THE VALUE OF BUSINESS TOURISM IN THE PERFORMANCE OF AN ORGANISATION

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DECLARATION

I, Pieta (Peta) H. Thomas declare that the thesis entitled, "The value of business tourism in the performance of an organisation", except in the aspects duly acknowledged, is my own unaided work. It is submitted for the ***PHILOSOPHIAE DOCTOR*** degree at the University of the North-West (Potchefstroom Campus). It has not been submitted for any other degree in any other university.

P. Thomas.

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SUMMARY

Key words and phrases: ROI; business event; organisational performance; knowledge; strategy.

The primary objective of this research is to review the value of business events in the performance of an organisation.

Business events are categorised as part of the business tourism sector of the tourism industry. This sector is a strong financial contributor to many nations' economies. The sector, sometimes also known as the M.I.C.E industry or meetings industry, focuses on creating business events to fit the knowledge needs of organisations across a wide range of industries. The business events are of several genre including exhibitions, training seminars, conferences, congresses and trade shows and all have been created for the purpose of helping organisations improve individual competitive advantages by learning from peers, competitors, suppliers and customers.

The financial outcome of holding business tourism events is typically measured by such indicators as the number of business event venues booked, the number of business tourism visitors to a country attending business events, the number of hotel bed-nights sold that relate to business events, the number of add-on packages in the way of transport, entertainment and leisure tours used by business event attendees. Countries including South Africa have specific national policies to attract globally rotating business events to their own country.

While hotels, transport and other tourism activities glean substantial financial benefit from the hosting of business events, the outcome of these events in terms of the new knowledge created for organisations is the primary objective of this research. As knowledge is intangible the value of knowledge is hard to understand in terms of past performance such as financial statements but it is seen in the literature review that there are many beneficial implications of seeking knowledge not limited to risk management through informed decision making. New knowledge has the ability to change the future work-place behaviour of employees in turn affecting the performance of an organisation. Lewin (1951) summarised that the level of

behavioural change from the influence of new knowledge attained at an event is a function of the people at the event and the environment of the event. Understanding these variables speaks directly to managing the intangible value created from business events. Thus Lewin's formula as applied to business events is considered a link in the value chain of intangible asset creation in this research.

Knowledge is an intangible asset of every organisation often documented in formal normative managerial actions such as policies, processes and databases and also held informally by individual employees who have personal skills and abilities. Measuring the change in knowledge value through an intervention such as a business event has relevance in terms of valuing the contribution of business events to improving organisational performance. A secondary objective of this research was then to review the current use of the Kirkpatrick-Phillips return-on-investment model in relation to its effectiveness in defining knowledge objectives and measuring their effect on intangible asset creation. The model is the business events sector recommended methodology to set the objectives and key performance indicators that define the degree of success of the business event for an organisation. The utility of this model in helping to manage organisational knowledge value derived from business events is reviewed. The relevance of business events to future organisational performance improvement is understood by analysing firstly an organisation's perspective of the value of business events and then the perspective of an employee of the organisation attending business events.

The findings of the literature review guided the design of both the qualitative and quantitative surveys that were used to explore the way knowledge flows from events into organisations. These surveys fulfil the third and fourth objectives of the research. To understand the flow of new knowledge through an organisation many functions and hierarchies of command, a systems thinking methodology was applied in that it is assumed that all units of the organisation add value at their own level and this value accumulates upwards towards the overall value of knowledge for the organisation in creating competitive advantages.

The literature review firstly highlighted the role of creating opportunity for socialisation at events as pivotal in improving an organisation's knowledge. Then

systems methodology tool of viable systems diagnosis suggested a theoretical viable systems model of what a healthy, successful organisational knowledge system would look like. The methodology was then applied to distil the secondary data reviewed to 12 variables each composed of many other variables that act within this theoretical model. The 12 variables were included in semi-open ended questions of a qualitative research instrument that interviewed 18 managers who either design or attend business events. The qualitative responses and the system of the 12 variables were then used to guide the creation of the quantitative instrument. The quantitative research produced 354 useable questionnaires that were statistically analysed by exploratory factor analysis. The latent factors identified were used in the design of a structured equation model (SEM).

The SEM indicated that organisations rely on socialisation activities such as business events to create new knowledge. The SEM also indicates that employees of an organisation may well consider business event activities from a personalised perspective of their own continued professional development needs which may not always align to those of the organisation suggesting the alignment between organisational and personal goals as critical in maximising the value attained from a business event. This research therefore made a valuable contribution in that it explored the value chain between the business events and their role in improving an individual organisation's performance. This in turn implies from a systems thinking point of view to the overall performance of a country's economy. A further contribution of this study is recommendations made to improve the ease of application of the Kirkpatrick-Phillips model and thus manage the process of socialisation and ultimately knowledge creation better. A pre- and post event extension to the model is recommended defined in a template to be used in an iterative manner to improve the management and capturing of the value of knowledge arising from the event and this fulfils the final objective of the research.

Opsomming

Sleutelwoorde: Opbrengs op belegging; besigheidsgebeurtenis; organisatoriese werkverrigting; kennis; strategie.

Die primêre doel van hierdie navorsing is om die waarde van besigheidsgebeurtenisse ter verbetering van organisasies se prestasie te verken.

Besigheidsgebeurtenisse word as deel van die besigheidstoerisme-sektor van die toerismebedryf gekategoriseer. Hierdie sektor lewer ‘n groot bydrae tot die ekonomieë van verskeie lande. Die sektor, soms ook bekend as die MICE-bedryf, fokus daarop om besigheidsgebeurtenisse te ontwerp om in organisasies se kennisbehoeftes oor ‘n wye reeks bedrywe heen te voorsien. Die besigheidsgebeurtenisse dek etlike tipes, insluitend uitstallings, opleidingseminare, konferensies, kongresse en handelskoue en elkeen is ontwerp vir die doel om organisasies te help om individuele mededingende voordele te verbeter deur by eweknieë, mededingers, verskaffers en kliënte te leer.

Die finansiële uitvloeisel van die aanbied van besigheidstoerismegebeurtenisse word tipies gemeet aan sulke aspekte soos die aantal besigheidsgebeurtenisse-lokale wat bespreek is, die aantal besigheidstoerisme-besoekers aan ’n land wat besigheidsgebeurtenisse bywoon, die aantal hotel bed-nagte wat verkoop is wat verband hou met besigheidsgebeurtenisse, die aantal bykomstige pakkette rakende vervoer en die vermaak en ontspanningstoere wat deur besigheidsgebeurtenisse-besoekers benut word. Lande soos Suid-Afrika, beskik oor spesifieke nasionale beleide om wêreld-roterende besigheidsgebeurtenisse na hul eie lande te lok.

Terwyl hotelle, vervoer en ander toerismeaktiwiteite aansienlike finansiële voordeel uit die aanbied van besigheidsgebeurtenisse trek, is die primêre doel van hierdie navorsing die uitvloeisel van hierdie gebeurtenisse met betrekking tot die nuwe kennis wat vir organisasies geskep word. Aangesien kennis ondefinieerbaar is, is die waarde van kennis moeilik om vas te pen uit vorige prestasie, soos finansiële state, maar uit die literatuuroorsig kan afgelei word dat die soeke na kennis wat nie beperk is tot

risikobestuur deur ingeligte besluitneming nie, talle voordele inhou. Nuwe kennis het die vermoë om toekomstige werksgedrag te verander wat dan ook die prestasie van die onderneming sal raak. Lewin (1951) toon aan dat die vlak van gedragsverandering wat beïnvloed word deur nuwe kennis opgedoen by die gebeurtenis is ‘n funksie van die mense wat die gebeurtenis bywoon asook die omgewing van die gebeurtenis. Die verstaan van die veranderlikes spreek direk tot die bestuur van die ontasbare waarde soos geskep deur die gebeurtenis. Dus kan Lewin se formule, soos toegepas by besigheidsgebeurtenisse, gesien word as ‘n skakel in die waarde-ketting van ontasbare bate skepping in die navorsing.

Kennis is elke organisasie se ontasbare bate wat dikwels in formele, normatiewe bestuursaksies soos beleide, prosesse en databasisse gedokumenteer word en ook informeel deur individuele werknemers wat oor persoonlike vaardighede en vermoëns beskik, gehuldig word. Die meting van verandering in kennis waarde deur ingryping soos ‘n besigheidsgebeurtenis is relevant in die bydrae van besigheidsgebeurtenisse om organisatoriese prestasie te verbeter. ’n Sekondêre doelwit van hierdie navorsing was dus om ’n oorsig te gee van die huidige gebruik van die *Kirkpatrick-Phillips Return-on-Investment-model* in verhouding tot die doeltreffendheid daarvan in die definiëring van kennis doelwitte en die meting van hulle effek op ontasbare bateskepping.

Die model is die besigheidsgebeurtenisse-sektor se aanbevole metodologie om die doelwitte en sleutelprestasie-indikatore wat die suksesgraad van die besigheidsgebeurtenis vir ’n organisasie stel. Die benutting van hierdie model om organisatoriese kenniswaarde te help bestuur wat ingewin is deur die bywoon van besigheidsgebeurtenisse, word beoordeel. Die toepaslikheid van besigheidsgebeurtenisse vir toekomstige organisatoriese prestasieverbetering word verstaan deur eerstens ’n organisasie se perspektief van die waarde van besigheidsgebeurtenisse te ontleed en daarna dié van ’n werknemer van die organisasie wat besigheidsgebeurtenisse bywoon. Die bevindinge van die literatuuroorsig het die ontwerp van sowel die kwalitatiewe as kwantitatiewe ondersoeke gelei wat gebruik is om die wyse waarop kennis uit gebeurtenisse in organisasies in vloei, te verken. Deur hierdie ondersoeke is die navorsing se derde en vierde doelwitte bereik.

Om die vloei van nuwe kennis deur ’n organisasie, talle funksies en bestuursvlakke te verstaan, is ’n sisteembenadering (systems thinking methodology) toegepas deurdat daar aanvaar is dat alle eenhede van die organisasie waarde op hulle eie vlak toevoeg en dat hierdie waarde opwaarts akkumuleer tot die algehele waarde van kennis vir die organisasie deurdat dit mededingingende voordele skep.

Die literatuuroorsig het eerstens die rol van die skep van geleenthede vir sosialisering by gebeurtenisse as deurslaggewend ter verbetering van ’n organisasie se kennis beklemtoon. Daarna het sisteembenadering-instrument van lewensvatbare stelsels ’n teoreties lewensvatbare model van hoe ’n gesonde, geslaagde organisatoriese kennisstelsel sou lyk, voorgestel. Die metodologie is daarna toegepas om die sekondêre data tot 12 veranderlikes, elk saamgestel uit talle ander veranderlikes wat binne hierdie teoretiese model optree, te distilleer. Die 12 veranderlikes is by semi-oopeindevrae van ’n kwalitatiewe navorsingsinstrument, wat gebruik is vir onderhoude met 18 bestuurders wat besigheidsgebeurtenisse óf ontwerp óf bywoon, ingesluit. Die kwalitatiewe response en die stelsel van die 12 veranderlikes is daarna aangewend om die ontwerp van die kwantitatiewe instrument te stuur. Die kwantitatiewe navorsing het 354 bruikbare vraelyste opgelewer wat statisties deur verkennende faktoranalise ontleed is.

Die geïdentifiseerde latente faktore is in die ontwerp van ’n gestruktureerde vergelykingsmodel (Structured Equation Model – SEM) aangewend. Die SEM het aangedui dat organisasies op sosialiseringsaktiwiteite soos besigheidsgebeurtenisse staat maak om nuwe kennis te genereer. Die SEM dui ook aan dat werknemers van ’n organisasie moontlik besigheidsgebeurtenis-aktiwiteite vanuit ’n gepersonaliseerde perspektief van hul eie voortgesette professionele ontwikkelingsbehoeftes oorweeg, wat moontlik nie altyd in ooreenstemming met dié van die organisasie nie, wat aandui dat die belyning tussen organisasie- en persoonlike doelwitte van kritieke belang is ter maksimalisering van die waarde wat uit besigheidsgebeurtenisse geput word.

Hierdie navorsing het dus ’n waardevolle bydrae gelewer deurdat dit die waardeketting tussen die besigheidsgebeurtenisse en hul rol ter verbetering van ’n individuele organisasie se prestasie verken het. Dit, weer, veronderstel van ‘n

sisteemdenke-uitgangspunt na die algehele prestasie van ‘n land se ekonomie. ’n Verdere bydrae van hierdie studie is aanbevelings wat aan die hand gedoen is ter verbetering van die gemak waarmee die Kirkpatrick-Phillips-Model aangewend kan word en dus die beter bestuur van die sosialiseringsproses en die optimale skepping van kennis. ’n Voor- en na-gebeurtenisuitbreiding op die model word aanbeveel, wat in ’n templaat gedefinieer is om op ’n iteratiewe wyse gebruik te word om die bestuur en die vaslegging van die waarde van kennis wat uit die gebeurtenis voortvloei te verbeter, en dit bereik die finale doelwit van die navorsing.

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ABBREVIATIONS AND ACRONYMS

BECA	Business Events Council of Australia
CMP	Certified Meeting Planner
CoP	Community of Practice
CPD	Continued Professional Development
CRM	Customer Relationship Management
EFA	Exploratory Factor Analysis
FIVA	Framework of Intangible Valuation Areas
GDP	Gross Domestic Product
HR	Human Resources
HRD	Human Resource Development
ICT	Information Communication Technology
ID	Interrelationship Digraph/diagram
IT	Information Technology
KPI	Key Performance Indicators
LOKA	List of Operational Knowledge Assets
MEA	Meetings and Events industry, Australia
MPI	Meeting Professionals International
OD	Organisational Development
PAF	Principal Axis Factoring
PM	Professional-based Management
ROI	Return-On-Investment
ROO	Return-On-Objective
SEM	Structural Equation Modelling
TM	Transaction-based Management
VSD	Viable System Diagnosis
VSM	Viable Systems Methodology
WTO	World Tourism Organisation

GLOSSARY

The following definitions give a dimension to the operational 'sense' of the term's usage as follows**:**

Absorptive/Absorption capacity

"Absorptive capacity is that prior related knowledge confers an ability to recognise the value of new information, assimilate it and apply it to commercial ends" (Cohen & Levinthal (1990:128); Brock & Yaniv, 2007:833).

Affective domain

"The affective domain includes the manner in which we deal with things emotionally such as feelings, values, appreciation, enthusiasms, motivations, and attitudes**"** (Dalkir, 2005:154).

Ba

"The knowledge-creating process is necessarily context-specific in terms of who participates and how they participate. Knowledge needs a physical context to be created: ``there is no creation without place". `Ba' (which roughly means `place') offers such a context" (Nonaka *et al.,* 2000:13).

Balancing loop

"A target or a limitation which [affects] the final condition of the system can take, creating a close loop control system. This target is compared to the actual state of the system, in order to provide information about the next action that its outcome will bring to the new status of the system's output. The delays in this system are critical factors for the ability of the system to be stabilised and should be considered in the design of each action." (Galanakis, 2008:1227).

Blended learning

"Blended learning has been widely adopted to depict combinations of face-to-face and technology-based learning**'** (Stubbs *et al.* 2006:163; Wall & Ahmed, 2007:187).

"Blended learning is a definition of different training media (technologies, activities and types of events) to create an optimum training programme for a specific audience. The term 'blended' means that traditional instructor-led training is supplemented with other electronic formats" (Bersin, 2004:xv).

