

EFFECT OF ROLE-PLAY AS A FORMATIVE ASSESSMENT TECHNIQUE ON JOB PERFORMANCE

by

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Declaration

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I declare that "*Effect of Role-play as a Formative Assessment Technique on Job Performance*" is my own work and that all the sources I have quoted have been indicated and acknowledged by detailed referencing.

Signature
(NN Munyai)

Date

Summary

The objective of the research was to investigate an improvement in job performance when role-play is used as a training and assessment tool in a sales call centre environment. The research was conducted by means of a competence assessment used at different stages (Quality Assurance Performance Management Questionnaire). The final stage was two weeks after the learners who had qualified to be sales agents had entered a real working environment. At this final stage, calls were retrieved and rated against the Quality Assurance Performance Management Questionnaire (QAPMQ).

A sample of 40 novice sales agents (learners) were selected and randomly divided into the control and experimental groups.

The research findings indicated that if planned well, role-play can be an effective training and assessment tool.

Key Terms

Assessment, formative assessment, integrated assessment, summative assessment, learner, National Qualification Framework, critical cross field outcomes, job performance, role-play, Social cognition theory, Gagne integrated theory

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Chapter 1

Research Introduction, Problem Statement and Objectives

1.1 Introduction

Role-play has been used as a learning tool for a long time. Without defining it as such, role-play is utilised as a basic tool of life. Whenever individuals project a kind of 'what if' scenario for the future, they indulge in some type of a role-play. They are projecting themselves into an imaginary situation where, although they cannot control the outcome, they can anticipate some or all the conditions and 'rehearse' their performance, in order to influence the outcome, which ultimately contributes to their learning (Barshaw & Ingram, 1996; Harbour & Connick, 2004-2005; The Quality Improvement Agency for Lifelong Learning, 2008).

In a learning environment, role-play has been rated to be a flexible and effective tool to transfer knowledge and skills (Blanchard & Thacker, 2004; Harbour & Connick, 2004-2005; Rae, 1993; Professional Role-Players, 2011). Learning can occur in various ways, and training is one of them.

Davis and Davis (1998:44) describe training as a process by means of which skills are developed, information is provided and attitude is nurtured. In addition it facilitates learning which is a universal activity, designed to increase capability and is facilitated formally and informally by many types of individuals at different levels of an organisation. Although training is designed to facilitate learning, learning can take place without training (Lawson, 2006).

In order to establish whether learning has occurred, it is important to infer this by studying the observable effects before, during and after the learning process. Such effects can be established by means of competence assessment techniques, such as role-play, written tests, case studies and many others to assist in evaluating learning

performance before moving to a real working environment. Therefore, assessment forms an integral part of instruction and is an important source of reflection for learners and facilitators (Blanchard & Thacker, 2004; Davis & Davis, 1998; Rae, 1993; Taylor & Furham, 2005; Wisconsin Center for Education Research–Madison, 2009).

For the purpose of this research, the focus will be on role-play as a competence assessment technique. This is perceived to be a useful assessment technique when training sales agents, as both learner and facilitator will be able to observe the level of competence. It is described as an activity where a limited number of participants, usually two or three, takes on specifically assigned and well defined roles and act out an encounter that involves some goal or problem (Blanchard & Thacker, 2004; Blatner, 2009; Davis & Davis, 1998; Rae, 1993;). Furthermore, according to Turner (1996), role-play can provide participation, involvement and the opportunity for action learning. Learners act out (or practice) the subject in a risk free environment. This competence assessment technique is considered to be one of the useful formative assessment tools both locally and internationally, which can be used during learning programme or learning cycle. However, to achieve a desired outcome, it should be integrated with other assessment such as case studies, written exams, group discussions, interviews, peer assessment etc. Furthermore, similar with other formative assessment, it should be planned, or purposely developed prior to delivery of a learning programme in order to achieve the agreed outcomes (Blatner, 2009; Professional Role Players, 2010; Wisconsin Center for Education Research, 2009). However, Revolution Learning and Development (2011) mentions some of the challenges that might be experienced, namely:

- I'm embarrassed, why do I need to do this?
- It's not realistic. It's just a training exercise with a workmate.
- I'm not an actor, I shouldn't be doing this

In South Africa, role-play is also viewed as a valuable technique in learning which collaborates with the learning paradigm shift that was introduced in 1998. This entails the shift to Outcome Based Education (OBE). OBE emphasises the need for both the facilitator and the learner to focus on the desired outcomes of the learning programme (Van den Horst & McDonald in Clench, 2010). Furthermore, OBE entails the use of critical cross field outcomes (CCFO), which are designed to close the

learning gaps which might not be specifically highlighted in the programme. However, those gaps are indirectly linked to the overall learning outcomes. Therefore, the introduction to OBE and the use of CCFO, encourages the inclusion of formative assessment such as role-play as it is designed to empower the learner to practice the skill gaps for a desired end result and readying prior to moving to a real work setting (SAQA, 2005; Zenzele Security & Training; 2010). A detail literature review will be provided in chapter two.

This research aims to investigate the impact of role-play when used as a competence assessment technique in a learning environment.

1.2 Scope of the Study

The study focuses on the assessment of learning transferred to novice sales agents. This will be conducted in a sales call centre environment. Role-play competence assessment will be conducted before, during and after training, to establish learners' improvement by means of the Quality Assurance Performance Management Questionnaire (QAPMQ) designed for quality assurance. This questionnaire is based on what and how the sales agent is expected to perform (attached as Appendix B).

The QAPMQ is based on competencies developed with the intention to be used at recruitment stage of novice sales agents. However, this process was declined, as it resulted in the recruitment cycle being lengthier than required (SHL Group, 2005).

The competence assessment will also take place two weeks after learners who have qualified to be sales agents have entered a real working environment. This will be done by means of retrieving calls and rating them against the QAPMQ.

A sample size of 40 novice sales agents (learners) was selected using simple random sampling (Terre Blanche & Durrheim, 2002). The sample size might limit the study, as results are generally more valid when the sample is larger. The sample group will be divided into two equally sized groups. There will be a control group, trained according to the present training structure. An experimental group will be trained with a role-play competence assessment technique included.

The current training structure is designed in such a way that newly appointed staff is trained for five days. The week following on the five-day training session, qualified sales agents start selling. Training covers the following four areas (training schedule is illustrated on table 4.4 and 4.5 in chapter 4):

- i. The company culture: Who we are and what the company stands for.
- ii. The company products.
- iii. Insurance legislation: Industry legislation that sales agents should abide by.
- iv. Sales training: Training on sales techniques, in order to sell and close a deal.

Some of the limitations of the current structure are the following:

- i. The summative assessment is the only type of assessment currently used.
- ii. The learners' ability "to sell" is not assessed before, during and after training, only their knowledge using a knowledge assessment.
- iii. Time allocated for training, practice and coaching is limited which contributes to the learners struggling to sell when they reach the real work setting.
- iv. No practical assessment took place to identify learning gaps and their level of competence.

These limitations are based on the feedback provided by existing staff members and complaints by the call centre management about a lack of performance after training.

It is problematic to motivate and address these challenges and limitations as sufficient evidence is required to prove whether role-play can be the appropriate solution to improve learners' performance.

The organisation is currently measuring performance, based on the following criteria:

- i. a minimum of five sales per day;
- ii. a minimum of 300 dials (300 calls per day); and
- iii. four hours of talk time per person per day.

When the researcher refers to agents reaching minimum targets and performance, the above criteria are being referred to.

Based on the above performance measurement, the existing sales agents' feedback indicates that they are failing to achieve the target. They are struggling with, among others, closing of the sale, handling objections, and questioning techniques to the client.

The researcher will therefore investigate whether the control and experimental groups will face similar performance challenges after training when entering their real work setting.

Data collection will be conducted by means of the results obtained from role-play, using the QAPMQ prior to performing a practical session. This will be to establish the learners' level of competence. This will also be collected during other formative assessment interventions as well as through the data obtained whilst retrieved calls of the learner's selling. The final part will be collated from the post-assessment (chapter four on research design will provide a detailed break-down of when data will be collected from which group).

The data analysis will investigate:

- i. Whether there are significant differences between the control and experimental groups.
- ii. The correlation between role-play and learners' performance.
- iii. The test re-test reliability of the measuring instrument.

1.3 Research Problem

There are numerous studies on the importance of competence assessment techniques and how it forms an integral part of the learning process (Wisconsin Center for Education Research, 2009; Zucker & Jorgensen, 2004). However, there are limitations in terms of how it is fully integrated into the learning process. The assessment process should not be something that only happens at the end of training to determine the extent of learning that occurred. Instead, every assessment should form part of the learning cycle in developing and guiding learners towards successfully achieving the desired outcomes and enhance job performance.

Therefore, integrated assessment, including both formative and summative assessment, is critical, as it assesses the learner's ability to achieve the overall purpose of what is being taught (Kenwright & Hattingh, 2002; Meyer, Mabaso, Lancaster & Nenungwi, 2004; INSETA, 2009; Blatner, 2009; Wisconsin Center for Education Research, 2009).

Formative assessment refers to assessment that is specifically intended to generate feedback on performance to improve and accelerate learning (Nicol, 2006; Bennett, 2011). It is conducted throughout the programme to identify learners' progress as well as during the training session. Role-play as an assessment will be used during training as a formative assessment to provide the learner's level of understanding and performance. Summative assessment (such as writing a final examination) on the other hand, is conducted after the training session. The purpose of summative assessment is to make a judgement on whether the learner can be declared competent in relation to what s/he had been taught (Meyer *et al.*, 2004; William & Kazanaz, 1998. Formative and summative assessments alike should be designed as learning opportunities that contribute towards developing the learner's ability to master the learning content and enhance performance (Kenwright & Hattingh, 2002; Wisconsin Center for Education Research, 2009).

The organisation where the research will be conducted currently uses summative assessment in the form of a knowledge test. This test is useful for assessing the learners' product knowledge and indirectly provides an indication on the level the learners master language and writing. However, other than assessing whether learners are knowledgeable, it is critical to assess their ability and potential to perform before entering the real working environment. Formative assessment such as the use of role-play provides them with an opportunity to display their ability to perform or redress any performance gaps. As a result, learners will be more confident and have a better understanding and ability to perform their job (Bartle, 2007; Harbour & Connick, 2004-2005; Hope & Vavra, 2007).

It is evident from various studies that role play is found to be an invaluable tool in bridging the learning gap. However, the focus is often on the use of role play as a single skill enhancer instead of integrating it with other methodologies or competence assessment techniques (Blatner, 2009; Slogoski, 2003). Therefore, in

the field of Industrial Psychology there is a need to emphasize the benefits of integrated learning techniques and how that collaboration could be performed. As well as providing combination of techniques that will work for a certain type of learning setting. For example, the use of case studies, scenario cards, role-play, group exercises, presentations etc which is necessary to determine whether the learner has theoretically grasped the concept learned. This will follow the assessment centre concept used for staff selection (Hutt, 2010).

Therefore, this researcher will investigate whether adding role-play, as a competence formative assessment technique in training, will address the performance concerns faced by sales agents in their working environment. If the outcome of this research proves that role-play in training add value to learners' performance. This will be integrated with the knowledge assessment, currently used as a summative assessment tool or final assessment after training.

Based on the research problem, the hypotheses of this study are as follows:

H0:

Adding the use of role-play as a competence formative assessment technique will not improve employees' performance.

H1:

Adding the use of role-play as a competence formative assessment technique will increase employees' performance.

1.4 Delimitation of the Study

The study seeks to investigate role-play as competence assessment in training. This entails describing what it is, how it can be applied to a learning environment, its challenges and other components of learning that collaborate with it. However, emphasis on this specific technique does not under estimate or suggests that other competence assessment techniques will not be valuable in the learning environment.

1.5 Purpose of the Study

The main objective of this research is to investigate the effects that role-play, as a competence assessment technique in training has on learner's job performance, in this case, novice sales agents. The novice must undergo training to acquire product knowledge, knowledge about the most pertinent insurance legislation and sales training. Thereafter, learners must be assessed and found competent in all these areas prior to entering their real working environment.

The specific purpose of this study is to:

- i. investigate the effects that role-play as a competence formative assessment technique has on work performance;
- ii. establish whether the current training structure should stay the same, based on the findings of the research; and
- iii. add value to the learning and development of sales agents, based on recommendations derived from the findings of the study.

1.6 Research Approach

This research project consists of two major components, namely a literature review and an experimental study. With regard to the literature review, the following concepts will be discussed:

- i. Learning: What it is and how it is affects competence assessment.
- ii. Competence Assessment: What it is and how it can contribute to the learning environment. Formative and summative assessment techniques will also be discussed.
- iii. Role-play as a competence assessment tool: What it is and what findings from other researchers can contribute to the research.
- iv. Learning outcomes and performance: How the above concepts relate to performance as a learning outcome.

Literature on the new paradigm in training includes approaches such as the National Qualifications Framework (NQF), Unit Standards and South African Qualification Authority (SAQA). This will be discussed in more detail in the next chapter.

In terms of the experimental study, more information will be provided under research design.

1.7 Research Paradigm

This research will be conducted within the organisation psychology field as part of Industrial and Organisational Psychology. The related psychological theory is social cognitive theory (Adam, 2010; Drew, 1999; Learning Theories, 2008).

In 1941, Miller and Dollard proposed the theory of social learning. In 1963, Bandura and Walters broadened the social learning theory with the principles of observational learning and vicarious reinforcement. Bandura provided the concept of self-efficacy in 1977, while he disproved the traditional learning theory for understanding learning (Adam, 2010).

Learning Theories (2008) as well as Adam (2010) describes Social Cognitive Theory to involve people learning through observing others' behaviour, attitudes, and outcomes of those behaviours. Most behaviour is learned through observational modelling which is when one is observing others, thereafter, forms an idea of how new behaviours are performed, and later on, this serves as a guide for action or behaviour (Learning Theories, 2008). Social learning theory explains human behaviour in terms of continuous mutual interaction between cognitive, behavioural, and environmental influences.

Therefore, the social cognitive paradigm focuses on ways in which mental representations of social events, societal and cultural norms and personal characteristics influence behaviour, reasoning, emotion and motivation (National Institute on Aging, 1997)

As a result, this is encouraging complementary between methods in order to build on strengths, cross checks and triangulate the information which is most crucial for addressing a particular research question concerned (Mayoux, 2005).

This study focuses on the use of both a behaviourist and cognitive paradigm, viewing external and internal conditions as the sources of all human behaviour. The stimulus/response, conditioning and learning theories form part of this paradigm. This paradigm views learning as a relatively permanent change in cognition (i.e. understanding and thinking), resulting in experience and directly influencing behaviour (Blanchard & Thacker, 2004; Guy, Edgley, Arafat, & Allen, 1987; Developmental Psychology, 2011)

1.8 Research Design

Terre Blanche and Durrheim (2002, p 29) define the purpose of a research design as “a strategic framework for action that serves as a bridge between the research question and the execution or implementation of the research”.

Quantitative design is described “as a plan on how to proceed with the research study. It entails the objective, systematic plan to gather data that has application to other population. It also centres on why, where, who, what when and how questions” (Boswell & Cannon, 2011, p 172).

The quantitative research process is aimed at transforming relevant variables which have been translated into scores to a statistical position to help the research describe the data more succinctly and make inferences (Terre Blanche & Durrheim, 2002)

The research design will follow the model illustrated by figure 1.1. The process that takes place during this phase will be discussed in Chapter 4.

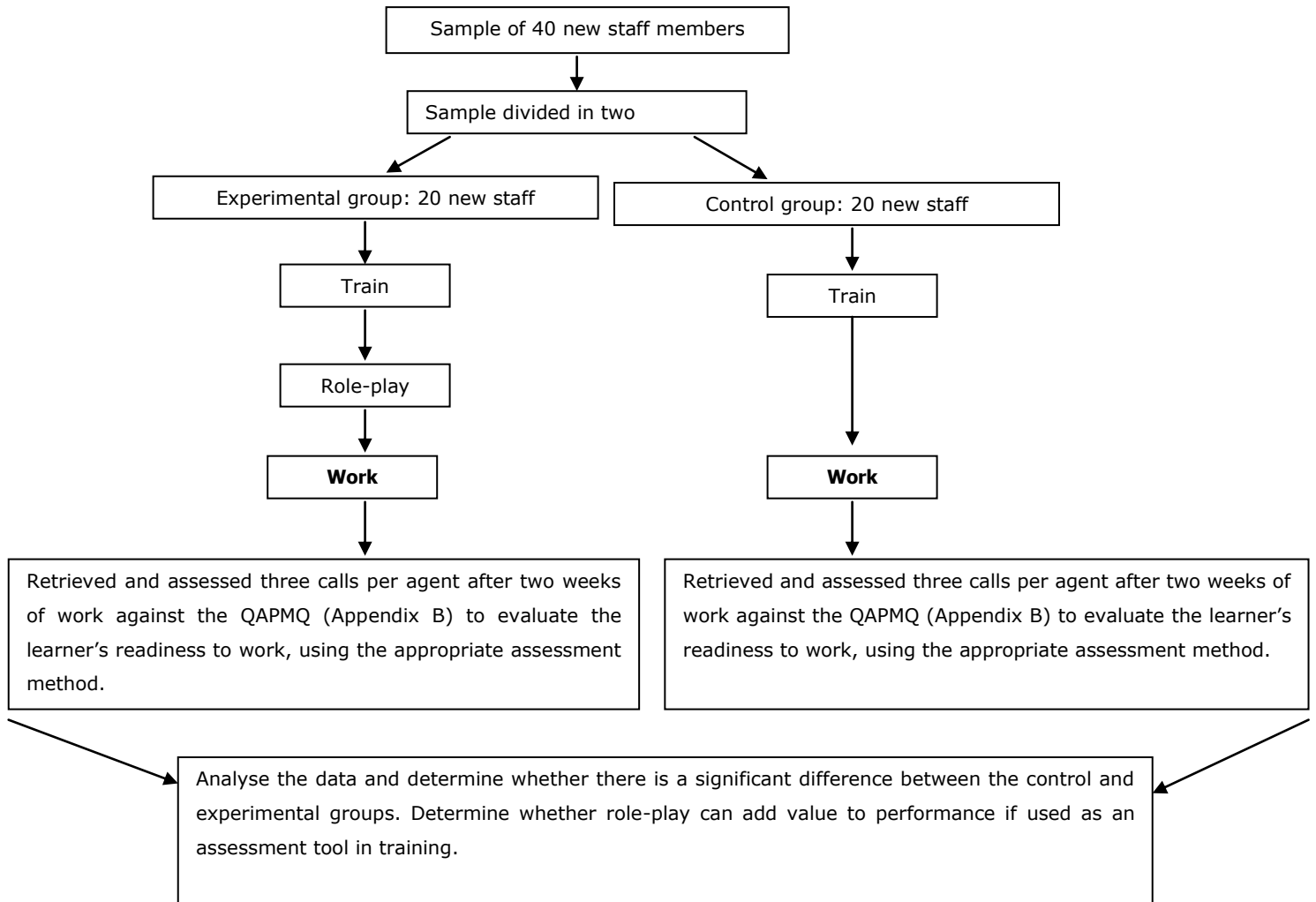


Figure 1.1 Research Design

1.8.1 Sample

Participants will comprise a total population of 40 novice sales agents. The group will be divided into two, in order to compare the usage of the current training format to the proposed format and will be selected based on simple random sampling. The sample group will be divided into two equally sized groups. There will be a control group, trained according to the present training structure. An experimental group will be trained with a role-play competence assessment technique included.

