactions, learning, behaviors) were practiced formally and informally among the six interviewed hotel managers. For the first step, four out of six managers used observation to evaluate their employees' reactions towards

training and one manager used paper-based survey. One manager said that he did not conduct evaluation on trainee reaction, and provided this rationale:

I think it is unbeneficial ... to ask them what they feel about the training because millions and trillions of time and energy and money has already gone into the training and it's proven that it works. (General Manager, medium-sized hotel)

For step two, learning, some managers used observation or corporate-developed tests to evaluate whether employees learned from the training. Similarly, observation was usually employed to evaluate the application of training knowledge on the job. In addition, guest survey (survey sent to guests who stayed at the hotels) was employed by all managers to evaluate their training processes, and it was usually used in evaluating knowledge, behavior, or as an indicator of business results. The HR manager from the large-sized hotel used a process from corporate that was similar to what Kirkpatrick suggested in his model. The similarities suggest that the model was practical, and managers were practicing what were similar to the steps described in the model, even when they were not aware of the model itself.

In order to provide timely feedback, the managers interviewed used observation. All managers employed formal or informal observations in most parts of their evaluation processes. One interviewee had the following to say about observations.

I really don't have like an evaluation... that I really evaluate them on. I guess it's more, really watching them in training, watching them role-playing, when they work with, with the guests and everything. I guess it's more of what I see them doing, what I hear them doing, more than evaluating them on a, you know, a piece of paper. (General Manager, small-sized hotel)

On the questionnaire, managers were asked to rate the frequency of usage for each of the evaluation activities on a 7-point-scale (1 = *never*, 2 = *rarely*, 3 = *occasionally*, 4 =

*sometimes*, 5 = *frequently*, 6 = *usually*, 7 = *every time*). Consistent with the interview findings, observation was usually used to evaluate participants' reactions ( $M = 6.25$ ,  $SD = 1.20$ ), learning ( $M = 6.71$ ,  $SD = 0.56$ ) and on-the-job behaviors ( $M = 6.50$ ,  $SD = 1.0$ ). Discussions with employees and feedback from guests were also frequently employed to evaluate training effectiveness. As managers viewed evaluation form and test after training as less important ways to evaluate training, they also did not utilize these methods often in their hotels, with the mean rating scores of 3.53 ( $SD = 1.72$ ) and 3.92 ( $SD = 1.92$ ) respectively. The reason for the lack of usage of these two methods could be attributed to the nature of the industry, with on-the-job training and non-classroom learning environment. It could also explain the high usage of observation by the managers, as it is one of the methods that could be conducted without affecting the trainee's work. The descriptive measures of activity usages are presented in Table 2.

The results from questionnaire analysis indicated that managers linked behaviors acquired from training to business results and training results to monetary results somewhat frequently, mean scores of 5.08 ( $SD = 1.39$ ) and 4.82 ( $SD = 1.63$ ) respectively. This finding was different from the results of Bersin's study (2006), which showed that only a small number of companies conducted evaluation on business results. Given the same questions, the interviewed managers initially indicated they used some financial measurements to evaluate their hotel performance, as well as the individual employee's performance (e.g. turnover rate, guest survey scores). However, when probed further, the interviewed managers stated they did not directly link their customer-service training program with business results and ROI (stated as monetary outcomes in both the interview and questionnaire questions). The same rationale could apply with the questionnaire results. The managers could use the business results or some financial results as indication of their trainees' performance; however, it is undetermined whether

any direct links between training and those results were established by the participating managers.

An independent samples t-test indicated the importance rating mean scores for small-sized hotels (less than 100 rooms) and middle-sized hotels (100 – 300 rooms) differed significantly ( $p < 0.05$ ) on 3 out of the 13 listed activities. The activities that had significantly different importance mean rating scores between the two groups were evaluation form in evaluating participants' reaction ( $t(58) = -2.037, p = 0.046$ ), guests' direct feedback in evaluating on-the-job behaviors ( $t(57) = -3.167, p = 0.002$ ), and observation in evaluating on-the-job behaviors ( $t(58) = -2.944, p = 0.005$ ). The middle-sized group had higher mean rating scores in these three categories compared to the small-sized group, for which the reason could be explained by the difference in sizes. For smaller hotel, the direct manager is usually the person who trains and evaluates employees; whereas in larger hotels, the person who conducts training and training evaluation may not have a reporting relationship with the employees. Because of the working relationship, it could be more important for training evaluation practitioners in larger hotels to employ more formalized method such as evaluation form to evaluate the trainee's reaction.

### **Relationship between Perception and Usage**

To examine the relationship between the perceived importance of training evaluation activities and usage in hotels, regression analysis was conducted for each pair of variables. Descriptions of all variable pairs are presented in Table 3. The results (Table 4) indicated that managers' perception about the importance of training evaluation activities have a significantly positive relationship with evaluation activity usage frequency. The findings demonstrate that managers' perception of training evaluation is an effective predictor for usage of training evaluation activities.

Table 3

*Summary of Variables for Regression Analyses*

Descriptions of Dependent Variables	Descriptions of Independent Variables
<b>Reaction</b> - evaluating trainee's reaction towards training	
Usage of <b>observation</b>	Perceived importance of <b>observation</b>
Usage of <b>discussion with employees</b>	Perceived importance of <b>discussion with employees</b>
Usage of <b>evaluation form</b>	Perceived importance of <b>evaluation form</b>
<b>Learning</b> - evaluating trainee's learning acquired from training	
Usage of <b>observation</b>	Perceived importance of <b>observation</b>
Usage of <b>guest comment cards/surveys</b>	Perceived importance of <b>guest comment cards/surveys</b>
Usage of <b>test after training</b>	Perceived importance of <b>test after training</b>
<b>Behaviors</b> - evaluating trainee's behaviors acquired from training	
Usage of <b>observation</b>	Perceived importance of <b>observation</b>
Usage of <b>guest' direct feedback</b>	Perceived importance of <b>guest' direct feedback</b>
Usage of <b>guest comment cards/surveys</b>	Perceived importance of <b>guest comment cards/surveys</b>
How often the managers link employees behaviors to <b>business results</b>	How important it is for the managers to link employees behaviors to <b>business results</b>
How often the managers link training results with <b>monetary results</b>	How important it is for the managers to link training results with <b>monetary results</b>

Table 3 (cont.)

Descriptions of Dependent Variables	Descriptions of Independent Variables
How often the managers analyze <b>outcomes of training compared to the costs</b> of that training	How important it is for the managers to analyze <b>outcomes of training compared to the costs</b> of that training
How often the managers take <b>follow-up actions</b> based on training evaluation results	How important it is for the managers take <b>follow-up actions</b> based on training evaluation results

Table 4  
*Results of Simple Regression Analyses*

Variables <sup>a</sup>	Constant	$\beta$	t	Model			
				F	Sig.	R <sup>2</sup>	Adjusted R <sup>2</sup>
<b>Reaction</b>							
Observation	1.12	0.81	6.76**	45.63	0.00	0.44	0.43
Discussion with employees	4.83	0.24	2.29*	5.23	0.03	0.08	0.07
Evaluation form	1.05	0.53	4.28**	18.34	0.00	0.24	0.23
<b>Learning</b>							
Observation	4.30	0.36	3.47**	12.02	0.00	0.17	0.16
Guest comment cards/surveys	2.20	0.60	4.78**	22.80	0.00	0.28	0.27
Test after training	0.67	0.69	5.43**	29.45	0.00	0.34	0.33
<b>Behaviors</b>							
Observation	0.61	0.89	5.02**	25.17	0.00	0.30	0.29
Guest' direct feedback	1.33	0.75	6.01**	36.08	0.00	0.38	0.37
Guest comment cards/surveys	0.17	0.93	7.75**	60.12	0.00	0.51	0.50
Business Results	0.45	0.79	6.53**	42.58	0.00	0.42	0.41
Monetary Results	-0.04	0.86	5.95**	35.41	0.00	0.38	0.37
Analyzing outcomes compared to cost	1.46	0.56	3.53**	12.44	0.00	0.18	0.16
Follow up actions	2.70	0.50	3.53**	12.43	0.00	0.18	0.16

<sup>a</sup>Dependent variables: usages of training evaluation activities. Predictors: perceived importance of training evaluation activities.

\*p < .05. \*\*p < .01.

Correlation analysis was also conducted for the perceived importance of the activities under each evaluation category. In the reaction and learning category, five out of six correlations were insignificant, indicating that participating managers that viewed one training evaluation activity as important do not necessarily view another activity within the same category as important. For example, how important managers perceive observation in evaluating trainees' reactions does not correlate with how important managers perceive evaluation forms in evaluating reactions. There were significant correlations between three evaluation activities to evaluate behaviors, which could be explained by the similarity of the activities. There was also a high correlation ( $r = 0.76$ ,  $p < 0.01$ ) between the evaluation of business results and monetary results, suggesting a relatively strong relationship between the two variables.

### **Reasons for Not Employing Training Evaluation Activities**

When interview participants were asked why they did not link training with business results and monetary outcome, one manager stated:

... anytime you invest money into training your employees and making them more effective at their tasks you are always, somehow down the road, directly link better financial performance for the hotel because people are going to want to come back more and more and more ... but to ask, "Is there a specific tool of measurement that would link those two that we would directly fill out?" No. No there isn't anything like that. And I'm not even aware of anything like that. (General Manager, medium-sized hotel)

This general manager further confirmed that he did not have the tool and did not know how to quantify training results. This suggested this manager was not aware of the tools available for linking training to business results and ROI, and perceived that it was difficult to quantify training results into monetary figures.

Another reason why the managers did not establish a link between training and business results was skepticism towards the value of training evaluation. One participant had this to say:

How it relates economically, it doesn't make sense to me that if you already have the high customer service scores told to you by your customers that I can come up with any other way to measure it, that I can link economically that isn't just made up. And I'm not into made up analysis to try to prove a point one way or the other.  
(General Manager, small-sized hotel)

This finding supported what Swanson (2005) stated that some training professionals did not believe in evaluation, which was why they did not conduct any evaluation. It is reasonable for managers to disregard the potential for correlating training results with business results if current processes are working well. It would take additional resources, time and money, to perform more evaluation, while the value of that could go unrecognized. It is the task of researchers to ensure the value of training evaluation is clearly demonstrated to managers.

Other reasons for not linking training with business results were these: corporate did not have any procedures set in place for evaluation and managers were too busy to establish an evaluation process. One HR manager from a medium-sized hotel stated that she did not have enough knowledge of other departments to set up a system to link their department training to business results, and she was too busy to work with other managers to establish that link.

Not all questionnaire participants provided reasons for not evaluating training because it was an optional question (only answer if not using any of the listed activities). Among the reasons for not evaluating training, time consuming was chosen the most

frequently ( $n = 7$ ). No program provided by the corporate office was the second most chosen reason ( $n = 5$ ), followed by high cost for training evaluation ( $n = 3$ ).