Business event

"Any public or private activity consisting of a minimum of 15 persons with a common interest or vocation, held in a specific venue or venues, and hosted by an organisation (or organisations). This may include (but is not limited to): conferences, conventions, symposia, congresses, incentive group events, marketing events, special celebrations, seminars, courses, public or trade shows, product launches, exhibitions, organisation general meetings, corporate retreats, study tours or training programmes. The demand for a business event is driven mainly by organisations choosing it as a forum to communicate messages, to educate or train, to promote a product, to reward or celebrate, to collaborate on issues and solutions, or to generate resources. Business events are generally made up of meetings, incentives, conventions and exhibitions defined as follows:

- Meetings: Meetings and Events Association Australia, a member of BECA, has characterised meetings as comprising of: off-site gatherings in a commercial venue; more than 15 persons; and with a common purpose.
- Incentives: These refer to programmes which are attended by 'high achievers' to recognise and further motivate participants for their performance within the organisation. Incentives are also used to introduce new products and services to key players.
- Conventions: Also referred to as conferences, conventions are a large assembly of participants, often several thousand, with many international visitors. Most conventions will have some form of exhibition attached.

- Exhibitions: Exhibition events are the gathering of suppliers to display their product and services for trade and public exhibition purposes".

(Business Events Council of Australia, 2011b)

Business [organisational] objectives

"Business objectives [defined] as the business specific goals for outcomes (e.g. 25 percent market share, $3 billion in revenue, or $100 million in earnings)" (Argenti, 2006:40)

Business [organisational] outcomes

"Business outcomes are the end results of business activities (e.g. market share, revenue and earnings)" (Argenti, 2006:40)

Business tourism

The definition of business tourism events outlined by the International Convention and Congress Association is, "The provision of facilities and services to the millions of delegates who annually attend meetings, congresses, exhibitions, business events, incentive travel and corporate hospitality" (ICCA, 2012).

Capabilities

"Capabilities are combinations of resources that create [organisational] value" (Huff *et al.,* 2009:30)

Causality

"Causality means that a change in X (the cause) makes a change in Y (the effect) occur" (Hair *et al.,* 2007:418)

Cognitive domain

The cognitive domain "Includes the ability to notice and interpret what is happening in interpersonal situations; to entertain multiple perspectives and integrate them; to envision strategic futures and to sort and analyse data. These skills allow employees to read situations, understand and resolve problems" (Harvey & Butcher, 1998:14; Selamat & Choudrie, 2007:325).

Competitive advantage

"Competitive advantage is whatever value a business provides that motivates its customers (or end users) to purchase its products or services rather than those of its competitors and that poses impediments to imitation by actual or potential direct competitors" (Christensen, 2010:21).

Continued professional development (CPD)

"CPD can be considered as the planned acquisition of knowledge, experience and skills and the development of personal qualities necessary for the execution of professional and technical duties throughout a professional life, encompassing both technical and non-technical matters" (Wall & Ahmed, 2004:185).

"CPD is the process of continually maintaining and developing knowledge skills and competence to improve performance at work. CPD is a personal commitment" (Katz, 2007:507).

Distinctive competencies

"Distinctive competencies are the organisation's unique resources, capabilities and routines" (Huff *et al.,* 2009:30).

E-learning

"The use of internet technologies to deliver a broad array of solutions that enhance knowledge and performance" (Rosenberg cited by Chen & Hsiang, 2007:571).

Emic

"An emic (a subjective insider as opposed to an etic who is an objective outsider) stance is an orientation where the researcher as an engaged co-participant who deliberately and selfconsciously works in the field in a process that continually generates and makes sense of aggregate data. This sense making is reflexive field work. Such reflexivity is influenced by collective meaning frames, biographical experience and world knowledge of the participants. It is also influenced by the researcher's own curiosity about what the data discloses as well as the new questions it raises" (Hallebone & Priest, 2009:29).

Explicit knowledge

"Knowledge that is precise, formally articulated, and documented" (Lin & Tseng, 2005:163).

Human capital

"Human capital refers to a person's education, skills and background necessary to be productive in a profession or organisation" (Dalkir, 2005:134).

Innovation

"Improvements in technology and better methods or ways of doing things" (Porter, 1998:45).

Learning organisation

"One [an organisation] that is characterised by continuous learning for continuous improvement and the capacity to transform itself" (Watkins & Marsick cited by Davis & Daley, 2008:53).

Model

"A model is essentially a representation of some real-world phenomena that is used for descriptive purposes" (Rothwell *et al.,* 2006:51).

Organisational resources

"Resources [of the organisation] are assets used to create and support offerings to customers" (Huff *et al.,* 2009:29).

Reinforcing loop

"An open loop control system where its output will continue to increase or decrease without a limit as long as the input (action) increases or decreases" (Galanakis, 2008:1226).

Social exchange theory

"Social exchange theory identifies the conditions under which people feel obligated to reciprocate when they benefit from some other person's or some other entity's actions" (Lambert, 2000:801).

Tacit knowledge

"An experience-based knowledge that resides within an individual" (Lin & Tseng, 2005:163).

Tourism

"Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes" (United Nations, 1994).

Trust

“The willingness of a party to be vulnerable to the actions of another party based upon the expectation that the other will perform a particular action to the trustor, irrespective of the ability to monitor or control that other party” (Mayer *et al.,* 1995:712; Masqood *et al.*, 2007:124).

Viable systems

“Viable systems are those able to maintain a separate existence. Such systems have their own problem-solving capabilities. If they are going to survive they need not only the capacity to respond to familiar disturbances but potential to respond to unexpected, previously unknown disturbances. The latter capacity is the hallmark of viable systems: it gives them the capacity to adapt to hanging environments” (Espejo, 1989:78).

Virtual knowledge market

“Markets are systems of exchange. Exchanges can be altruistically or economically motivated.” (Desouza & Awazu, 2005:145).

CHAPTER 1

INTRODUCTION AND PROBLEM STATEMENT

1.1 Introduction

Business tourism is an industry historically situated within the larger industry of tourism which encompasses both business and leisure tourism activities (United Nations, 1994).

There is a suggestion that the singular term 'tourism industry' is too narrow and tourism may in fact be categorised further into aligned but separate tourism activity industries (Leiper, 2008:242). Leiper suggests that all the transport supporting tourism activities could be considered a form of tourism industry (Leiper, 2008:244). Intuitively the same could apply to the tourism segment known as business tourism which Getz (2007:38-40) defines as trade shows, meetings, conventions and exhibitions.

Business tourism, whether a segment within tourism or a separate but aligned industry to other tourism activities, creates business events that bring together members of business organisations (Getz, 2007:38: ICCA, 2012). The goal of each event is to enhance personal professional knowledge commuting this into the organisation in terms of improved employee performance and thus influencing and improving organisational performance. Event supplier activities contribute directly to the gross national product with direct delegate expenditure (Lee, 2006:73-74; Pearlman, 2008:113; Hanly, 2012:172). Jago and Deery argue business tourism also has a vital role to play in contributing to improving organisational performance and may in fact influence improved productivity in aligned industries. Business tourism has the ability to influence the gross domestic product (hereafter referred to as GDP) contributions of many industries within an economy in addition to contributing itself through direct delegate expenditure value (Jago & Deery, 2009:8-10).

A review of secondary data including findings and theoretical interpretations is undertaken in the following chapters and serves to provide a situational analysis of variables influencing the value created by business tourism events. To comprehend the complexity of the relationships between tangible and intangible value-adding factors that business tourism events create, the relationship between business events and organisations is reviewed. Chapter 1 begins to unravel this complexity by understanding the current situation of the business tourism environment and leads to a statement of the research problem. The background to the problem is established further from a secondary data review in chapters 2, 3, and 4. Chapter 1 explains the utility of reviewing the research problem.

1.1.1 A situational analysis of the current business tourism environment

The business event is part of the tourism industry activities. Business events are recursive within the tourism industry creating value repeatedly at one level in the business tourism industry. These activities and their value generation affect the nation. Value is created firstly by business events affecting the performance of the tourism industry itself in terms of financial flows and employment opportunities. Secondly, industries that participate in business tourism activities gain new knowledge to enable them to perform better. Business tourism is a contributor to a country's economy (Walters & Raj, 2010:489-501). An individual event organisation's behaviour affects the national business tourism of a country which, in turn, has competitive implications for nations competing to host mega-business events in the global business tourism market (Espejo *et al.*, 1996:668).

As a starting point as to what the term 'business tourism' incorporates, the Business Events Council of Australia (hereafter referred to as BECA) is considered (Business Events Council of Australia, 2011a). The authors Jago and Deery summarise the purpose of business tourism for the Australian national economy as:

- "Attracting investment by attracting influential participants" - creating opportunity for new growth from alliances and mergers.

- "Showcasing local products, services and investment opportunities" - creating opportunities for future sales.
- "Bringing regional and international expertise into the community where it is accessible to local professionals" - encouraging collaboration and knowledge sharing for continued professional development (hereafter referred to as CPD).
- "Generating new inflows of technology providing a vehicle for local business to access the latest developments in their respective fields" - fostering innovation opportunities.

(Jago & Deery, 2009:8-10).

In each of these four statements there is value creation from business tourism activities. The value created is, in each case, through access to new knowledge about fellow organisations and their products, unique research and technology. The knowledge adds to the organisation's ability to do its work better. The process of people meeting and learning better ways of doing business is a driver for renewing the variety of organisational opportunities available and in turn this stimulation of creativity followed by innovation offers the opportunity to improve national GDP growth.

Business tourism events are planned by organisations as a vehicle for learning new facts to replenish organisational knowledge (Cufaude, 2006:4-8; Reychav, 2009:143-158). Both traditional face-to-face business events and the newer online business event formats serve to offer an organisation the opportunity to acquire new knowledge (Figure 1.1).

In Figure 1.1, the business events are shown as having two conditions. A condition of a business event is that it may be for a specific purpose designed solely for a specific organisation. In this case, only the employees of that organisation attend the event. Examples of this type of event are training, team-building and internal meetings. A second condition is that the event may be sponsored by single or selected organisations but is open to other organisations' employees as well as their own. In this case, the

attendees come together because the knowledge content to be presented at the business event attracts them. Examples of this type of event are conferences, congresses, exhibitions, trade shows and external meetings. These conditions are applicable to online business events as well. Examples of online business events are webinars from conferences and trade shows, online training, and virtual meetings facilitated by interactive meetings software and online conference calling.

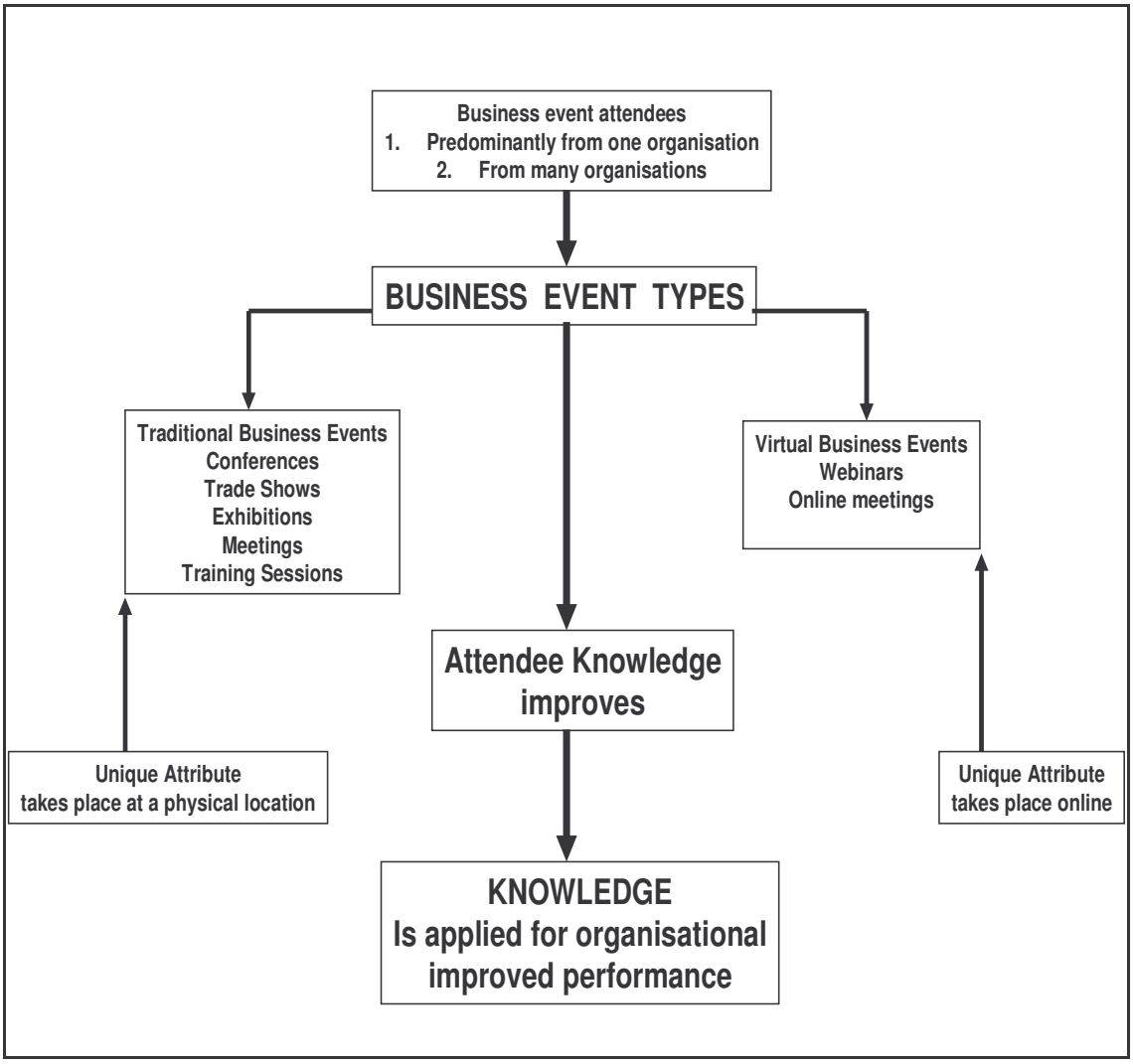


Figure 1.1: Business tourism events

Source: Author's own compilation (2010)

The two-variable relationship of, 'the value derived from a business tourism event' and 'an improvement in organisational performance' - are both dependent for their utility to an organisation on the flow of useful knowledge generated during a business event (Figure 1.1). The quality of the knowledge flowing from a business tourism event is shaped by many intervening variables (Hallebone & Priest, 2009:94). The recipient of the knowledge is the event attendee. Logically the event attendee will affect change in organisational performance. It can be claimed then that there is a relationship between business event knowledge, the event attendee and future organisational performance. Apart from the change in the ability of the organisation to perform better there will also have been a change in the level of knowledge of an employee after business event attendance.

Business events attendance is often specific to a domain of knowledge, for example engineering, science or medicine. Many who attend are specialists in their fields seeking new ways of doing their business better. People 'who knows what' about a domain, meet and collaborate to create a knowledge rich environment for sharing information about their subject (Dalkir, 2005:41). Getting people 'who know' together with people 'who want to know' requires attracting their attendance through design and promotion of an appropriate event environment. The activity of knowledge creation is so valuable to all industries in gaining a competitive edge that it is important to understand how business events within the tourism industry shape a nation's overall performance. Understanding how knowledge creation improves industry performance requires understanding of what is happening at a business event.