1.8.2 Data Collection

Data from both the experimental and control groups will be collected by using scores obtained during role-play assessment, measuring against the QAPMQ. This competence assessment will be conducted three times in both the experimental and control groups, on the third day as well as the last day of training. These will be the only times role-play will be used to assess the control group. For the experimental group, it will be used as a training tool. The final assessment will be conducted after the novice sales agents had spent two weeks in the real working environment. This will be conducted by means of retrieving three calls for each agent randomly and measuring them against the QAPMQ.

Two facilitators and the researcher will be the assessors for this study and will also rate the calls. In order to ensure consistency and reliability from all assessors, a pilot session will be conducted with all assessors who will participate in the rating process. Instructions on how to use the QAPMQ will be stipulated on the questionnaire. This will, however, also be covered during the pilot session.

1.8.3 Unit of Analysis

The unit of analysis for this study will be the novice sales agents entering the organisation. Line managers expect agents to acquire knowledge and ability to perform in a real work setting.

1.8.4 Measuring Instruments

The QAPMQ (Appendix B) will be used as a measuring instrument. The questionnaire was designed by the organisation to assess the quality of the calls dialled by sales agents. Depending on the feedback, a developmental discussion and coaching session will be arranged for the sales agents. This questionnaire was based on the competencies determined after completion of the SHL Online Competency Profiler System used for job analysis by the subject matter experts (SHL Group, 2005).

A five-point rating scale will be used on the QAPMQ to measure the level of knowledge, ability and attitude. Instructions for the assessors to refer to when necessary are provided on the questionnaire (Thorne & Mackey, 2003).

1.8.5 Validity and Reliability

Validity is the degree to which an instrument measures what is intended to measure. This implies that the measure should provide a good degree of fit between the conceptual and operational definitions of the constructs, and that the instrument should be usable for the particular purpose for which it is designed (Carmines & Zeller in Terre Blanche & Durrheim, 2002). The QAPMQ focuses on rating the sales agents' performance from the greeting to the close of the deal. The following are some of the statements in the questionnaire:

- How effectively did the sales agent use questioning techniques?
- How well did the sales agent explain the product benefits?
- How well did the sales agent handle objections?
- Is the sales agent able to identify buying signals?

These could qualify the measuring instrument as being valid, as an operational definition of the construct is provided; measuring what it is intended to measure, which is sales agent's performance. However, the fact that over time the management team and coach has been able to obtain valuable results using this questionnaire indicate some level of its validity. A formal assessment on the validity of this assessment has not been performed. This will be recommended to management in case they consider conducting further research.

The instrument could be termed as having predictive validity, as the scores from the questionnaire are intended to predict future performance of the sales agents. The competence assessment is conducted during training, and if agents obtain a score of 70%, they are considered competent to enter the real work environment (Terre Blanche & Durrheim, 2002).

Involvement of assessors other than the researcher in the process will also increase validity, as it would be unbiased. This will promote the quality of the process.

Reliability refers to the dependability of a measuring instrument, i.e. the extent to which the instrument yields similar results on repeated trials (Terre Blanche & Durrheim, 2002). The test re-test reliability will be analysed during the study, and results should indicate the reliability of the instrument.

1.8.6 Data Analysis

A Mann-Whitney U Test for independent group samples will be used to analyse and establish a significant difference between the control and experimental groups. The data derived from the two groups will be used to make the statistical calculation to establish if there is a significant difference between the two groups.

The correlation between performance without added role-play and the impact of added role-play as a competence assessment method will be investigated. This will be conducted by comparing and analysing the scores of the experimental group on day three of the training and two weeks in a real work environment. A comparison will be made between a positive or negative correlation based on the performance of the group. If there is an increase in performance after two weeks of working in comparison to the scores obtained on day three of the training, it can be concluded that there is a positive correlation. This will be in agreement with the overarching hypothesis and vice versa.

If there is no significant correlation in learners' performance in two instances (after training with and without role-play) it will be concluded that there is zero correlation.

1.9 Results and Discussion

The results and interpretation of the interventions will be presented in this study and also to the call centre management of the company where the study will be conducted.

1.10 Conclusion, Limitation and Recommendations

The five limitations below should be noted. As the study progresses, other limitations might surface. These will also be presented in the study and to the company.

- i. Learners might not be interested to take part in the study, as their priority will be to complete training and start selling. This will be addressed by including the research process as part of their training, so that not much time is spent performing tasks not included in their job description.
- ii. Additional measurement criteria might be included to address the quality of sale rather than the number of calls dialled and policies received.
- iii. The size of the sample might affect the validity of the results.
- iv. The learners might not want their calls to be retrieved for the sake of this research, as these may be confidential.
- v. There might be extraneous factors that affect performance improvement other than the usage of a new technique as an assessment tool in training, such as the following:
 - Support from management. By continuously focusing on the benefits of this research for the organisation it will hopefully not be perceived as a waste of time.
 - Omitting certain important aspects of the role-play technique implementation process, as this will be the first time such a process will be added to training. This will be addressed by a thorough literature review.

The recommendations and benefits of the research will be presented in this study and to the company after testing the hypotheses.

The conclusion will be specified with reference to the purpose of the study and the hypotheses that have been stated.

1.11 Structure of Chapters

The chapters will be structured as follows:

1.11.1 Chapter 1

This chapter includes the introduction, problem statement and purpose of the study, as well as the research methodology to be used.

1.11.2 Chapter 2

This chapter will address the new paradigm in training, the National Qualification Framework (NQF), Unit Standards and South African Qualification Authority (SAQA), to be discussed in relation to the impact on the research problem.

1.11.3 Chapter 3

This chapter focuses on the literature review, which addresses the following four concepts and integration thereof:

- i. Learning: What it is and how it is affected by competence assessment.
- ii. Competence assessment: What it is and how competence assessments contribute to the learning environment. Formative and summative assessment techniques will be addressed.
- iii. Role-play as a competence assessment tool: What it is, other researchers' opinions and how it can be used to benefit the learning environment.
- iv. Learning outcomes and performance: How the above concepts relate to performance as the learning outcome.

This chapter will also address the theoretical framework of this study.

1.11.4 Chapters 4, 5 and 6

In chapter 4 the methodology of the study and other research-related aspects will be delineated. Chapter 5 is where the results, findings and conclusion of the study will be presented, while chapter 6 describes all the limitations of the study, including

those that surfaced during the research. Recommendations will also be specified for the company.

1.12 Conclusion

The introductory chapter introduced role-play and how it can be used in a learning environment, as well as the impact of role-play on a learning environment and how it translates into performance improvement. The empirical study introduction provided a structure for how the research can be conducted. The next chapter will investigate the new paradigm in training and development and how this paradigm shift impacts on the research.

Chapter 2

The New Paradigm in Training

2.1 Introduction

This chapter provides an overview on the paradigm shift in skills development in South Africa which started in 1998. The background to this paradigm shift will be set, thereafter; a link on how it benefits this study will be made. Although the paradigm shift support this study, it is also necessary to note that the South African government is considering modifying this learning approach (Black Business Quarterly, 2011; South African Government Information, 2011) However, for the purpose of this research the current structure will be pursued.

According to Meyer *et al.*, (2004) and the Black Business Quarterly (2011) the field of training and development evolved rapidly in South Africa and abroad over the last ten years implying that traditional training is under threat. Traditionally, training was viewed as a tool to provide employees with knowledge and skills to perform their work effectively. Shane (2008) mentions that the earliest training efforts revolved around on-the-job experience. If fortunate, one would work with at least a seasoned veteran to guide on proper techniques and the tricks of the trade. If not fortunate, training was probably a matter of trial-and-error, and your best protection against injury was common sense. Today, this view is changing as employees play a crucial role in a company's ability to produce products and services, moreover, in a country's ability to improve productivity and economic growth. Increasing number of companies has begun to view training and development as an important business imperative to enhance competitiveness and overall business performance (Grobler, Warnich, Carell, Elbert, & Hatfield, 2006; Meyer *et al.*, 2004; Shane, 2008).

In order to adapt to the changing world of business and address education and training challenges, South Africa introduced an education and training system known as outcomes based education (OBE). This paradigm of learning emphasises on the desired end result, i.e. what the learner must be able to know, understand and apply

on completion of the learning experience. This supports the researcher's motivation to incorporate a practical session on the training programme, for the novice sales agents as that will empower them on the application of what they have learned (Burke, 1995; Clench, 2010; Meyer *et al.*, 2004).

The South African government has demonstrated its support of the new training paradigm by introducing the Skills Development Act, 1998 and the Skills Development Levies Act, 1999 elaborated below, to govern its implementation and delivery (Grobler *et al.*, 2006; Skills Development in the Workplace, 2002).

2.2 Skills Development Act and Related Concepts

According to Skills Development in the Workplace (2002), skills development encompasses the education, training and development interventions aimed at improving the skills and competencies of employees within a work context. Furthermore, skills development interventions can be conducted by means of formal and informal processes, including in-house classroom-based facilitated sessions, formal academic programmes attended at external institutions, on-the-job-training (e.g. mentoring and coaching), workshops and seminars, and learnerships, which combine institutional and workplace learning (Clench, 2010; Meyer *et al.*, 2004; Nihof & Brandsma, 1999;). Some of these are used during the training of novice sales agents in the company where the research is being conducted.

The Skills Development in the Workplace (2002) and the Skills Development Amendment Bill (2008) highlight the five objectives of these acts, namely to:

- i. Increase the levels of investment in education and training;
- ii. Develop the skills of the South African workforce, i.e. improving quality of life, productivity and competitiveness, to promote self employment and the delivery of social services;
- iii. Encourage employers to use the workplace as an active learning environment, to provide opportunities to acquire new skills and new entrants to the labour market with experience;
- iv. Encourage participation in learnership and training programmes; and

- v. improve employment prospects of previously disadvantaged persons.

The Skills Development Act of 1998 and Skills Development Levies Act of 1999 also require companies to (Skills Development Act general notice, 2004):

- register with the relevant Sector Education and Training Authority (SETA) and adhere to its requirements in respect of skills development interventions funded and quality assured by the SETA;
- pay a monthly skills development levy of 1% of the total payroll to the South African Revenue Service (SARS) to be used for skills development in the sector and nationally;
- appoint a Skills Development Facilitator (SDF) to oversee and guide skills development and act as liaison with the INSETA; and
- Prepare and submit an annual Workplace Skills Plan (WSP) and an Annual Training Report (ATR) on the implementation of the WSP, and submit it to the INSETA to qualify for a mandatory grant of 50% of the annual contribution made to the skills levy.

The company where the research is being conducted does comply with most these requirements and which has had great benefits (which are not elaborated as it deviates from the purpose this research).

Below are national structures which form part of this paradigm. Figure 2.1 illustrates these structures and how they fit together. The next paragraphs elaborate on the structural roles.

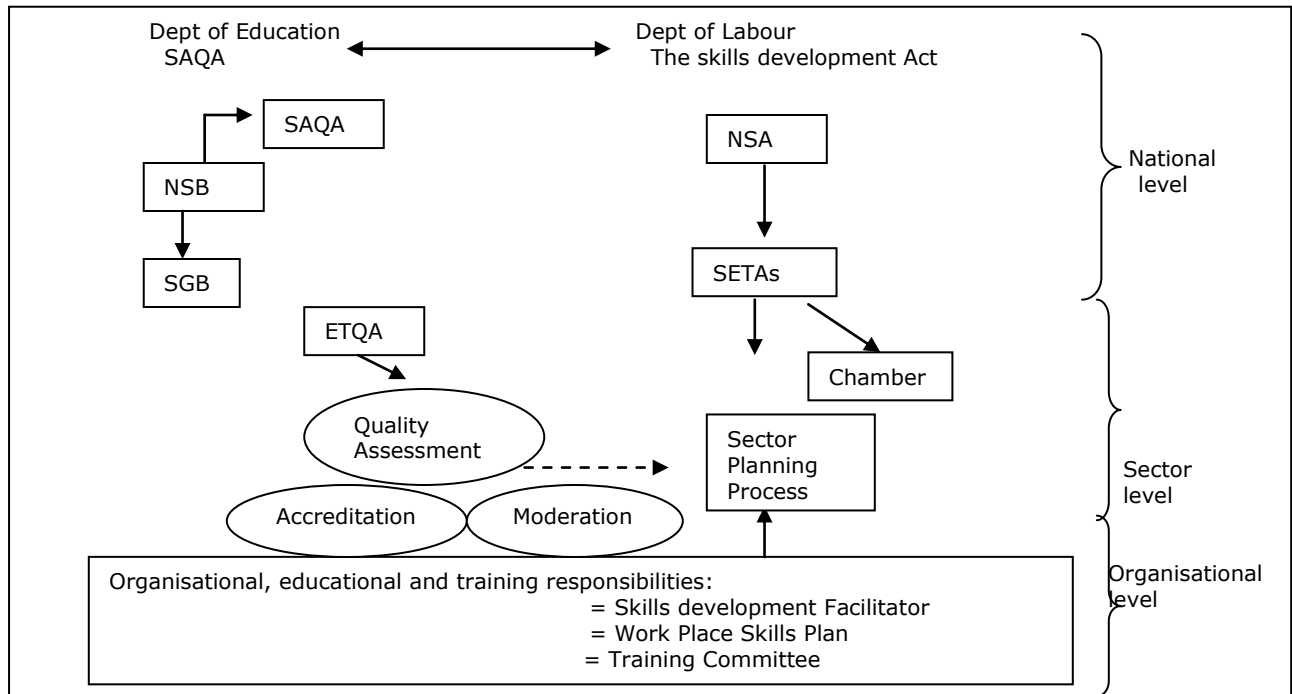


Figure 2.1 National Structures (Adapted from Meyer *et al.*, 2004, p 66)

2.2.1 Institutional and Financial Frameworks

Below are national structures which entail institutions and financial frameworks that are established in terms of the Skills Development and Skills Development Levies Act to achieve the above mentioned objectives (Grobler *et al.*, 2006; Skills Development in the Workplace, 2002).

2.2.1.1 National Skills Authority

This body advises the Minister of Labour on the National Skills Development Policy and Strategy. It also establishes guidelines for implementation and allocates subsidies from the National Skills Fund. As well as liaises with the SETA on the policy and strategy and conducts investigations on matters resorting under the Act (Meyer *et al.*, 2004; Skills Development in the Workplace, 2002).

2.2.1.2 Sector Education and Training Authorities (SETAS)

According to Skills Development in the Workplace (2002), approximately 27 SETA were established for all the sectors in South Africa (for example, banking; local government; health and welfare; construction and wholesale/retail). The SETAS have mainly the following six functions:

- i. Develop a sector skills plan;
- ii. Implement the plans by establishing learnerships;
- iii. Improving workplace skills plans;
- iv. Allocating grants and monitoring education and training in the sector;
- v. Promote learnerships (identify workplaces for practical work experiences);
- vi. Support development of learning materials and assist in learnership agreements.

2.2.2 South African Qualification Authority (SAQA)

According to Meyer *et al.* (2004), SAQA is a body appointed by the minister of education and labour having mainly the following two functions:

- i. To oversee the development of the NQF.
 - a. This to be achieved by formulating and publishing policies and criteria for the registration of bodies responsible for establishing education and training standards or qualifications; and
 - b. the accreditation of bodies responsible for monitoring and auditing achievements in terms of such standards and qualifications.
- ii. To oversee the implementation of the NQF.

However, in November 2009 an announcement that the SETA will be incorporated within the department of Higher Education was made. An elaboration on this integration might impact the current education system. However, it hasn't been clearly described; therefore, the research will focus the current structure (South African Government Information, 2011).

2.2.3 The National Qualifications Framework (NQF)

Since 1994, education in South Africa has undergone radical and far-reaching restructuring. The National Qualifications Framework (NQF) was introduced in 1995 and was done through the South African Qualifications Authority (SAQA) Act. The NQF is intended to integrate all education and training into a single system and facilitate movement between different types of educational institutions. An underpinning principle of the NQF is to provide multiple opportunities and platforms for life-long learning to individuals regardless of age, circumstance or level of prior education or training and discouraging isolated fragments of learning (Clench, 2010; Phillips, 1996; SA Publishing, 2008; SAQA, 2005). The NQF is firmly rooted in outcomes-based education (OBE) where the primary focus is on the end product of the learning process. The starting point for designing workplace training programmes should therefore be the outcomes that must be achieved, and how these will be measured (Clench, 2010; Grobler *et al.*, 2006). The NQF and the link to this research will be referred to in the chapters to follow.

Within the NQF, there are unit standards which also form an integral part of the outcomes-based system, as they describe the outcomes of learning programmes and the standard of performance required to certify competency. The objective is for learning programmes in future to be designed according to nationally registered unit standards, as these become available (Meyer *et al.*, 2004; Phillips, 1996).

The NQF is a national resource, representing a national effort at integrating education and training into a unified structure of recognised qualifications. It is a framework of qualifications, implying a record of learner achievement (INSETA, 2004).

Table 2.1 to follow demonstrates the NQF structure with the levels of learning. These levels should be used as a guideline when designing and developing a learning programme and assessments instruments. This will ensure consistency across learning and assessments. It will also ensure the assessment instrument is development at the correct level of complexity.

Table 2.1
The National Qualifications Framework

NQF	Band	Type Of Qualification and Certificates	Location of Learning for Unit and Qualification			
8	Higher Education and Training	Doctorates Further research, Degrees	Tertiary/Research/Professional Institutions			
7		Higher Degrees Professional Qualifications	Tertiary/Research/Professional Institutions			
6		First Degrees Higher diploma	Universities/ Colleges/Higher Education /Research/Professional Institutions			
5		Diploma Occupational certificate	Universities/ Colleges/Higher Education/Research/Professional Institutions/Workplace			
Further Education and Training Certificate (FETC)						
4	Further Education and Training	School/College/ Trade Certificates Mix of Units from all	Formal High Schools/Private/ State Schools	Technical/Community/P olice/Nursing/ Private Colleges	RDP and Labour Market Schemes, Industry Training Boards, Union, Workplace	
3		School/College/ Trade Certificates Mix of Units from all				
2		School/College/Tr ade Certificates Mix of Units from all				
General Education and Training Certificates (GETC)						
1	General Education and Training	Senior Phase	ABET Level 4	Formal Schools (Urban/Rural Farm/Special	Occupation/Work- based Training/RDP/ Labour Markets Schemes/Upliftment Programmes/Commun ity Programmes	NGOs/Churches/ Night Schools/ABET Programmes/Private Providers/Industry Training Boards/Unions/ Workplace etc.
		Intermediate Phase	ABET Level 3			
		Foundation Phase	ABET Level 2			
		Preschool	ABET Level 1			

Note: Table adapted from Meyer *et al.* (2004) and Corporate College International (2007).

In 2008 the SAQA Act was replaced by the National Qualifications Framework Act, 2008. This statute had the effect of changing the NQF levels of previously registered qualifications from 8 to 10 (Chartered Secretaries, 2011). The NQF structure provides

career and learning pathways for learners, who can move both up the levels and across the different areas of the NQF (Chartered Secretaries, 2011; Corporate College International, 2007; Learning Performance Link, 2004).