At the same time, managers participating in interviews acknowledged that there was value in having a training process; they based this claim on their experiences or from the industrial practices. One interview participant had the following comment:

There's probably no formal way to link it [employees' behavior to business results]. Informal way, I know that good customer service is essential for repeat business number one, to get customer to repeat. It's my understanding within the industry ... it's one of the biggest reasons, if not the biggest why hotel guests choose not to either return to a specific hotel, or return to a brand is their perception of customer service. (General Manager, small-sized hotel)

All the interviewed managers had the same opinion about training costs; training was an expensive process that cost in the short term, but would be profitable to the organization in the long term. In addition, it would be less costly if the manager could train employees well and retain employees compared to hiring new employees, because turnover always yielded high costs.

The interview findings were consistent with what Bersin's study (2006) found; managers were not assessing ROI for training. In the present study, interviewed managers provided the following two reasons for not assessing ROI, 1) they did not have the tools to quantify training results and 2) the corporate office did not establish any procedures for that assessment. These were similar to Bersin's (2006) finding that many companies lack the resources or processes needed to conduct the evaluation. Kline and Harris (2008) also suggested that hotel managers needed to be equipped with techniques and suitable tools for measuring training ROI. In the literature, several other reasons why organizations failed to carry out systematic evaluation were provided. These reasons included: training

professionals did not believe in evaluation, training managers thought evaluation was too difficult to conduct, and lack of confidence that the training program could add value to the organization (Spitzer, 1999; Swanson, 2005). One reason for not carrying out systematic training evaluation, found in this present study, was similar to Swanson's (2005) in that practitioners believed the evaluation was difficult to conduct. However, it was contradicting to Spitzer (1999) who found that managers were not confident in the value of training. All managers from the interviews implied that their training processes were effective and they believed it added value to their business. It should be noted that changes in the industry and advances in training evaluation have changed since the Spitzer (1999) study.

Spitzer (1999) stated that even with many models in the literature, managers and practitioners were still only using the first step of Kirkpatrick's model, reaction, to evaluate their training. As the study's results indicated, hotel managers actually carried out more than just the first step of Kirkpatrick's model. They also employed training evaluation activities in their process that were similar to the second and third steps of the model.

### **What characteristics should an evaluation model possess?**

Characteristics of an evaluation model would "depend somewhat on the size of the organization" (General Manager, small-sized hotel). Hotels of different sizes might require different types of evaluation for their training. One interview participant from a small-sized hotel discussed benefits of proximity allowed due to the smaller size of the hotel where he worked:

Because I work with these employees everyday, I sat 10 feet away from them when they're actually doing their job. If I were in an organization where my office was down the hallway, and my job was to evaluate them, I would have to be walking up

here, observing a lot more. I would have to have a lot more processes in place to gather the information necessary to evaluate ... so it kind of depends on the size, it personally depends on the size of the organization, ... the organizational structure.

(General Manager, small-sized hotel)

For hotels of small and medium sizes, it was easier for managers to interact directly with the employees they train and evaluate. However, HR managers of the two larger hotels indicated that they usually observed from afar or let the employees' direct manager (e.g. front desk manager) observe and evaluate employees. In all cases, the employees' direct managers, whether it was the general manager or a front desk manager, had close interactions with their employees and directly trained them. However, the person who evaluated training differed between hotels. For small and medium hotels, the person who trained also worked directly with and evaluated their employees. For the larger hotels, the person who trained was not necessarily the person who evaluated, and sometimes they did not work in the same division of the organization. In each case, the process would need to be different in order to accommodate the working relationships between trainer, trainee, and the evaluator.

Despite the differences in processes of different sized hotels, some similarities were found. Almost all interviewees emphasized standardization and consistency as preferences from their processes or characteristics a process would need to possess to be practical. It varied from consistency in following up with areas of improvement to standardization for training and evaluation of each job.

In the hotel industry, there are many factors that may affect the quality of the customer service, and training is one of them. Having different employees training others will produce inconsistent levels of service quality, depending on the knowledge, experience, or simply the personality of the trainer. Therefore, having a standardized

training and training evaluation process will help managers to ensure consistency in guest service. In addition, keeping a standardized record of training will make it easier to compare between employees' performance, and to link the results back to training.

The questionnaire data indicated that timely feedback ( $M = 6.14$ ,  $SD = 0.78$ ), easiness in conducting ( $M = 6.03$ ,  $SD = 1.17$ ), and cost effectiveness ( $M = 5.97$ ,  $SD = 1.05$ ) were the three most important characteristics to the questionnaire participants. Anonymous evaluation from outside source ( $M = 4.60$ ,  $SD = 1.56$ ) was the characteristic with lowest mean score. Although standardization was not on top of the list, it was considered an important characteristic to the participating managers with a mean rating score of 5.64 ( $SD = 1.24$ ). When asked to rate the importance of several information sources in developing a customer-service training evaluation process, the participants considered personal experiences ( $M = 6.16$ ,  $SD = 0.96$ ) as the most important source. Other sources that were considered relatively important were colleagues ( $M = 5.89$ ,  $SD = 0.88$ ), corporate office ( $M = 5.30$ ,  $SD = 1.66$ ), conferences ( $M = 4.77$ ,  $SD = 1.27$ ), and the Internet ( $M = 4.56$ ,  $SD = 1.64$ ). The mean scores for all characteristics and information sources are displayed in Table 5.

Table 5  
*Importance Ratings<sup>a</sup> of Characteristics and Information Sources*

	Mean	SD
<b>Characteristics<sup>b</sup></b>		
Provides timely feedback	6.14	0.78
Easy to conduct	6.03	1.17
Cost effective	5.97	1.05
Provides consistent evaluation	5.95	1.13
Contains practical analysis	5.85	1.19
Helps to continuously evaluate training results	5.69	1.21
Standardized in evaluation	5.64	1.24
Linked to business results	5.61	1.27
Consists of outsider evaluation	4.60	1.56
<b>Information Sources<sup>c</sup></b>		
Personal experiences	6.16	0.96
Colleagues	5.89	0.88
Headquarter/Corporate Office	5.30	1.66
Conferences	4.77	1.27
Internet	4.56	1.64
Business magazines/newspapers	3.98	1.40
Books	3.95	1.38

<sup>a</sup>Scale: 1 = *not at all important*, 2 = *very unimportant*, 3 = *somewhat important*, 4 = *neutral*, 5 = *somewhat important*, 6 = *very important*, 7 = *extremely important*

<sup>b</sup>n=58-59

<sup>c</sup>n=56-57

Because observation, discussions with employees, and guest's feedback played such an important role in evaluating training for hotels, it is important that researchers incorporate those into the functions of an evaluation model or process for hotel. Each method of training evaluation should also offer managers or practitioners flexibility and to apply on different levels of evaluation. For example, the same method of observation should offer the flexibility for it to be used to evaluate trainee's reactions, their

knowledge acquired from training, or their behaviors. The same method may be used differently on different level of training evaluation, and researcher should ensure that flexibility when designing their training evaluation tools.

Standardization is important for a process, but it is also difficult to ensure standardization between different job positions. Different jobs will have distinctive functions that require different types of evaluation. It is necessary for researchers to consider job functions when designing training evaluation. Furthermore, managers, especially top managers, do not have adequate time to carry out a process that contains too many steps, so the process should not be too complicated, rather easy to conduct. Perhaps a comprehensive process could be developed with all possible methods for training evaluation on each of Kirkpatrick's evaluation step. Different hotels had different methods of training and operation, and depending on their way of training, managers could select and customize the most appropriate methods of evaluation from the core model to develop optimum evaluation processes for different training, or even for different job descriptions.

Because managers' perceptions on the importance of training evaluation activities was an effective predictor of usage for the same activities, researchers should put more emphasis on raising practitioners' awareness of what evaluation tools have been designed for them. Furthermore, personal experiences and colleagues were important information sources. Therefore, researchers should present the developed processes or models in simple and straightforward language in easily accessible sources for the managers or practitioners.

### **Limitations**

Although the response rate was consistent with previous studies, the sample size (n=60) was relatively small. However, a large sample size is not required for the

statistical techniques used, therefore the small sample size was not considered a limitation in this study. Because of the small number of large sized hotel in the area the research was conducted, there were two groups (hotels of large and major sizes) not presented in the sample. Future research on a larger scale with more diverse groups will be beneficial for researchers to obtain meaningful results that have practical significance.

The study was conducted in one Midwestern state; therefore results may not be generalized to different geographic areas. Further research may be necessary to explore the extent to which these study results can be generalized.

### **Conclusions and Implications**

This study provided researchers with insights into what hotel managers were employing to evaluate training, and what managers believed a practical process should possess. Knowing how managers are evaluating their training processes will give researchers a realistic view to improve current models or to develop new ones. Each industry has distinctive characteristics that will require a certain degree of specialization for training and training evaluation. For the hotel industry, the fast-paced working environment and high level of customer interaction require timely feedback and continuous training evaluation. In addition, observation and guest feedback were employed thoroughly in the hotel training evaluation process due to the nature of the industry. A training evaluation process customized for hotel industry should incorporate those characteristics to help practitioners manage their operations most efficiently and effectively. Integration of on-the-job observations and guest feedback for evaluation should be aligned with the training itself. Evaluations should also be simple enough for practitioners to utilize constantly on a daily basis. Consistency is another element that needs focus in developing training evaluation process for hotels. Although the method to evaluate may vary between job positions (e.g., due to their different levels of customer

interaction), the results should be consistent with the training and consistent over time. Lastly, the cost of evaluating training should be taken into consideration by researchers when developing training evaluation processes. The cost to conduct training evaluation on a frequent basis will raise concerns for the managers and practitioners, and it may prevent them from acknowledging and utilizing tools developed for them.

Recognizing what the managers require from a process will also assist researchers in developing practical training evaluation models. This will in turn benefit hotel managers, practitioners and the industry in general. This study finding also contributes to the literature of hospitality management. It gives researchers an understanding of managers', from different hotel sizes, perceptions. Based on that knowledge, more customized models or processes could be developed for hotel of different sizes. More personal interaction could be added to the process for smaller hotels, while standardization is essential for hotels of larger size in evaluating training.

This study is an exploration of the practices and perceptions of hotel managers in a Midwestern state. With in-depth interview information from six managers and 60 additional questionnaire participants, the results will help researchers gain insights about managers' perceptions and awareness. Further research may be necessary to gain a broader understanding and to explore the extent to which these study results can be generalized, for example conducting research on managers of major-sized hotels or in other geographic areas.

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## CHAPTER 5. GENERAL CONCLUSIONS

This study provides researchers with more insight into how hotel managers evaluate the training of their employees, and what they believe a practical evaluation process should possess. Overall, managers rated observation as the most important, and most frequently employed method used to evaluate training. Discussions with employees and feedback from guests were also perceived as important and were frequently utilized to evaluate training effectiveness. Understanding methods managers use to evaluate training will promote incorporation of those methods into current models or new ones. For example, a standardized form for behavioral observation could be developed and tested for reliability and validity before being incorporated as a training evaluation model tool.