1.1.2 Lewin's model for affecting a behavioural change

Lewin (1951:25) postulated that new knowledge gained by an event attendee may influence the future behaviour of that person. Figure 1.2 implies that the resulting degree of change in a person's behaviour is a function of two factors. Lewin (1951:25) theorised that this change is dependent on the intensity of interaction between who attends the

event (p), and the environment of the event (e). Intuitively, it follows that both variables are affected by the event design chosen to deliver them as the event activity.

Event design also requires cognisance of the effect of intervening variables that act on the function (p, e) such as: the target market that attends; the event content and presenters; the venue; the business event type (exhibition, conference, meeting, training, trade show) suitability for attendees; and the event experiential ergonomics present to encourage new knowledge flows and learning (databases, presentation quality, Q&A sessions, notes, blackboard sessions). Being a business event, the attendees for the most part work within an organisation as employees or are in business for themselves. Employees are the human resource of the organisation and as with any resource it must be renewed and adapted to create a product that succeeds over those of competitors.

B = *f* (p, e)

Where

B (the future behaviour of a person)
is a function (*f*) of the **people (p)** present at the [business] event and the **environment (e)** of the event itself.

Figure 1.2: Lewin's model applied to business events
Source: Lewin (1951:25)

Modifying an employee's future behaviour requires that the event design ensures that the employee attains new skills, new relationships and new ideas set pre-event as outcomes of attendance. The event aims to present knowledge that changes the way an employee perceives work situations. In turn, this affects the way employees perform in the workplace. It is a cornerstone of this research that the opportunity for enhanced organisational performance lies with a business event changing an individual's work behaviour. To understand how design in a business event could maximise behavioural change requires examining the inputs of, and the outputs required from, the work flow of the business event process.

The remaining paragraphs of this section identify some of the variables that influence the business event system to establish a background for the purpose and value of the research objectives chosen, the research questions set and the methodology used to investigate and answer questions about this situation.

1.1.3 The SIPOC model to explain business event work-flow

The business event is a work process. It takes inputs and transforms them to outputs that customers want. The workflow and the value that the stakeholders expect from a business event are examined using the Supplier-Input-Process-Output-Customer (SIPOC) model to analyse work flowing through an event in Table 1.1 (Scholtes, 1998:59). Three major stakeholder groups in a business event see value to them arising from a business event. The three are: the person who arranges the business event, the event organiser; the organisations who fund or support business events; and individuals who attend business events. Defining the event workflow has relevance as it diagrammatically begins to unravel the interdependency of the relationships between organisational needs, business event attendee needs, and the event organiser's skill in fulfilling these two needs simultaneously.

This table shows work flowing from left to right: The suppliers are all those who provide input to creating the event as per the event design (Table 1.1, input column). A client provides resources for the event creation in the form of money and event goals (Table 1.1, input column). The event organiser designs the event based on the organisational goals and money available (Table 1.1, design column). An event attendee expects improved personal business attributes from attending the event (Table 1.1, output column). The organisation sending staff or owning the event expect improved employee performance in the workplace (Table 1.1, output column). The event organiser gains reputation and financial payment (Table 1.1, output column). The organisations whose employees attend the event are the direct customers of the product of the work process in this case knowledge (Table 1.1, customers' column).

Indirect or intermediary customers are the organisation's customer who benefits from the attendees' new knowledge and other staff in the organisation who can share and benefit from the attendees' new knowledge (Table 1.1, customers' column). The indirect customers gain value because the attending employee's personal performance improves and this value ripples through and up the organisation processes. The event process is one that occurs repetitively continually generating a degree of value at each occurrence.

Table 1.1: The SIPOC model applied to a business event
Source: Adapted from Scholtes (1998:59)

INPUT	DESIGN	PROCESSES	OUTPUT	CUSTOMERS
Services Provided by suppliers to support the business event.	**Event brief** Supplied by the client defines why the event is needed: The brief identifies: - the event objectives; - the target audience; - the budget available.	**The business event** Processes use the client brief to: - design the event; - deliver the event; - to meet predefined goals and affect future organisational performance.	**Value Adding/ Satisfaction** **1) For attendee:** -learning; -collaboration; -innovation. **2) For organisation:** An improved human capital asset creating a competitive advantage. **3) For event organiser:** - income; - reputation.	**Direct customer:** -the Client; -the Attendees. **Intermediate/ indirect customers:** - the organisation's customer; - other staff in the organisation.

Event objectives are the input that guides event design that ensures the interactions between the people (p) present at an event (e). The new knowledge is anticipated to flow back into the organisation and improve its performance (Lewin, 1951:83-84; Desouza & Awazu, 2005:93-98). Variables of the organisation, the employee or the event organiser that can be influenced to maximise this workflow process are examined in chapters 2, 3, and 4.

1.1.4 Exploring the relationship between the SIPOC and Lewin models

Value created in the business event work process is subjective and given a personal value biased by each individual's perspective of the event (Getz, 2007:68-69). For the

employee, their perspective of 'learning gained' often aligns to a personal requirement for learning targets. Personal professional development known often as CPD is sought by employees. The organisation's perspective of value from the event is in the degree to which the goals it set for development of new employee capabilities that extend and refresh the internal organisational knowledge environment, are met (Scholtes, 1998:382-384). Both perspectives need to be considered in the event design as they will be influences on the creation of value from the (p, e) relationship. These influences are evaluated in the literature review undertaken in chapters 2, 3, and 4.

1.1.5 The CATWOE model to explain business event value multipliers

The contributions by business tourism events to GDP are from several levels. The CATWOE model is used to unravel the co-dependency relationships of several levels of work process that contributes to the value created by the business tourism industry.

The CATWOE model is used to define a root definition for the system of business events. The model reveals the what, how and why of this work system as: an organisation needs knowledge (what); created by business event interventions (how); to improve organisational performance (why). The acronym is as follows: Customers receive the benefit of the work process; Actors carry out the work process; The Transformation is how inputs to the work process become outputs and relates to the SIPOC model; Worldview describes why this is important to higher systems that the business event effects, for instance improving a nation's knowledge makes it more competitive, thus earning more GDP and better able to underpin the welfare of its people; The Owner of the event is who has the right to stop the event thus owns the work process; And the Environment is an overview of forces in the operating environment that affect the value creation (Smyth & Checkland cited by Bergvall-Kåreborn *et al.,* 2004:56).

The CATWOE in Table 1.2 differentiates four types of perspectives on business events as a system that generates value. These are: the system of the national tourism industry; the suppliers supporting business events; the organisation who owns or pays for attendance at

a business event; and finally the business event attendees. The SIPOC is the 'transformation column'. The CATWOE diagnosis shows how each level of recursion, uses the business event process output in a unique manner to add value to the business tourism industry.

For the purposes of this CATWOE analysis the differentiation between tangible value (financial returns) and intangible value (knowledge and new behaviours) is not defined other than in generalities. These will be reviewed individually as to their contribution to value in greater detail in chapters 2, 3, and 4.

The CATWOE analysis is extremely detailed but serves to understand how each level of the system contributes value upwards to the next. This infers that no one system stands alone for the value it creates and thus the literature review must consider the effect of the interrelated systems. This will give a more concise understanding of the role of business tourism and specifically business events in organisational performance.

The CATWOE model at the level of the nation (row 1) shows how business tourism activities relate to the stakeholder (the national business tourism industry) and create value. The business event quality attracts both local and international business events, these are 'C' the customers. The customer is for whom the business event value satisfies a need and may be a local or an international business organisation. The actors, 'A' are the people nationally who drive national business event tourism agendas and quality assurance. The transformation, 'T' is having a business tourism industry that attracts and holds successful business events. This contributes to generating GDP. The worldview, 'W' is how external stakeholders who might choose the country as a business event host view the potential quality of the nation's business tourism events industry.

It follows that for rotating global events this would be a deciding factor in using a country for its host. It follows that hosting has positive financial implications for a nation. The 'owner', 'O' is who has the right to alter or stop the transformation process such as authoritative national industry bodies. These national bodies must take actions that

maintain the integrity of the business event industry. When these bodies cease to do this the value of business tourism to the GDP value is no longer assured. The environment describes how poor business event experiences can detrimentally affect the possibility of hosting future events and in turn affect GDP.

Row 2 reflects the relationship of the business event to the stakeholder, business event suppliers in particular the event manager. These are the actors 'A' who create value by delivering business events. The customers, 'C' are the organisations of many industries that contract their service. The transformation 'T' is to contribute to an event experience that transforms attendee behaviour. From a worldview, 'W' perspective, organisations will choose to work with only those suppliers who add value to their organisational performance and if suppliers' performance is poor, then this arguably affects GDP potential. As 'owners' the event organisers need to have the knowledge to stop an event of unacceptable risk or quality and or a specific contracted supplier activity if the outcome is not going to be delivered as planned. To do this, event organisers need to be aware of environmental trends, 'E' and undertake CPD to stay abreast of trends thereby retaining their professionalism. When the event organisers cease to satisfy the client needs, the organisation no longer calls on their services. Value is created at this level by having suppliers who can add their own value to the business event process through superior design.

Row 3 reflects the relationship of the stakeholder, the individual organisation, and the business event. This is at the level of the transformation 'T' shown in the SIPOC model applied earlier. The customer 'C' is the target group that the event attracts and is the event attendees. The actors 'A' are both the event organiser who uses the funding resources to create an event and thus the funder is also an actor. The worldview, 'W' perspective is that the funding organisation wants to see the event improve their viability and thus the value they supply for their customers. In the owner 'O' role is the funder of the event as they can stop the event if they feel the event is not giving them expected outcomes.

Table 1.2: Applying the CATWOE model to the business tourism industry

Source: Smyth and Checkland quoted by Bergvall-Kåreborn (2004:56)

Stakeholder	**Customer**	**Actors (people who carry out the work)**	**Transformation Input/Output (what the event delivers for them)**	**Worldview (perspective) of stakeholder**	**Owner (the person who can stop the process)**	**Environment:** **Threatening elements**
Row 1 The national tourism industry bodies e.g. SA Tourism; Provincial; Tourism; City Tourism.	People in the country and outside of the country seeking to hold business tourism events in the country.	The promoters of business tourism events.	Input: marketing the quality of the SA business tourism experience. Output: an economic driver for SA economy.	The quality of the current business event impacts future business tourism GDP.	The tourism bodies.	Poor image of the country through inappropriate business tourism offerings. Reduced viability across national industries due to poor inflows of knowledge from poorly run business events. Legislation.
Row 2 Business tourism services: event organising companies.	Business and organisations.	Event managers and suppliers.	Input: event production expertise. Output: event delivery to a standard defined by the business tourism industry.	Help create event experiences that transform the attendee behaviour.	The event manager.	Poor business event design. Poor grasp of outcomes required. Poor event design and management training.
Row 3 The event funder/owner.	Event attendees both international and national.	The funding organisation.	Input: employees to improve human capital value and organisational performance. Output: more knowledgeable employees.	Improve organisational viability.	The event funder/owner.	Lack of understanding by the organisation and event organiser of organisational requirements for the business event in terms of human capital development.
Row 4 The event attendees.	Their organisations.	-The event organiser. -The funding Organisation.	Input: expectations of new knowledge. Output: new knowledge and personal continued professional development (CPD).	The cognitive behaviour of the attendee changes and influences the behaviour of the attendee.	The event manager. The event owners.	Poor research, design and delivery of the business event.

The environment ‘E’ would reflect badly designed elements of the event that detrimentally affect the overall value created by the event.

Row 4 shows the relationship between the stakeholder, the event attendees and the business event. The attendees are the customer ‘C’ whose needs must be satisfied by event attendance. The actors ‘A’ are both the event organiser who must produce a transforming experience and the organisation that sends the attendee to the event. In the latter case, the organisation has an expectation of how they expect their attendee will be transformed at the event. The transformation ‘T’ is the change wrought in the employee. The attendees contribute value to their industry by their improved knowledge which in turn improves their organisation’s performance and GDP. The worldview ‘W’ is that improved employee knowledge improves the overall quality of the organisation within the industry in which they work.

To summarise, at each individual recursive level the value created flows from left to right and the degree of value created depends on how well this level of transformation does its work. The value created at each level then flows upwards to higher levels: Simply stated; Better trained and informed attendees can make a greater contribution at their workplace; better trained event organisers can create a better event where the knowledge flow is more rewarding to attendees; well organised business events that can be seen to have organisational benefits and so attract industries to hold more business tourism events; organisations who hold successful business events improve their performance and add value to the GDP.

1.1.6 Business events and risk management in organisations

In the final column of the CATWOE model applied to the business tourism environment, is shown threats to the value created in the transformation process. This is looked at more closely because risk from the external environment is a constraint in business performance which can degrade the value of an organisation’s performance and, in doing so, its outputs. As such, it needs to be minimised as to its impact on performance by

strategies and plans of action that seek to manage the risk within acceptable parameters (Burke, 2010:268). The risks to a business event process are of a wide variety and an output value degraded at a lower level of the systems for instance by a poorly qualified event organiser who produces a poorly designed business event, has a degrading effect upwards on the value that can be created by an of the higher systems.

Reviewing the quality of risk management of business event quality as a constraining effect from the national level of the system downwards, risk from a poorly designed business event is shown as a ripple effect affecting output values. On a national level (row 1), poor monitoring of the quality of business events by tourism bodies reduces the likelihood of a high quality national business tourism industry performance and of attracting international events. The potential result will be that fewer of the globally rotating conferences choose the country as a preferred host for their business event and GDP contributions created by business tourism industry are negatively affected.

For the business event suppliers segment (row 2), inadequately trained event organisers affect the quality of the event transforming experience. A poor event means that the owner of the event and the attendees had a low opinion of the abilities of all the suppliers including the event organiser and are unlikely to use these supplier services again. The future value of each of the supplier organisations in terms of goodwill is affected.

At the level of the individual organisation (row 3) sending a delegate to a poorly produced business event does not add value to future organisational performance and costs money. At the level of the attendee (row 4) going to a business event where no value is gained is a waste of their time. The attendee, if international, may blame this on the host country lacking the ability to host an excellent business event. The word-of-mouth goodwill they will generate on returning to their home country will be minimal and may even discourage future participation at events held in the host country.

In each row there are threats that are also risks to be minimised if value creation is to be optimised. As was seen in the previous section where actions to create value at the lowest

level had an effect on the overall value of the national business tourism so, similarly, threats at rows 2, 3, and 4 diminish the opportunity to maximise value at row 1. An inability to devise risk strategies to minimise the threat risk at any individual level will result in diminished value creation ability at the higher levels.

In row 1 of the CATWOE analysis, the national level legislation affecting both the business tourism industry and of the organisations doing business with the business tourism industry affects value creation activities. The most recent legislative change that has an impact on business events globally is that of the Sarbanes-Oxley Act of 2002 section 404 (Zhang, 2007:2). This Act places an onus on organisations to annually submit an assessment of the effectiveness of their organisation's internal controls in maintaining the benefits accrued from any action equal to or greater than the cost to organisation of expenditure (Ramos, 2004:1). This act is legislated from the United States of America and affects all American national and international subsidiaries.