2.2.4 Outcomes Based Education

The National Qualifications Framework (NQF) makes provision for an OBE system. According to Jerling in Meyer et al. (2004), one of the main objectives of the NQF is to create an integrated learning achievement framework and to facilitate access and progression in learning and development. Van den Horst and McDonald in Clench (2010) mentions that in OBE facilitators and learners focuses in what learners must be able to know, understand, performance at the end of the learning experience (Burke, 1995; Flanagan, 1997; Limpopo Department of Education, 2006).

According to Bellis in Hattingh and Kenwright (2002) outcomes are not attached to the content after the learning programme had been designed and developed. Instead, OBE is a process of analysis before deciding what the content will be and what methods and media will be used to enable the learners to experience while learning.

Van den Horst and McDonald in Clench 2010 provide the following objectives of OBE:

- To allow students to reach their full abilities and potentials
- To build the self-esteem of learners, in turn, result in better performance
- To create a positive learning environment wherein learners can be motivated to achieve the desired outcomes

OBE is focused on assessing the result of the learning process. These are expressed in outcomes and competence. The assessment of the achievement (or non-achievement) of outcomes and competence must be conducted against clearly described assessment criteria, as illustrated in Figure 2.2 to follow. Therefore, this study aims to underpin training by applying the OBE principles to ensure that the learners are able to apply the knowledge acquired (Hattingh & Kenwright 2002; Van Rooyen & Prinsloo, 2002).

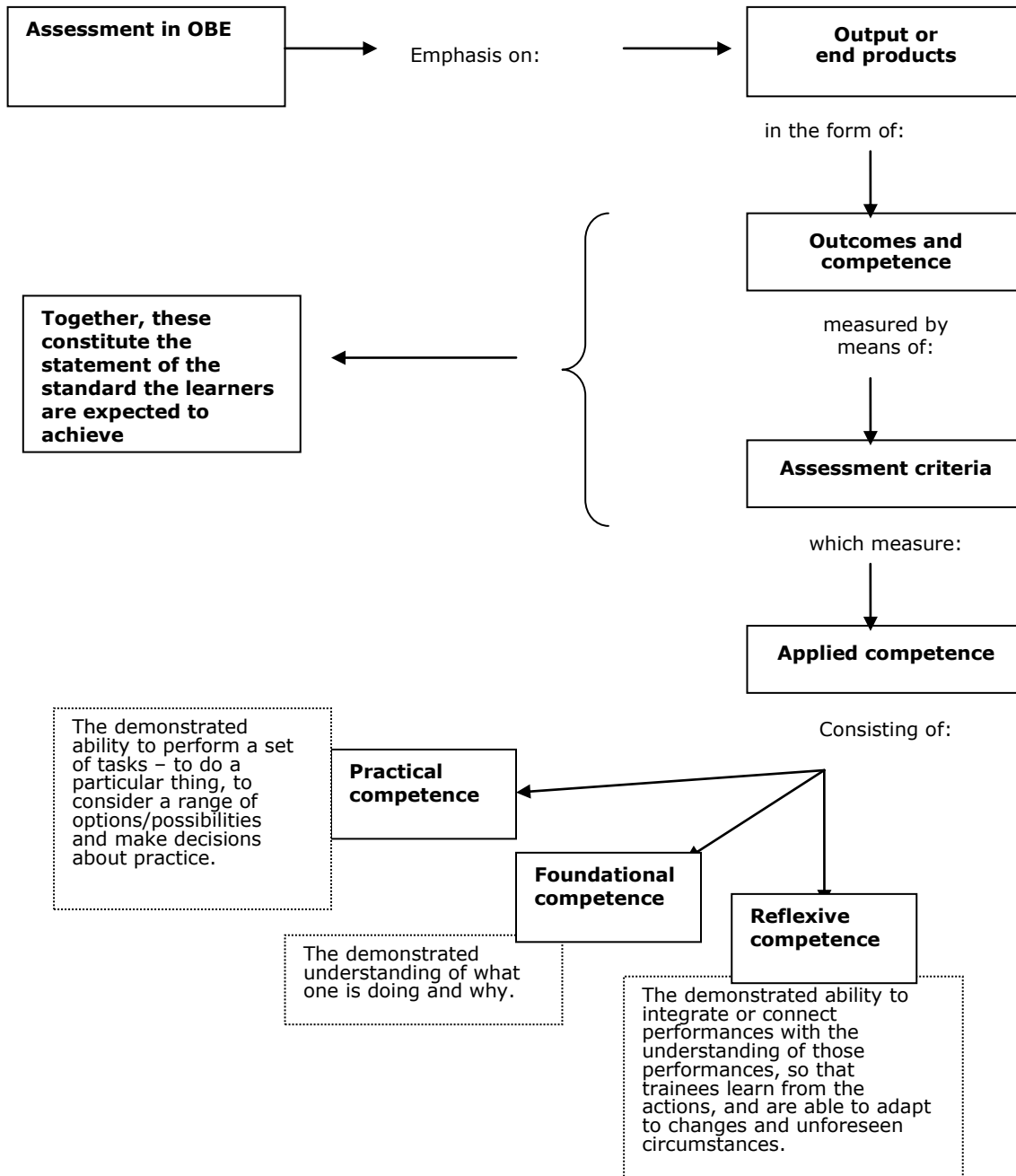


Figure 2.2 Components Key to Outcomes-Based Assessment
 (Adapted from Hattingh & Kenwright, 2002, p 7)

According to Hattingh and Kenwright (2002) as well as Clench (2010), the following are components that are key to outcomes-based assessment are:

- i. Outcomes;
- ii. assessment criteria; and
- iii. Applied competence.

2.2.4.1 Outcomes

Outcomes are the demonstrable and assessable results of a learning process. They are statements regarding elements of competence (SAQA in Hattingh & Kenwright, 2002). Additionally, they capture what the learner should be able to perform and demonstrate at the end of a learning programme.

Cates and Jones (1999), Hattingh and Kenwright (2002) and Burke (1995) emphasise that outcomes statements must be clearly and accurately formulated to ensure that both learners and assessors understand precisely what learners are required to demonstrate. Below are four examples of outcomes statements:

- i. List Johan Black's seven principles of marketing.
- ii. Describe the seven principles of marketing and provide a practical example of each principle.
- iii. Develop a marketing plan for a specific product in which you describe how the plan is aligned to Black's seven principles.
- iv. Analyse your own company's marketing strategy, identify the areas where the strategy is not aligned to Black's seven marketing principles, and describe the changes that need to be made to the marketing plan to ensure alignment to the principles.

2.2.4.2 Critical Cross Field Outcomes

According to Zenzele Security and Training (2011) critical cross field outcomes contribute to the personal development of each learner and the social and economic development of the society. These assist the learner to not only develop the specified learning outcomes, but as well as other indirect skills required for the learner to perform efficiently.

The following are the critical outcomes adopted by SAQA (2005):

- Identify and solve problems in which responses demonstrate that responsible decisions using critical and creative thinking have been made.

- Work effectively with others as a member of a team, group, organisation, community.
- Organise and manage oneself and one's activities responsibly and effectively.
- Collect, analyse, organise and critically evaluate information.
- Communicate effectively using visual, mathematical and/or language skills in the modes of oral and/or written presentation.
- Use science and technology effectively and critically, showing responsibility towards the environment and health of others.
- Demonstrate an understanding of the world as a set of related systems by recognising that problem-solving contexts do not exist in isolation

In order to ensure that the learners have acquired the knowledge, skills and values imparted (desired outcomes); the assessor must also develop assessment criteria.

2.2.4.3 Assessment Criteria

According to Van Rooyen and Prinsloo (2002) as well as Van der Horst and McDonald in Clench (2010) assessment criteria describe evidence that applied competence has in fact been achieved. These are statements that describe guidelines for developing particular assessment tasks. Furthermore, assessment criteria are statements that describe the standard to which learners must perform, i.e. the actions, roles, knowledge, understanding, skills, values and attitudes stated in the outcomes. These should be a clear and transparent expression of requirements against which successful (or unsuccessful) performance will be assessed. In addition Hattingh and Kenwright (2002) state that the assessment criteria should specify the following:

- i. The knowledge, understanding, actions, roles, skills, values and attitudes that a learner should to display, in order to provide evidence that outcomes and competence have been achieved.
- ii. the level of complexity and quality of the above; and
- iii. the context of and conditions under which demonstrations should occur.

These statements are used to judge whether the evidence provided by a learner is sufficient to demonstrate competent performance (SAQA in Hattingh & Kenwright, 2002). Furthermore, assessment criteria should be clearly defined, unambiguous, measurable and verifiable.

The manner the assessor and/or facilitator has developed the learning programme content, outcomes, assessment criteria and the actual presentation or facilitation of the programme will contribute to applied competence. All these should be developed in a manner that learners should understand from the beginning of a learning programme to the end. As a result, the learners will know what is required of them, in order to acquired applied competence and be certified as competent.

2.2.4.4 Applied Competence

Applied competence is the ability to put into practice in the relevant context the learning outcomes acquired via a learning programme. With the knowledge acquired during the learning programme, a qualified learner must be able to understand as well as apply useful information in a real world context acquired form the learning programme. It is important to note that competence must not be viewed as either practical or foundational or reflexive, but that these three dimensions should be integrated in every demonstration of competence as demonstrated on figure 2.3 (Hattingh & Kenwright, 2002; Van Rooyen & Prinsloo, 2002).

There must be a direct link between the purpose of the learning programme, the competence required, the learning outcomes that must be demonstrated, and the assessment criteria used to determine whether the outcomes have been achieved successfully (Hattingh & Kenwright, 2002).

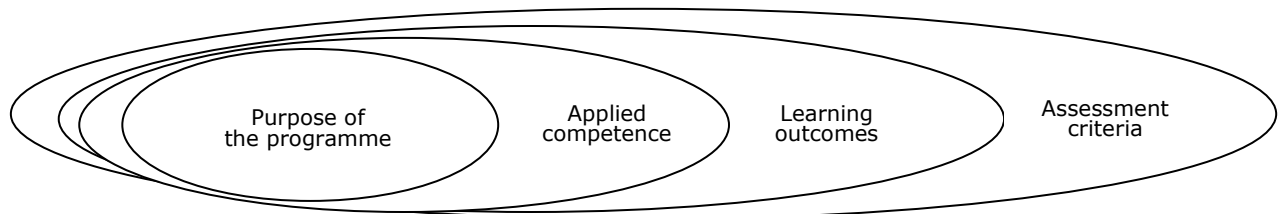


Figure 2.3 Links between the purpose, applied competence, outcomes and assessment criteria (Hattingh & Kenwright, 2002, p 8)

Table 2.2 below also demonstrate a detail overview of the relationship between the unit standard, outcomes and assessment criteria which contributes to applied competence.

Table 2.2
Links between the Purpose, Align Outcomes and Assessment criteria

Purpose of the unit standard	This unit standard is intended for intermediaries who market long term insurance products.
The qualifying learner is capable of:	<ul style="list-style-type: none"> ▪ Explaining the planning required of an intermediary. ▪ Explaining the role of prospecting in sales success. ▪ Describing how to access a potential client. ▪ Making a case for a sale.
Specific outcomes	<ul style="list-style-type: none"> ▪ Explain the planning required of an intermediary. ▪ Explain the role of prospecting in sales success ▪ Describe how to access a potential client. ▪ Make a case for a sale.
Assessment criteria for specific outcome 4:	<ul style="list-style-type: none"> ▪ Questions are demonstrated to elicit the required information in five different situations. ▪ An accurate assessment is made of a prospective client's buying motive in five different situations • Make a case for a sale. ▪ The needs of a prospective client are prioritised in order to propose a solution. ▪ An appropriate solution is matched to a product and to the needs, value system and wants of the prospective client.

Note: Adapted from SAQA (in Hattingh & Kenwright, 2002)

Table 2.2 highlights an example of the unit standard and how it links. The purpose indicates the programmes' intentions. This is very similar to specific outcome. An example of specific outcome four is used. The assessment criteria assessment are statements that describe the standard to which learners must perform, i.e. the actions, roles, knowledge, understanding, skills, values and attitudes stated in the outcomes.

Additionally, during facilitation and presentation of a learning programme, different assessment instruments and types should be used in order for learners to acquired applied competence. Assessments instruments are tools designed for assessor and/or facilitators to collect evidence of a learner's competence (Learning Performance Link, 2004). Moreover, the instrument is designed to assess the following:

- Knowledge (what the learner) knows
- Skills (What the learner) can do
- Attitude/values/behaviour (Willingness to internalise and apply)

Different assessment types should be applied to assess the learner's competence against set criteria. The type of assessment will depend on the purpose of the programme and the environment should be created to achieve that purpose. These assessment types include summative, formative and integrated assessments. Within these types of assessment, there are methods of assessment that should also be used (INSETA, 2004; INSETA, 2009).

2.2.5 Formative, Summative, and Integrated Assessment

This assessment types are used to achieve applied competence and should be designed against specific outcomes to narrow the learning gap (Meyer *et al.*, 2004; Institute of people development, 2009; Wisconsin Center for Education Research, 2009).

The above authors describe the assessments types below as some that can be used learning design and training facilitation, namely:

2.2.5.1 Formative Assessment

Sadler in Nicol (2006) define formative assessment as an assessment that is specifically intended to generate feedback on performance to improve and accelerate learning. According to Meyer *et al.* (2004) formative assessment takes place on a continuous basis throughout the training process. Its purpose is to determine the learner's progress towards achieving the specified outcomes.

The Wisconsin Center for Education Research (2009) describes formative assessment as a valuable way of assessing day-to-day training when used to meet learners' needs. It benefits learners immediately as it enables them to monitor their own progress as a result of the feedback received from their peers and facilitators. Learners also have the opportunity to revise and refine their thinking it further assists facilitators to monitor their learners' progress and to modify instruction accordingly.

Furthermore, formative assessment could also be used to:

- diagnose learner strengths and weaknesses and motivate the learner by means of feedback on learning achievements and strengths;
- provide feedback to learners on their progress (or lack thereof);
- develop strategies to address the learner's weaknesses;
- evaluate the success of learning and teaching strategies employed;
- inform how learning and training strategies can be improved; and
- assist the learner, learning facilitator and/or assessor to plan future learning.

This type of assessment requires a planned process ensures a cooperative relationship between the assessor and the learner. This approach can be challenging for both the assessor and the learner because it breaks down the 'old ways' of thinking and assessing. In the past, the assessor determined how, when, where and in what ways the assessment will occur. Whereas, the new paradigm shifts away from the assessor making all the decisions, to forming a partnership with learners. Learners need to know how they are going to be assessed and the criteria against which they will be assessed. They also need to understand the reasons for the assessment and the way the assessment process is going to take place (INSETA, 2004; Wisconsin Center for Education Research, 2009).

Moreover, this allows learners to understand that they can actively participate in the assessment and how. This provides them an accurate picture of their own level of competence and discovers further opportunity for personal growth. Learner's involvement is therefore, not about bringing in a 'feel good' sense into the assessment process; it is essentially allowing the maximum growth or development for the learners. Direct involvement means the learner can take more control over their own assessment and self assess their performance before the summative (final) assessment (INSETA, 2004).

Once the learner has been assessed as competent against formative assessment, it is not necessary to assess these outcomes again. However, a final assessment should take place to assess the overall performance at the end of the programme to establish if the learner can apply all the assessment criteria against each specific outcome (standard) especially if there are credits or a full qualification to be awarded (INSETA, 2009).

2.2.5.2 Summative Assessment

Summative assessment is aimed at assessing whether the learner has achieved the outcomes, in terms of being awarded a credit, qualification or certificate. Its purpose is to judge whether or not the learner has achieved the outcomes described for the module/programme. It is therefore conducted at the end of the programme and/or at the end of modules. The learner must be informed and must clearly understand when an assessment is summative (*Bennett, 2011; INSETA, 2009; Meyer et al., 2004*).

Summative assessment is not restrictive to a written exam, but allows a range of methods. These methods could be in a form of a written questionnaire, oral questioning, observation and product evaluation. Evidence can be collected from a variety of sources by making use of a range of assessment instruments. It could be in the form of role-plays, written exams, assignment, demonstrations, projects, case studies, video recording etc (*INSETA, 2009*).

A comparison between formative and summative assessment is illustrated on Table 2.3. This entails an overview of the purpose of the assessment, examples, when the type of assessment should take place, learner readiness, the type of feedback to be provided, including awarding of credits.

Table 2.3
Comparison of Formative and Summative Assessment

	FORMATIVE ASSESSMENT	SUMMATIVE ASSESSMENT
Purpose	<p>The main purposes are to:</p> <ul style="list-style-type: none"> - determine the progress of the learner in the learning process, - diagnose the learner's strengths and development areas, - guide further learning in the specific programme, and - support the learning process. 	<ul style="list-style-type: none"> - The purpose is to measure and judge the learner's achievement of the specified outcomes, in order to determine if the learner is competent or not yet competent. - It is used to make decisions about promoting learners from one level to the next and/or to award credits to learners for unit standards/qualifications achieved. - It can be used to evaluate the success of the learning programme, in terms of the extent to which it facilitated the achievement of the outcomes.
Example of assessment method	<ul style="list-style-type: none"> - A wide variety of methods can be used, e.g. projects, class debates, group discussions, knowledge tests, role-play and case studies. 	<ul style="list-style-type: none"> - A final test or examination is typically used as a summative assessment.
Timing	<ul style="list-style-type: none"> - Assessment is conducted continuously throughout the learning programme. - It should form an integral part of the teaching/learning process. 	<ul style="list-style-type: none"> - Assessment is conducted at the end of a learning programme (e.g. qualification programme or short course) or on completion of each module. - In input-based systems this usually occurs after a specified period of study, e.g. in the middle or at the end of the year.
Learner readiness	<ul style="list-style-type: none"> - Assists in making decisions on the readiness of the learner for summative assessment. 	<ul style="list-style-type: none"> - It is conducted when the assessor and learners agree that the learner has mastered the outcomes to be assessed sufficiently.
Feedback	<ul style="list-style-type: none"> - Is developmental in nature, and provides feedback to the learners on the extent to which they have mastered the outcomes, as well as on development areas. 	<ul style="list-style-type: none"> - Should be provided to the learner on the achievement of outcomes, development areas, as well as further learning.
Award of credits or certificate	<ul style="list-style-type: none"> - Credits/certificates are not awarded for formative assessment. - The results from formative assessments can be used for summative assessment, with the agreement of the learner. 	<ul style="list-style-type: none"> - The assessment is designed to award credits and/or certificates to learners for successful completion of the learning programme.

Note: Table adapted from Hattingh and Kenwright (2002, p 18)

The use of both summative and formative assessment ensures that learners achieve applied competence. The sales learners in the company where the research is being conducted were only receiving summative assessment in the form of a written exam. This seems to have been limiting the competence of sales learners as they were not receiving the opportunity to practice the knowledge acquired. Feedback from the existing staff indicates the need to implement a formative type of assessment such as role-play. The sales learners need to practice how to sell before entering into a real working environment and this type of assessment should assist in also establishing the learning gaps before conducting a summative assessment. The shift to the new paradigm of learning which emphasises the need for applied competence seems to motivate the need to include formative assessment in future learning

programmes. However, the research findings will provide factual data which either reject or approve this need.