Recognizing what managers require from a process will also assist researchers to develop practical training evaluation models. Timely feedback, ease in conducting, and cost effectiveness were rated as the three most important evaluation model characteristics, followed by consistent evaluation, practical analysis, and continuous evaluation. Researchers should take these characteristics into consideration when developing a model. Their integration will, in turn, benefit hotel managers, practitioners and the industry in general. This study's findings also contribute to the hospitality management literature. It provides a better understanding of perceptions of managers from different hotel sizes. The interviewed managers indicated hotel size was an important aspect affecting the characteristics of a training evaluation model. Personal interactions between evaluator and trainee occur more often in smaller sized hotels, while more formalized and comprehensive processes may be required in middle size and large size hotels. Further research is necessary to distinguish the differences. It is suggested more customized models or processes be developed for hotels of different sizes.

**Limitations**

Although the response rate was consistent with a previous study with hotel managers (Paez & Arendt, in press), the sample size (n=60) of this study was relatively small. A large sample size is not required for the statistical techniques used, therefore the sample size was not considered a limitation. Because of the limited number of large-size hotels in Iowa, there were two groups (large and major sized hotels) not represented in the sample. Future research with more hotel size diversity will be beneficial for researchers in obtaining data on a larger scale.

The chosen sampling frame caused a minor coverage error to occur in this study: the 2011 AAA TourBook (AAA, 2011) did not include all hotels in Iowa, and using this sampling frame excluded some hotels from the sample population. However, because it was the most complete and up-to-date list available, and the potential number of hotels omitted from the list was small, the coverage error was expected to be insignificant.

Finally, the study was conducted in Iowa; therefore results may not generalize to other geographic areas. Further research may be necessary to explore the extent to which these results can be generalized.

**Future Research**

This study was an exploration of the practices and perceptions of hotel managers in Iowa. In-depth information from six hotel managers (interviews) and 60 additional hotel managers (questionnaires) provided insights into managers' training evaluation perceptions and awareness. Further larger scale investigations are needed to gain a broader and more comprehensive understanding of practitioners' points of view. For future research, hotels of larger sizes should be included to evaluate the similarities and differences among various sized hotels. Similar research could also be conducted in different states or countries, exploring the extent to which these results generalize to other

geographic areas. Additional research is necessary to develop applicable training evaluation models for the hospitality industry. Researchers can work with managers at hotels of different sizes to develop the most applicable model for each particular hotel size based on Kirkpatrick's (1959a) and Phillips' models (1996a), and results from this study. More particularly, a core model for hotel training evaluation can be developed. Determining which factors work best for each hotel size will significantly assist managers and HR practitioners to apply suitable training evaluation models to their organizations. Furthermore, demonstrating the usefulness and applicability of the models will encourage managers to consider using the developed training evaluation models in their hotels. However, because the link between perceived importance and usage is undetermined, further research is necessary to determine the relationship between these two variables.

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## APPENDIX A. IRB STUDY APPROVAL AND MODIFICATION APPROVAL

**IOWA STATE UNIVERSITY**  
OF SCIENCE AND TECHNOLOGY

Institutional Review Board  
Office for Responsible Research  
Vice President for Research  
1138 Pearson Hall  
Ames, Iowa 50011-2207  
515 294-4566  
FAX 515 294-4267

**Date:** 12/22/2011

**To:** Dieu-Anh Ho-Dac  
31 MacKay

**CC:** Dr. Susan Wohlsdorf Arendt  
9E MacKay Hall

**From:** Office for Responsible Research

**Title:** How are hotel managers utilizing the training evaluation tools created for them?

**IRB ID:** 11-605

**Study Review Date:** 12/22/2011

The project referenced above has been declared exempt from the requirements of the human subject protections regulations as described in 45 CFR 46.101(b) because it meets the following federal requirements for exemption:

- (2) Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey or interview procedures with adults or observation of public behavior where
  - Information obtained is recorded in such a manner that human subjects cannot be identified directly or through identifiers linked to the subjects; or
  - Any disclosure of the human subjects' responses outside the research could not reasonably place the subject at risk of criminal or civil liability or be damaging to their financial standing, employability, or reputation.

The determination of exemption means that:

- **You do not need to submit an application for annual continuing review.**
- **You must carry out the research as described in the IRB application.** Review by IRB staff is required prior to implementing modifications that may change the exempt status of the research. In general, review is required for any modifications to the research procedures (e.g., method of data collection, nature or scope of information to be collected, changes in confidentiality measures, etc.), modifications that result in the inclusion of participants from vulnerable populations, and/or any change that may increase the risk or discomfort to participants. Changes to key personnel must also be approved. The purpose of review is to determine if the project still meets the federal criteria for exemption.

Non-exempt research is subject to many regulatory requirements that must be addressed prior to implementation of the study. Conducting non-exempt research without IRB review and approval may constitute non-compliance with federal regulations and/or academic misconduct according to ISU policy.

**Detailed information about requirements for submission of modifications can be found on the Exempt Study Modification Form.** A Personnel Change Form may be submitted when the only modification involves changes in study staff. If it is determined that exemption is no longer warranted, then an Application for Approval of Research Involving Humans Form will need to be submitted and approved before proceeding with data collection.

Please note that you must submit all research involving human participants for review. **Only the IRB or designees may make the determination of exemption, even if you conduct a study in the future that is exactly like this study.**

**IOWA STATE UNIVERSITY**  
OF SCIENCE AND TECHNOLOGY

Institutional Review Board  
Office for Responsible Research  
Vice President for Research  
1138 Pearson Hall  
Ames, Iowa 50011-2207  
515 294-4566  
FAX 515 294-4267

**Date:** 5/11/2012  
**To:** Dieu-Anh Ho-Dac  
31 MacKay  
**CC:** Dr. Susan Wohlsdorf Arendt  
9E MacKay Hall  
**From:** Office for Responsible Research  
**Title:** How are hotel managers utilizing the training evaluation tools created for them?  
**IRB ID:** 11-605  
**Study Review Date:** 5/10/2012

The project referenced above has been declared exempt from the requirements of the human subject protections regulations as described in 45 CFR 46.101(b) because it meets the following federal requirements for exemption:

- (2) Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey or interview procedures with adults or observation of public behavior where
  - Information obtained is recorded in such a manner that human subjects cannot be identified directly or through identifiers linked to the subjects; or
  - Any disclosure of the human subjects' responses outside the research could not reasonably place the subject at risk of criminal or civil liability or be damaging to their financial standing, employability, or reputation.

The determination of exemption means that:

- **You do not need to submit an application for annual continuing review.**
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Non-exempt research is subject to many regulatory requirements that must be addressed prior to implementation of the study. Conducting non-exempt research without IRB review and approval may constitute non-compliance with federal regulations and/or academic misconduct according to ISU policy.

**Detailed information about requirements for submission of modifications can be found on the Exempt Study Modification Form.** A Personnel Change Form may be submitted when the only modification involves changes in study staff. If it is determined that exemption is no longer warranted, then an Application for Approval of Research Involving Humans Form will need to be submitted and approved before proceeding with data collection.

Please note that you must submit all research involving human participants for review. **Only the IRB or designees may make the determination of exemption**, even if you conduct a study in the future that is exactly like this study.

Please be aware that **approval from other entities may also be needed.** For example, access to data from private records (e.g. student, medical, or employment records, etc.) that are protected by FERPA, HIPAA, or other confidentiality policies requires permission from the holders of those records. Similarly, for research conducted in institutions other than ISU (e.g., schools, other colleges or universities, medical facilities, companies, etc.), investigators must obtain permission from the institution(s) as required by their policies. **An IRB determination of exemption in no way implies or guarantees that permission from these other entities will be granted.**

Please don't hesitate to contact us if you have questions or concerns at 515-294-4566 or IRB@iastate.edu.

## APPENDIX B. INTERVIEW QUESTIONS

1. Break the ice questions: I'd like to start with some questions about you and this hotel:
  - How long have you worked in the hospitality industry?
  - How long have you been working in this organization?
  - What is your job title? How long have you been in this job?
  - What are your job responsibilities?
  - How long have you been involved with training employees?
  - What qualifications do you have regarding training and training evaluation?
  - Is this hotel a chain hotel or a franchised hotel?
  - How many employees work here?
  - What is the average occupancy in the last 6 months? How about the last 12 months?
2. How would you rate the quality of the **customer service** in your hotel?
3. How do others, such as employees, customers, or competitors, rate the quality of **customer service**? What mechanisms are in place to measure this?
4. What **customer service** training do you provide?
5. Please describe how you evaluate the **customer service** training you provide in your organization.
  - Follow up questions:
    - How do you evaluate the reactions of employees toward the **customer service** training? (Step 1 of Kirkpatrick's model)
    - How do you evaluate the amount of knowledge they gained from the **customer service** training? (Step 2 of Kirkpatrick's model)
    - How do you evaluate whether they apply what they have learned from the **customer service** training to their job? (Step 3 of Kirkpatrick's model)
    - How do you link those behaviors to business results? (Step 4 of Kirkpatrick's model)
6. How do you link **customer service** training results with monetary outcomes? If not linked, why not?
7. How do you analyze the outcomes from **customer service** training compared to the costs of that training? (Question 5 and 6: Step 5 from Phillips' model)
8. Based on **customer service** training evaluation results, what actions do you take?
9. If the interviewee described a process in response to question 5 – 8 above:
  - Where did you obtain the process you are using to evaluate **customer service** training?
  - Why are you using that process (as stated by interviewee) to evaluate the **customer service** training results?
  - What are the characteristics of the process you currently employ to evaluate **customer service** trainings that you think are good and what are the ones that can be improved?
10. If interviewee stated that he/she was not using anything:
  - Why are you not employing any processes to evaluate the results?
11. If I wanted to develop a process for evaluating training, in your opinion, what characteristics would that process need in order to make it practical and applicable?

12. I recognize that the turnover rate is quite high for our industry. Would you share with me how many employees have left, and how many new ones you have hired in the last 6 months? How about the last 12 months?
13. Ending question: Is there anything else you would like to share?

### APPENDIX C. INTERVIEW INVITATION LETTER

Dear Mr./Ms. [manager's name],

I am a graduate student in the Hospitality Management program at Iowa State University. I am conducting a study to understand how hotel managers perceive customer service training evaluation. I am writing this email to briefly explain the study procedures and to **request your assistance with the study.**

Hotel managers' awareness and perceptions of customer service training evaluation are important factors for developing a good training evaluation model. The results of this study will provide researchers with the knowledge necessary to develop practical training evaluation models that managers can apply in their operations. Because you are a manager with training responsibilities, your participation in this study is valuable. I was referred to you by [name of the person who referred].

The interview process will consist of open-ended questions related to the training evaluation process in your organization and your perception about that process. It will take around 1 hour to complete the interview. You may choose to skip any questions you are not comfortable answering. Your participation is completely voluntary and you may refuse to participate. The interview will be audio recorded and I will take notes during the interview. Your responses will be kept confidential. There are no costs and no foreseeable risk associated with participating in this research. **If you agree to participate in this study, we will contact you to set up a date, time, and place to do the interview at your convenience.**

Thank you for your time and consideration. If you have any questions, please do not hesitate to contact me or my major professor, Dr. Susan Arendt, at the emails or phone numbers listed below. I will be calling in next week as a follow up to this email. I am looking forward to talking with you soon.