The legislation, by implication, requires that organisations qualify business event expenditure by proving that the activity gave the organisation benefit (Meeting Professionals International, 2011a:2; Phillips *et al.*, 2007:xxiii-xxvi). This is not easy to do because, while feet through the door can be counted as can attendee tickets sold, it is not easy to quantify the value of the knowledge that attendees take away from a business event. Although this legislation is American, it has far reaching implications for the globally rotating business events in that the American events have to qualify the expenditure of going to another country to host the event. The effect of business events not moving around the globe will be explained later in the review but suffice to say at this point it limits the variety of knowledge at an event not to mention impinges on the quantity of work available to in-country business event tourism suppliers.

The Act recommends using an excellent five-component framework to establish a prerequisite standard for every action taken by an organisation (Table 1.3). These internal control measures are holistic in application meaning, "Tightly integrated in a non-linear fashion" (Ramos, 2004:30). The five components of the legislative framework are

leadership (i), value chain analyses of all processes to understand where and how value is added and lost (ii), managerial actions to standardise processes through policies and processes (iii), an information flow system (iv), and a monitoring system to recognise and manage risk (v).

The framework is a very valuable template that is shown in this research to have similarities in application to managing the quality of a business event with the models examined in chapter 4. It is interesting that the legislative framework is applicable and useful at all levels of the business tourism systems and is designed as generic methodology to be used across all business functions. Not applying the framework exacerbates the ability to manage the degree of risk that can occur at every level. Risk response strategies based on the methodology application still require that there is the requisite information available to the organisation to make an informed decision as to how to manage the risk. Business events play an integral part in providing the variety of information required to make informed decisions and thus bestow a risk management capability (Warren, 2008:35; Warren, 2008:528; Scholtes, 1998:383).

Table 1.3: Five components of organisational internal control
Source: Ramos (2004:33)

i) A controlled organisational environment where the leadership and management set the tone of work practice and all other personnel follow this best practice.
ii) A risk assessment that is integrated through all value chain activities and supports the attainment of predefined organisational objectives while ensuring that risk management is strategically planned for and there are risk management pro-active measures in place.
iii) Control policies and processes that help ensure that management actions continuously address risk control while striving to meet the organisational objectives.
iv) A system that ensures reliable information flow and communication enabling personnel to, "Capture and exchange the information needed to conduct, manage and control its [the organisation's] operations".
v) A monitoring system that ensures that the organisation responds dynamically to change in its environment.

Herein lies the conundrum of the legislation in that quantifying the cost of gaining an intangible asset such as the value of new knowledge as a financial expenditure item is difficult. Intangible value is, by definition, "Incorporeal/incapable of being defined" (The Free Dictionary, 2012). For the simplest business event activity such as an organisation's internal meetings there is a cost in terms of employee time spent at the meeting. Thus value of new knowledge needs to justify the meeting cost to satisfy legislation. In countries where legislation does not exist, good business sense holds that as much value as possible is still required from their own business meetings and while Sarbanes-Oxley may not have the same impact as it does for American companies, it still makes good organisational sense to try and quantify the value of knowledge. The answer to giving knowledge a value is, to some extent, found in understanding knowledge flowing from a business event and how it contributes to organisational performance.

1.1.7 The role of virtual business events

Legislation such as Sarbanes-Oxley combined with the spread of communicating via the Internet may both be drivers for fewer face-to-face events and more virtual events. By using Internet supported software for collaboration, organisations reduce event expenditure in travel and hotels for attendance at a physical event. Business events such as training, meetings and conference attendance can happen online. The cost to an organisation associated with employee time to attend the virtual event still exists as it does with a face-to-face event. Reviewing the impact of virtual meetings from the national business tourism perspective indicates possible reductions in GDP. This would be seen as a shrinking in the segment of business tourism suppliers to live events and would reduce the economic impact of this segment. Other shrinkage would follow in allied segments such as hospitality and travel.

Another use of virtual events is derived from organisational change in the form of adaptation to serve globalised business. Employees often work geographically remote from one another and this is a driver for the use of virtual business meetings technology (Gibson & Cohen, 2003:69; Harris, 2003:159; Desouza & Awazu, 2005:166-167).

A final driver for the use of virtual business events is the workers who have joined the workforce over the past 20 years. Having lived from a young age with Internet-based technologies, they are well equipped for the virtual meeting environments. Virtual meetings provide a cost effective method of delivering information to many simultaneously but the antecedents, both drivers and constraints, for virtual meetings to be a vehicle for knowledge collaboration are somewhat different to those for face-to-face meetings and may have implications for the quality or type of organisational knowledge created (Gibson & Cohen, 2003:26-35; Gorelick *et al*., 2004:11-13).

To quantify expenditure on event attendance, whether virtual or physical, requires that an organisation to understand how to prove that elements such as skills development and collaborative relationships positively affect organisational performance (Scholtes, 1998:34-43; Senge *et al.,* 1999:434; Phillips *et al.*, 2007:22). Exploring the role that face-to-face events in particular and, to a lesser extent virtual business events have to play in organisational performance is investigated in this research.

This section has given an overview of business tourism value creation and has drawn attention to how the value of knowledge in driving organisational performance is related to the quality of the business event experience**.** This serves as a high level situational analysis which brings into focus the problem identified for this research.

1.2 Problem statement

It is intuitively accepted from the analysis of the current situation of the relationship of business events to organisations that the role of business events is significant in organisational performance.

Knowledge is constantly draining from the organisation as employees leave, skills become outdated and new competitors/opportunities/technologies come into play (Warren, 2008:124). The drainage negatively affects future organisational performance if the lost information still has organisational value and is not replaced. Business events stimulate new organisational knowledge inflows and balance drainage. As shown in the

previous section, there are many intervening variables which influence the relationship of organisational knowledge levels and business tourism events.

As a consequence of these variables' behaviour, the level of knowledge assets held by the organisation continually fluctuates as shown in Figure 1.3. This graph shows the behaviour of the value of the knowledge held in an organisation over time. Driver and constrainer variables act on the variable by improving or depleting the overall value of knowledge available. Interventions through business events can improve this behaviour. The concern variable's impact on organisational performance is managed by maintaining an appropriate level of knowledge assets (Scholtes, 1998:23; Warren, 2008:17-35). Business event activities come at a tangible, financial cost to the organisation so their intangible value contribution needs to be maximised to offset the cost.

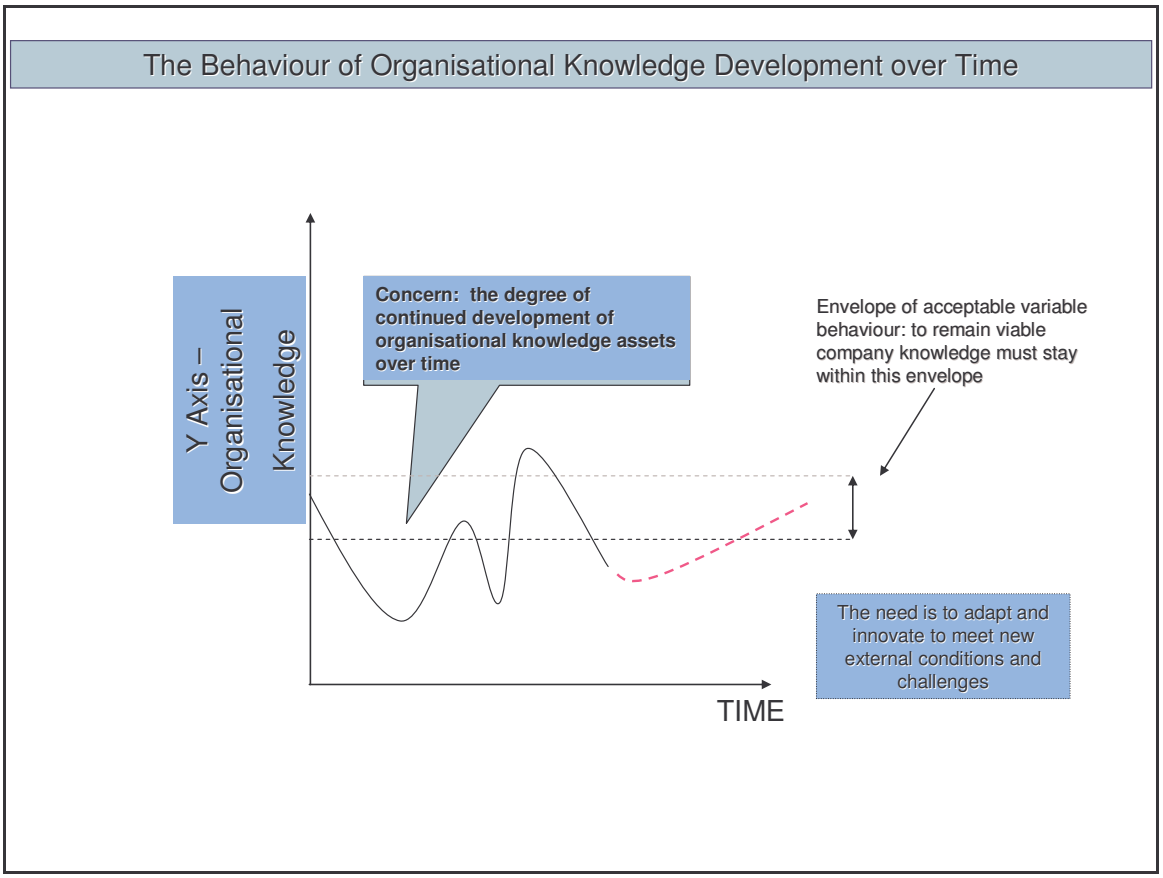


Figure 1.3: The behaviour of the level of knowledge in an organisation over time

Source: Author's own compilation (2010)

The overall concern arising from the situational analysis is how to maintain the behaviour of organisational knowledge within acceptable limits of fluctuation. This will help ensure optimised opportunity for improved organisational performance from holding business events. This concern is the problem investigated in this research.

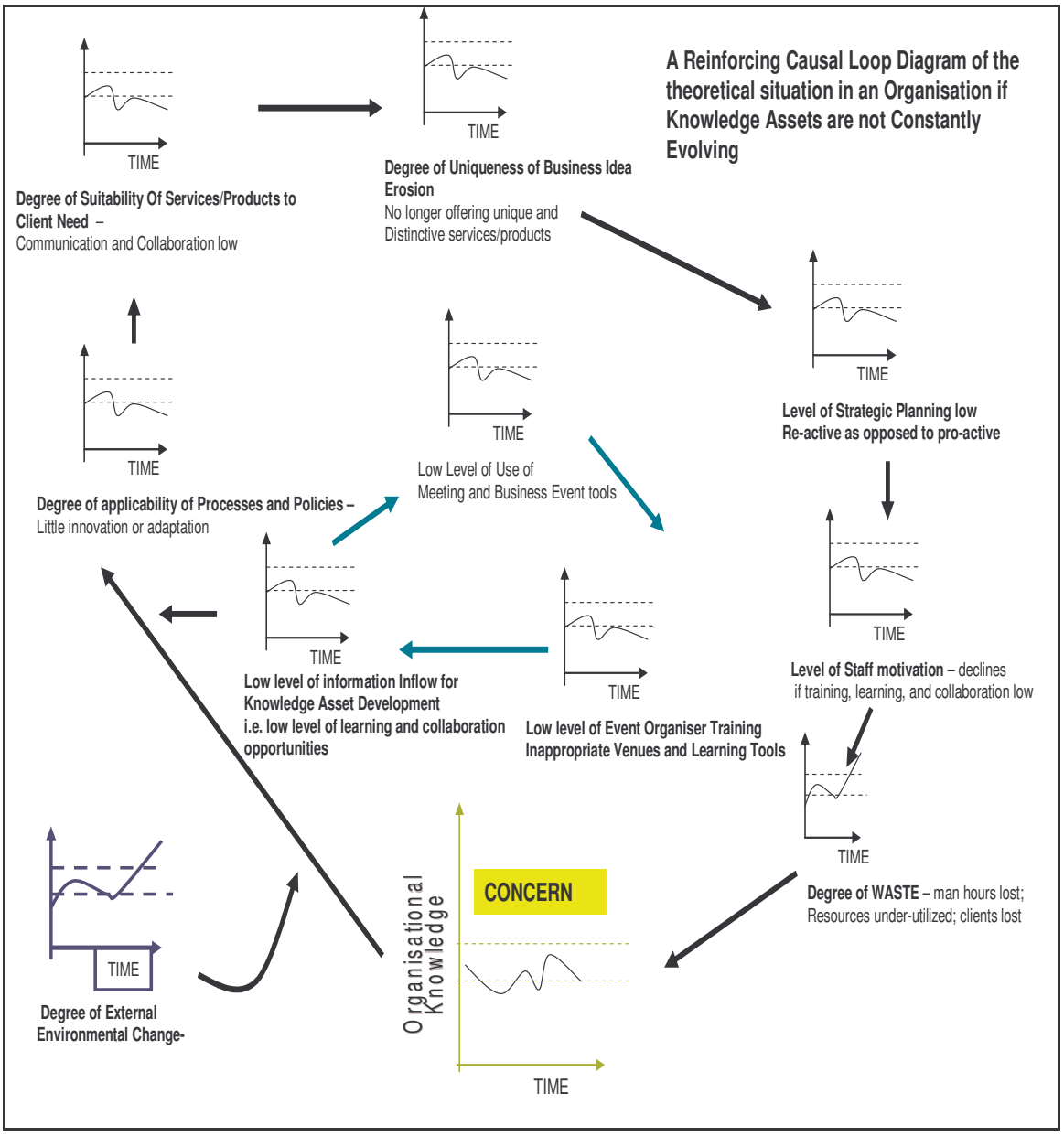


Figure 1.4: A reinforcing causal loop diagram reflecting the theoretical situation in an organisation where knowledge assets are not constantly evolving

Source: Author's own compilation (2010)

The implications for business performance are diagrammatically represented with a theoretical causal loop diagram explaining the negative influences of a low level of knowledge on overall organisational performance as alluded to in the introductory situational analysis (Figure 1.4). This research is directed at understanding the dependent, independent, moderating and mediating variables to be able to moderate the behaviour of unwanted variables and strengthen needed variables.

The implications of fluctuating knowledge levels on organisational performance are diagrammatically represented with a theoretical causal loop of variable influences presented in Figure 1.4. The causal loop explains a range of possible negative influences leading to a low level of knowledge on overall organisational performance. The research is directed at understanding the dependent, independent, moderating and mediating variables for improved organisation performance.

1.3 Research questions

1.3.1 The focus of the research questions

The high level situational analysis presented has been to introduce and frame the scope of this research. A systems approach is taken in that two systems, the organisation and the employee, are the focus of the literature review. To establish where these systems gain value from and pass value to, these two systems have been shown under a national workflow process.

Each chapter of the literature review has created a research question that, in answering it, helps attain the objectives of this research. Chapter 2 focuses on a research question concerning value created at the systems level of the organisation and knowledge from business events. Chapter 3 focuses on a research question about the value created at a lower systems level of the employee, and the business event. In both cases, the research question provides a subsidiary and supporting focus to the main objective of the research.

Chapter 4 collates variables of interest found acting in both relationships (chapters 2 and 3) and reviews models that can assist in managing these variables within the context of knowledge management and business events. Chapter 4 then constructs a theoretical model to manage knowledge from business events and an associated research question based on testing the model with elements of the quantitative survey.