2.2.5.3 Integrated Assessment

This is a form of assessment which permits the learner to demonstrate applied competence and which uses a range of formative and summative assessment method (SAQA, 2008). It also implies that theoretical (knowledge) and practical (skill) components should, where possible, be assessed together (Learning Performance Link, 2004).

SAQA (2008) indicates that integrated assessment includes, where appropriate, the assessment of critical cross-field outcomes. This type of integration can take place within the smallest unit of learning, i.e. one unit standard, or across a number of learning units.

Hattingh and Kenwright (2002:18) as well as Van Rooyen and Prinsloo (2002) state that integrated assessment assesses competence across a number of outcomes in an integrated manner, e.g. assessing the qualification as a whole, rather than each module of the qualification. Furthermore, it provides the learner with an opportunity to demonstrate applied competence, i.e. the integration of practical, foundational and reflexive competence, and also the integration of knowledge, skills, theory and practice (INSETA, 2004).

The following are examples of integrated assessment practices according to SAQA (2001)

- combining a range of formative and summative assessment methods;
- assessing a number of outcomes together;
- assessing a number of assessment criteria together;
- assessing a number of unit standards together; assessing specific and critical cross-field outcomes together;
- using a combination of assessment methods and instruments for assessing outcomes;
- collecting naturally occurring evidence (such as in a workplace setting); and
- Acquiring evidence from other sources, such as supervisors' reports, testimonials, portfolios of work previously done, logbooks, journals, etc.

Although the assessment types, processes and instrument can be properly developed it is also critical that they adhere to assessment principles, which entails that learning programme assessment should be fair, valid and reliable and do not disadvantage any learner (INSETA, 2004).

2.2.5.4 Principles of Assessment

The quality of assessment is important to ensure the credibility of the credits and certificates awarded to learners. Assessment results often affect personal, social and economic progression and mobility in society. Assessments that adhere to an agreed set of principles will contribute towards allaying the concerns and fears of users, i.e. learners, parents, employers, learning institutions and the general public. The principles of assessment are aimed at ensuring that assessment processes are fair, valid, reliable and practical and that they provide accurate information about the individual that has been assessed (Meyer *et al.*, 2004; Wragg, 1997). There are more principles in various literatures; however, the most important principles of assessment that cannot be excluded in learning are fairness, reliability, validity and practicability, an overview is provided on the Table 2.4 (INSETA, 2004; INSETA, 2009).

**Table 2.4
Summary and Alignment to the Assessment Principles**

	Description of the principle	Practices aligned to these principles	Practices not aligned to these principles
FAIRNESS	The assessment must provide learners with an equal and fair opportunity to demonstrate their competence. It should not favour anyone and must not be biased against any learner.	<ul style="list-style-type: none"> - The description of the assessment process is clear, transparent and available to all learners. - Appeal mechanisms and re-assessments are accessible to all learners. 	<p>Examples of unfair practices:</p> <ul style="list-style-type: none"> - unequal opportunities and/or resources, inappropriate teaching/learning approaches; - bias in respect of gender, age, disability, race, etc; - lack of clarity on what is being assessed.
RELIABILITY	<p>Reliability in assessment is about consistency.</p> <p>Every time the assessment is conducted or the assessment instrument is used, it must assess the same outcomes at the same level.</p>	<ul style="list-style-type: none"> - Each time the assessment is administered, the same or similar conditions prevail. - The assessment procedures, methods, instruments and practices are the same or similar. - Assessors give clear, consistent and unambiguous instructions. - Internal and external moderation procedures are in place to monitor the consistency of assessment. Assessment results are accurately and systematically recorded. 	<ul style="list-style-type: none"> - Assessment results are perceived to be influenced by external variables, such as the assessor's bias against the learner's gender, religion, appearance or personality. - Different assessors interpret unit standards differently. - Different assessors apply standards differently. - Assessor assumptions about the learner based on previous performance, influence assessment results.
VALIDITY	The assessment measures what it purports to assess, i.e. the test, exam or competence demonstration 'tests' what it is supposed to test.	<ul style="list-style-type: none"> - Assessment procedures, methods, instruments and materials are appropriate for what is being assessed. - The outcomes being assessed are clearly stated, and the assessment remains focused on assessing those outcomes. - The assessment stays within the parameters of what is required. It does not assess more or less than what is required in the unit standard or qualification. - The type and amount of evidence required is appropriate to the outcomes that must be achieved, e.g. the evidence required on NQF level 3 cannot be the same as that required on NQF level 5. 	<ul style="list-style-type: none"> - The procedures, methods, instruments or materials used are inappropriate for assessing the specified outcomes. - Aspects are assessed that are related to the outcome, but that are not focused on the outcome itself. - For example, an essay-type question would be inappropriate to assess the learners' ability to plan a marketing strategy. Learners may fail to achieve the outcome, not because they do not know how to plan a marketing strategy, but because they lack essay-writing skills.
PRACTICABILITY	Assessments take into account the available financial resources, facilities, equipment and time.	<ul style="list-style-type: none"> - Assessment procedures are manageable and time-efficient. 	<ul style="list-style-type: none"> - Assessments that require elaborate arrangements for equipment and facilities, and that are very costly, are impractical. - Assessments that are too time-consuming can be an obstacle to learning and effective workplace production.

Note: Adapted from Hattingh and Kenwright (2002, p 19) and INSETA (2004)

The principles of assessment should be embedded in all assessment practices because the quality of the assessment is critical. This also impacts the success of the learning as learners will be negatively affected if they are treated differently and the assessment is not assessing what it is meant to assess and it is not practical. The assessor and/or facilitator would have failed to implement the quality golden thread intended to contribute to the effectiveness of the learning programme.

2.3 The New Paradigm's Impact on the Research

Introducing the NQF and OBE in South African seem to be an advantage in learning, because the emphasis on learning programmes has evolved towards achieving desired outcomes than acquiring knowledge. This influences the learning programme design and development to include specific outcomes, critical cross-field outcomes, assessment criteria, integrated assessment which entail formative (e.g role-play) and summative (written tests) assessment and assessment practices in order to achieve applied competence. Thus benefits the learner and company's performance.

This paradigm shift to integrated assessment, which entails the use of formative assessment, affords learning organisation to find techniques such as role-play to equip learners to acquire skills not only specified learning outcomes, however, also those indirectly affect the overall programme. The shift should assist assessors, instructional designers and facilitators to plan design and develop content with the end goal in mind. Ensuring that they include the learner's needs and investigate appropriate techniques such as role-play to achieve the desired result.

In this case, role-play as a formative assessment technique align to OBE in that it is a vehicle to equip the learner on how to apply what they have learned. A learner practices various skills in a safe environment and by the time they enter the real work setting he/she knows what to expect and is able to handle related load and challenges. It also align to methodologies with OBE such as critical cross field outcomes, which assess a number of skills over and above those the learning programme is focusing on. Ensuring that by the end of the programme a learner would have obtained a skill on how to sell. However, they would have also learners

to work as a team as role play requires them to be a team play as well as communication and problem solving.

With regards to critical cross fields, Limpopo Department of Education (2006) state that they don't directly facilitate the critical cross-field outcomes. Instead, they could regard them as a list of good habits they will help their learners develop. They indicate habits develop unconsciously and through various kinds of life experiences. Therefore, facilitators use critical cross-field outcomes as an information tool for them to decide on the different kinds of learning experiences to be constructed for learning.

According to Professional Role-Players (2011) the following are some of the benefits of role-play relating to OBE:

- i. Role play highlights the difference between, how people think they are communicating and how their communication is perceived by both others around them and themselves.
- ii. It stimulates the imagination and enables participants to engage with people's concerns and complexities within a supportive environment.
- iii. It is a dynamic and highly engaging skill that can boost confidence and increase behavioural change; tools which are vital for any work force.
- iv. It has an immediate effect and application, strengthening, learning and increasing the probability of using these newly acquired skills outside of the classroom.
- v. It also encourages critical thinking, for example, analysis and problem solving skills, which is a cognitive learning method.

Therefore, role-play supports the view of OBE, as it introduces practice tool for learners to apply the acquired knowledge. However, the research will have to fit in other practices that were not initially included in the training design process in the organisation where the research is being conducted such as designing of specific outcomes and assessment criteria for each outcome.

The specific outcomes for the learning programme, both formative and summative assessments have been included in this research and will be seen in the following chapters. This will ensure alignment to the new paradigm as well as demonstrate how it can be applied including the benefits that could be achieved from its

implementation. If the research findings demonstrate the benefits of the integration of role-play with the new paradigm, it will be presented to the call centre management with the possibility of becoming norm.

As highlighted earlier, the South African Government is modifying OBE to improve the performance of learners, however, this will be introduced on the 2025 curriculum (IOL News, 2010). Until that occurs, organisations can benefit from applying these learning methodologies in their organisation.

2.4 Conclusion

Skills development via education and training is a powerful tool to improve both the individual career opportunity and organisational competitiveness worldwide.

Economic and social development requires a planned approach to national training and development; hence the new paradigm shift. This demonstrates how the South African government has planned an improved skills development strategy for the country and organisations. This paradigm shift supports the recommendation to develop an integrated learning solution or learning programme for novice sales agents that will enable them to apply themselves in a working environment.

With regards to the learning approach, the OBE approach to training integrates learning methodologies with assessment, i.e. these are aligned. This is fundamentally different from the current learning process where learners are assessed by means of writing a test at the end of a programme as was previously practised in most organisations.

The new paradigm in training and development allows both the government and organisations to support integrated learning and learners interest, in order to benefit both the individual, organisation and in turn the government economy. This way, the learner is able to learn, find more opportunities and become a valuable member of the community, organisation and country. The organisation also benefits as an empowered staff member can add value to the success of the business. With regard to the country, this process and flow of benefits from learner to organisation might

eventually affect the country, as the economy might grow, which in turn might affect the financial stability of the country.

This chapter provided the fundamentals regarding the new paradigm shift, however, its practical implementation will be discussed in chapter four. This will be integrated with the concepts that will be discussed in the next chapter.

However, the next chapter is going to elaborate on what role-play entails, its benefits to learning, how it is applied, other concepts that add value to learning and this research. The theoretical framework will also be discussed.

Chapter 3

Literature Review

3.1 Introduction

In the previous chapters the importance of role-play as an assessment tool for training novice sales staff and the impact of the OBE paradigm were discussed. This chapter will pay attention to other concepts that contribute to the effectiveness of role-play and how these concepts can add value to the success of this learning programme. .

Four concepts below will be discussed, namely:

- i. Learning: What it is and how it is affected by competence assessment.
- ii. Assessment: What it is and how it contributes to the learning environment. This includes formative and summative assessment techniques.
- iii. Role-play as an assessment tool: What it is and the view from other researchers that can add value to this research.
- iv. Learning outcomes and performance: How the above concepts relate to performance as a learning outcome.

An integration of the above concepts and the theoretical Framework of this research will be discussed later in this chapter.

3.2 Concepts Impacting Performance Outcomes

3.2.1 Learning

Khoza (2002) refers to Vrey regarding the definition of learning that describes it as a human phenomenon by which learners acquires knowledge, behaviour and performs specific activities. Some of their behaviour can change permanently whereas others for a short time. (Goldstein, 1993). Mission to Learn (2009) have a similar definition

which describe learning as the lifelong process of transforming information and experience into knowledge, skills, behaviours, and attitudes. Vrey further state that, learning refers to gaining understanding of the things in an environment and assigning meaning to them. This way, the facilitator orientates a learner towards people, things and ideas and how to act towards them.

Learning occurs in various ways, in different environments such as the domestic environment, schools, personal development, community, and the workplace . This learning can be motivated by various reasons such as habit or it could be focused goal oriented. If the learning is to achieve a certain goal, it necessary to prepare the learner to ensure readiness to accommodate that learning (Burke, 1995; Leimbach & Maringka, 2009; Khoza, 2002; Taylor & Furham, 2005) The learning outcomes should be what drives the learning and the methodologies that will be used during training interventions (Davis & Davis, 1998; Leimbach & Maringka, 2009).

One way one can learn is via training. The Cambridge Advanced Learner's Dictionary (2004) defines training as the process of learning the skills one needs to perform a particular job or activity. Therefore, training is one way to acquire knowledge and skills needed to perform effectively on the job. This process changes or improves the behaviour of the learner to perform a job better (Forsyth, 1992).

Many techniques are used in training. Selected techniques will dictate the delivery process to be followed, in turn affect the effectiveness of learning and performance. However, it is critical to establish a learning method that suits the content in order to achieve the best results (Nkosi, 2000; Taylor & Furnham, 2005; Wisconsin Center for Education Research, 2009). Additionally, Ferreira in Nkosi (2000) propounds that techniques should be adjustable to special training needs. Ferreira further point out that, an effective training technique should make use of dormant mental abilities and tap into the creative capabilities of both the facilitator and learner. The training technique should avoid fatigue and tension, and create an atmosphere of openness and playfulness. Learners should feel free and confident in the training environment as well as during the learning process (Cates & Jones, 1999). The Human Sciences Research Council (in Khoza, 2002) argues that training should take place in a real, actual business situation and solve real problems. This implies that the learning environment should allow learners to participate rather than remain passive.

Goldstein (1993) adds that, learners can benefit from training if they are ready and motivated to learn. They can also benefit if they have relevant experience to the training programme.

However, it is critical to validate that the learning has been acquired, to confirm the change in performance and behaviour, close the knowledge gap and build on success. This can be done by conducting an assessment on the learning imparted (Goldstein, 1993; INSETA, 2009).

3.2.2 Assessment

Assessment is often described as the process of making judgements about a learner's performance by matching evidence collected to the appropriate standard or outcome. It is also a term used to refer a process of gathering and discussing information from multiple and diverse sources in order to develop a thorough understanding of what learners know, understand, and apply as a result of their learning experience experiences; the process culminates when assessment results are used to improve subsequent learning. It can also be described as a process of collecting data for the purpose of making decisions about learner's competence and areas of development (Meyer et al., 2003; Lamberts & Lines, 2000; INSETA, 2009; Teaching Effective Programme, 2011).

The Wisconsin Center for Education Research (2009) indicates that assessment forms an integral part of instruction and is an important source of reflection for learners and facilitators. It can be used as a compass to guide learners to learning and performance achievement. However, in order to achieve the desired outcomes, a balanced programme, incorporating both formative and summative assessments should be designed

INSETA (2009), indicate that according to OBE, assessment is a learner-centred process that is results oriented towards supporting learners to achieve their full potential and implies that:

- What learners are to learn is clearly defined.
- Learner's progress is based on demonstrated achievement.

- Learner's needs are accommodated through multiple teaching and learning strategies and assessment tools.
- Each learner is provided the time and assistance to realise his/her potential.

Assessment in OBE is based on whether or not the learners are able to demonstrate an outcome. To do this, assessment must be criterion-based, meaning that learners are assessed against criteria that indicate if an outcome has been attained. Criterion-based assessment is different to the old form of assessment wherein learners were tested against other learners' performance. This paradigm encourages facilitators to assess the learners continuously. This does not mean a repetition of assessment techniques, however, it refers to use of various assessment methods to monitor learning impact on learners (Clench, 2010)

Additionally, Kenwright and Hattingh (2003) and INSETA (2009) emphasise some key elements of assessment:

- i. Assessment is a structured process that must be carefully planned to achieve a specific objective. The process must be communicated beforehand to all involved in the learning/assessment process.
- ii. Various instrument of assessment, such as simulations, tests, work-based projects or assignment should be used.
- iii. The method for assessment must be flexible, clear, valid and reliable.
- iv. Assessment involves gathering evidence about the learner's performance and/or non-performance in order to award certificates or credits for achievements.
- v. The learner's performance is measured against predetermined and clearly described outcomes and assessment criteria.
- vi. The outcomes and assessment criteria must be accurately and unambiguously formulated and understood by the assessor and the learner.
- vii. Where workplace assessment is not possible, performance should be demonstrated and assessed under conditions as close as possible to the real setting.

Nkosi (2000) refers to Munetsi who positions the concept of assessment practically by arguing that the measurement of training must do more than only discriminate between satisfactory and unsatisfactory performance. It should establish why a

particular performance was not up to standard. Such a practice would assist in correcting what is needed, in order to bring the performance up to standard.

When measuring learner competence, both formative and summative assessment should be used. As indicated in table 2.3 in chapter two, formative assessment refers to techniques used during a training session to assess whether learners are able to display what they have learned by means of different techniques, such as simulations like role-plays and other related techniques. This also serves as entry level requirement to complete the summative assessment (INSETA, 2009; SAQA, 2001).

Moreover, formative assessment is useful in providing feedback that learners can use to measure their understanding and ability to apply concepts, facts and procedures. This implies that a feedback session following for example a role-play training and assessment technique will provide them an opportunity to analyse some of the social dynamics that occurred. This will also provide feedback, which will be useful prior to entering the real working environment (SAQA, 2001; Van Rooyen & Prinsloo, 2002). McManus (in Bennett, 2011) also describes formative assessment as a process used by facilitators and learners during instruction that provides feedback to adjust ongoing training and learning to improve learner's achievement of intended instructional outcomes.

In contrast, summative assessment is designed to measure the level of ability after completion of training. Learner's' knowledge and skills are assessed on completion of the learning period. This is used to ensure that they have mastered the learning outcomes and can take various forms, such as a knowledge assessment (Goldstein, 1993; SAQA, 2001; INSETA, 2009; Wisconsin Center for Education Research, 2009)

Kirkpatrick (1994) cited the following evaluation stages linked to both formative and summative assessment:

- Reaction:

- This can best be described as how well the learners liked a particular training session or programme.

- **Learning:**
Learning focuses on the principles, facts and techniques that are understood and absorbed by the learners.
- **Behaviour:**
If a learner is going to change his/her behaviour, the following five basic requirements must exist:
 - i. The need to improve.
 - ii. Recognition of his or her own weaknesses.
 - iii. Working in a permissive climate.
 - iv. There must be some help from someone who is interested and skilled.
 - v. There should be an opportunity for the learner to try out new ideas.
- **Results:**
Results or outcomes can be observed in the form of a reduction of costs, reduction of turnover and absenteeism, reduction of grievances, increase in quality and quantity of production and positive morale as a result of training.

The assessments that are being used either (formative or summative) as indicated by the above stages should link to the purpose of the learning programme and the desired learning outcomes (Blanchard & Thacker, 2003).

Globally, both types of assessments are highly recommended; however, they have significant benefits when used in the role for which they are designed. However, gaps in their utility emerge when they are used in roles for which they are not designed. There is also high emphasis on using an integrated balanced assessment system which incorporates formative and summative (Hatzipanagos, 2008; Wisconsin Center for Education Research, 2009; Zucker & Jorgensen, 2004).

Zucker and Jorgensen (2004) mentions that educational policy and practice is a barrier to its implementation. The current policies and practices which govern assessment place a counter-productive distance between the learners and facilitators. The crisis is largely attributable to policies which advocate the energetic use of methods which do not and which have never adequately met social needs

The effects of training will also be evident by the learner's perform when entering their real work setting (Nkosi, 2000). Taylor and Furnham (2005) and Kroon in Nkosi (2000) point out that a process of change should be evident, new ideas, work approaches and creativity should be noticed. Furthermore, improvement of service, product and method of production should be experienced. Brum, 2007 indicates that when a training programme is completed the following benefits will accrue to the organisation: gaining a competitive edge, an increase in worker output or productivity, as well as higher employee retention. However, to the employee benefits will be in terms of compensation (Brum, 2007)

These kinds of improved results in performance are attributed to the use of an effective training and assessment technique. Role-play is such a technique; it allows learners to practice and be assessed on the knowledge acquired before entering their real work setting. This allows a representation of some aspects of the real world where abstract models are developed and then manipulated in dynamic ways to create learning. It involves abstracting elements of social or physical reality in a safe and time-compressed setting for a learner to enter into and learn (Davis & Davis, 1998; McGill & Beaty, 1995).