Anh Ho, Graduate Student  
Hospitality Management Program  
Iowa State University  
[anhho@iastate.edu](mailto:anhho@iastate.edu)  
515-441-4494

Susan W. Arendt, PhD, RD  
Associate Professor  
Hospitality Management Program  
Iowa State University  
[sarendt@iastate.edu](mailto:sarendt@iastate.edu)  
515-294-7575

## **APPENDIX D. INFORMED CONSENT FORM**

### **Informed Consent Document for Interview Participants**

**Title of Study:**        **How are hotel managers utilizing the training evaluation tools created for them?**

**Investigators:**        **Anh Ho Dac Dieu**  
                                 **Susan Wohlsdorf Arendt**

This is a research study. Please take your time in deciding if you would like to participate. Please feel free to ask questions at any time.

#### **INTRODUCTION**

The purpose of this study is to explore hotel managers' perceptions and awareness of training evaluation models and tools. You are being invited to participate in this study because you are either a hotel training manager or a manager with training responsibilities.

#### **DESCRIPTION OF PROCEDURES**

If you agree to participate, your participation will last around 1 hour. During the study, you may expect the following procedures to be followed:

1. The researcher will ask you a series of questions related to training and training evaluation in your organization and your personal experiences.
2. Your responses will be audio recorded and the researcher will take notes during the interview.

#### **RISKS**

At this time, there are no foreseeable risks from participating in this study.

#### **BENEFITS**

If you decide to participate in this study there will be no direct benefit to you. It is hoped that the information gained in this study will benefit others who practice training and training evaluation by assisting researchers in developing more practical and applicable training evaluation frameworks for the hospitality industry.

#### **COSTS AND COMPENSATION**

You will not have any costs for participating in this study. You will not be compensated for participating in this study.

#### **PARTICIPANT RIGHTS**

Your participation in this study is completely voluntary and you may refuse to participate or leave the study at any time. You can skip any questions that you do not wish to answer.

#### **CONFIDENTIALITY**

Records identifying participants will be kept confidential to the extent permitted by applicable laws and regulations and will not be made publicly available. However, federal government regulatory agencies, auditing departments of Iowa State University, and the Institutional Review Board (a committee that reviews and approves human subject research studies) may inspect and/or copy your records for quality assurance and data analysis. These records may contain private information.

To ensure confidentiality to the extent permitted by law, the following measures will be taken:

1. Interview data will be reported without identifiers. A pseudonym will be used.
2. The computer data will be stored in secured databases and will be kept on the principal investigator's personal computer, while printed data will be stored in a cabinet that only the principal investigator has access to.
3. All data will be kept for one year after completion of the study.
4. The recorded files will be destroyed one year after the completion of the study.
5. Only the principal investigator and the major professor will have the right to access all data.
6. If the results are published, your identity will remain confidential.

**QUESTIONS OR PROBLEMS**

You are encouraged to ask questions at any time during this study. For further information about the study, contact

1. Anh Ho  
Graduate Student, Iowa State University  
[anhho@iastate.edu](mailto:anhho@iastate.edu)  
Contact number: 515-441-4494
  
2. Susan W. Arendt, PhD, RD  
Associate Professor, Iowa State University  
[sarendt@iastate.edu](mailto:sarendt@iastate.edu)  
Contact number: 515-294-7575

If you have any questions about the rights of research subjects or research-related injury, please contact the IRB Administrator, (515) 294-4566, [IRB@iastate.edu](mailto:IRB@iastate.edu), or Director, (515) 294-3115, Office for Responsible Research, Iowa State University, Ames, Iowa 50011.

\*\*\*\*\*  
\*

**PARTICIPANT SIGNATURE**

Your signature indicates that you voluntarily agree to participate in this study, that the study has been explained to you, that you have been given the time to read the document, and that your questions have been satisfactorily answered. You will receive a copy of the written informed consent prior to your participation in the study.

Participant's Name (printed) \_\_\_\_\_

\_\_\_\_\_  
(Participant's Signature)

\_\_\_\_\_  
(Date)

## APPENDIX E. CODES, CATEGORIES, AND EMERGING THEMES

<b>List of codes</b>
<b>Interview 1</b>
Train the core, and the core train the rest
General manager is like the main orchestrator
It's people work with me, not for me
Tools to succeed
Never miss a day without opportunity to train
You got to inspect what you expect
Trust – you have to allow you their trust
Always look for opportunity to train
Student of life, always in training
Empowerment, provide people with the resources
Provide the resources
Constant learning and changes
Resourceful support
Provided resources for his job
Overwhelming resources
Consistency in training
Consistency – “Wow, every single time I've come here, this has happened”
Hospitality companies help each other grow
Interactive videos for training
Situation/scenarios for training
Continuing education items
Thousands of other training for improvement
Resourceful, other training options
Utilizing the resources
Career development
Small trainings at daily/monthly meetings
Consistently look for areas to improve
Training all the time
Career development mainly for managers
Continuous on the job evaluation (every week)
Improve and commitment plan
Sensitivity in communication
Employee will not receive anything correctly if they are emotional
Training is delicate
Emphasis on clear communication
Good communication, good relationship -> good trainer
Everyone learn differently
No process to evaluate employee reaction
Ask questions on videos
Reaction: no form to evaluate, because not beneficial
Ongoing training
Employee sign form saying they understand the information
Unbeneficial to evaluation reaction because a lot of time and energy was spent in there already
More beneficial to evaluate knowledge

Evaluation may be hard to change as they come from corporate level  
 Leave it to corporate to handle development  
 Employees are into customer service/customer service orientated  
 Empowerment – power to take care of the guests  
 Empowerment – empower all team members to take care of guest concern immediately  
 Test, demonstration, recap, train others as ways to test knowledge  
 Knowledge: Observation to test knowledge  
 Observation  
 Behavior: Constant observation and evaluation  
 Communicate better with individual employee to succeed  
 Communication: positive reinforcement  
 Team members observe each other  
 In house comment card  
 Listening posts  
 Aware and observational towards guests  
 Listening posts to fix problem right away  
 Solicit guest feedback  
 Customization for guests  
 Little ways/methods to enhance business  
 In house comment cards  
 Use guest survey to target specific weaknesses  
 Behavior and business results: Absolutely related  
 Behavior and business results: Directly correlated  
 Know there's a link, but now aware of tools to do that  
 ROI: No link to monetary  
 Business results and ROI: Wouldn't even know how to begin to measure that  
 Know there's a link  
 Rewards for positive results  
 Negative results: action plan, retrain, reprovide tools, reevaluate  
 Measure results again  
 Encourage managers to give constant feedback  
 Good to have more constant feedback  
 Time consuming  
 Battle between operation and expenses, what we want to do and what we can do  
 Corporate's job to develop process, manager's job to carry it out

## **Interview 2**

Job shadowing  
 Observation  
 Qualification: experience and the same training  
 Guest survey: email to guest and encourage them to go to website  
 Rated online and compared with other hotels in the same group  
 Training: videos example of good and bad customer service  
 Quizzes: pass and fail, pass means learning  
 Observation  
 Feedback right away  
 Only record quizzes scores and feedback from guests  
 Listen to phone conversation  
 Reaction: Discussions and observation  
 Listen for questions, can tell who understand or not

Reaction: No official form for evaluation  
 Knowledge: Feedback from other employees  
 Training: learn with different people  
 Behavior: observation  
 Behavior: check their transaction on system  
 Phone listening only during training  
 Observation  
 Business results: better in long term to have well-trained employees  
 Business results: guess review is one of the main thing  
 Care a lot about what guests think  
 The improved rating has something to do with training  
 Business results: do not link training with business results  
 Business results: can see the link, but no recorded direct link  
 ROI: guests happy -> come back -> loyal guests -> profit goes up  
 Look at results, but do not establish link
 

- Because of the changes in the hotel (management change)
- Training (e.g. keeping record) is the least important on the list
- Manager doesn't really care if training is recorded, as long as everything is good
- Overwhelmed with stuff to do
- Long hours, long week, haven't gotten to that yet
- Haven't seen the importance of keeping records
- As long as it's working
- Don't care about how it's done, as long as nothing goes wrong

 Cost vs. results: costly in short term, but profitable in long term  
 Saving in the long term  
 No link of turn over to training  
 Share feedback with all employees (good or bad)  
 Discussion for improvement  
 Show guests comment to everyone, the person who has bad comment will feel embarrassed enough to do better job  
 Feedback to employee upon seeing mistakes  
 Comment on the job: usually want to do in private, not in front of people because that will embarrass them  
 If they get too emotional, they won't learn  
 Start recording if mistake repeated  
 Process partially from personal experience  
 Cannot always be there, so guests' evaluation tells how the employees are doing  
 Constant learning for manager  
 Like using guest review to evaluate  
 Currently based on what's being seen but not actual facts written down  
 Need to record things and be more organized, and link them to profit  
 Need a good record of training to link to training  
 Hard to link training and evaluation without record  
 Customer review  
 Good characteristics:
 

- Customer reviews
- Keep record of training
- Keep track of what was done
- Notes of taken actions

- Record everything, positive or negative  
 Incentives program for positive reinforcement  
 Currently keep all guest reviews recorded

### **Interview 3**

A lot of training online  
 Coaching along the way  
 Certifications for the same training as employees  
 7 days training for General Manager  
 Member organization, not franchised  
 High customer service scores within the brand – 8.9/10, top 20% best  
 Customer generated feedback  
 The rating from other site (3<sup>rd</sup> party travel site) are pretty old  
 Observation  
 Constant observation – always evaluate  
 Evaluate by guest concern  
 Performance appraisal: 2-3 times/the first year. 1-2 times/year afterward  
 Informal conversation for review  
 Performance appraisal for general review  
 Informal conversations are on specific issues  
 Reaction: observation on their progress (misunderstood question)  
 Length of training varies on employees and how they start – everyone learns differently  
 2-3 weeks training for front desk  
 Not uncommon to retrain  
 One-on-one training  
 Observation all the time, training technically never stops  
 Knowledge: observation  
 Feedback from other employees  
 Feedback from the employee themselves  
 Behavior: observation  
 Knowledge and behavior: guest survey  
 Evaluation is an ongoing process, normal part of the day  
 Link guest comment with who is responsible  
 Actions with guest comments  
 Business results: no formal way to link behavior to business results  
 Customer service: one of the biggest reasons why guest choose not to return  
 Knows there's a link, only link it informally  
 No scale that can be used to link  
 Know that they are linked and repeat business  
 No link of costs to results  
 Training costs money  
 Well known fact that training costs money  
 Turnover costs are expensive  
 If can retain employee, cost less  
 Analyze some of the costs  
 No comparison to training results  
 Follow up when necessary on deficiency of customer service  
 Informal evaluation  
 Performance appraisal meeting  
 Written evaluation form

Numerical score appraisal  
 No set of rules for numerical scores (what to do with a numerical score)  
 Ongoing informal evaluation  
 Improvement: consistency to follow up with areas of weaknesses  
 Consistency to follow up on ongoing specific improvement conversation (informal)  
 Improvement for the manager: consistency  
 Observant to make sure of follow up  
 Good characteristics:

- Will depend on the size of the organization
- The responsible people working closely with others will change the process
- Depend on organization structure
- Work closely with employees -> personal observation
- Personal interaction
- Small size: not difficult to be constantly evaluation
- Everyday is an evaluation period
- Easier to informally evaluate in small organization
- If big size: probably rely more on written strategies and written evaluations

Linking cost and outcomes: more matter whether it's measurable  
 Know customer service is essential for repeat customers  
 My size of organization doesn't require anymore link than me observing and talking to customers  
 Have the general framework to know that we are successful  
 Doesn't make sense to measure in other way if already have high scores  
 Not onto made up analysis to prove a point one way or the other  
 Individualized basis for employee improvement  
 Customer service is highest area with guest contact

#### **Interview 4**

Qualification: corporate training program  
 Guest survey  
 Rating system: less than expected, expected, better than expected  
 Pass comments to everyone  
 Customer service is key  
 Role play for training  
 A lot of role play in training  
 Role play in the first week of training  
 Orientation - 2 hours  
 Try to do one on one training  
 Train with different people on different shifts  
 Interaction with employees, use own judgment  
 Own feelings to see if they are ready  
 Observation, watching them  
 See, hear more than evaluation on a piece of paper  
 Reaction: observation  
 Reaction: don't really have any evaluation, observing to evaluate reaction  
 Knowledge: observation  
 Make them feel like they are on their own in the last few days of training  
 Behavior: also observation  
 Business results: guest comments, customer feedback  
 Customer feedback is top, key

Business results: no link between training and business results  
 Feedback from other employees as evaluation  
 Reason for not having evaluation: there's nothing set in place for that area  
 That is something corporate would have to do  
 ROI: no evaluation  
 Pretty confident that training is successful (less turnover)  
 Turnover went down after the manager joined, and training plays important part  
 Training is huge  
 There's a cost in training  
 Expensive process but needs to happen  
 Budget for training  
 Budget on monthly basis  
 Compare costs with budget for training  
 Talk directly with employee  
 Actions taken after guest feedback: review, role play  
 One on one feedback with employee  
 If good comment, share with all  
 Share the bad comments, so employees aware and know what to do  
 Performance review every year  
 Try to do something good for them along the year  
 When you work, you are training  
 Managers partially have some of their own way of training/process  
 Nothing from corporate for evaluation  
 Have to let corporate know something they may want, something to look further into  
 Difficult to find one evaluation for everyone  
 Never had an evaluation to fill after training  
 The corporate is not there all the time  
 Like to know what guests are thinking and feeling, take their comments to heart  
 Like the survey, get customer's positive and negative  
 Customer feedback is key  
 Nothing to change or improve, feel we're very thorough  
 Read people wrongly sometimes  
 Communication is huge  
 Personality – like process to evaluate personality  
 Personality is huge  
 If you never smile, only say 2-3 words, it won't get you very far  
 Corporate does not provide anything set in place, so haven't started to do  
 Observation as the main method  
 Gained more by just observing than writing it on paper

#### **Interview 5**

Corporate has required training for each year  
 Tracking mechanism to make sure training is completed  
 Training for all employees (Orientation): within 14 days of hire  
 Training for employees who have guest contact: within 30 days of hire  
 Enhance employees' experience  
 More computer based training  
 Reports to track training  
 Empowerment guidelines for managers  
 Weekly training

Certification for training  
 Video taped and reviewed in order to be certified to train  
 Cadre of trainers  
 Cadre – highest level of certification  
 92% rating on customer service from guest survey  
 Room for improvement, that's why do empowerment training  
 Rated B+ by others (secret shoppers, managers from other hotels)  
 Role playing for training  
 Test at end of class, pass if over 85%, otherwise retake  
 Orientation – warm up for the next class  
 4 quadrants to inspire performance  
 More specific training for each department  
 Scenarios for computer based training  
 Different training for different department  
 Specific training for each department  
 Reaction: survey  
 Knowledge and behavior: service audits  
 Share feedback  
 Feedback session for improvement (one-on-one)  
 Observation for audit  
 Front desk employees do audit on each other  
 Audit: many people doing the audit -> consistency  
 Managers all do audits  
 Reaction: anonymous survey (paper based)  
 Reaction: survey at the end of any large program  
 Knowledge: service audit + test for knowledge  
 Online courses: different courses have different scores in order to pass  
 Behavior: service audit + guest scores (survey)  
 If high scores or good comments -> they are obviously taking some of the training and putting into their daily behavior  
 Business results: looking at data to link to business results (Guest service scores)  
 Good correlation  
 Put key position back through training to emphasize  
 Employees sharing experience in training  
 The old employees teach the new by learning  
 Financial driven, the value of human resources  
 Training to strengthen career development  
 Turnover average, high per employees  
 Use indicators to see how they are doing  
 All reports in one reporting mechanism  
 Turnover, engagement costs  
 Intangible indicators  
 No direct link to business results (e.g. profit, revenue)  
 Training: front desk 30-60 days, 90 days should be good for all information  
 No costs versus outcomes  
 Some training are required, don't look at cost associated with those  
 Stand up meeting  
 Pre-shift meeting to talk  
 Give suggestions on what could be done to improve customer service

Audit to test what was taught  
 Review feedback with employees  
 Send back to training or disciplinary actions if no improvement  
 Use the audit to start the conversation/feedback, continue audit to check improvement, if not disciplinary  
 Pull the person aside to give feedback  
 Audit from afar  
 Score failing -> planning training  
 Coaching and counseling  
 Review after 90 days  
 Review after 6 months: not scores but compliments and areas to improve  
 Get scores after 1 year  
 3 reviews during the first year  
 After the first year, 2 times/year  
 Action plan for improvement  
 Don't wait until review to address problems  
 To be improved: more up to date materials  
 More up to date information  
 Scripting, materials easy to teach  
 Like the current process

#### **Interview 6**

Training program not started yet  
 Not sure of what is in the new program  
 Haven't got training program for trainer  
 HR doesn't know ADR – relationship between HR and management  
 Guest survey to rate themselves  
 Top 20 in Midwest segment  
 Not sure of guest survey scores  
 Think employees are proud to work there  
 Orientation – basic overview, talks about brand  
 No specific training towards customer service  
 Training talk about customer service in general  
 More of an overview of philosophy, wouldn't call it training  
 Looking for friendly people when interview  
 Cannot teach someone to be friendly  
 Computer based training 3-4 days  
 Job shadowing  
 Script to follow at front desk  
 1 week training  
 Check in process  
 How to do, something you know because you work for so long  
 Reaction: no evaluation  
 Knowledge: no evaluation  
 Most people have bad perception of HR  
 May have something, but nothing shown in employees' personal files  
 90 day review  
 Standard format  
 For every job description  
 One-on-one feedback meeting

Take the employees' opinions  
 Observation for the 1-3 steps  
 2 times review in first year, annually after  
 Secret auditor/shopper – inspector from the corporate  
 Similar to secret shopper, but from corporate  
 Lose customer -> lose money -> relate to monetary  
 High turnover in the industry  
 There's a link between training and business results  
 Knows there's a link but nothing currently implemented  
 Don't consider cost of training, part of hourly wage  
 Orientation conducted every 2 weeks if possible (4-5 hours)  
 Addressing customer service problem right away: sit down and talk, retrain, give kudos in front of everyone  
 Never go back orientation  
 Retraining on certain things (all jobs)  
 Rather retrain than letting employees go and hire new ones - time consuming  
 Process is a combination from 2 corporations  
 Customer service scores as indicator of training  
 People thing: start with someone friendly  
 Good to have: specific to each job for training and training evaluation (standardization?)  
 Reason for not having any link or evaluation: waiting for corporate  
 If change from corporate: start from scratch  
 Good to have:
 

- Standard list for job
- Link job requirements to training
- People learn differently
- Evaluate reactions, process, and how each person doing
- Everyone learns differently

 Banquet and housekeeping have highest turnover rates  
 90 days and annual review: same format  
 Don't wait too long to address problem  
 Need improvement -> action plan  
 Will be good to link training to business results  
 Willing to change if there is a process has link  
 Training/shadowing with assistant manager  
 Scale from 1-10 for review  
 Include observation in performance review  
 Don't really have anything set up from corporation  
 Hard to employ anything without knowledge of other departments (never worked there)  
 Do not have time to establish that with other managers  
 A lot of things come from corporate  
 Most of the things come from corporate  
 Expecting the brand to have their own training

<b>Codes<sup>a</sup></b>	<b>Categories</b>	<b>Emerging themes</b>
<p>(1) It's people work with me, not for me Trust – you have to allow you their trust Sensitivity in communication Employee will not receive anything correctly if they are emotional Training is delicate Emphasis on clear communication Good communication, good relationship -&gt; good trainer</p> <p>(2) Show guests comment to everyone, the person who has bad comment will feel embarrassed enough to do better job If they get too emotional, they won't learn</p> <p>(4) Pass comments to everyone Feedback from other employees as evaluation One on one feedback with employee If good comment, share with all Share the bad comments, so employees aware and know what to do Try to do something good for them along the year</p> <p>(5) Share feedback Pull the person aside to give feedback Feedback session for improvement (one-on-one)</p> <p>(6) Think employees are proud to work there One-on-one feedback meeting Take the employees' opinions</p>	Sensitivity in communication	“Communication is huge”
<p>(1) Encourage managers to give constant feedback Good to have more constant feedback</p> <p>(2)</p>	Personal interaction/communication	

<p>Comment on the job: usually want to do in private, not in front of people because that will embarrass them</p> <p>(3)</p> <p>Informal conversation for review</p> <p>Informal conversations are on specific issues</p> <p>Individualized basis for employee improvement</p> <p>Work closely with employees -&gt; personal observation</p> <p>Personal interaction</p> <p>Informal evaluation</p> <p>Ongoing informal evaluation</p> <p>Small size: not difficult to be constantly evaluation</p> <p>My size of organization doesn't require anymore link than me observing and talking to customers</p> <p>Individualized basis for employee improvement</p> <p>(4)</p> <p>Try to do one on one training</p> <p>Train with different people on different shifts</p> <p>Interaction with employees, use own judgment</p> <p>Talk directly with employee</p> <p>One on one feedback with employee</p> <p>Communication is huge</p> <p>(5)</p> <p>Share feedback</p> <p>Feedback session for improvement (one-on-one)</p> <p>Review feedback with employees</p> <p>Pull the person aside to give feedback</p> <p>Coaching and counseling</p> <p>Action plan for improvement</p> <p>(6)</p> <p>Addressing customer service problem right away: sit down and talk, retrain, give kudos in front of everyone</p> <p>One-on-one feedback meeting</p> <p>Take the employees' opinions</p>		
<p>(1)</p> <p>Employees are into customer service/customer</p>	<p>Looking for friendly people</p>	