In deciding how to answer each research question, the information collected in the preceding literature review that forms the research questions affects the design of the research instrument in terms of the mix of qualitative and quantitative question strategy chosen. In this research, a mixed survey instrument is used as both qualitative and quantitative primary data is required. The survey instruments are designed to explore the behaviour of selected variables and their implications for the theoretical model proposed while providing answers to the three research questions.

1.3.2 Research question 1: concerning business event design

Davies advocates that organisations should indeed facilitate opportunities for, “Learning effects” to take place by encouraging occasions that create, “Linkages and different interrelationships within the firm or between the firm and its outside customers and suppliers”, and arrange exposure to, “Technological advantages” if the employees are to be equipped to serve their customers (Davies, 1991:148).

Some professions such as in the fields of medicine, engineering, banking, insurance, academia, event organisers and accountancy recognise that benefits favourable to improving future organisational performance accrue from renewing and supplementing personal knowledge by attendance at business events. It has been established that the design of an event is important in creating knowledge transfer opportunities. If the event design is appropriate, employees have the opportunity to develop business relationships with others that can have important implications for future business strategies.

Desouza and Awazu review the influence of an organisation's many relationships noting that it is through collaborative relationships with suppliers, customers, employees and others that the organisation remains aware of changing customer needs and responds appropriately (Desouza & Awazu, 2005:109-113). To meet changing customer needs sometimes requires creativity and innovation. Harris suggests that organisations develop their innovative capacity through accelerating the role of collaboration and the opportunity for the learning that arises from it (Harris, 2003:159). It can be said then that there is a relationship between individual employee contribution and the organisation's knowledge assets (Oltra, 2005:2; Desouza & Awazu, 2005:148-149; Lee-Kelley *et al*., 2007:205-217).

The first research question is to explore how the organisation's management actions influence the value of the organisation's knowledge.

RQ1: How do an organisation's staff members affect the design of business events?

The question begins with the term 'how' because the research needs to establish 'in what manner' management typically helps acquisition of knowledge from business events and what other actions from them would help.

This suggests that a qualitative approach, which is more of a discussion, is required and the research undertakes this in the form of semi-structured interviews with employees in senior positions of various functions of an organisation.

Little is known directly related to research on business events and knowledge and this is shown in the literature review of chapter 2 where a wider inter-disciplinary approach across other knowledge domains is used to build a picture of findings about the situation. The qualitative survey seeks to establish an understanding of current management perspectives of how knowledge from business events affects organisational performance. This can then be compared to the findings of the secondary data and gaps or

corroborations identified. These then form a background and influence the quantitative instrument design.

1.3.3 Research question 2: concerning the business event attendee experience

The second research question arises as a result of the literature review of chapter 3 which indicates that behavioural change in an employee is dependent on the value the organisation places on human capital as a resource to be developed and leveraged in value creation**.** A brief description is provided as the argument for and relevance of answering this question with this research. The question is as follows:

RQ2: What variables influence the business event attendee experience at a business event?

Meyer (2007:4-5) notes that the Human Resources function (hereafter referred to as HR) is responsible for many training interventions.

Rothwell *et al*. prefer the term "Human Performance Improvement practitioner" (HPI practitioner) noting that, in some organisations, it is not always HR who are appointed to seek improvements in the organisation's human resources (Leonard, 1999:8; Rothwell *et al*., 2006:39-84). The role of each is essentially the same in that the preliminary situational analysis has established the importance of HR or HPI in maintaining a high level of work-related employee knowledge to drive organisational knowledge creation.

Tissen *et al*. (2010:643-648) argue how interpreting the value of each individual employee in respect of personal knowledge is of such importance that it should be an obligatory management action before considering how to apply human resources for financial value creation. They comment that employee knowledge will increase the variety of knowledge available for decision making.

Oltra (2005:6-9) concurs that an organisation's human resource function advances organisational objectives by creating interventions to maintain the proficiency of human capital as a resource.

Oltra (2005:8) notes that the human resources function should be to take actions that ensure, "Promoting knowledge management related organisational demands e.g. by promoting a knowledge-sharing nature of daily work".

From this evidence, it is clear that the management of event outcomes could feasibly lie with HR (Bahra, 2001:210-211). Organisations can use the human resource function or an HPI practitioner to guide the relationship between employees' need, organisational need and event delivery. Such actions may establish the importance of the relationship between the organisation's HR/HPI function and the successful application of business tourism events.

If the HR/HPI function were to be enabled to take control in aligning employee learning requirements and event deliverables, management would need to involve HR/HPI in future plans (strategy) for human capital usage. In this way, HR/HPI could ensure the events are designed and applied so as to ensure the readiness of the human resource knowledge pool (the employees themselves) for management of customers and future performance (Desouza & Awazu, 2005:198-209).

Management actions would need to set the tone for knowledge replenishment and sharing (Marchand, 2000a:232-235; Key *et al*., 2009:3-4). Murdock and Scutt (2003:xxxv) state that, "Managers skilled in managing themselves show adaptability to the changing world" which infers that the HR/HPI intervention in events applies as much to employees as to management ensuring that they, too, continue professional development and replenish the knowledge pool if the organisation is to thrive (Bahra, 2001:52-71; Darroch, 2005:111-112).

A business event changes the value of an employee in terms of their performance as a resource. However, this change contributes little in terms of value creation if there is

minimal alignment of the change with an organisation's overall strategic purpose. The research question uses the term 'what' which indicates that this research is more specific in seeking answers of a quantitative nature.

1.3.4 Research question 3: a methodology to influence business event value creation

The final research question is created to understand and manage constraints identified in chapters 2 and 3 as to the use of business event ROI models - in particular the Kirkpatrick-Phillips ROI model favoured in professional designation training for event organisers. As has been shown by the high level situational analysis presented in chapter 1, the business event process is part of a value creation strategy and, further, part of a larger value chain creating process.

A brief supporting background is presented to establish the importance of this question. The use of 'what actions' assumes that the constraints are presented as variables that can have the unacceptable behaviour minimised. The third research question follows:

RQ3: What actions in business event design methodology help in creating event designs as a strategy map for knowledge that support the overall strategic goals of an organisation?

The influence of good design of meeting spaces for employees is influential in creating knowledge flow (Appel-Meulenbroek, 2010:189-205; Gorelick *et al.,* 2004:70-73). The appropriateness of the design of the space in which people interact affects how knowledge is shared between those people. Event design is overseen by the event organiser inferring that the event organiser works closely with the organisation and its HR/HPI function to create opportunity for the outcomes anticipated.

Various models and methodologies are reviewed in chapter 3 to understand the knowledge value chain management of business events and the organisation. With regards to the application of existing knowledge management and knowledge transfer

theory for the tourism industry, the authors Shaw and Williams (2009:330-335) note that the concept of a tourism related "knowledge value chain" is largely undocumented and untested.

The authors' concern seems justified especially in the case of business tourism and its events as the significance of managing and monitoring an optimised work process for knowledge creation appears to be relatively unexplored.

Several models exist that document the effect and relationships of various known variables at work in knowledge creation for the organisation. A brief overview of those reviewed in this research, although not directly derived from research applied to business tourism events, is given in Table 1.4.

The third research question's purpose is to propose an extension to the actions of the Kirkpatrick-Phillips model that will help in creating maximum value from the business event process. The quantitative survey instrument reflects the findings from the literature and from the qualitative interviews and further investigates the behaviour of variables of interest in this situation in relation to models and methodologies that seek to measure this behaviour.

The primary and secondary research objectives that follow provide the overall goals to be attained by answering the three research questions. The primary research objective focuses on exploring the role of business events in organisational performance and underpins the first and second research questions. The secondary objective, which is to explore extending the Kirkpatrick-Phillips ROI model to help with practical application, underpins the third research question.

Table 1.4: Models for value creation extension

Source: Author's own compilation (2012)

Model	Description and Application
The Phillips Evaluation and ROI Model Source: Myhill & Phillips (2006:698)	**Description** - a model to plan & monitor the success of a business tourism event and its implications for organisation performance evaluated at six levels. **Applicability** – a method of following value stemming from an event.
System-based Knowledge Management Modelling Technique to Create Qualitative Politicised Influence Diagrams (QPID) Source: Powell & Swart (2005:45-58)	**Description** - a method of modelling the existing 'knowing' in a social network such as the "community of a business". This is used to multiply the value of new knowledge in attaining future performance objectives (strategic planning). **Applicability** – a method of mapping and controlling the flow of knowledge from employees through the organisation.
Self-Directed Learning Readiness (SDLRS) Scale Source: Beitler & Mitlacher (2007:526-536)	**Description** – a study that proves a strong positive link between employees who undertake self-directed learning) and improved sharing of knowledge within the organisation. **Applicability** – this study suggests that testing the capacity of a person to learn affects the quantity and quality of renewing knowledge in an organisation.
A Framework of Intangible Valuation Areas and Antecedents Source: Andreou *et al*. (2007:52-75)	**Description** – linking strategic intent to the organisation resources available using the FIVA and LOKA models. **Applicability** – identification of operational knowledge performance areas and intangible drivers that leverage them for improved business performance.
Template Use and the Effectiveness of Knowledge Transfer Source: Jensen & Szulanski (2007:1716-1730)	**Description** – the use of templates in knowledge transfer when re-creating replication of best organisational practices. **Applicability** – the concept of using standardised templates for knowledge transfer.
The Balanced Scorecard Framework Source: Kaplan & Norton (1996:76)	**Description** – the model focuses on four elements of organisational asset valuation: financial, customer, internal business process, learning and growth. **Applicability** – alignment of intangible asset management to the Balanced Scorecard overarching concepts.
The Cyclic Model of Organisational Attention Source: Brock & Yaniv (2007:838)	**Description** – the model develops the Arrow Core concept. This model focuses on maintaining the quality of known key performance variables in a business model. Known variables are proactively influenced in the unknown section of the model. **Applicability** – the arrowcore template defines known organisational behaviour but also adds attributes as required, to deal with operating environment changes.

1.4. Research objectives

The research objectives state the purpose of this research and are composed of a primary objective supported by four secondary objectives.

1.4.1 Primary objective

The primary objective of this research is to explore the value of business tourism in the performance of an organisation.

1.4.2 Secondary objectives

To achieve the primary objective of the study requires that the following secondary objectives are dealt with:

- Postulate a theoretical template that extends the Kirkpatrick-Phillips return on investment model to enhance the value of the knowledge flowing from a business event through an organisation.
- Conduct a qualitative survey to explore the effectiveness of business meetings in improving organisational performance (open-ended, semi-structured qualitative questions).
- Conduct a quantitative survey to explore the importance of selected variables that may affect the knowledge flow from business tourism events into an organisation performance (questionnaire).
- Draw conclusions and make recommendations from the survey data with regards to measuring the value of business events using the Kirkpatrick-Phillips model.

1.5 Method of research

1.5.1 A literature review to establish secondary data underpinning the research

The literature review is carried out first to establish an understanding the relationship of organisational knowledge management and business events (Figure 1.4). The information is sourced from academic journals, academic books, and industry associations. The

review examines the findings and research discussion that exists about the business tourism industry and business events. As these are limited with regards to the role that knowledge plays in business events and organisational performance, the review draws on other knowledge domains. The literature review attempts to describe what is known about the field of research, where there exists corroborating or conflicting findings on the same subject and to provide a sound point of departure on which to base this research.

Figure 1.5 shows how the literature scope is defined by the research objectives and related research questions stated earlier in this chapter. The figure further shows how these, together with variables of interest pinpointed during the literature review, give rise to the strategy adopted for the research.

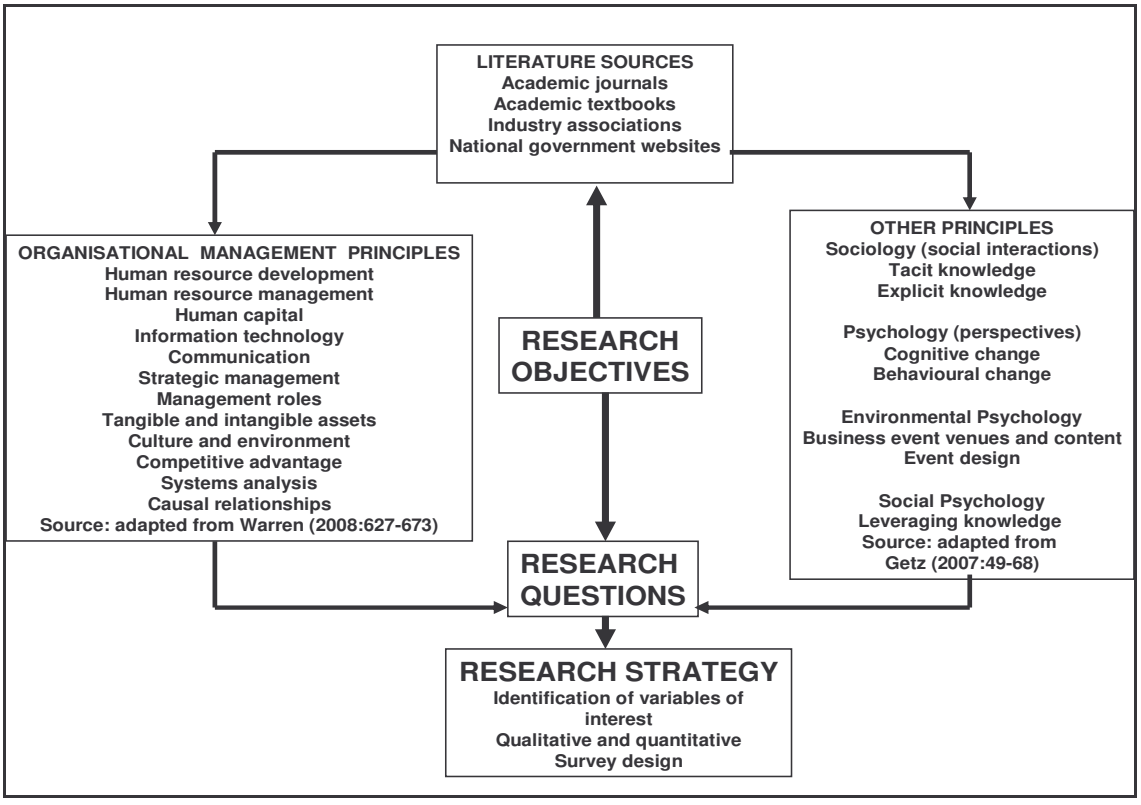


Figure 1.5: Knowledge domains underpinning this research

Source: Author's own compilation (2012)

The review explores how and why employees learn. Appreciating the role of learning from the employee's perspective helps understand the influence of CPD activities and business event attendance on organisational viability. In this manner, the relationship between employee new knowledge, the business event and changes in employee future behaviours as a result of the event, are established. Lewin's model (1951) suggests that successful organisational adaptation depends on collaborative learning actions between people attending business events.

While face-to-face business events have been the traditional mode of business event delivery, the implications of virtual business events on knowledge flow are considered. Reviewing the benefits and constraints of virtual business event technology helps envisage what future learning at business events may look like (Dalkir, 2005:2-4; Bourhis & Dubé, 2010:175-193).

The role of professional business tourism industry associations is reviewed to understand the role of associations in influencing event management responses to knowledge change.

1.5.2 Empirical study

The research seeks to find evidence of the role of the value of business tourism activities in the form of business events, in organisational performance. Based on the findings of the literature review, little attempt has been made to date to apply existing theory about organisational value creation to the relationship of the value created by a business event in relation to the latter's contribution to improving organisational performance.