3.2.3 Role-Play

Many researchers have discussed the successful use of role-play as a training tool in many different scenarios (Bartle, 2007; Bashaw & Ingram, 1996; Baumgartner, 2001; Davis & Davis, 1998; Harbour & Connick, 2004-2005; Turner, 1996). However, Davis and Davis (1998) as well as Professional Role-Players (2010) describe role-play as an activity where a limited number of learners take on specifically assigned and well defined roles, act out an encounter that involves a goal or problem and denotes a cluster of prescribed behaviours associated with particular positions. For example, when being a sales agent, manager or trainer each role carries certain expectations. A facilitator and/or other learner may watch the role-play and critique it afterwards.

The concept of roles comes from the field of sociology where role-players assume individual roles in a hypothesised social group and experience the complexity of establishing and implementing particular goals within the fabric established by the system. The use of role-play has been practiced as a simulation method since the

1920s where it was used in politics, by company executives in dealing with change and international relations contexts, including model League of Nations organisations, which gave rise to model United Nations simulations. Mock trials and model legislatures, such as the YMCA Youth in Government programme, are some of the examples of political role-play (Fripp, 1993; Rilstone, 1994).

Role-plays are also used for various purposes such as therapy, skills development, etc. However, in skills development programme, which is the research study's area of focus, role-play is used in diagnosing and analysing a particular role. This entails training learners the content of the role and providing them an opportunity to practice a specific role, and evaluating how well they can actually play the role (Barshaw & Ingram, 1996; Bartle, 2007; Davis & Davis, 1998; Turner, 1996:33).

Role-players depending on the environment are used to determine the actions of their characters based on their characterisation, and the actions succeed or fail according to a system of rules and guidelines. Within the rules, they may improvise freely. Their choices shape the direction and outcome of the games (Baumgartner, 2001; Davis & Davis, 1998).

Harbour and Connick (2004-2005) indicate that the drawback of using role-play is that facilitators in skills development programmes often schedule a role-play exercise at the end of a course. This is done to gather information and assess how well the role-players have understood the training. Consequently, leaving it until the last minute can cause the dreaded role-play to loom in the learners' minds, causing a negative distraction throughout the course. This does not imply that role-play is not a useful tool, but that facilitators must introduce learners to the role-play experience gradually by conducting mini role-plays at an early stage and throughout the training. This serves a double -purpose: it de-mystifies the experience so that learners become more comfortable with the idea of 'performing' in public, and, it more fairly shows role-playing to be a good tool for rehearsing life and work, which is its main function (Fripp, 1993).

To illustrate the value of role-playing, Harbour and Connick (2004-2005) provided the following theatre analogy: "Actors spend hours rehearsing a twenty minute scene. They do it again and again to get it right; to get the behaviours and the

relationships right, to make sense of the scene and to understand the issues. They get feedback in the form of notes from the director, which they will immediately apply to the work in hand. They carry on in this way until it is perfect and the scene becomes part of them”.

The above illustration does not suggest that those in learning and development situations should become actors and rehearse their life scenarios for hours on end. However, the principle is the same, in that the learners in training also need to practice the knowledge acquired until they are able to perform it, which benefits the learner’s performance.

Hope and Vavra (1996) also state that when para-professional HelpLine employees are asked about the most helpful part of training and supervision, they invariably mention the opportunity to act out and practice skills in role-plays. Therefore, role-plays assist in building skills and confidence; identify individual training needs as well as personal issues of HelpLine staff that could interfere with job performance effectiveness.

Barshaw and Ingram (1996) agree on the benefits of role-play by pointing out that organisations can use a learners’ performance in role-play exercises as a partial predictor of readiness for field selling. Accordingly, role-play can serve as an indicator of training cycle time, indicating the duration of the training before a learner starts with another group and before the sales learner qualify as an agent and start selling. The better the role-play performance in training, the faster the learner will move to the next step in the training sales cycle time. Additionally, because role plays can be involving, both in emotional and cognitive ways, it can also be used to help people understand others, and the positions of others. For example, a person can role-play a position with which they disagree, to better understand that position (Bacal, 2010)

Barshaw and Ingram (1996) highlight the following challenges faced by facilitators when using the role-play technique in training sales learners:

- Role-plays are staged and sometimes over-dramatised which can potentially lengthen the training cycle time. This is because the learners play an unfamiliar part and draw upon new experiences to perform the role adequately. As such,

they may have problems getting into or stepping out of character during the role-play.

- Facilitators may fail to give the learners sufficient information about the “role” in which they are about to appear.
- Learners may have no prior experiences to draw upon to help them play the role (e.g. seller). This possibility severely limits the range of behaviors learners are able to portray.

When the above challenges occur, the cycle time to achieve satisfactory role-play results is lengthened. Therefore, several different role-plays may be required to achieve the desired effects. Cycle time reductions can occur if organisations prepare learners for role-play rather than simply increase the number of role-plays (Barshaw & Ingram, 1996).

Davis and Davis (1998), suggest a structured programme with training material that should include the following to address some of the above challenges:

- Learners’ action in a particular scenario and how their efforts to play their roles will become complicated as the action progresses.
- Training materials to be related to the learning outcomes of the role-play so that the scenario developed provides a virtual reality; i.e. a reality close to the actual environment of the expected real world performance with the potential to draw out the intended learning outcomes.
- In connection with the facilitator’s role, the facilitator should select learners for each role, provide clear instructions, assign specific duties to the observers, guide the role-play as it unfolds and lead the subsequent discussion of the meaning of the role play. A skilful facilitator knows that different aspects of a role can be emphasised in role-plays.

According to Davis and Davis (1998) the following four stages should be included in the role-play training material:

3.2.3.1 Role conflict:

When a player is asked to play two different roles that interfere with each other. For example, a sales agent selling to a prospective client and also play the role of a client who is buying a product.

3.2.3.2 New Role

When the role is full of puzzles and surprises as with a new sales agent facing a different objections on the first day at a call centre. S/he has never experienced this and is trying to make sense of it.

3.2.3.3 Role Relationships

When the people one interacts with are difficult, such as a customer not comfortable to buy a product over the phone.

3.2.3.4 Role Fatigue

When it becomes difficult to play the same role over and over again, always smiling, always pleasant. For example, selling to the 100th prospective customer and has been rejected from all other previous calls. The sales agent is still expected to smile and treat that prospective customer like s/he is the first one.

Additionally, Bartle (2007) suggests three stages to a standard role-play session, namely:

3.2.3.5 The Set-up

When the facilitator sets the stage, this implies describing the scenario and assigning roles to learners. An optional part of the set-up stage is to provide some time for the learners to map out the general plot of their play. The facilitator must decide this on the basis of what should be emphasised, when designing the workshop in which the role-play will be conducted. Another option is to compile a single page description of the scenario to be worked out by the role-players. Alternatively, it may be useful for

the learners to be spontaneous and devise their separate acts on the spot. In this case, there will be no time for the role-player to plan their actions, and no written descriptions or guidelines, which might empower the learners on how to deal with unexpected problem solving.

3.2.3.6 The Play

The play stage of the session is when the learners act out the roles and the play is in progress. If the play becomes too long, the facilitator can provide the role-player a time warning of one or two minutes, and end the play after that. Alternatively, the play may be too short, and the facilitator must encourage the role-player to embellish their acting, and to add speeches and actions that make their play worthwhile.

3.2.3.7 The Discussion

It is important for all the learners to discuss what had happened as it provides feedback to all participating. They may question individual role-players to ask why they chose a particular position, made a certain statement, or undertook a specific action. The explanation and the resulting discussion are important for the role-players to obtain a greater understanding of the social dynamics related to a particular field scenario. In some role-play sessions, a certain show of emotion such as anger, dismay and disagreement may be generated, especially if some role-players take the play too seriously. The follow-up discussions offer the facilitator an opportunity to calm down the group a little, and explain that the heat was generated by the structure of the scenario, not the stubbornness of the role-players. These emotions should not be avoided as it provides an opportunity to reveal the nature of some field scenario, and encourages role-players to be sensitive to different assumptions, values, goals and positions that may be taken by others in the actual field.

Bartle (2007), further recommends that the facilitator needs to assist the learners to understand that a "play" by definition is not reality, and should not be taken seriously. Humour is encouraged, as it can defuse a wayward situation, and allows role-players to take an objective approach to analysing the potential field scenarios they might experience later. Turner (1996) points out that the scenarios must

simulate a real situation that the learners will face in the foreseeable future, to ensure efficient application.

Barshaw and Ingram (1996) conducted a research study to investigate the impact of role-play on sales agents' performance. They focused on the goal of role-play to increase the sales agents' current levels of selling knowledge, their sales skills, and enhance their beliefs in their ability to sell. The following were their findings:

- Role-play focuses attention on the interaction between a prospective client and a seller. In a training setting, sales learners imagine they are playing the role of a sales person interacting with a prospective customer.
- As role-play was designed to help new sales people learn new behaviors and improve performance, in order to take on the actual role of a sales-person, sales learners tried new behaviors and practiced being a sales person in a controlled environment entering the real work setting.
- Role-play eases new sales people into this unfamiliar role.
- Sales facilitators consistently rated role-play as the most effective form of sales training. This is because it simulates expected on-the-job scenarios and coerces the learners to translate learning into doing. Sales effectiveness increases considerably when facilitators ensure that the role-play is conducted in a friendly, positive atmosphere.
- Role-play lessens the sales learners' fears of failure and allows them the best opportunity to experience success in their role-plays. This success contributes to the confidence of sales learners in their own selling abilities after they qualify as sales agents.

According Yardley-Matwiejczuk (1997), the success of role-play technique depends on the judgement of those observing the role-plays. The skill of effective observation is as critical as the skill of role-playing. Moreover, the success of this method depends on the role-players' (learners') willingness to participate in and adjust to the planned role. The learners' behaviour, speech and feelings during the role-play form the basis for self-appraisal and feedback the observers. As a result, they will learn behaviours, words and approaches that are effective. Errors can be made and learned in a risk-free environment where the consequences are not too costly (Turner, 1996; Rae, 1993).

Additionally, Revolution Learning and Development (2010) also mentions the following benefits of using role-play.

- In most cases people like to play. However, it should bring out a key learning points, it can also be fun.
- Role play encourages critical thinking, because it's live, they have to think on the spot.
- It provides learners the ability to provide feedback against something realistic rather than wait until serious mistakes are made in the real world.
- When used in small groups, it allows delegates to share ideas by providing feedback to each other.

However, assessments should be conducted to ascertain that transfer of skills has taken place, the learning outcomes have been achieved, which should translate to a desired job performance. According to Garavaglia in Nkosi (2000) when only a small percentage of skills learned during training is applied to the job, as a result of lack of confidence, low motivation and failure to master the skills, partial transfer of skills has taken place. Foxon in Nkosi (2000) indicates that skills should be utilised optimally. He further argues that this type of optimal skills application and unconscious maintenance occur when the skills learned in training are applied to the job unconsciously or become the norm.

Blatner (2009) raised the following barriers that affect role play globally, namely

- i. Role playing is a technology for intensifying and accelerating learning; therefore, facilitators have to be well trained, competent and well-grounded in the various aspects of that role..
- ii. The most common problem with role playing is that of the leader not appreciating its essential nature. Therefore, it is necessary to learn how to warm up a learners and how to keep the warm-up going in order to achieve desired results.
- iii. Another barrier with role playing rises when facilitators gave into their own impulses to "play psychiatrist" and slip from dealing with the group problem to explore some issue to focusing on the real-life personal problems of a given individual.

A third barrier comes from the common tendency to assume that interpersonal skills are easier than technical skills--though in fact they are even more difficult.

These barriers and challenges should be taken into consideration during the planning, design and development of role-play as a formative assessment.

However, lack of skills transfer can be avoided by a continuous use of formative assessment and aligning it to learning outcomes during training. This will ensure improvement in job performance when the learner enters the real work setting.

3.3 Learning Outcome and Job Performance

According to Miner in Nkosi (2000) direct measurements of improvement in job performance should be a guide to the impact from training. Such an assessment will assist the facilitator to verify if training has in fact developed the skills and potential of the learner. The facilitator can achieve this by establishing learning outcomes for the learning programmes prior to its delivery and ensure the outcomes are aligned to the job the learner is expected to perform after the training (Mentkowski & Associates, 2000).

However, learning outcomes are those statements about the training programme that describe the desired behaviour of the learner when s/he leaves the training programme. They also provide an explanation and account of what (knowledge, skills and attitudes) learners should know, display and be able to perform at the end of the learning programme (Adam, 2004; Meyer *et al.*, 2004; Van der Horst & McDonald in Clench, 2010; Van Rooyen & Prinsloo, 2002). Additionally, SAQA (2001) describes learning outcomes as the demonstrable and assessable results of a learning process or statements regarding competence (refer to par.2.4.1). Outcome statements capture what the learner should be able to perform and demonstrate upon completion of a training programme (Hattingh & Kenwright, 2002). Adam (2004) agree to this by pointing out that learning outcomes represent a clear statement of instructional intent and are written in a form that clarifies the intent of the programme. Additionally, these are broad performance statement that should be referred to when the training programme is completed, to ensure that all the learning outcomes have been covered. Furthermore, the key question to be asked at

this point is what knowledge and skills should learners obtain and be able to demonstrate to confirm that they have acquired the skills (Adam, 2004).

Hattingh and Kenwright (2002) provided below some of the questions that should be covered and what the learning outcomes should include:

- i. **What** - What will the learner accomplish?
- ii. **When** - What is the target date for completing the learning objective?
- iii. **How** - How will the learner accomplish this outcome?
- iv. **Evaluation** - How will this outcome be evaluated or how will the facilitator know when it has been accomplished?

The learning outcomes should also:

- relate directly to the training programme and the learners' job assignments on completion of the training programme;
- represent the vision/learning the learners hope to achieve during the training programme;
- demonstrate the knowledge, skills and abilities the learner should be assisted to develop; and
- Include identified tools for measuring the results.

Learning outcomes represent culminating demonstrations of learning and achievement, not simply a listing of discrete skills, nor broad statements of knowledge and comprehension. Outcomes describe performances that demonstrate that significant learning has been verified and achieved by learners of the programme. The definition and description of characteristics of learning outcomes have introduced a new terminology that forms part of a widespread movement for making education more meaningful to learners, and more responsive to workplace demands (Hoskins & Fredrikson, 2008).

Burke (1995) as well as Hoskins and Fredrikson (2008) perceive learning outcomes as a performance outcome or assessment. They indicate that the need to meet workplace demands requires the introduction of a strategy for verifying the achievement of learning outcomes, known as performance assessment. Mentkowski and Associates (2000) as well as Hoskins and Fredrikson (2008) define performance

assessment as a process, which mainly relies on the assessor's observations and professional judgment for the verification of learners' learning on the basis of what the learners can do with their knowledge while performing complex tasks. Furthermore, techniques for performance assessment include essay-writing assignments in which the learners analyses, synthesises and evaluates issues, the preparation of demonstrations, exhibition projects, computer simulations, portfolios of work, the undertaking of problem-solving exercises and similar tasks. These techniques require the facilitator to either observe the learner perform a complex task and/or assess the product of such performance, and then to make a judgment about the quality.

Adam (2004) describes performance assessment as a strategy which:

- asks learners to perform, produce, create something;
- uses tasks that are representative of performances displayed in the workplace;
- requires the use of higher-order thinking processes;
- provides learners with opportunities to present and defend their work publicly and orally; and
- Relies on people, and not machines, to do the scoring with the use of assessment criteria as the basis for human judgment.

Creating learning outcomes is an important part of determining the learners'-related experience. This motivate him/her to maximize the benefits of the training programme, identify what the s/he hopes to gain from the learning experience, and help him/her focus on learning and performance goals upon completion of the programme. In addition, evaluating the learning outcomes (upon completion of the programme) will assist the learner to assess his/her overall learning experience, professional skills, and personal growth (Adam, 2004; Meyer *et al.*, 2004; Hoskins & Fredrikson, 2008)

Therefore, the learners' ability to perform effectively in their job requires that they have a complete understanding of their job requirements. Upon completion of the training, learners should also understand performance standards they are expected to meet. These should be renewed by both the learner and the supervisor prior to

the learner entering a real working environment (Hoskins & Fredrikson, 2008; Mentkowski & Associates, 2000).

Nkosi (2000) argues that the most important criterion in performance assessment systems should be measurement of an individual's contribution towards customer's satisfaction. It should be integrated with the notion of joint responsibility for quality. The individual's contribution towards meeting and exceeding customer's expectations should be a guiding factor. It is therefore important that a post assessment evaluation approach be introduced and promoted (Rae, 1993;). The fundamental purpose of learning and development is to help people develop skills which, when applied in a work setting, enhance job and organisational performance (Leimbach & Maringka, 2010).

The impact of learning in this research is critical; therefore, proof that the transfer of learning has occurred by means of increase in performance, is critical. The theoretical framework will address the different theorist's view and what can be implemented from a theoretical perspective to enhance the impact on learning.

3.4 Theoretical Framework

The study seeks to investigate an integrated assessment method in training and learning, focusing on how role-play as a formative assessment tool (pre and during training) can be integrated with summative assessment (final assessment after training) to improve novice sales agents' performance (Kenwright & Hattingh, 2003; SAQA, 2008).

Learning is seen as the building and reorganisation of schema to make sense of new information (Blanchard & Thacker, 2004). It is also described as the essence of everyday living and conscious experience; a process of transforming that experience into knowledge, skills, attitudes, values and belief (Mentkowski & Associates, 2000; Mission to Learn, 2009). To the cognitive theorist, learning is defined as a relatively permanent change in cognition occurring as a result of experience. Furthermore, cognitive theorists maintain the view that even-though learning can be inferred from behaviour, it is separate from behaviour. The current assessment approach in the

company where this research is conducted seems to be based on this theory as it values a knowledge test (Blanchard & Thacker, 2004; Davis & Davis, 1998).

The use of an integrated theory validates the use of social cognitive theory as it links both the cognitive and behaviour (Blanchard & Thacker, 2004; Cates & Jones, 1999; Learning Theories, 2008) This theory states that people learn through observing others' behavior, attitudes, and outcomes of those behaviors. (Learning Theories, 2008).

The use of role-play will collaborate with this theory as it integrates the cognition which refers to the acquiring of knowledge with behaviour, as this is how understanding of learning through performance is demonstrated.

Fritscher (2009) defines the cognitive theory as a learning theory of psychology that attempts to explain human behaviour by understanding the thinking processes. The assumption is that humans are logical beings that make the choices that make the most sense to them. The behavioural theory suggests that learning is measured in terms of relatively permanent changes in behaviour (Rae, 1993; Sullivan, Wircenski, Arnold & Sarkees, 1990).