<p>service orientated</p> <p>(4)</p> <p>Personality – like process to evaluate personality</p> <p>Personality is huge</p> <p>If you never smile, only say 2-3 words, it won't get you very far</p> <p>(6)</p> <p>Looking for friendly people when interview</p> <p>Cannot teach someone to be friendly</p> <p>People thing: start with someone friendly</p>	<p>when interview</p>	
<p>(1)</p> <p>Everyone learn differently</p> <p>(3)</p> <p>Length of training varies on employees and how they start – everyone learns differently</p> <p>(4)</p> <p>Difficult to find one evaluation for everyone</p> <p>(5)</p> <p>More specific training for each department</p> <p>Different training for different department</p> <p>Specific training for each department</p> <p>Employees sharing experience in training</p> <p>The old employees teach the new by learning</p> <p>(6)</p> <p>People learn differently</p> <p>Evaluate reactions, process, and how each person doing</p> <p>Everyone learns differently</p>	<p>Everyone learn differently</p>	
<p>(1)</p> <p>Communicate better with individual employee to succeed</p> <p>Communication: positive reinforcement</p> <p>Rewards for positive results</p> <p>(3)</p> <p>Incentives program for positive reinforcement</p> <p>(5)</p> <p>Review after 90 days</p> <p>Review after 6 months: not scores but</p>	<p>Positive reinforcement</p>	

<p>compliments and areas to improve</p> <p>Get scores after 1 year</p> <p>(6)</p> <p>Addressing customer service problem right away: sit down and talk, retrain, give kudos in front of everyone</p>		
<p>(1)</p> <p>Behavior and business results: Absolutely related</p> <p>Behavior and business results: Directly correlated</p> <p>Know there's a link, but now aware of tools to do that</p> <p>ROI: No link to monetary</p> <p>Business results and ROI: Wouldn't even know how to begin to measure that</p> <p>Know there's a link</p> <p>(3)</p> <p>Business results: no formal way to link behavior to business results</p> <p>Knows there's a link, only link it informally</p> <p>No scale that can be used to link</p> <p>Know that they are linked and repeat business</p> <p>Know customer service is essential for repeat customers</p> <p>My size of organization doesn't require anymore link than me observing and talking to customers</p> <p>Doesn't make sense to measure in other way if already have high scores</p> <p>Have the general framework to know that we are successful</p> <p>Not onto made up analysis to prove a point one way or the other</p> <p>Customer service is highest area with guest contact</p> <p>(4)</p> <p>Customer service is key</p> <p>Reason for not having evaluation: there's nothing set in place for that area</p> <p>Turnover went down after the manager joined, and training plays important part</p> <p>Training is huge Nothing to change or improve, feel we're very thorough</p>	<p>Doesn't make sense to find way to link if it already works</p> <p>Nothing set in place for evaluation</p> <p>Aware, but don't know how to link</p> <p>Knows it is important, but no formal/current way to link</p>	<p>"I wouldn't even know how you would begin to measure that"</p>

<p>(5)</p> <p>Business results: looking at data to link to business results (Guest service scores)</p> <p>Good correlation</p> <p>Intangible indicators</p> <p>No direct link to business results (e.g. profit, revenue)</p> <p>No costs versus outcomes</p> <p>Some training are required, don't look at cost associated with those</p> <p>(6)</p> <p>Training program not started yet</p> <p>Not sure of what is in the new program</p> <p>Haven't got training program for trainer</p> <p>No specific training towards customer service</p> <p>Training talk about customer service in general</p> <p>More of an overview of philosophy, wouldn't call it training</p> <p>Lose customer -&gt; lose money -&gt; relate to monetary</p> <p>There's a link between training and business results</p> <p>Knows there's a link but nothing currently implemented</p> <p>Don't consider cost of training, part of hourly wage</p> <p>Will be good to link training to business results</p> <p>Willing to change if there is a process has link</p>		
<p>(1)</p> <p>Evaluation may be hard to change as they come from corporate level</p> <p>Leave it to corporate to handle development</p> <p>Corporate's job to develop process, manager's job to carry it out</p> <p>(4)</p> <p>Reason for not having evaluation: there's nothing set in place for that area</p> <p>That is something corporate would have to do</p> <p>Managers partially have some of their own way of</p>	<p>Corporate to develop process</p>	

<p>training/process</p> <p>Nothing from corporate for evaluation</p> <p>Have to let corporate know something they may want, something to look further into</p> <p>The corporate is not there all the time</p> <p>Corporate does not provide anything set in place, so haven't started to do</p> <p>(6)</p> <p>Training program not started yet</p> <p>Process is a combination from 2 corporations</p> <p>Reason for not having any link or evaluation: waiting for corporate</p> <p>If change from corporate: start from scratch</p> <p>Don't really have anything set up from corporation</p> <p>A lot of things come from corporate</p> <p>Most of the things come from corporate</p> <p>Expecting the brand to have their own training</p>		
<p>(1)</p> <p>Time consuming</p> <p>(3)</p> <p>Overwhelmed with stuff to do</p> <p>Long hours, long week, haven't gotten to that yet</p> <p>(6)</p> <p>Do not have time to establish that with other managers</p>	<p>Time consuming/Too busy</p>	
<p>(6)</p> <p>HR doesn't know ADR – relationship between HR and management</p> <p>How to do, something you know because you work for so long</p> <p>Most people have bad perception of HR</p> <p>May have something, but nothing shown in employees' personal files</p> <p>Hard to employ anything without knowledge of other departments (never worked there)</p>	<p>Hard to do without knowledge of other department</p> <p>Relationship between HR and management</p>	
<p>(1)</p> <p>Battle between operation and expenses, what we want to do and what we can do</p>	<p>Costly in short term, but profitable in long term</p>	

<p>(2) Business results: better in long term to have well-trained employees Cost vs. results: costly in short term, but profitable in long term Saving in the long term</p> <p>(3) Training costs money Well known fact that training costs money Turnover costs are expensive If can retain employee, cost less</p> <p>(4) There's a cost in training Expensive process but needs to happen</p> <p>(5) Turnover average, high per employees Turnover, engagement costs Financial driven, the value of human resources</p> <p>(6) Rather retrain than letting employees go and hire new ones - time consuming Lose customer -&gt; lose money -&gt; relate to monetary High turnover in the industry</p>		
<p>(2) Look at results, but do not establish link</p> <ul style="list-style-type: none"> <li>- Because of the changes in the hotel (management change)</li> <li>- Training (e.g. keeping record) is the least important on the list</li> <li>- Manager doesn't really care if training is recorded, as long as everything is good</li> <li>- Long hours, long week, haven't gotten to that yet</li> <li>- Haven't seen the importance of keeping records</li> <li>- As long as it's working</li> <li>- Don't care about how it's done, as long as nothing goes wrong</li> </ul>	<p>Training is not currently important</p>	

<p>(1) Consistency in training Consistency – “Wow, every single time I’ve come here, this has happened”</p> <p>(3) Improvement: consistency to follow up with areas of weaknesses Consistency to follow up on ongoing specific improvement conversation (informal) Improvement for the manager: consistency Observant to make sure of follow up</p> <p>(4) Difficult to find one evaluation for everyone Read people wrongly sometimes</p> <p>(5) To be improved: more up to date materials More up to date information Audit: many people doing the audit -&gt; consistency</p> <p>(6) Good to have: specific to each job for training and training evaluation (standardization?) Good to have: <ul style="list-style-type: none"> <li>- Standard list for job</li> <li>- Link job requirements to training</li> <li>- Evaluate reactions, process, and how each person doing</li> </ul> </p>	<p>Standardization /consistency Consistency to follow up</p>	<p>Characteristics a process should possess</p>
<p>(1) You got to inspect what you expect</p> <p>(3) Linking cost and outcomes: more matter whether it’s measureable Not onto made up analysis to prove a point one way or the other</p> <p>(6) Good to have: <ul style="list-style-type: none"> <li>- Standard list for job</li> <li>- Link job requirements to training</li> </ul> </p>	<p>Measurable</p>	
<p>(2)</p>	<p>Record of</p>	

<p>Start recording if mistake repeated</p> <p>Currently based on what's being seen but not actual facts written down</p> <p>Need to record things and be more organized, and link them to profit</p> <p>Need a good record of training to link to training</p> <p>Hard to link training and evaluation without record</p> <p>Customer review</p> <p>Good characteristics:</p> <ul style="list-style-type: none"> <li>- Customer reviews</li> <li>- Keep record of training</li> <li>- Keep track of what was done</li> <li>- Notes of taken actions</li> <li>- Record everything, positive or negative</li> </ul> <p>(5)</p> <p>Tracking mechanism to make sure training is completed</p> <p>Reports to track training</p> <p>(6)</p> <p>Good to have:</p> <ul style="list-style-type: none"> <li>- Evaluate reactions, process, and how each person doing</li> </ul>	<p>training</p>	
<p>(3)</p> <p>Good characteristics:</p> <ul style="list-style-type: none"> <li>- Will depend on the size of the organization</li> <li>- The responsible people working closely with others will change the process</li> <li>- Depend on organization structure</li> <li>- Work closely with employees -&gt; personal observation</li> <li>- Personal interaction</li> <li>- Small size: not difficult to be constantly evaluation</li> <li>- Easier to informally evaluate in small organization</li> <li>- If big size: probably rely more on written strategies and written evaluations</li> </ul> <p>My size of organization doesn't require anymore</p>	<p>Depending on size of organization</p>	

<p>link than me observing and talking to customers (4) Gained more by just observing than writing it on paper (5) Front desk employees do audit on each other Audit: many people doing the audit -&gt; consistency Managers all do audits More computer based training (6) Computer based training 3-4 days</p>		
<p>(1) Never miss a day without opportunity to train Always look for opportunity to train Student of life, always in training Constant learning and changes Small trainings at daily/monthly meetings Consistently look for areas to improve Training all the time Continuous on the job evaluation (every week) Improve and commitment plan Ongoing training Encourage managers to give constant feedback Good to have more constant feedback (2) Feedback right away Share feedback with all employees (good or bad) Show guests comment to everyone, the person who has bad comment will feel embarrassed enough to do better job Comment on the job: usually want to do in private, not in front of people because that will embarrass them Constant learning for manager (3) Coaching along the way Constant observation – always evaluate Observation all the time, training technically</p>	<p>Training never stops Everyday is a evaluation period Constant feedback on the job It can always be improved</p>	<p>“Everyday is an evaluation period”</p>

<p>never stops</p> <p>Evaluation is an ongoing process, normal part of the day</p> <p>Ongoing informal evaluation</p> <p>Everyday is an evaluation period</p> <p>(4)</p> <p>When you work, you are training</p> <p>(5)</p> <p>Front desk employees do audit on each other</p> <p>Audit: many people doing the audit -&gt; consistency</p> <p>Managers all do audits</p> <p>3 reviews during the first year</p> <p>After the first year, 2 times/year</p> <p>Action plan for improvement</p> <p>Don't wait until review to address problems</p>		
<p>(2)</p> <p>Feedback right away</p> <p>Feedback to employee upon seeing mistakes</p> <p>(5)</p> <p>Don't wait until review to address problems</p> <p>Audit to test what was taught</p> <p>Pull the person aside to give feedback</p> <p>Audit from afar</p> <p>(6)</p> <p>Addressing customer service problem right away: sit down and talk, retrain, give kudos in front of everyone</p> <p>Don't wait too long to address problem</p>	<p>Don't wait until review to address problem</p>	
<p>(1)</p> <p>Knowledge: Observation to test knowledge</p> <p>Behavior: Constant observation and evaluation</p> <p>Team members observe each other</p> <p>Listening posts</p> <p>Aware and observational towards guests</p> <p>Listening posts to fix problem right away</p> <p>(2)</p> <p>Observation</p>	<p>Observation is key</p>	