The literature review provides secondary research about organisational value creation that has influenced the research design of the qualitative and the quantitative survey instrument used to explore this relationship. The empirical research purpose is to observe directly what is known about this relationship by collecting primary data from people who both work and have experience with business events. The literature review suggests that certain organisational behaviours improve or inhibit organisational value creation.

The surveys investigate the respondents' personal perceptions of this situation in relation to business events and the findings are data that adds to the understanding of the concern situation (this being the knowledge strategy of organisations). The data is analysed and applied in answering the three empirical research questions aligned to fulfilling the overarching research objectives.

The workflow process to attain the primary data begins with defining the research strategy as shown in Figure 1.6 which is a continuation of Figure 1.5. In Figure 1.5 the literature reviewed resulted in three research questions which, when answered, align to adding information to reach the research objectives. The literature is the foundation for the research strategy adopted. The work flow for the empirical research is shown in Figure 1.6.

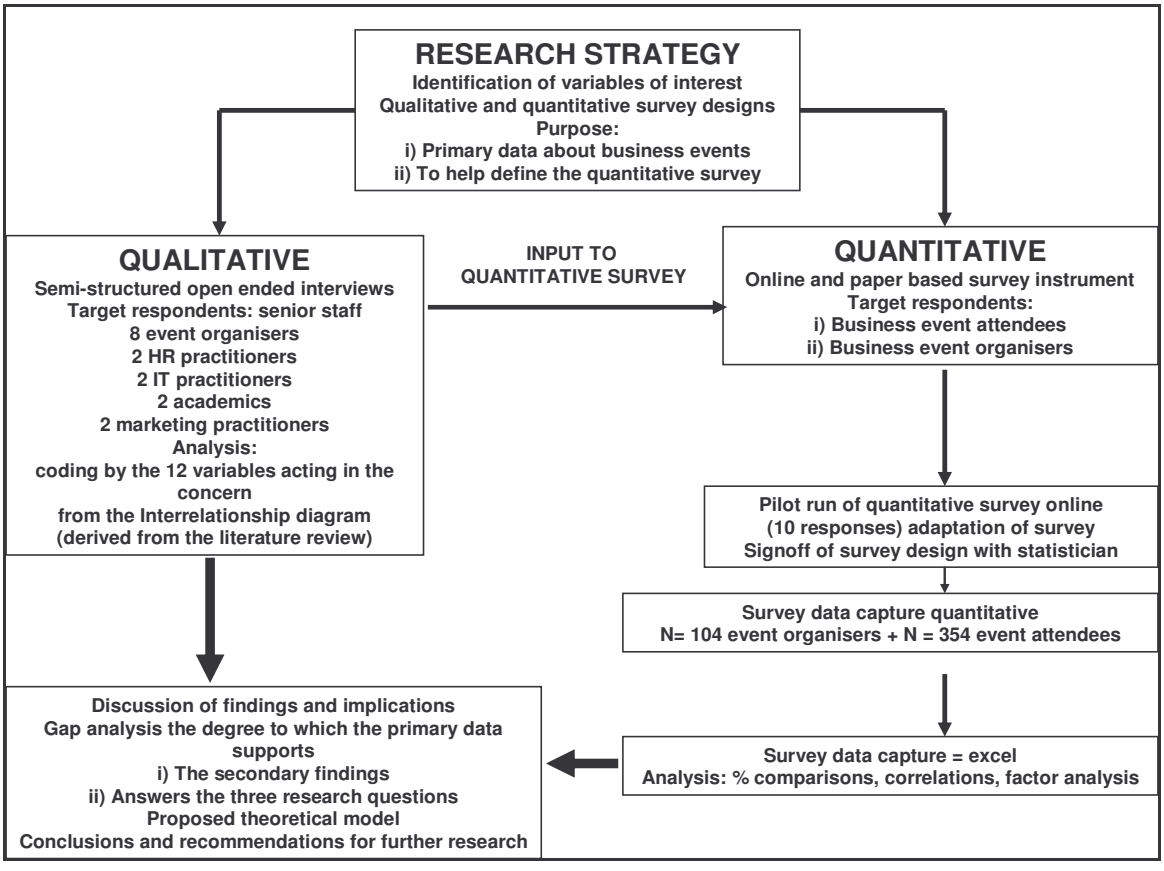


Figure 1.6: Flowchart of the research process

Source: Author's own compilation (2012)

1.5.2.1 Research survey design

The scope of influence of the variables in the business event-organisational performance relationship is considerable in the systems in which they act and, as stated before, not much is known about them from the literature review in the context of a business event. The variables and their influences on each other guided the creation of questions included in the design of both the qualitative survey instrument and a quantitative questionnaire (Figure 1.6). Apart from acknowledging the secondary data as an influence in the design of survey questions in both surveys, the qualitative instrument findings also influenced the design of the quantitative questions with the emphasis being that the business event is a work process and the quality and value of its output to the organisation will be defined by both the inputs and the design of the work process.

The research strategy is based on identifying variables of interest from the secondary data of the literature review and investigating a selected number of them further with qualitative and quantitative surveys. The literature review sought to understand the following related variable systems: the purpose of business events to the business tourism industry (chapter 1); variables in organisational performance and the use of business events by organisations (chapter 2); and the development of employees to achieve better performance in the workplace (chapter 3).

The analysis of the variables influencing the relationship of a business event and organisational performance - specifically the value of knowledge as an organisational asset that fluctuates over time - began by linking the four concepts to sub themes and variables identified in the literature review and related to answering the research questions. This is explained in detail in chapter 4. This comprehensive theme/variable list was further sorted using an affinity analysis into 12 final groups of variables that shared common characteristics. These represent 12 major variables of interest in this research system. These variables were analysed further as to which may have influence on another using an interrelationship diagram. The 12 variables are identified individually as acting as a driver or a constraint in the business event-organisational performance system.

1.5.2.2 The qualitative survey instrument

The qualitative instrument creation and application preceded the quantitative. Semi-structured, open-ended qualitative questions are posed about variables identified in the literature review as influencing the behaviour of organisational knowledge over time to unravel the complexity of the 12 variables. The findings from the qualitative survey represent the perceptions of 18 respondents who hold senior management positions in the workplace and have attended business events.

The responses were taped with consent and, post interview, were transcribed verbatim by the researcher and agreed by each respondent as representative of their perceptions. The 12 variables were linked to themes/concepts in each response using Atlas.ti version 6.2 (2011) software designed for qualitative research analysis.

Since the variables represent concepts and themes of systems of sub-variables within the situation of this research as identified in the literature review, application of this software as the methodology for grouping similar response quotes seemed reasonable for categorising the responses. These findings are presented in chapter 5.

1.5.2.3 The quantitative survey: development of a random test plan and sampling

The target individuals (sample frame) of the entire global population involved in business tourism events is drawn from population sub-groups that include specifically gathering primary data from two target groups of respondents: Business event organisers; and individuals who work and attend business tourism events. These two groups were felt to have insight into the behaviour of variables acting in the situation of a business event. The two population samples were drawn from several sources shown in Table 1.5.

Table 1.5: The quantitative survey target groups

Source: Author's own compilation (2012)

Target group name	Web address and/or course of action	Respondent type	Total population number
Public Relations Institute of Southern Africa	www.prisa.co.za sent individual emails	Business Event Organisers	95
Exhibition & Event Association of Australasia	www.eeaa.com.au sent individual emails	Business Event Organisers	225
Certified Meetings Professional (SA)	CMP Network SA sent a group email	Business Event Organisers	35
Meeting Professionals International USA	www.mpiweb.org sent individual emails	Business Event Organisers	320
Southern African Association for the Conference Industry	www.saaci.co.za sent individual emails	Business event organisers	125
Exhibition Association of Southern Africa	www.exsa.co.za sent individual emails	Business event organisers	75
MPI UK & Ireland	Linked-in discussion see Appendix 8	Business event organisers and Business event attendees	821 members in the group
Meetings Africa	Paper survey	Business event attendees – business event organisers	200 handed out
AllAboutXpert (2011)	Paper survey	Business event attendees	40 handed out
Association of Personnel Services Organisations (SA)	www.apso.co.za sent individual emails	Human Resource practitioners – Business event attendees	50
Institute of People Management (SA)	www.ipm.co.za sent individual emails	Human Resource practitioners – Business event attendees	65
Institute of People Management (USA)	www.ipm-hr.org sent individual emails	Human Resource practitioners – Business people	75
SAP HR/HCM Linked in	Linked in discussion See Appendix 8	Business people and HR practitioners	1993 members in the group
SHRM India	Linked-in discussion see Appendix 8	Business event attendess and HR practitioners	1489 members in the group
Academia	Personal network sent individual emails	Academics and business people	82
Oxford Brookes Alumni	Linked-in discussion see Appendix 8	Academics and business people	5619 members in the group
Direct Selling Association of South Africa	www.dsasa.co.za sent individual emails	Marketing Practitioners	30
Digital Media & Marketing Association	www.dmma.co.za sent individual emails	Marketing Practitioners	90
IT website	www.carbonite.co.za see Appendix 8	IT practitioners	Open group for IT specialists
City of Cape Town	Sent individual emails	IT practitioners	27

1.5.2.4 The rationale for the development of two quantitative questionnaires

The quantitative survey looked at the business event from two respondent perspectives of using the business event as a work process and thus there are two survey formats applied (Table 1.5; Appendix 6).

1.5.2.5 Pilot study with the quantitative survey instrument

The web-based quantitative survey was created using the online survey software, SurveyMonkey™ (2012). The 'select' plan version of the SurveyMonkey™ software was chosen to design the survey from a choice of four degrees of survey design sophistication. The 'select' plan is the first option after the free option and the least expensive but was proven as adequate in the pilot survey trial.

The online survey was initially completed by a small group of 10 to establish its user-friendliness. Three respondents were event organisers and seven were business event attendees.

The length of the survey in the pilot run of the survey for online completion with 10 respondents was 8-15 minutes per survey whether taken from the event organiser or the event attendee perspective. This was considered a reasonable time to expect a respondent to give when completing the survey by the pilot group.

The survey data collection fields in SurveyMonkey™ derived from the pilot were cleared to begin the surveys afresh.

The paper version and the online version of the quantitative survey are the same because the online version prints as an Adobe Acrobat document (Appendix 6).

1.5.2.6 The final quantitative survey instruments

The qualitative findings influenced the design of the quantitative analysis instrument in that they highlighted areas in these large systems where the variables of interest were behaving as expected or, in some cases, not as expected.

The quantitative findings contribute to the final research discussion, implications and conclusions as they add more understanding of the personal perceptions of people who use and work with business events in the context of the behaviour of the variables of the systems in focus. This provides a much larger population sample response than obtained by the qualitative data.

The quantitative survey in both formats used predominantly close-ended questions that included three-way questions (agree/disagree/don't know), rating scale questions and multiple choice questions.

The first format of the survey was to ascertain who was included in designing a business event from the perspective of the business event organiser (Appendix 6a and 6b). It has already been indicated in the qualitative findings that business event process design can influence the value that the event creates so the views of the creator of event, the event organiser, has relevance in understanding the concern situation.

The second format of the survey investigated the business event design from the context of the event attendees trying to ascertain what attendees perceive as a positive knowledge experience from event attendance (Appendix 6a and 6c).

Table 1.6 shows which questions and statements both sets of survey respondents answered and which questions were unique to a specific group.

Table 1.6: Questions posed to the two quantitative survey groups
Source: Author's own compilation (2012)

Organiser and/or Attendee	Survey Section Completed by the Respondent in the Quantitative Survey Formats
Both	Agree that they had attended a business event defined as a conference, meeting, seminar, trade show, and exhibition or training session.
Both	Age.
Both	Whether they typically worked for service or manufacturing organisations.
Attendee	What their function is in the organisation.
Organiser	Professional association membership.
Organiser	Professional event qualifications.
Attendee	Who defines the objectives of the attending the business event to them.
Both	10 statements as to who typically influences the design in business event creation.
Both	6 statements rating the importance of HR involvement in business event design.
Attendee	12 statements relating to an attendees' personal experience of business events.
Attendee	11 statements relating to social interaction at a business event.
Attendee	5 statements on the relationship of CPD and organisational strategy.
Attendee	5 statements on the importance of post-event strategies by the organisation in order to use attendee business event generated knowledge.
Both	4 statements relating to the requirement for a tool that helps to define intangible variables in organisational/business event strategic planning.

The first version of the survey targeted event organisers (n=104) specifically to identify how these respondents viewed designing the business event as a work process. The survey attempts to identify what actions the event organisers consider to create value for the organisation from their perspective. This is important as event organisers are responsible for influencing the event design and event delivery in their role as professional business event organisers.

The second version of the survey targeted attendees of business events (n=354) as a separate group to understand how they thought business events worked with regards to knowledge value created for them as customers of the process. These responses gave a

sense of how business people view business event design and what it delivers from the perspective of two different groups. The explanation of how the samples are collected and analysed is fully documented in chapter 5.

The ethical implications of the survey from the aspect of the survey responses representing the private views of the respondents have been considered in that each survey returned is anonymous unless the respondent wished to make themselves known to the researcher.

1.5.2.7 Primary data analysis

The research sought to establish how the 12 variables working in the situation of organisational knowledge itself an intangible asset with a value, were behaving in the context of business events. The literature review suggested expected behaviour patterns, and statistical methods were used to seek support or not, for these secondary data findings.

The statistical analysis sought evidence that supported or not, relationships - for instance between the degree of support of the organisation for business events, the degree of expectation of the attendee of continued professional development (learning and collaboration) from the event, and the effect of the event organiser on a business event – to name a few. Dependencies, independencies and root reasons for causality were sought from these statistical results and related to theory reviewed.

It is anticipated that the raw data analysis includes a series of correlation analyses to identify relationships suggested in the literature review as significant. Exploratory factor analysis is used to identify latent factors underlying the behaviour of selected variables from the literature review.

The results of these analyses allow the researcher to compare theory from secondary data to perceptions of variable behaviour.

1.6 Defining the concepts

The literature review and research in this study adds to the body of knowledge about the importance of business events in an organisation's performance. The study identifies how a business event activity can be optimised in regenerating the organisational resource of knowledge. The importance of the business event as both an organisation work system and a value-creating process which contributes to an improved future organisational performance organisation is established.