Pure cognitive theory largely rejects behaviourism on the basis that it reduces complex human behaviours to simple cause and effect, as also indicated by Blanchard and Thacker (2004). However, in past decades, the trend has been towards merging the two theories into a comprehensive cognitive-behavioural theory, as in the case of **Gagne's learning types**. This encourages practitioners to use techniques from both schools of thought to help clients achieve their goals (Fritscher, 2009; Learning Theories in Educational Technology, 2011).

Blanchard and Thacker (2004) point out that both theories have implications, and different strength and weaknesses (as shown on table 3.1 below), hence the suggestion to introduce an integrated theory approach.

Table 3.1
Training Implications of Cognitive and Behaviourist Learning Theory

Issues	Cognitive Approach	Behaviourist Approach
Learner's role	Active, self-directed, Self-evaluating	Passive, dependent
Instructor	Facilitator, co-ordinator and presenter	Director, monitor, evaluator
Training content	Problem or task-oriented	Subject-orientated
Learner motivation	Internally motivated	Externally motivated
Training climate	Relaxed, mutually trustful and respectful, collaborative	Formal, authority-orientated, judgemental, competitive
Instructional goals	Collaboratively developed	Developed by instructor
Instructional activities	Interactive, group, project-oriented, experiential	Directive, individual, subject- orientated

Note: Adapted from Blanchard and Thacker (2004)

Below is a recommended integrative theory of learning, which seems to validate the need for formative assessment, and can be conducted in the form of a role-play in collaboration with summative assessment. This can be conducted in the form of knowledge assessment.

3.4.1 Gagne's Learning Types

Gagne's learning types theory integrates both the cognitive and behaviourist theories. Blanchard and Thacker (2004) and Cates and Jones (1999) mention that according to Robert Gagne, different types of learning can be categorised in terms of the events required for learning to occur. Table 3.2 below provides a summary of these learning types.

Table 3.2
Summary of Gagne’s Eight Learning Types

Learning Type	Description
Signal learning	Learning a general response to a specific signal. Pavlov’s classical conditioning falls into this category.
Stimulus –response	Learning a single response to a stimulus situation. Basic forms of operant conditioning fall into this category.
Shaping	Chaining together of two or more stimulus-response associations. Originally termed chaining by Gagne. It is called shaping to avoid confusion with other parts of the text [sic].
Verbal association	A chain of two or more verbal associations. Basically the same as shaping, but the application to language makes it special because it involves internal links to language capabilities.
Multiple discrimination	Ability to make different but appropriate responses to stimuli that differ to greater or lesser degrees.
Concept learning	Typically called generalisation learning. Reflected by the ability to make a common response to a class of stimuli demonstrating some common characteristics or relationship, but otherwise differing to greater or lesser degrees.
Principle-learning	Represented by a chain of two or more concepts characterised by the development of formal logical relation between concepts, similar to an “if A then B” formulation, where A and B are concepts.
Problem-Solving	Involves the retrieval of two or more previously learned principles and their combination to produce a novel (to the learner) capability reflecting a higher principle.

Note: Adapted from Blanchard and Thacker (2004)

Tables 3.1 and 3.2 indicate important differences between the use of only either the cognitive or behaviourist theoretical framework in learning. Table 3.2 demonstrates an integrated method that will ensure the learner will be able to acquire facts mentally, and translate such facts into behaviour. Gagne’s categories can be described as a hierarchy of learning types from the simple to the complex, with each successive step requiring competence at the preceding step (Blanchard & Thacker, 2004).

Furthermore the acquisition of knowledge, concepts, principles and ability to think logically are the primary focal point of learning. To illustrate, a sales agent makes a decision based on the knowledge that s/he possesses. Simply viewing the decision will not confirm much about how knowledgeable s/he is. The skill and clarity with which s/he is able to describe the thought process that led to the decision will

indicate how knowledgeable the sales agent is. However, if s/he is not able to communicate those thought processes, the focus of training should begin with language rather than with the content of the decision. Only after the written and oral communication have been developed can the facilitator determine whether the content within which the decision is made need to be addressed in training. Therefore, this demonstrates steps between the cognitive and behavioural essential for the required performance outcome that must be identified as well as what type of learning is necessary to acquire those behaviours (Blanchard & Thacker, 2004).

This is important for this research, as it demonstrate what type of learning style facilitators should employ for the novice sales agents to acquire desired learning. It is critical to employ an integrated training and assessment mechanism such as the use of formative and summative assessments. This should contribute to the learners' competence, thus attaining the set performance outcomes.

3.5 Conclusion

A human being thinks acts and feels at the same time, but these three processes may not be congruent. The most effective way to train learners is by reaching the totality, which is his/her thinking, feeling and behaving. Therefore, role-play seems to be a technique that can ensure that learning imparted is acquired effectively in a performance risk free environment.

Based on comments from the above researchers, role-play complement the use of the knowledge assessment. This is because it will extend the quality and evaluation of learning performance by demonstrating whether a learner is able to perform the job. It addresses and alleviates the challenge where a facilitator could have assumed that a learner was competent because s/he performed well on the knowledge assessment yet is unable to apply the acquired knowledge.

Outcomes based education also addresses this challenge, as it focuses on the knowledge acquired by learners and translates such knowledge into a desired outcome. This is achieved by training learners towards a particular outcome in terms

of how they can perform in the workplace. Training has been defined as a process by which knowledge is imparted, skills are developed, information is provided and attitudes are nurtured, in order to assist learners to become more effective and efficient in their work.

Role-play fits in this definition as it allows trainer/facilitator and assessor to provide learners or role-players an opportunity for action and practical learning.

Furthermore, it encourages an integration of cognitive and behavior theory. Learners are able to acquire knowledge via reading, training and other methods, thereafter, a technique such as role-play enable learners to demonstrate behavior learned, which will be a demonstration of what the knowledge imparted. The assessment that takes place during the role-play session will assist the trainer/facilitator and assessor to become aware of areas for improvement or the competence level of the learner.

The next step is to practically investigate whether role-play as a formative assessment tool can add value in training. A research is conducted, and chapter four focuses on the research design which demonstrate a research plan of this investigation and might validate the research problem.

Chapter 4

Research Design and Methodology

4.1 Introduction

According to Burns (1994), a research design is a plan or strategy aimed at providing answers to research questions. Therefore, this chapter will outline the methodology of the study, i.e. empirical analyses of the effect that role-play (as a competence formative assessment tool) has on job performance (Terra Blanche & Durrheim, 2002). The QAPMQ was the instrument used to measure the collected data. This questionnaire was used to establish the competence level of sales agents during training, as well as shortly after they entered a real working environment.

An investigation of the role-play technique as a competence formative assessment tool in training is conducted, to establish how value can be added to the sales agent's learning.

The outcomes of the training and agenda to be followed during the recommended training approach will also be detailed in this chapter.

4.2 Experimental Design

The problem statement in Chapter one indicated that no formative assessment tool is used during the learning process when training novice sales agents currently. The only assessment used in the organisation where the study is being conducted is summative assessment in the form of knowledge assessment. This assessment is developed based on the products sold, process of selling and the sales questions posed by the customer.

The usage of a knowledge assessment does not provide a full assessment of ability and attitude, as the emphasis is not on demonstrating ability, but on knowledge acquired during training. Against this background, the following hypothesis was formulated:

“Adding the use of role-play as a formative assessment technique will increase employees’ performance”.

Table 4.1 below illustrates a summary of the experimental design study.

Table 4.1
The study is experimental design

Group time phase	Experimental group	Control group
Pre-training	Pre-assessment, using the QAPMQ.	Pre-assessment, using the QAPMQ.
Manipulation	Use of role-play during training as a practice and assessment tool. Summative assessment in the form of knowledge assessment.	Use of role-play only to assess the sales agent on the final day of training. Summative assessment in the form of knowledge assessment.
Post-training (after two Weeks’ training)	Assessment conducted by retrieving three random calls for each person in the sample group.	Assessment conducted by retrieving three random calls for each person in the sample group

Both the experimental and the control groups were assessed on the third day before beginning with the sales training, in order to establish the sales agents’ previous experience (the scores are illustrated on Table 5.4 in chapter five). Thereafter, the experimental group was trained and assessed using role-play to provide sales agents with an opportunity to demonstrate their selling skills before entering the real work setting. The control group did receive this experience, as they are representing the current training structure in the organisation where the research is being conducted. This was followed by knowledge assessment in the form of summative or final assessment, to assess knowledge on both groups. Post-assessment was conducted in the form of listening to retrieved calls of both the experimental and control groups using a QAPMQ (the scores are illustrated on Table 5.5 in chapter five).

The research approach was based on the following:

- Assessment of the experimental and control group’s ability to sell by means of a pre-assessment was conducted on the third day of training, as mentioned above. Role-play was used for the control group only at various stages (specific details are provided in the training schedule in Tables 4.3 and 4.4).
- The next step was to conduct training with both groups:
 - When adding role-play, an extra two days of practice were added as per approval by the call centre management for the experimental group.

- The QAPMQ was used during role-play to assess whether the sales agents were able to meet the level of competence as per the questionnaire.
- During role-play sales agents were requested to work in pairs, one pretending to be the customer and another sales agent.
- The novice sales agents were provided feedback by the facilitator and other participating learners. This opportunity was provided to all 20 learners in the experimental group.
- The overarching hypothesis states that the experimental group would increase performance as a result of adding role-play as an assessment tool to training, compared to the control group.
- The next step was to conduct a knowledge assessment as a summative assessment with both the experimental and control groups. This was done in order to measure the level of knowledge acquired during training. A pass mark of 85% was set for the knowledge assessment (see Appendix C for the knowledge assessment).
- On the final day of training, both groups were assessed to establish competence levels.
- Expectations from the researcher regarding the overall results were that the performance level of the control group would be lower than that of experimental group, as they have not been given the opportunity to practice performing in the new environment. The call centre line management did not foresee any difference between the two groups (Chapter five will provide the results regarding this expectation).
- The final step involved retrieving three calls per person.
 - This was conducted after the learners had been rated competent over seven days of training for the experimental group and five days for the control group. They also spent two weeks in the real work setting.
 - The calls were retrieved and measured against the QAPMQ. The results of these calls are illustrated in chapter five Table 5.5.
 - Those rating the learners comprised of the researcher, one quality assurance consultant/facilitator and one training specialist.

Scott in Nkosi (2000) indicates that this type of design is more powerful than any other design, specifically since the control group was not subjected to the same interventions as the experimental group. According to Nkosi (2000), the

experimental design allows for better comparison of the scores of the two groups as well as better assessment of the effects of the training programme. This investigates whether the addition of role-play in training can improve the sales agent's performance. It should be noted that potential moderator variables were treated as constants in this study, such as facilitation skills of the facilitator and the quality of the training programme. The constants were not assessed.

4.3 Measurements

As mentioned above, the QAPMQ was used during role-play sessions in training. This questionnaire was designed by the Quality Assurance department within the company, in order to measure and manage the performance of sales agents. The questionnaire was also designed to accommodate the competencies of the sales agent as demonstrated on table 4.2 (SHL profiling system, 2005)

Table 4.2
Outbound Sales Agent's Performance Competencies

No	Competencies
1.	Specialist knowledge
2.	Quality orientation
3.	Ability to convince
4.	Customer focus
5.	Relating to customers
6.	Reliability
7.	Resilience
8.	Organisation
9.	Results driven
10.	Team work
11.	Oral communication
12.	Fact finding skills
13.	Initiative
14.	Business awareness
15.	Written communication
16.	Problem solving skills

The researcher adapted the performance questionnaire with the company's permission, and added it as an assessment tool during role-play training. The performance questionnaire was used to measure the potential ability and knowledge of the learners during performance.

Each statement was rated on a five-point rating scale as follows:

Table 4.3
QAPMQ Rating Scales

Rating scale	Represents	In percentage
1	Poor	10-30
2	Fair	31-49
3	Average	50-69
4	Good	70-80
5	Excellent	81 and above

The QAPMQ measures the following six components of the sales call:

- i. Greeting and opening of the call
- ii. Customer focus
- iii. Sales agent's ability to present and sell
- iv. Presentation of the product
- v. Closing
- vi. Company and industry legal compliance

The summative assessment which is in the form of a knowledge assessment is designed as a final assessment by the company's training department. This assessment is based on the products that sales agents were going to sell and sales questions they should be able to respond to when selling. However, historically they were not provided with the opportunity to demonstrate orally that they can sell the product to the customer. The knowledge assessment was designed to assess knowledge acquired during training. This seemed convenient as call centre management required the training cycle to end quickly, in order for the competent sales agents to start selling. Thereafter, a post assessment was conducted by retrieving calls randomly after spending the first two weeks in the real work setting.

4.4 Training Programme

With regards to the training programme, the experimental group was trained based on the training schedule illustrated on table 4.4, whereas the control group followed the training schedule illustrated in table 4.5.

Table 4.4
Experimental Group 7-day training programme

DAY	TIME	PROG DESCRIPTION	FACILITATOR
1: Monday	9h00 – 10h00	Induction: Welcome <ul style="list-style-type: none"> Who is the organisation Brief overview on the company and what it does A one-pager organogram on company structure 	N/A
	10h00 – 11h30	Induction: Company Policies and Procedures <ul style="list-style-type: none"> HR info, including completion of the legal & Compliance Representative Declaration Form, broker application forms, warning letters Do's and don'ts with interactive activity/exercise, business ethics, salaries, commission, etc 	P/X
	11h30 – 11h45	Tea break	
	11h45 – 13h00	<ul style="list-style-type: none"> Training programme learning outcomes Introduction to Assurance/FAIS/FICA/Advice and non-advice (overview) 	B/A
	13h00 – 14h00	Lunch break	
	14h00 – 15h30	<ul style="list-style-type: none"> Introduction to Assurance/FAIS/FICA/Advice and non-advice continues, a case-study/puzzle for homework 	A
2: Tuesday	09h00 – 10h00	Revision: introduction to assurance/FAIS/FICA/advice and non-advice	A
	10h00 – 11h00	Group discussion/activity re-learner's function as "sales agents"	N/A
	11h00 – 11h15	Tea break	
	11h15 – 12h15	Product training	A
	12h15 – 13h15	Lunch	
	13h15 – 16h00	Customer orientation Why customers buy/types of customers	A/B
3: Wednesday	09h00 – 0h00	Learners write the product assessment	A
	10h00 – 10h15	Tea break	
	10h15 – 12h30	<ul style="list-style-type: none"> Sales pre-assessment: sales agents role-play their ability to sell for two minutes, and facilitators score them Sales training: What selling is about and what it entails 	B/N
	12h30 – 13h30	Lunch break	
	13h30-14h45	Sales process: sale introduction, sale presentation and closing	N/B
	14h45-15h00 15h00-16h00	Tea Break Sales agent receives results and review	B/N
4: Thursday	9h00– 16h00	<ul style="list-style-type: none"> Sales agent rewrites product assessment if not yet competent Revise sales process by means of a role-play exercise Sales techniques: listening, objection handling, questioning and responding to prospect. Facilitator introduces concepts and sales agents role-play with facilitator's guidance 	B/N
5 :Friday	09h00 – 13h00	Role-playing sales process and sales techniques: listening, objection handling, questioning and responding to prospective client. Role-play incorporating the sales techniques, sales process integrating with the products and legislation	B/N
	13h00-14h00	Lunch break	
	14h00-15h00	Sales agents summative assessment: <ul style="list-style-type: none"> Integrating products, legislation, customer orientation, sales process and sales techniques 	A/B
6: Monday	09h00-11h00	Sales agents summative assessment results and review	A/B/N
	11h00-11h15	Tea break	
	11h15-16h00	Role playing sales process and Sales techniques: listening, objection handling, questioning and responding to prospect integrating with the products and legislation Re-writing of summative assessment	B/N
7: Tuesday	08h00-09h00		
	09h00-16h00	<ul style="list-style-type: none"> Line manager coach: Role-playing sales process and sales techniques: Listening, objection handling, questioning and responding to prospect, integrating with the products and legislation Role-play assessment 	Line managers/QA/B/N

**Table 4.5
Control Group 5-day training programme**

DAY	TIME	PROG DESCRIPTION	FACILITATOR
1: Monday	9h00 – 10h00	Induction: Welcome <ul style="list-style-type: none"> Who is the organisation Brief overview on the company and what it does A one-pager organogram on company structure 	N/A
	10h00 – 1h30	Induction: Company Policies and Procedures <ul style="list-style-type: none"> HR info, including completion of Legal & Compliance Representative Declaration Form, broker application forms, warning letters Do's and don'ts with interactive activity/exercise, business ethics, salaries, commission, etc 	P/X
	11h30 – 1h45	Tea break	
	11h45 – 3h00	<ul style="list-style-type: none"> Training programme learning outcomes Introduction to Assurance/FAIS/FICA/advice and non-advice (overview) 	B/A
	13h00 – 4h00	Lunch break	
	14h00 – 15h30	<ul style="list-style-type: none"> Introduction to Assurance/FAIS/FICA/advice and non-advice continues A case-study/puzzle for homework 	A
2: Tuesday	09h00 – 10h00	Revision of introduction to assurance/FAIS/FICA/ advice and non-advice	A
	10h00 – 1h00	Group discussion/activity re learner's function as "sales agents"	N/A
	11h00 – 1h15	Tea break	
	11h15 – 12h15	Product training	A
	12h15 – 13h15	Lunch	
3: Wednesday	13h15 – 16h00	Customer orientation Why customers buy/types of customers Learners write the product assessment	A / B
	09h00 – 0h00	Tea break	A
	10h00 – 10h15	<ul style="list-style-type: none"> Sales pre-assessment: Sales agent's role-play their ability to sell for two minutes and facilitators/trainer score them Sales training: What selling is about and what it entails 	B/N
	10h15 – 12h30	Lunch break	
	12h30 – 13h30	Sales process: Sale introduction, sale presentation and closing	B/N
	13h30-14h45 14h45-15h00 15h00-16h00	Tea break Learner receives results and review	B/N
4: Thursday		<ul style="list-style-type: none"> Learner rewrites product assessment if not yet competent Revise sales process Sales techniques: Listening, objection handling, questioning and responding to prospect. Facilitator introduces concepts and allow group discussion, integrating with products and legislation Sales agents receives results and review 	B/N
	9h00– 16h00		
5: Friday	09h00 – 1045	<ul style="list-style-type: none"> Group discussion on sales process and sales techniques: Listening, objection handling, questioning and responding to prospective client. Role-play incorporating sales techniques, sales process integrating with products and legislation 	B/N
	10h30-10h45	Tea break	
	10h45-12h00	Learners summative assessment <ul style="list-style-type: none"> Integrating legislation, customer orientation, sales and objection-handling scenarios and products 	A / B
	12h00– 13h00	Lunch break	A / B
	13h00-14h00	Review summative assessments	A/ B
	14h00-16h00	Role-play assessment	
Monday	08h00-09h00	Rewrites summative assessment if not yet competent on Monday, before moving to real work setting	B

The training programmes are similar. However, the control group was not provided an opportunity to practice and demonstrate the knowledge acquired and the ability to perform as sales agents within the five days. On the third day before the beginning of sales training, the researcher and the facilitators assess the learners against the QAPMQ in order to establish their level of sales competence prior to the sales training (the tests results are illustrated on table 5.4). The pre-assessment results were not used while training to assist learners to improve as the five-day training structure required by the Head of Sales had to be followed. This structure

didn't leave much opportunity for a practical session. This implied more group exercises had to be included so that all the content and some exchange of ideas could be shared among the group.