<p>Reaction: Discussions and observation  Behavior: observation  (3)  Constant observation – always evaluate  Reaction: observation on their progress  (misunderstood question)  Observation all the time, training technically  never stops  Knowledge: observation  Behavior: observation  (4)  Interaction with employees, use own judgment  Own feelings to see if they are ready  Observation, watching them  See, hear more than evaluation on a piece of paper  Reaction: observation  Reaction: don't really have any evaluation,  observing to evaluate reaction  Knowledge: observation  Behavior: also observation  Observation as the main method  Gained more by just observing than writing it on  paper  (5)  Observation for audit  Front desk employees do audit on each other  Audit: many people doing the audit -&gt;  consistency  Managers all do audits  Audit to test what was taught  Audit from afar  (6)  Observation for the 1-3 steps  Include observation in performance review</p>		
<p>(1)  Solicit guest feedback  Customization for guests  In house comment cards  Use guest survey to target specific weaknesses</p>	<p>Guest  evaluation is  important</p>	

<p>(2)</p> <p>Guest survey: email to guest and encourage them to go to website</p> <p>Rated online and compared with other hotels in the same group</p> <p>Business results: guest review is one of the main thing</p> <p>Care a lot about what guests think</p> <p>ROI: guests happy -&gt; come back -&gt; loyal guests -&gt; profit goes up</p> <p>Cannot always be there, so guests' evaluation tells how the employees are doing</p> <p>Like using guest review to evaluate</p> <p>Currently keep all guest reviews recorded</p> <p>(3)</p> <p>Customer generated feedback</p> <p>Evaluate by guest concern</p> <p>Knowledge and behavior: guest survey</p> <p>(4)</p> <p>Guest survey</p> <p>Customer feedback is top, key</p> <p>Business results: guest comments, customer feedback</p> <p>Like to know what guests are thinking and feeling, take their comments to heart</p> <p>Like the survey, get customer's positive and negative</p> <p>Customer feedback is key</p> <p>(5)</p> <p>92% rating on customer service from guest survey</p> <p>Business results: looking at data to link to business results (Guest service scores)</p> <p>Score failing -&gt; planning training</p> <p>Put key position back through training to emphasize</p> <p>(6)</p> <p>Guest survey to rate themselves</p> <p>Not sure of guest survey scores</p> <p>Customer service scores as indicator of training</p>		
(3)	Performance	

<p>Performance appraisal for general review</p> <p>Performance appraisal: 2-3 times/the first year. 1-2 times/year afterward</p> <p>Performance appraisal meeting</p> <p>Written evaluation form</p> <p>Numerical score appraisal</p> <p>No set of rules for numerical scores (what to do with a numerical score)</p> <p>(4)</p> <p>Rating system: less than expected, expected, better than expected</p> <p>Performance review every year</p> <p>(5)</p> <p>Review after 90 days</p> <p>Review after 6 months: not scores but compliments and areas to improve</p> <p>Get scores after 1 year</p> <p>3 reviews during the first year</p> <p>After the first year, 2 times/year</p> <p>Action plan for improvement</p> <p>(6)</p> <p>90 day review</p> <p>Standard format</p> <p>For every job description</p> <p>90 days and annual review: same format</p> <p>2 times review in first year, annually after</p> <p>Scale from 1-10 for review</p> <p>Include observation in performance review</p>	<p>appraisal</p>	
<p>(1)</p> <p>Continuing education items</p> <p>Thousands of other training for improvement</p> <p>Resourceful, other training options</p> <p>Utilizing the resources</p> <p>Career development</p> <p>Career development mainly for managers</p> <p>(5)</p> <p>Enhance employees' experience</p> <p>Training to strengthen career development</p> <p>Put key position back through training to</p>	<p>Training to strengthen career development</p>	

emphasize		
<p>(1) Situation/scenarios for training</p> <p>(2) Training: videos example of good and bad customer service</p> <p>(4) Role play for training A lot of role play in training Role play in the first week of training Actions taken after guest feedback: review, role play</p> <p>(5) Role playing for training Scenarios for computer based training</p>	Role playing, scenario	
<p>(5) Rated B+ by others (secret shoppers, managers from other hotels)</p> <p>(6) Secret auditor/shopper – inspector from the corporate Similar to secret shopper, but from corporate</p>	Secret shopper	
<p>(1) Empowerment, provide people with the resources Provide the resources Empowerment – power to take care of the guests Empowerment – empower all team members to take care of guest concern immediately</p> <p>(5) Empowerment guidelines for managers Room for improvement, that’s why do empowerment training</p>	Empowerment	Empowerment
<p>(1) Reaction: no form to evaluate, because not beneficial No process to evaluate employee reaction Employee sign form saying they understand the information Unbeneficial to evaluation reaction because a lot</p>		Reaction

<p>of time and energy was spent in there already (2) Reaction: Discussions and observation Listen for questions, can tell who understand or not Reaction: No official form for evaluation (3) Reaction: observation on their progress (4) Reaction: observation Reaction: don't really have any evaluation, observing to evaluate reaction (5) Reaction: survey Reaction: anonymous survey (paper based) Reaction: survey at the end of any large program (6) Observation for the 1-3 steps</p>		
<p>(1) More beneficial to evaluate knowledge Test, demonstration, recap, train others as ways to test knowledge Knowledge: Observation to test knowledge (2) Quizzes: pass and fail, pass means learning Knowledge: Feedback from other employees Listen to phone conversation (3) Knowledge: observation Feedback from other employees Feedback from the employee themselves Knowledge and behavior: guest survey (4) Knowledge: observation Make them feel like they are on their own in the last few days of training (5) Test at end of class, pass if over 85%, otherwise retake</p>		<p>Learning</p>

<p>Knowledge and behavior: service audits  Observation for audit  Knowledge: service audit + test for knowledge  Online courses: different courses have different scores in order to pass  (6)  Observation for the 1-3 steps</p>		
<p>(1)  Behavior: Constant observation and evaluation  (2)  Behavior: observation  Behavior: check their transaction on system  Phone listening only during training  Observation  (3)  Knowledge and behavior: guest survey  (4)  Behavior: also observation  (5)  Knowledge and behavior: service audits  Observation for audit  Behavior: service audit + guest scores (survey)  If high scores or good comments -&gt; they are obviously taking some of the training and putting into their daily behavior  (6)  Observation for the 1-3 steps</p>		<p>Behavior</p>
<p>(1)  Behavior and business results: Absolutely related  Behavior and business results: Directly correlated  Know there's a link, but now aware of tools to do that  (2)  Business results: better in long term to have well-trained employees  Business results: guest review is one of the main thing  Care a lot about what guests think  The improved rating has something to do with</p>		<p>Business results</p>

<p>training</p> <p>Business results: do not link training with business results</p> <p>Business results: can see the link, but no recorded direct link</p> <p>(3)</p> <p>Business results: no formal way to link behavior to business results</p> <p>Knows there's a link, only link it informally</p> <p>(4)</p> <p>Business results: guest comments, customer feedback</p> <p>Customer feedback is top, key</p> <p>Business results: no link between training and business results</p> <p>Feedback from other employees as evaluation</p> <p>Reason for not having evaluation: there's nothing set in place for that area</p> <p>That is something corporate would have to do</p> <p>(5)</p> <p>Business results: looking at data to link to business results (Guest service scores)</p> <p>Good correlation</p> <p>No direct link to business results (e.g. profit, revenue)</p> <p>(6)</p> <p>There's a link between training and business results</p> <p>Knows there's a link but nothing currently implemented</p> <p>Will be good to link training to business results</p> <p>Willing to change if there is a process has link</p>		
<p>(1)</p> <p>ROI: No link to monetary</p> <p>Business results and ROI: Wouldn't even know how to begin to measure that</p> <p>(2)</p> <p>ROI: guests happy -&gt; come back -&gt; loyal guests -&gt; profit goes up</p> <p>(3)</p>		ROI

<p>Knows there's a link, only link it informally No scale that can be used to link Know that they are linked and repeat business (4) ROI: no evaluation Pretty confident that training is successful (less turnover) Turnover went down after the manager joined, and training plays important part (5) Financial driven, the value of human resources No direct link to business results (e.g. profit, revenue) (6) Knows there's a link but nothing currently implemented Lose customer -&gt; lose money -&gt; relate to monetary Will be good to link training to business results Willing to change if there is a process has link</p>		
<p>(2) Cost vs. results: costly in short term, but profitable in long term Saving in the long term No link of turn over to training (3) No link of costs to results Training costs money Well known fact that training costs money Turnover costs are expensive If can retain employee, cost less Analyze some of the costs No comparison to training results (4) Training is huge There's a cost in training Expensive process but needs to happen Budget for training Budget on monthly basis</p>		Cost vs results

<p>Compare costs with budget for training (5) Turnover average, high per employees Use indicators to see how they are doing Turnover, engagement costs No costs versus outcomes Some training are required, don't look at cost associated with those (6) Don't consider cost of training, part of hourly wage</p>		
<p>(1) Rewards for positive results Negative results: action plan, retrain, reprovide tools, reevaluate Measure results again (2) Comment on the job: usually want to do in private, not in front of people because that will embarrass them Feedback to employee upon seeing mistakes Show guests comment to everyone, the person who has bad comment will feel embarrassed enough to do better job Discussion for improvement Share feedback with all employees (good or bad) Start recording if mistake repeated Incentives program for positive reinforcement (3) Not uncommon to retrain Follow up when necessary on deficiency of customer service Informal evaluation Individualized basis for employee improvement (4) Talk directly with employee Actions taken after guest feedback: review, role play One on one feedback with employee</p>		<p>Actions</p>

<p>If good comment, share with all</p> <p>Share the bad comments, so employees aware and know what to do</p> <p>Try to do something good for them along the year</p> <p>(5)</p> <p>Audit to test what was taught</p> <p>Review feedback with employees</p> <p>Send back to training or disciplinary actions if no improvement</p> <p>Use the audit to start the conversation/feedback, continue audit to check improvement, if not disciplinary</p> <p>Pull the person aside to give feedback</p> <p>Audit from afar</p> <p>Score failing -&gt; planning training</p> <p>Coaching and counseling</p> <p>Review after 90 days</p> <p>Review after 6 months: not scores but compliments and areas to improve</p> <p>Get scores after 1 year</p> <p>3 reviews during the first year</p> <p>After the first year, 2 times/year</p> <p>Action plan for improvement</p> <p>Don't wait until review to address problems</p> <p>(6)</p> <p>Addressing customer service problem right away: sit down and talk, retrain, give kudos in front of everyone</p> <p>Never go back orientation</p> <p>Retraining on certain things (all jobs)</p> <p>Rather retrain than letting employees go and hire new ones - time consuming</p> <p>90 days and annual review: same format</p> <p>Don't wait too long to address problem</p> <p>Need improvement -&gt; action plan</p>		
<p><sup>a</sup>The number in parentheses indicates interview number</p>		

## APPENDIX F. QUESTIONNAIRE

Dear Hotel Manager,

My name is Anh Ho, and I am a graduate student in the Hospitality Management program at Iowa State University. I am conducting a study to understand how hotel managers evaluate customer service training. I am writing this letter to briefly explain the study procedures and to **request your assistance with the study.**

Hotel managers' awareness and perceptions of customer service training evaluation are important factors for developing a good training evaluation model. The results of this study will provide researchers with the knowledge necessary to develop practical training evaluation processes that managers can apply in their operations. Because you are a manager with training responsibilities, your input to this study is valuable. If you believe that you are not the right person for this, please pass the survey to the person responsible for training in your hotel.