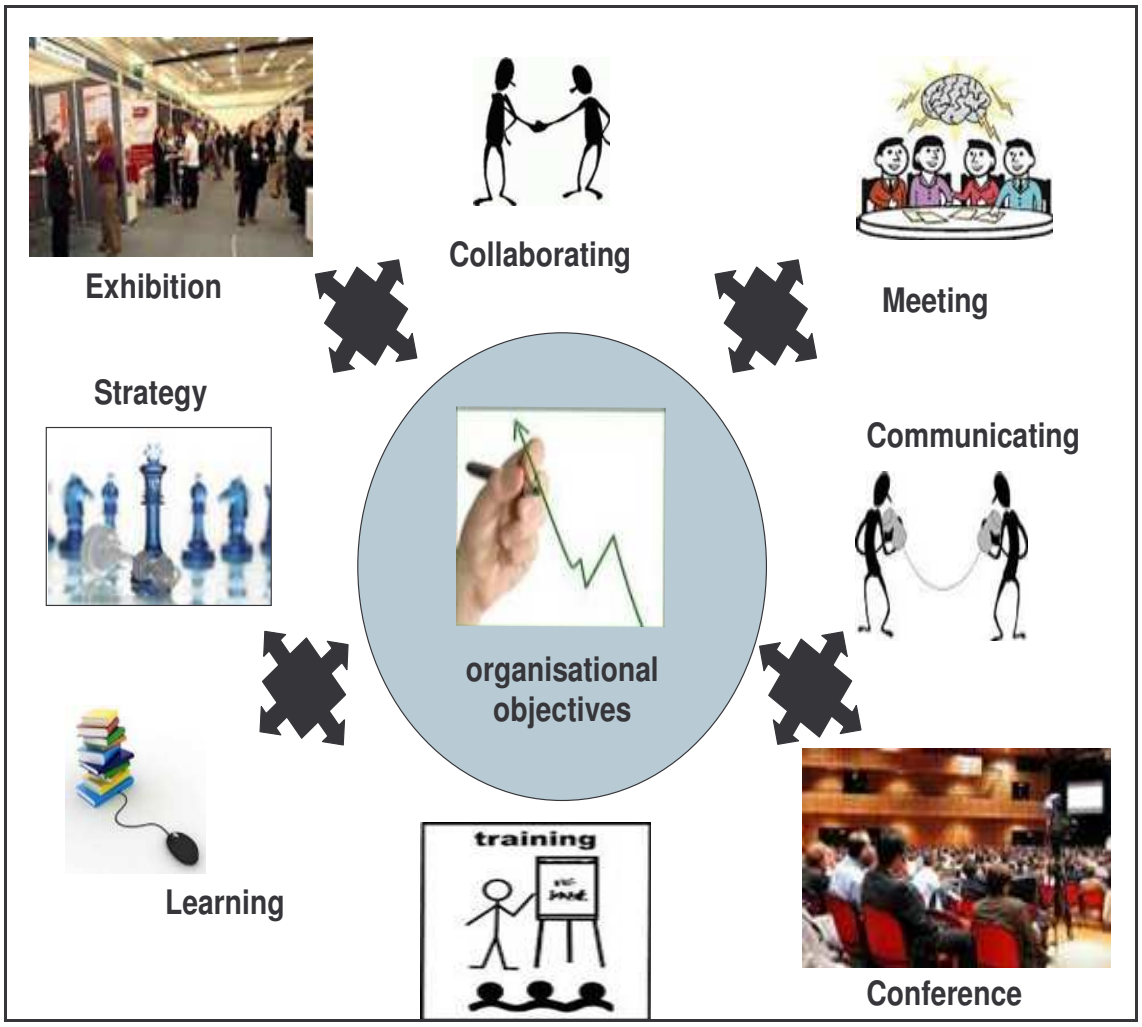


Figure 1.7: A rich picture of the research themes relevant to an organisation
Source: Author's own compilation (2012)

Figure 1.7 is a rich picture.

A rich picture is described by Jackson as used in systems thinking to set out in a picture the overview of the probem situation being observed. This picture shows how business events, the organisation and the four themes/concepts of the research affect each other (Jackson, 2003:191).

To establish relationships that exist between an organisation's business event(s) and its organisational performance it is necessary to identify concepts of relevance to this situation.

The conceptual definitions are the theoretical basis used to describe the four concepts used as themes in this research. The conceptual definitions are derived from other researcher definitions of these concepts. Four concepts follow.

Each concept is explained by presenting: an argument for its usefulness in this research; a claim which is a statement that understanding this concept; an explanation of the utility of this concept in terms of defining the scope of this research.

Each concept is supported by a table which presents: the research source of the concept; the scope of the concept in the context of this research situation; and empirical indicators often associated with this concept in this situation. The empirical indicators are the operational definition of each concept.

The purpose of each concept explanation is to give a 'sense' of the concept creating cognitive awareness of its domain attributes in the research process.

1.6.1 The concept of the business tourism event in organisational knowledge creation

The research concern addressed by this concept is the identification of different variables at work in the business tourism events and organisational knowledge creation interface highlights their significance in relation to improving organisational performance in Table 1.7 (Bahra, 2001:116-129).

Argument for the relevance of adopting this concept: there is a need to understand which variables at the interface of business and business tourism events can be controlled when seeking optimised knowledge transfer and organisational attention for optimised organisational performance (Brock & Yaniv, 2007:835-836).

Claim of the validity of this concept in this research: business tourism events, both face-to-face and virtual, have a role to play in improving business performance.

Utility of applying this concept: placing a value on the impact of the role of face-to-face and virtual business tourism events to companies using the event for improved business performance (Phillips *et al.,* 2007:13-48).

This concept encompasses: how to match employee development from event attendance, to organisational strategy for improved organisation performance; identifying the role the human resource function can play in applying business tourism events in a manner that improves overall organisation viability; empowering the organisation to anticipate the value in knowledge received from business tourism events and manages the interface of event organiser and organisation to optimise this; exploring the effect of the relationship of a younger workforce potentially attaining learning from virtual events (Meyer, 2007:297-318).

Table 1.7: The value of business tourism events in the performance of an organisation

Source: Adapted from Getz (2007:38-42)

CONCEPT	**"The fundamental purpose of the [business tourism] event is to promote, market or directly engage in commerce or otherwise meet corporate objectives" (**Getz, 2007:38-42).
Dimension	The dimension of this concept refers to the way in which the variety of business tourism events can be managed to contribute to an organisation's overall performance for instance: "trade and consumer shows, meetings, conventions and conferences, corporate and association events, professional symposia and specific theme conferences" (Getz, 2007:38-42).
Empirical Indicators	▪ Antecedents for the event attendance and transformation of the organisation attendee: (Getz, 2007:236-254; Phillips *et al*., 2007:13-26) - Identifying and meeting the needs of the employee (to ensure they receive learning to be able to do the job); - Anticipated benefits received from event attendance; - Personal attitude to event attendance; - Personal motives for attendance (CPD); - Evaluation of organisation support for personal development; - Effect of the quality of event design and resulting opportunities arising from event delivery and content; - Improved ability to make decisions affecting business performance. ▪ Assessment of the value and effectiveness of business event attendance from an HR function perspective seeking improvement in organisation performance variables and addressing organisation strategic plans (Kaufman, 2010:619): . - Productivity; - Improved sales; - Employee retention; - Service/product quality assurance; - Innovation and collaboration; - Employee professional development alignment with organisation strategy and goals; - Information flow into the organisation.

1.6.2 The concept of learning in improving organisational performance

The concern addressed by this concept is the influence of the organisation in maintaining an appropriate level of organisational knowledge over time to enhance organisation long term viability in Table 1.8 (Scholtes, 1998:30).

Argument for the relevance of adopting this concept: companies that utilise their resources of hardware, people and time in an optimised manner create an improved degree of ROI while delivering improved levels of value-adding to their service/product

for their customers (Warren, 2008:239-308; Deschamps, 2000:120-133). Business tourism events should have a positive association with organisational knowledge creation if the venue for the business event is appropriate to the target audience and the tools used to present learning are relevant. Getz (2007:277) comments that the importance of all inputs to an event because, "How the supply chain of needed information, goods and services flow through the events system" will deliver an event that meets the client's objectives.

Claim of the validity of this concept in this research: it is reasonable to claim that a well designed and delivered business event can convey the client intentions for organisational knowledge development while satisfying the employee need for continued professional development (Dalkir, 2005:56-57).

Utility of applying this concept: the human resource function of an organisation continually seeks to renew and develop internal employee skills (Peters, 2003:74-83). An event that delivers content that aids the human resource function in aligning to the strategic goals by extending employee skills must have positive implications for the organisation's overall performance. The empirical indicators of this utility are outlined in Table 1.8.

Table 1.8: Organisational learning and improvement
Source: Adapted from Scholtes (1998:30)

CONCEPT	**"Understanding how we learn, develop and improve: leading true learning and improvement"** (Scholtes, 1998:30).
Dimension	The dimension of this concept refers to the way in which a continuous cycle of learning and improvement helps an organisation focus on its purpose, systems and processes constantly learning how to improve and adapt.
Empirical Indicators	▪ Discussing current systems – staff, client and customer – co-operation. ▪ Processes/systems of service/product development. ▪ Data/information available to improve systems and communicated. ▪ Staff ideas and managing change – innovation, skills development. ▪ Inclusion of staff needs for professional development in organisation learning plans.

1.6.3 The relationship of the quality of knowledge flow and an organisation's performance

The research concern addressed by this concept is how the degree of organisational collaboration and communication can affect the degree of adaptation displayed by the organisation over time (Morosini, 2000:250-253). The concept explores the complex relationship between an organisation's functions, processes and people in Table 1.9. A change in one affects the others.

Argument for the relevance of adopting this concept: the external environment of an organisation is in a state of constant change. To remain viable the organisation must adapt and have the information to make the right adaptation and innovation decisions (Brooking, 1996:151). Information for decision making comes from both inside and outside of the organisation (Deschamps, 2000:134-145). This can be in many forms such as peer lectures on trends and developments, or by meeting the customer and getting to understand his/her needs better. Business tourism events seek to provide the forums for this information transfer between individuals.

Claim of the validity of this concept in this research: it is reasonable to claim that a business tourism event can provide an opportunity to review products, services, intelligence and meet skilled expertise that may have applicability when considering organisational adaptation and innovation interventions (Dalkir, 2005:8-9; Getz, 2007:209-211; Evers & Knight, 2008:555).

Utility of applying this concept: the event will bring the organisation value in the form of knowledge. The knowledge will tend to improve performance by the employee which, in turn, improves various functions and processes of the organisation. The organisation's output of product or service will be advanced in a positive manner. The empirical indicators review how these improvements might be seen within the organisation.

Table 1.9: Communication and collaboration

Source: Adapted from Scholtes (1998:44)

CONCEPT	**"Understanding the interaction and interdependence between systems, variability, learning and human behaviour: knowing how each affects the others"** (Scholtes, 1998:44).
Dimension	This concept highlights the complexity of organisational systems and the need for a constant flow of pertinent information (through collaboration and communication) into the many systems. Sometimes a change in one can bring valuable change in another over time.
Empirical Indicators	▪ Successful customer interface of intermediate and final customers – measurement of customer 'delight' indicators (verbal, written). ▪ Identify key indicators that will show the value of collaboration and communication at events. ▪ Staff feedback from staff on training needs. ▪ Evaluating the capacity for enough residual variety in an organisation's interdependent systems. ▪ Setting envelopes of acceptable behaviour – expectations from collaborative meetings. ▪ Information that helps the flow of work.

1.6.4 The concept of knowledge and an organisation's strategic intent

The research concern addressed by this concept is ensuring that the organisation is prepared for the future. While there is no guarantee that the external environment will change in a prescribed manner, an organisation can remain alert to change by maintaining a watch on its environment. The importance of building for the future through management objectives maintains the organisation's competitive edge in Table 1.10 (Gilbert, 2000:111-115; Acur & Englyst, 2006:79).

Argument for the relevance of adopting this concept: employees are important resources that require development over time (Warren, 2008:251-263). The development needs to be aligned now to the organisation's strategic goals for the future if it is to be of benefit to the organisation when needed. The empirical indicators reflect the drivers – collaboration, investigation and innovation – to identify options for change to meet changing customer needs.

Claim of the validity of this concept in this research: it is reasonable to claim that strategic objectives that ensure the performance of the organisation into the future are better assured by developing the human capital of the organisation (Dalkir, 2005:148-157).

Utility of applying this concept: listing the types of knowledge available from business event attendance and giving each a value ranked in importance as related to the unique strategic goals of any one organisation, will allow the human resource department and management to make informed decisions about the contribution of every event to future organisation performance.

Table 1.10: Building performance into the future
Source: Adapted from Warren (2008:4)

CONCEPT	**"Strategic management is about building and sustaining performance into the future"** (Warren, 2008:4).
Dimension	This concept highlights the need to pro-actively plan the development of assets such as employees and customer relationships. These in turn affect the processes and functions of product delivery. Performance can only be sustained if the organisation's system has the knowledge and requisite variety internally for it to make informed and planned decisions.
Empirical Indicators	▪ Listening to the customer to be responsive to changes in their needs. ▪ Developing a depth of relationship with customer. ▪ Developing knowledge of aligned technologies for innovative response to customer needs. ▪ Implementing change in the organisation to deliver to customer needs.

1.6.5 The concepts as framework to identify themes

A theoretical framework using the four underpinning concepts defines the scope of the literature review carried out in chapters 2, 3, and 4 (Figure 1.8).

The literature review identifies secondary findings in the form of themes pertinent to investigating the variables acting in relationship of the business event and the organisation in chapter 2; the literature of relevance to identifying variables acting in the

relationship of the employee and a business event in chapter 3; and chapter 4 reviews existing models and methodologies that have relevance to monitoring and influencing the behaviour of variables identified in chapters 2 and 3.

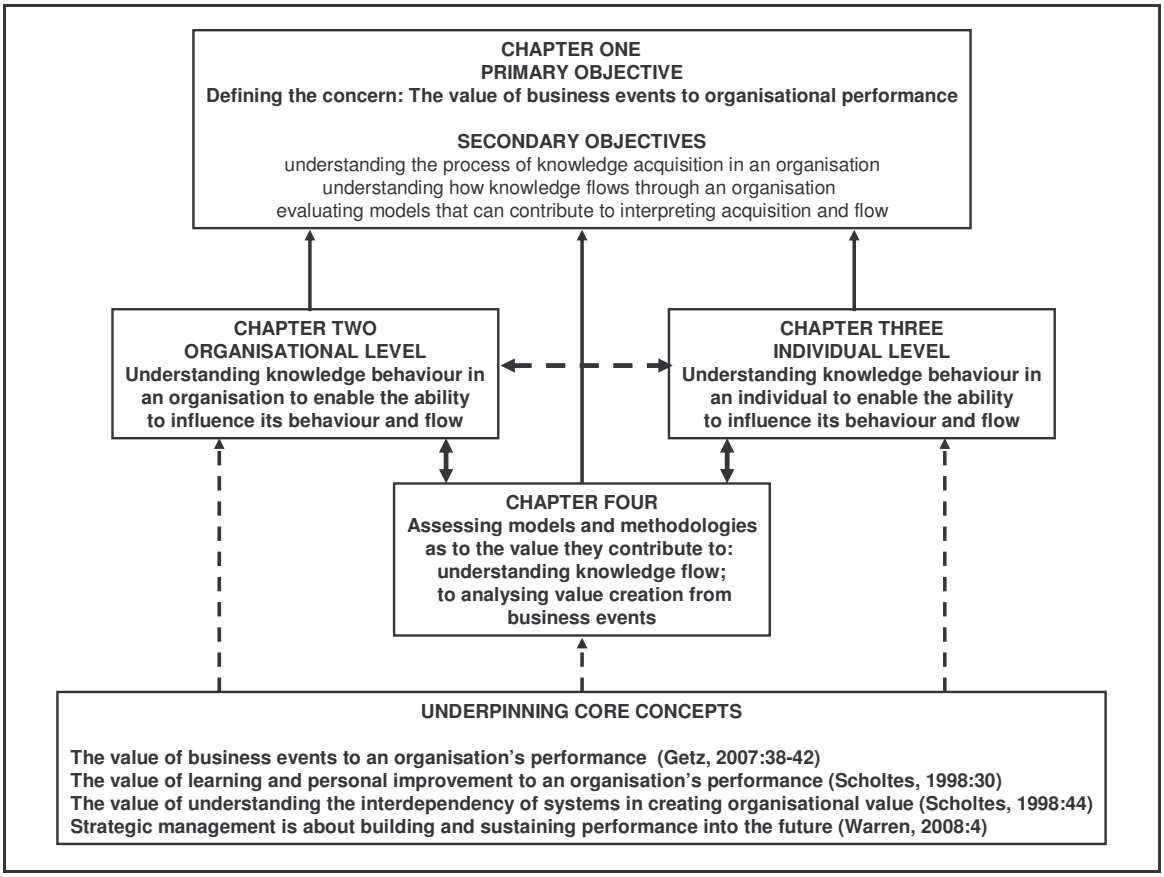


Figure 1.8: The concepts as a framework for the literature review
Source: Author's own compilation (2011)

The concepts are abstract in nature, so themes within each concept are identified during the literature review to lend further understanding and help in identifying variables of interest for inclusion in the research instruments. The themes and their related variables that arose from the literature review are shown in Appendix 1.