With regards to the experimental group, the researcher included role-play in their training from the pre-assessment when it was first introduced to measure their competence levels as illustrated in Table 4.4. The pre-assessment was conducted on the third day before the practical sales training (the scores of the pre-assessment are illustrated in table 5.4).

An extra two days were added to the programme which provided the experimental group an opportunity to practice and learn how to integrate sales, product, presentation skills and legislation.

Another aspect critical to learning as demonstrated in the literature review is developing a training programme with learning outcomes. The next aspect will demonstrate how these benefits the learners especially after completion of the learning programme.

4.5 Learning Outcomes

Learning outcomes are statements which provide learners with direction and guidance that what they are learning is aligned to performance set after training. These statements regarding elements of competence in the training programme describe the desired behaviour of the learner when leaving the training programme.

Table 4.6 below illustrates the outcomes of all modules

Furthermore, it is also necessary to incorporate the critical cross field outcomes. These assess a number of skills over and above those the learning programme is focusing on. They are illustrated on paragraph 4.5.1.

Table 4.6
Learning Outcomes

No	Outcomes
At the end of the Legislation module learners (sales agents) will be able to:	
1	Explain the purpose of the Financial Advisory and Intermediary Services (FAIS) and FICA
2	Explain the terminology used in the FAIS and FICA Act and identify the various role-players within the FAIS & FICA framework
3	Describe the difference between advice and non-advice in relation to the FAIS Act
4	Explain the licensing requirements under FAIS
5	Explain the FAIS fit and proper requirements
6	Explain the implications non-compliance and importance of complying with this Act
At the end of Sales module, learners (sales agents) will be able to demonstrate the ability to:	
1	Diagnose client buying patterns and signals
2	Demonstrate effective presentation and closing skills
3	Demonstrate resilience when dealing with objection handling
4	Demonstrate the ability begin, control and conclude the sales conversation
At the end of Product training modules learners (sales agents) will be able to:	
1	Demonstrate knowledge of the nature of the product to a prospective client
2	Demonstrate knowledge of the features and benefits of the product to a prospective client
3	List the product's marketing opportunities

Note: Adapted from SAQA. (2004). Unit Standard 14317.

4.5.1 Critical Cross Field Outcomes (CCFO)

Below are the CCFO for the above mentioned learning outcomes:

Unit Standard CCFO Identifying

Learners are able to identify and solve problems in recommending appropriate products to prospective clients.

Unit Standard CCFO Organising

Learners are able to organise and manage themselves effectively by becoming responsible citizens in identifying planning a work programme or diary and drawing up a simple budget.

Unit Standard CCFO Collecting

Learners are able to collect, organise and critically evaluate information in gathering evidence and presenting a case for a sale.

Unit Standard CCFO Communication

Learners are able to communicate effectively asking questions, prospecting making a case for a sale and counteracting objections

Unit Standard CCFO Demonstrating

Learners are able to demonstrate an understanding of the world as a set of related systems by matching products to the needs, wants, and value system of a prospective client.

4.6 Assessors and Facilitators

The assessors and facilitators were all well trained in the subject and had adequate knowledge and experience in their areas of expertise as can be seen from Table 4.7 below.

**Table 4.7
Qualifications and experience of the facilitators**

Assessors & Facilitators	Qualification	Experience
Assessor 1	Industrial Psychology (Hons) Facilitator Assessor	Training specialist in the Financial sector for eight years
Assessor 2	Wealth Management Qualification Sales and Marketing trainer and coach Facilitator	Sales trainer, quality assessor and coach in the insurance industry for five years
Assessor 3	Wealth Management Qualification Teacher Facilitator Assessor	Product and soft skills facilitator and assessor in the insurance industry for four years
	Wealth Management qualification	

4.7 Sampling

According to Terre Blanche and Durrheim (2002), sampling is described as a process that involves making decisions about observing people, settings, events and behaviours and/or social processes. There were no formalised sampling selection criteria for the purpose of this study. As the group of novice sales agents were appointed, the training was conducted, and the researcher used the opportunity to

propose that the research be conducted. A group of 20 learners were trained at a time; while a group of 40 learners was used for the purpose of the study in order to accommodate the analysis method to be used. The group of 40 was divided in two, one group of 20 sales agent learners as an experimental group and 20 as a control group. The researcher then chose the Mann-Whitney U test which accommodated such a small sample.

4.8 Data Collection

This section focuses on methods used to collect the relevant data for this study. Kruger and Welman (2002) indicate that a data-collection method, must be appropriate to the research problem and the population in question should be used.

The data was collected by observing learners role-play and pre-assessing them on the third day of training. This was performed once again on the fifth day of training for the control group and seventh day of training for the experimental group. The final collation was made by retrieving three random calls per person after the learners (sales agents) have spent two weeks in the real work setting.

The collated data was compiled and analysed, in order to make a comparison between the two groups.

Data was also collected from the summative assessment conducted in the form of a knowledge assessment. This assessment was theoretically based (refer to the Appendix C to view the test). Some questions were multiple choices, while others required the learners to complete a sentence demonstrating their understanding of the subject.

Result from this assessment, were compiled, in order to make a comparison between the two groups.

4.9 Pilot Meeting

A pilot meeting was conducted to ensure that those rating the learners had the same level of knowledge, followed the same process and understanding. A quality assurance consultant from the call centre was appointed to assist with this process.

The experienced observer had a strong quality assurance background.

4.10 Conclusion

In this chapter the problem statement was reconsidered and the experimental design selected.

The data collection method was clearly elaborated, i.e. use of the QAPMQ to measure performance during training and by retrieving three calls per learner sales agent. The data from the knowledge assessment were collected to establish whether obtaining a high score in the knowledge assessment should imply having the ability to sell.

The critical cross field outcomes were also included to illustrate what other skills the learners is grasping being assessed over and above the specified.

Chapter five will discuss the results of this study.

Chapter 5

Empirical Study- Results and Findings

5.1 Introduction

This chapter entails the quantitative study wherein statistical results and the findings of this research is presented. The findings indicate whether role-play does add value as a formative assessment technique in the training or not

5.2 Research Problem, Experimental Design and Findings

As indicated in chapter one the research problem seeks to investigate the impact of job performance if role-play is added as a competence formative assessment technique in training. This research will investigate whether adding it will address the performance concerns faced by sales agents in their working environment.

Call centre management raised concerns that the existing sales agents were not fully competent after training. This management was not satisfied with the quality of sales, which largely resulted from the manner in which the sales agents were presenting and closing the sale. The researcher, who forms part of the training division, had made her own assumption, namely that the agents were not competent after training because they did not have an opportunity to practice how to perform their job before entering to the real work setting. There were no activities such as role-play or similar to assist the learners to practice and develop into a competent sales agent prior to entering the real work setting. This also implied allocation of more training time, which the call centre management were not in favor of, as they wanted the novice sales agents to start selling as soon as possible.

This study was conducted in one of the insurance companies in South Africa. Simple random sampling was used where a sample of 40 novice sales agents were drawn.

Thereafter, it was randomly divided in a group of 20 each, representing the control and experimental group.

A training programme was planned and conducted with both the experimental and control group. The experimental group had role-play added to their training, while it was not incorporated into the control group's training. The experimental group was trained for seven days, in order to accommodate an opportunity to practice and demonstrate the ability to sell before entering the real work setting. The control group was trained for five days, according to the structure decided by the call centre manager.

To determine whether call centre management's decision to conduct training for five days was appropriate, they agreed to allow the researcher to investigate this over a period of six month and to make suitable recommendations.

On the final day of training both groups were assessed by means of a summative assessment (the scores of this assessment is on table 5.4).

The study's experimental design has three phases (as indicated on table 4.1) namely:

- i. Pre-training where the pre-assessment will be conducted and the QAPMQ will be used as a measurement to both the experimental and control group.
- ii. Manipulation where role-play is used during training of the experimental group as a practice and assessment tool. The control group only experienced role-play on the final day of training. Summative assessment to be also conducted in the form of a knowledge test with both groups.
- iii. Post-assessment (after two weeks), random calls were retrieved for each person in the sample group to establish the difference.

However, even though the research focused on the above, there were variables that affected it, which will be elaborated in the next section.

5.3 Variables Affected

The following variables below affected this research and will form part of the recommendations to be provided to the company where the research was conducted:

- i. The sales agent's prior experience- No sales and insurance industry experience was required as part of the recruitment criteria. However, experience was an advantage. It could have been necessary to include sales and insurance industry experience, as this would imply that the learners needed to have an ability and understanding of the role. However, they also need product knowledge, which might accommodate the training cycle preferred by call centre management.
- ii. Most of the sales agents were very young, aged 19-24. This seems to be the reason why there was a tendency not to take the training seriously and why there seemed to be no sense of commitment and responsibility, which affected their performance in the long run .
- iii. Facilitation skills of the trainer, referring to how competent s/he is in delivering the learning.

These variables did affect the reliability and validity of the study as the researcher had to ensure that there are integrated methods when facilitating and assessing to compare the results and validate that the learners acquired the knowledge imparted. The next part provides more information.

5.4 Validity

Validity is the degree to which a measure does what is intended to measure (Carmines & Zeller in Terre Blanche & Durrheim, 2002). The QAPMQ focuses its attention on rating the sales agents' performance from the origination of the call to close of sale. Therefore the QAPMQ should qualify as a valid measurement instrument.

The QAPMQ could qualify as a valid measuring instrument as the operational definition of the construct provided shows that it was measuring what it was intended to measure, which is sales agents' performance.

The instrument could be said to have predictive validity, as the scores were indeed predictive of future performance of sales agents. The research is investigating if adding role-play as a formative assessment tool can enhance performance, which requires a predictive measuring instrument such as the QAPMQ. The competence pass mark on the questionnaire is 70% implying that the learners will be considered competent (Terre Blanche & Durrheim, 2002). This assessment was used together with a summative assessment to ensure that learners did acquire the appropriate knowledge. If a learner was found not competent in one of the assessments, the facilitator and line management arranged for him/her to receive either adequate review or coaching, depending on the need.

Involvement of other assessors other than the researcher in the process would also increase validity, as there would be no biasness. If any, it would be reduced because of the perspective of other assessors involved in the process (refer to pilot phase).

The validity of the QAPMQ could be disputed as there was no formal testing conducted. Although that might be the case, it should be noted that the call centre has been using this questionnaire for more than 12 months. As results, they were able to obtain valuable information that could be used to identify the learners' skills gap and quality of performance. However, a recommendation for a formal validity study will be included in the suggestions for further research.

On the other hand, reliability refers to the degree to which the results are generalisable and repeatable. Sales agent learners should score similarly on a reliable measure at various occasions, and the measuring instrument should yield consistent results over time (test-retest reliability) (Terre Blanche & Durrheim, 2002).

5.5 Reliability

The test-retest reliability of the QAPMQ was established by means of the following:

- The pre-assessment conducted.
- The pre-assessment was conducted on the third day of training on the experimental Group.

- The pre-assessment percentage score, the score obtained on the final day of training and the post-assessment scores obtained after retrieving the calls.

Burns (1994) indicated that a minimum of one day and perhaps one year are boundaries generally considered acceptable for test re-test reliability estimates.

A minimum competence score of 70% had to be obtained on the QAPMQ for the learner to be considered competent. The same rating was applied during quality assurance rating. However, in quality assurance, if the learner received a high rating but there was still an area to improve, coaching would be offered.

The QAPMQ's total score was 115. This was calculated by multiplying the number of questions, which are 23 and the highest rating score, which is five.

The QAPMQ test re-tests scores for the experimental group are given in table 5.2.

As illustrated on Appendix B, the rating scales were also matched to a percentage as illustrated in Table 5.1 below.

Table 5.1
Quality Assurances Performance Management Questionnaire Rating Scale

Rating scale	Represents	In percentage
1	Poor	10-30
2	Fairly poor	31-49
3	Average	50-69
4	Good	70-80
5	Excellent	81 and above

The test re-tests scores (Table 5.2) indicate the level of competence before practical sales training was conducted. Role-play was conducted on day three as a pre-assessment to establish the level of competence at that point before practical training began. These are the scores for the experimental group which were compared to those on the final day of training. This was to ascertain whether there was a difference in potential ability to performance after adding role-play to the training programme. The scores would then be compared with those of the novice sales agents after spending two weeks in the real work environment. The final

comparison was to ascertain the impact that adding role-play to training has in performance.

Table 5.2
Experimental Group QAPMQ scores

Number of learners	Pre-test % score Day 3 training	Facilitator's/ Researcher's feedback % score Day 4 training	Facilitator's feedback % score Day 5 training	Facilitator's feedback's % score Day 7	Researcher's/ Raters Post- assessment feedback % score two weeks after training
1.	55	58	70	82	80
2.	40	48	62	68:after more practice, the learner achieved: 78)	82
3.	42	45	52	75	78
4.	52	68	76	79	92
5.	55	62	74	80	80
6.	60	72	86	90	85
7.	60	64	72	78	75
8.	85	88	96	100	92
9.	40	48	72	76	80
10.	34	45	48	56	79
				After practice, the learner achieved 76	
11.	58	62	70	79	85
12.	63	70	78	86	90
13.	88	92	98	98	96
14.	41	46	52	70,	78
				After more practice: 76	
15.	45	56	68	76	79
16.	76	78	80	80	76
17.	55	66	70	78	82
18.	52	60	72	75	78
19.	78	80	85	90	93
20.	40	51	60	75	78

The scores obtained before adding role-play indicated the need for an intervention or technique that can assist learners to improve their overall selling skills. The pre-assessment measurement for the role-play was the QAPMQ.

5.6 Formulation of the Hypothesis

The following hypotheses were formulated:

H0:

Adding the use of role-play as a competence formative assessment technique will not improve employees' performance.

H1:

Adding the use of role-play as a competence formative assessment technique will increase employees' performance.

5.7 Data Collection

The data collecting was conducted by means of the QAPMQ developed for quality assurance. A questionnaire was used as the data collection technique because it can be standardized to meet your needs and is quantifiable and flexible (<http://extnet.usu.edu/evaluate/Useful/tsld003.htm>).

5.8 Data Analysis Process

After the sampling had been conducted, the analysis process and the probability value were identified from the statistical table.

The data analysis investigates the:

- i. Level of significance between the control and experimental groups and which option results in improved performance.
- ii. Correlation between role-play and learners' performance.
- iii. Test-retest reliability of the measuring instrument.

5.9 Sampling

The sample group consisted of 40 who were all novice employees within the same organisation selected based on simple random sampling. This group was again randomly divided into two equally sized groups. This was done in order to have a

control group, trained according to the present training structure and an experimental group will be trained with a role-play competence assessment technique included.

Majority of the learners were between the ages 18-25 with no sales and insurance experience.

5.10 Hypothesis Testing

The following were analysed as per the data analysis process:

5.10.1 Level of Significance

The analysis to establish the level of significance was conducted by means of the Mann-Whitney U Test. The level of differences is between two independent groups when the assumptions for the parametric *t* test cannot be met. The test does not require two equally numbered groups and/or similar. It must however, be possible to rank the scores produced by the subject, i.e the scale of measurement must at least be ordinal (Burns, 1994)

In order to establish a significant difference, the pre-assessment scores taken on the third day of training, before role-play, were analysed, and the U was 226.5. When applying the same method for the post-assessment, based on the scores of the calls that were retrieved and measured against the same questionnaire used for the pre-assessment, the U score was 398.5. This demonstrates an increase from the initial score. However, an elaborated explanation will be provided at the latter part of this chapter as it is necessary to view the data from the Tables below before the final conclusion.

Table 5.3 below provides the pre-assessment scores for both the control and experimental group which forms part of the final calculation.

Table 5.3**Pre-assessment Scores for the Control and Experimental Group**

No. of Learners	Control group's feedback assessment % score on day three	Rank assigned	Experimental group's pre-assessment % score day three	Rank Assigned
1	52	14.5	55	20
2	54	17	40	5.5
3	73	35	42	9
4	63	29	52	14.5
5	66	32	55	20
6	44	10	60	26.5
7	37	3	60	26.5
8	40	5.5	85	39
9	55	20	40	5.5
10	68	34	34	1
11	65	31	58	24.5
12	67	33	63	29
13	49	12	88	40
14	55	20	41	8
15	63	29	45	11
16	56	23	76	36
17	84	38	55	20
18	36	2	52	14.5
19	58	24.5	78	37
20	52	14.5	40	5.5
Sum of Ranks		427		393

Table 5.4 below illustrates the post-assessment results for the control and experimental group, in order to demonstrate if there is a significant difference after training both groups.

Table 5.4
Post-assessment results for the Control and Experimental Group

No. of Learners	Experimental group's feedback % score after two weeks in the real work setting	Rank assigned	Control group's feedback % score after two weeks in real the work setting	Rank assigned
1	80	29.5	55	8
2	86	35	48	5
3	78	23.5	76	20.5
4	92	37.5	65	14
5	80	29.5	68	17
6	85	33.5	44	4
7	75	19	35	1
8	92	37.5	43	3
9	80	29.5	58	11
10	79	26.5	66	15
11	85	33.5	72	18
12	90	36	67	16
13	96	40	54	7
14	78	23.5	59	12
15	79	26.5	63	13
16	76	20.5	56	9
17	82	32	80	29.5
18	78	23.5	42	2
19	93	39	57	10
20	78	23.5	52	6
Sum of Rank		599		221

The calculated higher value of U (226.5) for pre-assessment and 398.5 for post-assessment is equal or higher than the critical value of 127 based on the Mann-Whitney U two-tailed test at a 0.05 level of significance. This implies that the null hypothesis can be accepted and the alternative hypothesis rejected. It may therefore be concluded that there is a significant difference in two groups when the role-play technique is added to training (Burns, 1994).

The results illustrate that there is a significant difference between the experimental and control groups with regard to performance, as 90% of the experimental novice sales agents were considered competent after two weeks, whereas only about 15% of the control group was able to sell with 85% of this group struggling with sales.

Table 5.5 below illustrates scores from the summative knowledge assessment.

Table 5.5
Summative assessment results for Experimental and Control Group

No Learners	Experimental group %	Control group %
1.	89	85
2.	85	92
3.	87	92
4.	89	89
5.	83	82
6.	96	96
7.	70	85
8.	89	94
9.	93	92
10.	93	94
11.	74	83
12.	85	91
13.	83	91
14.	93	98
15.	87	94
16.	91	96
17.	91	92
18.	94	92
19.	100	68
20.	100	85

The above summative assessment scores were obtained by conducting a knowledge assessment (attached as Appendix C). If competence is measured only by these results, it can be assumed that almost all sales agent learners were competent. The pass mark for knowledge assessment was 85%. From the experimental group, four learners were found not competent, and from the control group three. Therefore, with the results obtained from the post-assessment and the significance difference demonstrated by the Mann-Whitney U test results, it seems clear that it would be necessary to use various assessment techniques to assess the desired level of competence.

5.10.2 Correlation between Role-Play and Learners' Performance

The correlation between role-play and performance was also assessed. Assessing the correlation provides the researcher an opportunity to establish the impact relationship from the training and assessment method used. Figure 5.1 demonstrates the relationship that exists between performance and training when using practical techniques.