The survey will consist of close-ended and open-ended questions related to the training evaluation process in your organization and your perceptions about that process. It will take around 20 minutes to complete the survey. You may choose to skip any questions you are not comfortable answering. Your participation is completely voluntary and you may refuse to participate. Your responses will be kept confidential. There are no costs and no foreseeable risks associated with participating in this research. **If you agree to participate in this study, please fill out the survey on the following pages. At the end of the survey, you will be asked if you wish to be entered in a drawing for a \$50 gift card.**

Thank you for your time and consideration. If you have any questions, please do not hesitate to contact me or my major professor, Dr. Susan Arendt, at the emails or phone numbers listed below.

Best regards,

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Graduate Student  
Hospitality Management Program  
Iowa State University  
[anhho@iastate.edu](mailto:anhho@iastate.edu)  
515-441-4494

Susan W. Arendt, PhD, RD  
Associate Professor  
Hospitality Management Program  
Iowa State University  
[sarendt@iastate.edu](mailto:sarendt@iastate.edu)  
515-294-7575

## CUSTOMER SERVICE TRAINING EVALUATION SURVEY

Please select your response by either filling in the circle or marking the appropriate response.

### A. DEMOGRAPHIC INFORMATION

#### Section 1: Hotel Information

1. How many rooms are there at the hotel where you work?
  - Less than 100 rooms
  - 100 – 200 rooms
  - 201 – 300 rooms
  - More than 300 rooms
  
2. To which of the following types does this hotel belong?
  - Independent hotel
  - Chain hotel
  - Franchised hotel
  - Other. Please specify: \_\_\_\_\_

#### Section 2: Personal Information

3. What is your gender?
  - Male
  - Female
  
4. What is your ethnicity?
  - Asian/Pacific Islander
  - Black/African-American
  - Hispanic/Latino
  - Native American Indian
  - White/Caucasian
  - Other. Please specify: \_\_\_\_\_
  
5. What is your age?
  - Younger than 30 years old
  - 30-40 years old
  - 41-50 years old
  - 51-60 years old
  - Older than 60 years old
  
6. What is the highest level of education you have completed?
  - High school (General Education Diploma)
  - Associate's degree
  - Bachelor's degree
  - Master's degree
  - Doctorate
  - Other. Please specify: \_\_\_\_\_

7. How many years of experience do you have working in the hotel industry?
  - Less than 1 year
  - 1 – 2 years
  - More than 2 years, but less than 5 years
  - 5 years or more, but less than 10 years
  - 10 years or more, but less than 15 years
  - 15 years or more
  
8. How long have you worked in this lodging company/group/chain?
  - Less than 1 year
  - 1 – 2 years
  - More than 2 years, but less than 5 years
  - 5 years or more, but less than 10 years
  - 10 years or more, but less than 15 years
  - 15 years or more
  
9. How long have you worked at this hotel?
  - Less than 1 year
  - 1 – 2 years
  - More than 2 years, but less than 5 years
  - 5 years or more, but less than 10 years
  - 10 years or more, but less than 15 years
  - 15 years or more
  
10. In general, how long have you been involved with training employees?
  - Less than 1 year
  - 1 – 2 years
  - More than 2 years, but less than 5 years
  - 5 years or more, but less than 10 years
  - 10 years or more, but less than 15 years
  - 15 years or more

**Please continue to the next page.**

## B. TRAINING EVALUATION

1. Please circle your response based on the extent to which the following activities are **important** to you in **evaluating customer service training**.

Use the following scale: (1) = Not at all important, (2) = Very unimportant, (3) = Somewhat unimportant, (4) = Neutral, (5) = Somewhat important, (6) = Very important, and (7) = Extremely important.

	Not at all important	Very unimportant	Somewhat unimportant	Neutral	Somewhat important	Very important	Extremely important
How important is each of the following methods in assessing employees' feedback toward the training?							
Evaluation form	1	2	3	4	5	6	7
Observation	1	2	3	4	5	6	7
Discussion with employees	1	2	3	4	5	6	7
How important is each of the following methods in assessing the amount of knowledge employees gained from the training?							
Observation	1	2	3	4	5	6	7
Test after training	1	2	3	4	5	6	7
Guest comment cards/surveys	1	2	3	4	5	6	7
How important is each of the following methods in determining whether employees apply what they have learned from the training?							
Guest comment cards/surveys	1	2	3	4	5	6	7
Guests' direct feedback	1	2	3	4	5	6	7
Observation	1	2	3	4	5	6	7
How important is it to link employees' behaviors (as a result of training) to business results (e.g. percentage of return customers, turnover rate)?	1	2	3	4	5	6	7
How important is it to link training results with monetary results (e.g. revenue, cost savings)?	1	2	3	4	5	6	7
How important is it to analyze the outcomes of training compared to the costs of that training?	1	2	3	4	5	6	7
How important is it to take follow-up actions based on training evaluation results?	1	2	3	4	5	6	7

2. Please circle your response based on **the extent to which you use** the following activities in **evaluating customer service training**.

Use the following scale: (1) = Never, (2) = Rarely, (3) = Occasionally, (4) = Sometimes, (5) = Frequently, (6) = Usually, and (7) = Every time.

	Never	Rarely	Occasionally	Sometimes	Frequently	Usually	Every time
How often do you use each of the following methods in assessing employees' feedback toward the training?							
Evaluation form	1	2	3	4	5	6	7
Observation	1	2	3	4	5	6	7
Discussion with employees	1	2	3	4	5	6	7
How often do you use each of the following methods in assessing the amount of knowledge employees gained from the training?							
Observation	1	2	3	4	5	6	7
Test after training	1	2	3	4	5	6	7
Guest comment cards/surveys	1	2	3	4	5	6	7
How often do you use each of the following methods in determining whether employees apply what they have learned from the training?							
Guest comment cards/surveys	1	2	3	4	5	6	7
Guests' direct feedback	1	2	3	4	5	6	7
Observation	1	2	3	4	5	6	7
How often do you link employees' behaviors (as results of training) to business results (e.g. percentage of return customers, turnover rate)?	1	2	3	4	5	6	7
How often do you link training results with monetary results (e.g. revenue, cost savings)?	1	2	3	4	5	6	7
How often do you analyze the outcomes of training compared to the costs of that training?	1	2	3	4	5	6	7
How often do you take follow-up actions based on training evaluation results?	1	2	3	4	5	6	7

3. If you are not using any of the activities listed above, please indicate the reason why you are NOT employing them to **evaluate customer service training**? (Mark all that apply)
- It is time consuming to evaluate training.
  - The cost of evaluating training is too high.
  - The evaluation is hard to conduct.
  - I do not know any way to evaluate training.
  - There is no use for conducting training evaluation.
  - I do not see any value in evaluating training.
  - The corporate office does not have anything in place for training evaluation.
  - Other. Please specify: \_\_\_\_\_

4. How **important** is each of the following characteristics in developing a **practical and applicable training evaluation process**?

Use the following scale: (1) = Not at all important, (2) = Very unimportant, (3) = Somewhat unimportant, (4) = Neutral, (5) = Somewhat important, (6) = Very important, and (7) = Extremely important.

Characteristics	Not at all important	Very unimportant	Somewhat unimportant	Neutral	Somewhat important	Very important	Extremely important
Easy to conduct	1	2	3	4	5	6	7
Provides timely feedback	1	2	3	4	5	6	7
Consists of anonymous evaluation from outside sources (e.g. mystery shopper)	1	2	3	4	5	6	7
Standardized	1	2	3	4	5	6	7
Cost effective	1	2	3	4	5	6	7
Simple to conduct	1	2	3	4	5	6	7
Helps me to continuously evaluate training results	1	2	3	4	5	6	7
Provides consistent evaluation	1	2	3	4	5	6	7
Linked to business results (e.g. revenue, turnover rate)	1	2	3	4	5	6	7
Contains practical analysis rather than theoretical analysis	1	2	3	4	5	6	7
Other. Please specify: _____	1	2	3	4	5	6	7

**5. How important are the following information sources to you when you develop a customer service training evaluation process?**

*Use the following scale: (1) = Not at all important, (2) = Very unimportant, (3) = Somewhat unimportant, (4) = Neutral, (5) = Somewhat important, (6) = Very important, and (7) = Extremely important.*

Sources	Not at all important	Very unimportant	Somewhat unimportant	Neutral	Somewhat important	Very important	Extremely important
Headquarter/Corporate Office	1	2	3	4	5	6	7
The Internet	1	2	3	4	5	6	7
Personal experiences	1	2	3	4	5	6	7
Colleagues	1	2	3	4	5	6	7
Conferences	1	2	3	4	5	6	7
Business magazines/newspapers	1	2	3	4	5	6	7
Books	1	2	3	4	5	6	7
Other. Please specify: _____	1	2	3	4	5	6	7

**6. Please provide any additional comments about the evaluation of customer service training at this hotel (optional).**

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**Please fold the survey in half and make sure that the self-addressed, prepaid business reply page is visible; tape the bottom and the sides, and drop it in the mail.**

**Your participation in this study is greatly appreciated!**

**If you would like to enter a drawing for one of two \$50 Wal-Mart gift cards, please provide your information below. This information will be kept separate and not be linked to any of your answers.**

**Name:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**APPENDIX G. PILOT TEST FEEDBACK FORM**

This pilot test is intended to test reliability and wording of the questionnaire. Please fill out the attached questionnaire about customer service training evaluation. Feel free to make comments on the questionnaire if you feel getting your point across would be easier by doing so. After filling out the questionnaire, please respond to the following questions:

1. Were the questions understandable? \_\_\_\_\_

If not, please indicate the question number and why it was difficult to understand:

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2. Were the scales understandable? \_\_\_\_\_

If not, please indicate what you feel could be done to make the scale easier to understand:

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3. Overall, what suggestions do you have to improve the questionnaire?

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Thank you for all your help with this pilot test; your input is greatly appreciated.

## APPENDIX H. REMINDER CARD

Dear Hotel Manager,

About two weeks ago, you received a survey booklet from Iowa State University about customer service training evaluation. If you have already completed and mailed back the survey, please accept our gratitude for your support. **If you have not had the time to complete the survey, we would appreciate you taking some time to do so as soon as possible. Your input is extremely valuable.** We would like to receive your completed survey back by **August 3<sup>rd</sup>, 2012**. If you did not receive the survey or have misplaced the original, please contact us and we will be happy to provide another copy of the survey.

Thank you for your time and consideration. If you have any questions, please contact us at the emails or phone numbers listed below.

Best regards,

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