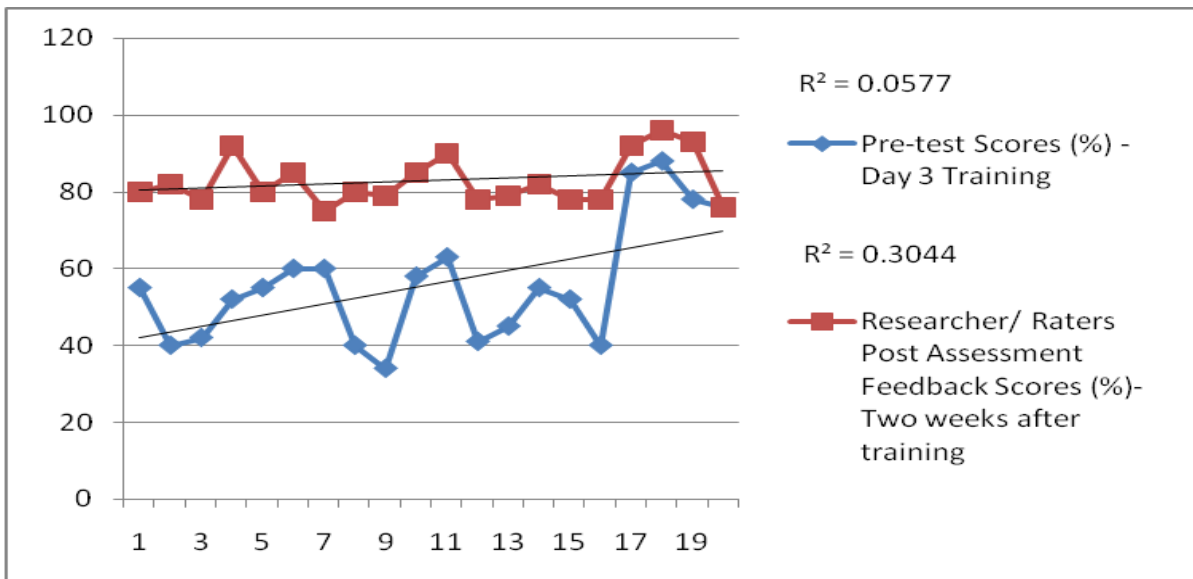


Figure 5.1
Experimental Group Pre and Post score relationship after adding role-play

Figure 5.1 above demonstrates the correlation that exists between before and after scores using role-play as a practice and competence assessment tool, to improve learner performance. The bottom blue-line bar illustrates the scores from day three of the training, when role-play was used as an assessment tool to establish the sales agent learners' competence level. Whereas the top brown line bar illustrates the impact after role-play had been used as a practice and assessment tool during training. These scores represent the calls retrieved after the sales agents learners had entered the real work setting. There is a low but positive correlation after role-play was added to the training programme (an increase in performance), which is represented by $r=0.30$.

The raw scores are attached in Appendix C.

5.10.3 Test Retest Reliability

Based on the above data, the score on the seventh day of training, with the use of role-play as an assessment tool, indicated an improvement. This is because 17 learners from the experimental group, which is equivalent to 90%, were able to obtain a score of 70% or above.

The score obtained on the final day of training (in comparison to the score obtained after two weeks, which was considered as the post-assessment) indicated that the QAPMQ was reliable over time, as the scores obtained were similar. All novice sales agents scored above 70% implying that 100% were found competent, in comparison to 90% of the novice sales agents assessed two weeks before. The researcher recommended to the organisation a need to conduct another assessment, using the same instrument after six months, as that would provide validation for test re-test reliability, as more time would have passed.

In conclusion, the measurement used can be considered reliable as it was able to supply similar results over time.

5.11 Hypothesis Results

After consideration of all the above facts, the alternative hypothesis is not rejected. This means adding the use of role-play as a competence formative assessment technique will increase employees' performance.

5.12 Integration of the Literature and Empirical results

The objective of the study has been to investigate the impact after adding role-play as a formative assessment.

The literature review in Chapter 3 indicates that many researchers value the impact of role-play in learning (Blatner, 2009; Hutt, 2008; Professional Role-Player, 2010; Revolution Learning and Development, 2011). Hattingh and Kenwright (2002) as well as Van Rooyen and Prinsloo (2002) argue that this integration provides learners with an opportunity to demonstrate applied competence, i.e. the integration of practical, foundational and reflexive competence, and also the integration of knowledge, skills, theory and practice (INSETA, 2004).

Challenges and barriers were indicated, which entails adherence to assessment principles that requires the assessment to be fair, valid and reliable and do not disadvantage any learner and non adherence may hinder its impact and effectiveness (INSETA, 2004). Furthermore, leaving role-play until the last minute can cause the dreaded role-play to loom in the learners' minds, causing a negative distraction throughout the course. Other challenges also entail:

- Role-play being staged and sometimes over-dramatised which can potentially lengthen the training cycle time.
- Facilitators failing to give the learners sufficient information about the "role" in which they are about to appear.
- Learners not having prior experiences to draw upon to help them play the role (e.g. seller). This possibility severely limits the range of behaviours learners are able to portray.

However, ways to deal with these challenges and barriers in order to achieve the desired results were indicated (Barshaw & Ingram, 1996)

The empirical study corroborates the literature review in that the findings indicate a significant difference after the inclusion of role-play with the experimental group. There is also a positive correlation between increased performance and the addition of role-play. However, there were other contributing conditions such as thorough planning, providing sufficient information to the learners, and being experienced as a facilitator (in order to be able to manage the emotional challenges resulting from the experience). Therefore, if designed and developed well role play can yield good rewards for both the learners and the organisation.

5.13 Conclusion

The results have demonstrated that the addition of role-play to training will be of great value. It will provide novice sales agents with the opportunity to practice as well as afford the facilitator the opportunity to assess whether they are competent to perform.

These results should encourage the organisation where the study is conducted to consider the impact that role-play as an assessment tool can have in the

performance of sales agent learners and existing experienced competent sales agents.

The next chapter provides the limitation, recommendations and suggestion for future research. This will provide the organisation with insight if they would consider researching this further. The limitation and recommendations will provide them awareness on the challenges that sales agent learners and trainers (facilitators) faced during training. Thereafter, they can decide on the action to take.

Chapter 6

Limitations, Recommendations and Suggestions for Future Research

6.1 Introduction

This chapter is addressing the limitations, recommendations and suggestions for future research. Recommendations will also be listed, in order for the company to know and obtain ideas on how to address the limitations.

6.2 Limitations and Recommendations

The limitations and recommendation below are based on what affected this research. This will provide insight on the challenges that sales agent learners as well as facilitators face during training. The limitations and recommendations will be addressed together as they are inter-related.

6.2.1 Appointing sales agents with no industry experience

It is recommended that the organisation employ sales agent learners with prior sales and insurance industry experience, as this will accelerate the training process. This could be done through the engagement with recruitment agencies to provide a short list of suitably skilled applicants.

Thereafter, the organisation can follow an appropriate selection process. The benefits will be hiring sales agents who are familiar with the content as well as reducing time spent in training, as not all the training content will be new to them. This will also be beneficial when entering the real work setting as adjustment will be easier for the new employees.

6.2.2 Establishing a proper recruitment process

The recommendation is that the organisation investigates an applicable recruitment process for this type of environment. This process should include the use of psychometric assessment, focusing on assessing the cognitive behaviour, ability and emotions of the candidate, in order to achieve the correct match for the job. This can increase the productivity of the organisation in the long run and also reduce high turnover. It is recommended that the human resources department and management be involved in the recruitment and selection process. This will ensure a higher quality of selection decisions.

6.2.3 The quality of the training programme

This study did not focus on assessing the quality of the training programme, but rather the mechanisms that contribute to a quality training programme. The purpose of the research was to investigate whether there was a significant difference between the current programme (used for the control group) in comparison to the revised programme (using role play to train the experimental group).

Therefore, the recommendation is for the organisation to assess the efficiency of the proposed programme, in order to establish if there are aspects that should be removed, revised or added to benefit the outcomes of the programme and job performance.

6.2.4 Facilitator Competence

The organisation does follow certain criteria when recruiting (referring to knowledge, ability and attitude). These criteria as well as the facilitator's skills are, however, not assessed in this study, to establish the effect on the success and outcomes of the training programme. However, every training session ends with an evaluation, where learners provide feedback on the programme, learning content and facilitators. This should provide a valuable assessment on whether the facilitator is suitable for the role.

Nevertheless, it is recommended that the organisation considers assessing the facilitators' competence, i.e. style, experience, knowledge and ability, as this also affects the success of the programme.

6.2.5 Conducting Further Research

The recommendation is for the organisation to conduct further research in the area that is critical based on the recommendation from suggestions for further research on paragraph 6.3 below. This will make it possible to compare results as well as improve current training mechanisms.

6.2.6 Allocating more time for training

The recommendation is that novice sales agents request more time to be allocated, in order to put the acquired learning into practice. However, this will depend on whether the recruitment process has been changed, i.e. recruiting more experienced sales agents in future. This could imply that increased practice time may not be necessary.

6.2.7 Adding extra measurement criteria to assess the quality of a sale

The current sales criteria focuses on the numbers sold, with less emphasis on assessing the commitment of the sale to stay in the books. This assessment is necessary, as there are sales agents who are searching for loopholes and who are manipulating the process and data base system when capturing an application, for example, capturing prospects that did not commit to the sale, or dishonest behaviour such as the creation of a fictitious customer.

It is therefore recommended that the Call Centre management assess the results of the QAPMQ thoroughly. However, it may also be necessary to assess any limitations.

6.2.8 The size of the sample can affect the validity of the results

The authority of the results are compromised if a small sample is used. For the purpose of this research, the intention was to use a sample of at least 80 respondents. However, it was impossible to analyse the data using the T-test, as the

assumption that the standard deviation of the scores for the two groups should be approximately equal, could not be met.

The researcher had to use the non-parametric Mann-Whitney U Test. It is recommended that the organisation should investigate the possibility of undertaking another study after an appropriate period of six months to a year, as this would assist in confirming the results of this study.

6.2.9 Extraneous factors that might affect performance improvement

One of the extraneous factors that might affect performance improvement was support received from management. This exercise may be perceived to waste sales agents' time which will hinder the targeted performance. This could be addressed continuously by communicating the benefit of research to the organisation, by the researcher.

Another factor could be omission of aspects considered important within the role-play technique implementation process. However, the researcher consulted various literature sources and other training specialists from external companies, to ensure that the benefit of role-play could be appropriately implemented. If there are, however, any aspects noticed to be outstanding; the organisation could include it during further research. Some of the interventions the researcher implemented to optimise the benefits of role-play were the inclusion of learning outcomes, critical cross-field outcomes, the use of role play prior to the learning programme, formative assessment and post-assessment, as well as assessment principles.

6.2.10 Changes in the National Qualifications Framework

In contrast to the previous situation SETA's will in future resort under the Department of Education. This recent development shouldn't make this study any less important. However, it raises many questions such as how the OBE paradigm shift will impact on the learning environment within organisations and institutions.

This provides an opportunity for further research once the changes have been clearly defined and implemented. The changes include the New NQF Bill, which provides a

fully integrated and needs driven occupational learning system. In order to achieve this, extensive use will be made of an "Organising Framework for Occupations" (OFO). The OFO will set the basis for linking various occupations to specific skills and will assist in identifying further training needs (Skills Portal, 2009).

6.3 Suggestions for Further research

The limitations cultivated the need for further research. Therefore, the organisation where the research was conducted should consider further research in areas namely:

- i. Recruiting experienced sales agents might imply less need to increase training practice time.
- ii. Adding additional measurement criteria to address the quality of sale rather than the number of calls dialled and policies received.
- iii. The size of the sample affecting the validity of the results.
- iv. Research on other aspects of role-play that might not have been included in this research, such as the impact of the use of OBE.
- v. Novice sales agents' readiness and motivation to learn was not investigated, further research might provide the organisation with more understanding regarding their commitment to training.
- vi. Incorporating the critical cross-field outcomes in the learning programme.

6.4 Conclusion

This chapter has presented the limitations, recommendation and suggestion for future research. These will be presented to the organisation where the research was conducted. If the organisation considers further research, the literature review should provide valuable information regarding role-play, i.e. how it can be implemented, which entails how it can be included in the overall learning programme. The limitations and recommendations will also serve as a point of reference in order to avoid unnecessary barriers.

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Appendices

Appendix A

Quality Assurance Performance Management Questionnaire

Instruction:

Heading

The highlighted heading are representing the competencies that should be demonstrated and these are agreed on based on those given by the SHL Online profiler system used for job analysis.

The information that could not be received through the recording such as info on the data capturing section will be requested from the head of department.

Instruction:

Those rating must tick next to the relevant scale according to the info on the recording.

Rating scale

The rating scale is as follows:

Rating scale	Represents	In percentage
1	Poor	10-30
2	Fair	31-49
3	Average	50-69
4	Good	70-80
5	Excellent	81 and above

Those rating must tick next to the relevant scale according to the info on the recording.

Heading

The highlighted headings are representing the areas that the Quality Assurance Performance Management Questionnaire measured at a point in time.

Quality Assurance Performance Management Questionnaire					
1. Introduction	Rating scale: 1-5				
Did the Consultant offer an appropriate greeting?	Excellent	Good	Average	Fair	Poor
Did the Consultant identify him/herself and the company's name	Excellent	Good	Average	Fair	Poor
Did the Consultant use the correct opening statement?	Excellent	Good	Average	Fair	Poor
2. Customer Focus					
How effective did the Consultant use questioning techniques?	Excellent	Good	Average	Fair	Poor
Rate the Consultant use of hold/transfer/conferencing	Excellent	Good	Average	Fair	Poor
Rate the Consultant's ability to remain focussed on the customer throughout the call	Excellent	Good	Average	Fair	Poor
Rate the Consultants use of the customer's name/title	Excellent	Good	Average	Fair	Poor
Rate the Consultant's language, communication, pace, pitch and tone	Excellent	Good	Average	Fair	Poor
3. Product Presentation and Sales					
Rate the Consultant's level of confidence and enthusiasm	Excellent	Good	Average	Fair	Poor
Rate the Consultant's presentation and persuasion skills	Excellent	Good	Average	Fair	Poor
How well did the Consultant handle objections	Excellent	Good	Average	Fair	Poor
Rate the Consultant's ability to identify buying signals	Excellent	Good	Average	Fair	Poor
4. Customer focus while Closing					
Rate the consultant's ability to close the sale	Excellent	Good	Average	Fair	Poor
Rate the Consultants skill in asking the customer for referrals	Excellent	Good	Average	Fair	Poor
Rate the consultant's level of customer focus	Excellent	Good	Average	Fair	Poor
Rate the consultant level of resilient when dealing with a difficult client	Excellent	Good	Average	Fair	Poor
Rate on how well the Consultant explain the products benefits?	Excellent	Good	Average	Fair	Poor
Rate the consultant's level in relating to customers	Excellent	Good	Average	Fair	Poor
Did the Consultant close off the call appropriately	Excellent	Good	Average	Fair	Poor
5. Legal and Compliance					
Rate on how well the Consultant state clearly the reason for calling?	Excellent	Good	Average	Fair	Poor
Rate on how well the Consultant tell the customer that the call was being recorded?	Excellent	Good	Average	Fair	Poor
Rate on how well the Consultant discuss all exclusions?	Excellent	Good	Average	Fair	Poor
Did the Consultant cover all aspects of the confirmation?	Excellent	Good	Average	Fair	Poor

Appendix B Summative assessment

Summative Assessment

- The duration of the assessment is 1 hour
- All questions must be answered
- The pass mark is 85%
- The total mark is 55

FULL NAME & SURNAME

ID NUMBER

DATE

E-MAIL ADDRESS

MANAGER'S NAME

DIVISION / DEPARTMENT

ASSESSOR'S NAME

CANDIDATE SIGNATURE

Section A: Please answer the following questions:

(a) What does FAIS stand for and what is its purpose?

(2 Marks)

(b) What does FICA stand for and what is its purpose?

(2 Marks)

(c) What is advice and how does it differ from non-advice?

(2 Marks)

(d) What does being fit and proper entail?

(4 Marks)

(e) Provide four examples of what "non-advice" entails.

(4 Marks)

(f) State four examples of phrases, which you will use when dealing with clients within the "advice" exclusions:

(4 Marks)

(g) Provide four examples of phrases, which you, as a telemarketer, are NOT allowed to use:

(4 Marks)

(h) What are the reasons why people take insurance?

(3 Marks)

(i) What is "insurable interest"? Motivate with an example.

(2 Marks)

(j) Which cession is allowed on the Personal Accident plan?

(1 Mark)

(k) On the Funeral Family Funeral Plan, which people DONOT have Contractual Capacity and why?

(2 Marks)

(l) Consider the following scenario: "My name is Jane and I'm 22 years old. I am a single mum with a 3-year-old daughter, Sandy. My mum takes out a Personal Accident Plan for me and my dad will be paying the premiums for this policy. Should I die, I requested a transfer 50% of my pay-out to my sister and the other 50% to my brother."

Based on above, who would be the:

Insurer: _____

Policyholder: _____

Main Life Assured: _____

2nd Life Assured: _____

Premium Payer: _____

Beneficiary: _____

(7 Marks)

Section B: As a Telemarketer, how would you answer the following questions:

(a) Seeing that I am a policeman by profession, I ought to take the ABC Funeral cover. Don't you think?

(2 Marks)

(b) I already have a Personal Accident cover with Company XYZ. Is YOUR product any better than theirs?

(2 Marks)

Section C: Please answer the following on Sales Techniques:

(a) Vusi was online with a client when the client asked a question..." after how many days will I be covered?" Vusi hesitated and could not answer the question; he then proceeded to ask someone else. Whilst he did that the client dropped the call?

- Why did the client drop the call?

- Why couldn't Vusi answer the question?

- What areas should a marketer prepare?

- Why should he prepare?

(4 Marks)

(b) Thabo explained everything to the client and the client gave a positive response to the product, however Thabo kept on explaining the additional benefits, client then changes his mind, and doesn't take out the product? What did Thabo miss?

- What action should Thabo take when he identifies a buying signal?

- What skill is needed to be sharpened in order to identify a buying signal?

(3 Marks)

Adri presented to a client who seemed to be very interested in the product, whilst she presented she said "your contract will start on the 5th of October, your premium will be debited on the same day..." The client became nervous and backed off the sale?

- Why did the client become nervous?

- What words should have been used?

- What is the correct way of saying "your contract will start on the 5th of October and the premium will be debited on the same day" using power words?

(3 Marks)

(d) When Thabi found the opportunity to close a client she used the following close "can we arrange this protection for you" and the client said NO?

- What is this close called? _____
- What is the negative aspect of this close? _____
- What would be a better close to use? _____
- Give an example of a fatal alternative? _____

(4 Marks)

Appendix C

Experimental Group Pre- and Post- Correlation Result after adding Role-Play

No of Learners	Pre-test Scores (%) Day 3 Training	Researcher/ Raters Post Assessment Feedback Scores (%) Two weeks after training	Difference
1.	55	80	25
2.	40	82	42
3.	42	78	36
4.	52	92	40
5.	55	80	25
6.	60	85	25
7.	60	75	15
8.	85	92	7
9.	40	80	40
10.	34	79	45
11.	58	85	27
12.	63	90	27
13.	88	96	8
14.	41	78	37
15.	45	79	34
16.	76	76	0
17.	55	82	27
18.	52	78	26
19.	78	93	15
20.	40	78	38