1.7 Chapter classification

1.7.1 Chapter 1: introduction and problem statement

Chapter 1 clarifies the purpose of the study which is to understand and evaluate the role of business events in organisational performance.

This chapter contributes to defining the scope of the relationship between organisational value creation and business tourism events to provide an overview of the problem that this research investigates. The concept and value created by recursion at four levels of the business tourism industry is discussed. Each level creates value that is shown to have an aggregate effect for national gross domestic product.

Two of the systems levels are selected as the systems-in-focus of this research as follows: the business event organiser representing the business event suppliers; and the business event attendees. The function of business tourism events is highlighted as a creator of new knowledge to supplement the existing knowledge repository in the organisation. While the knowledge is an intangible asset for the organisation it is a definitive contributor to organisational performance and this is highlighted throughout the literature review in chapters 2, 3 and 4. The organisational knowledge repository however continually fluctuates in its pertinent value and thus its usefulness to its organisation. Business events replenish the organisational repository but certain variables act as both drivers and constrainers of the knowledge value created at business events. The effect of these variables is reviewed in the literature review of chapters 2, 3 and 4.

The research objectives are associated with four main themes that guide the literature review process. The three research questions are shown in relation to the chapters of the literature review they arise from. Answering these questions helps achieve the research objectives.

The relationship of the research questions, concepts and themes to the research strategy and design is explained. Two survey instruments are designed based on the strategy objectives. These are a semi-structured qualitative survey instrument and a quantitative survey instrument.

1.7.2 Chapter 2: business tourism and business events

Chapter 2 provides a review of the existing theory and research as to how organisations maintain the variety of knowledge required to foster competitive advantage. The review explores how an organisation's pool of knowledge, as held within the abilities and skills of its employees, affects organisational performance (Liao & Wu, 2010:1096-1103). The role of the human resource function (Kaufman, 2010:628-633) or a knowledge champion is considered in creating and maintaining pertinent information flow to and from the organisation.

Causal loops to diagrammatically present the findings of the relationship of the organisation's mission statement and aligned strategy to the value of knowledge created from business events and the role of employees in the productivity of this knowledge are proposed. The value of business event design in knowledge transfer is examined in terms of events that have been researched such as tiger meetings and syntergration workshops. This chapter has relevance in understanding what is required to create the (e) of Lewin's formula to influence behavioural change in individuals.

The first research question arises from these secondary findings as to how organisational actions can influence knowledge transfer from business events. A number of themes applicable to each of the four concepts are identified. The latter are collated in Appendix 1 and contribute to creating the affinity diagram of themes, ideas and issues relevant to addressing creation of a research strategy.

1.7.3 Chapter 3: employees, business events and organisational performance

Chapter 3 reviews research about the variables influencing employee personal replenishment of work related knowledge. These personal knowledge activities include reviewing the literature for commentary on the value of continued professional development (CPD) and business networking activities (Meyer, 2007:505-519).

The chapter looks at various social interactions that influence behavioural change in an individual. This has relevance to understanding the (p) of Lewin's formula. The employee knowledge transference process is dependent for success on the physical and the social attributes of business tourism events so these elements are considered. This chapter also looks at the importance for organisational performance in aligning an employee's CPD to organisational strategic goals (Tissen *et al*., 2010:641). This information highlights variables that affect the behaviour of the knowledge repository value over time.

The second research question about the variables that influence employee knowledge uptake is posed. A further set of themes relevant to the four concepts and to creating a research strategy are identified and added to the affinity analysis document (Appendix 1).

1.7.4 Chapter 4: ensuring value from business tourism events

Chapters 2 and 3 have established how organisational knowledge development is encouraged or constrained by a number of variables. Where theory or research exists, the application of these variables in terms of their influence on the business event and the organisation is explored. In chapter 4, these highlighted variables are taken and matched to existing models that may be able to help influence and manage their behaviour in creating intangible asset value such as knowledge. The purpose of this is to explore extending the Kirkpatrick-Phillips model in a practical manner that increases the magnitude of knowledge transferred between business event and the organisation.

The possibility, practicality and benefits of modifying the Kirkpatrick-Phillips process to better manage the intangible value organisational outcomes from a business event is the third research question addressed.

1.7.5 Chapter 5: the research strategy and findings

This chapter explains how 12 overarching variables of interest are identified by way of linking the four research guiding concepts with a multitude of lesser variable systems through application of an affinity table and digraph. This makes the variables of interest more manageable and of fewer numbers. To interpret at a high-level these variables system of influence, the research strategy adopted used a qualitative survey of 18 respondents to review the relevance of the literature review secondary data to the business event attendee and event organiser populations. The data of these open-ended interviews is analysed using Atlas.ti version 6.2 (2011) to show where the 12 variables are thought to be influencing the business event-organisational performance situation.

In conjunction with identifying the theoretical system of variables, the reasoning for using action science to guide the overall purpose of the research design is explained based on the premise that a normative process for knowledge management is sought. The use of an arrowcore template that will help create an iterative and repeatable set of generic steps to co-ordinate and control the value of a business event in delivering improved opportunity for future organisational performance is argued. The action research stance guides an overall linear line of argument which gains support from the findings of the primary and secondary data.

This chapter then reports on how the quantitative survey is administered. The data from this survey is analysed using various statistical methodologies including exploratory factor analyses and a structural equation modelling technique. The findings are reviewed in relation to the literature which theoretically proposes an understanding of the relationship of the business event for improving organisational performance.

1.7.6 Chapter 6: conclusions and recommendations

The findings are discussed in relation to their implications for answering the three research questions that guided the research and in relation to the reviewed theory. The limitations of the study are considered and an argument for the development of an arrowcore type template using a modified Kirkpatrick-Phillips methodology with a balanced scorecard is presented. The researcher highlights general areas where more research is needed when considering the business event as an organisational work process.

CHAPTER 2

BUSINESS TOURISM AND BUSINESS EVENTS

2.1 Introduction

The purpose of this chapter is to review the role of business events and their contribution to an organisation's performance.

The internal and external environment in which the organisation operates is continuously changing, presenting new challenges and threats (Jackson, 2003:167; Warren, 2008:392). It follows that the organisational knowledge repository from which the organisation draws information on which to base strategic responses (decisions) to manage change must be continually updated if it is to remain an accurate input to decision making (Fincham & Rhodes, 2005:522; Kruger & Ramphal, 2010:118). Updating this information ensures that the organisation has the most pertinent information on which to make a strategic decision (Warren, 2008:607). An informed decision seeks to charter a future that ensures an organisation remains viable and profitable (Jackson, 2003:87). The role of the business event in this adaptation process is explored from the perspective of the organisation in chapter 2.

Research on business events with relation to their role in the organisation and their value for nations, is limited (Pearlman, 2008:117; Hanley, 2012:177). Business events are viewed in this research chapter as part of an interrelated system composed of organisations that use business events, within a business events segment or industry within the tourism industry, which is fiannly within a system of national industries that all lend support to the economic health of a country (Jackson, 2003:103). This chapter offers a situational analysis of what is currently known about the behaviour of variables acting within and on business events at the level of their relationship with the organisation that uses them to create new knowledge. From this review the first research question is derived and specific variables are selected to be the focus of the research survey.

2.2 Reviewing international terminology used for business tourism activities

Literature relevant to the subject is reviewed from several disciplines such as accountancy, social psychology and business strategy because of the limited nature of currently available information on the specific relationship of business events as an organisational intangible value creator.

To understand why business tourism is actively supported at a national level requires reviewing how nations view business tourism activities as important contributors to their national productivity. Furthermore, hosting international business events brings many tangible and intangible benefits to the host nation which will be highlighted in this literature review. The term M.I.C.E. and 'business tourism' are both used by different countries to describe the business event activity and discussed further in the next sections.

The next section reviews South Africa, Australia, Canada and the World Tourism Organisation definitions of business tourism with regards to business events and what these terms or similar terms for business tourism means to each. The 3 countries have been selected to represent in a general manner the current state of defining the value creation attributed to business tourism. The World Tourism Organisation represents a global statement creating common ground for understanding the meaning of business tourism activities.

South Africa has a business tourism strategy focused on attracting a share of the international business tourism market (Table 2.1). This has been confirmed by announcements in 2012 by the South African tourism minister van Schalkwyk, of an expectation to host 200 international business events worth ZAR 1.6 billion over the next 5 years (Pickford, 2012).

Australia has a business tourism strategy that looks uniquely for benefits from both the tangible and intangible values that business events create (Section 2.2.2). Canada is the first country to complete a study of the economic significance of business tourism with regards to tangible economic factors (Table 2.2). Each suggests a view of what it

believes a business tourism event to be. In doing so, the scope of this research is set by establishing what a business event is and what it is not.

2.2.1 South Africa and business tourism

South Africa defines 'business tourism' as, "A trip which is undertaken with the purpose of attending a conference, meeting, exhibition, event, or, as part of an incentive" (South African Tourism, 2010). The tourism body is the premier tourism body for South Africa and positions business event marketing only at attracting international business tourism events (Table 2.1). The responsibility for promoting business event capabilities to the local market-place lies with the provincial tourism authorities (Table 2.1). Many countries see the same value in business tourism as does South Africa and South African Tourism describes the market as, "highly competitive" (Table 2.1). The fact that South Africa invests financially to compete assumes the reward is greater than the costs.

Table 2.1: Business tourism in South Africa
Source: Adapted from the South African Tourism: "Marketing tourism growth strategy 2011-2013" (2010:11)

Business Tourism *(A trip which is undertaken with the purpose of attending a conference, meeting, exhibition, event or as part of an incentive)*	
Domestic Business Tourism	**Global Business Tourism**
Conferences, meetings, exhibitions, events or incentives with a **domestic audience** as: • Exhibitions with a purely domestic audience; • Local government meetings; • South African Associations meetings; • Local corporate meetings / off sites.	Conferences, meetings, exhibitions, events or incentives with an **international audience:** • –Inter-governmental meetings at regional or global level; • Regional / global exhibitions; • Regional / global association meetings; • Corporate involving meetings participants from more than one country; • Incentive trips for employees from outside South Africa.
A large and lucrative **local market** that should not be neglected.	A highly competitive **global business events industry.**
Responsibility of provincial and local tourism authorities to target and develop. **Not the focus of South African Tourism.**	**A focus of South African Tourism.**

2.2.2 Australia and business tourism

Australia actively promotes itself as a business event destination. The Business Events Council of Australia (here after referred to as BECA) is a similar umbrella organisation to South African Tourism. BECA uses the term "business events" to encompass business meetings, incentives, conventions and exhibitions (Business Events Council of Australia, 2011a).

BECA defines a business event as, "Any public or private activity consisting of a minimum of 15 persons with a common interest or vocation, held in a specific venue or venues, and hosted by an organisation (or organisations). This may include (but is not limited to): conferences, conventions, symposia, congresses, incentive group events, marketing events, special celebrations, seminars, courses, public or trade shows, product launches, exhibitions, company general meetings, corporate retreats, study tours or training programmes. The demand for a business event is driven mainly by organisations choosing it as a forum to communicate messages, to educate or train, to promote a product, to reward or celebrate, to collaborate on issues and solutions, or to generate resources" (Business Events Council of Australia, 2011a).

Australia includes the same events types in this definition as does South Africa. BECA however goes further than South Africa extending the definition of a business event to include descriptors of business event activity objectives including, "communicating messages", "educating", "promoting", "celebrating", "collaborating" and "generating resources". These infer both tangible and intangible benefits from a business event (Business Events Council of Australia, 2011a).

2.2.3 Canada and meetings

The Canadians apply the term "meeting" as an inclusive term for a range of sizes of business events. They define business events as being from, "Small gatherings in a booked room to larger conventions, conferences, consumer shows, trade shows and

incentive travel events" in the Canadian Economic Impact Study released in 2008 (Meeting Professionals International, 2011). The range of business events genre is the same as for South Africa and Australia. Canada offers no descriptors of the attributes of business events.

2.2.4 Other terms used for business tourism

The World Tourism Organisation (hereafter referred to as WTO) uses the term 'meetings industry' for business tourism activities. The organisation states that travel (a trip) is only to get to the business event and not the main purpose when defining the meetings industry stating, "If a trip's main purpose is business/professional, it can be further subdivided into attending meetings, conferences or congresses, trade fairs and exhibitions and other business and professional purposes" (World Tourism Organisation, 2012).

An alternative term used by many countries for business events is the acronym 'M.I.C.E.' M.I.C.E .stands for 'Meetings, Events, Conferences and Incentives' (Buhalis, 2000:100).

2.2.5 Business events as the primary objective of business tourism

WTO notes in the previous section that business tourism does not include the travel to the event as part of business tourism. BECA agrees, noting that, "The principal motivator to attend a business event is the business activity itself rather than the desire to travel for pleasure. Whilst tourism may be a consequence of the event, there is no overriding tourism objective**"** (Business Events Council of Australia, 2011a).

This exclusion of travel is important as it supports the assumption of this research that business events are solely for the purpose of business. Extraneous leisure activities undertaken before or after the business event are not the principal purpose of attending the business event. The value of the travel and the leisure activities are acknowledged as having a contributory role in the expectation of making the decision to buy a ticket and to attend the event but the quality of the knowledge creating activities at the business event

are considered as the primary reason that drives the buy decision (Mair & Thompson, 2009:407).

2.2.6 The scope of the research with regards to business event types

Having reviewed terminology and definitions for a business tourism activity, the scope of the activity types of this study can be defined.

The business event termed an 'incentive' or 'incentive travel event' is not part of the scope of this research. This is most commonly a leisure trip given as a reward for high levels of sales (Scofidio, 2007:40). The reasoning for this is that incentives are not generally used as a vehicle for knowledge transfer although they are acknowledged as a sales motivator. The 'trip' to or from the business event is not part of this study. Pre- and post-business event leisure activities are not part of this study.

This study is limited to exploring business tourism events - meetings, exhibitions, conventions, trade shows, training events and conferences - in the context of how they are adding value to business performance. The next section introduces the role of tangible and intangible benefits arising from a business event.

2.3 National value generated by business tourism including business events

The value of business events in tangible terms for South Africa, Australia, Canada and the United States of America is shown in Table 2.2. This data shows how business tourism contributes to economies. The benefit to each nation varies as do measurement indicators, but the table still highlights that South Africa realised a financial benefit of US$556 million in 2009 and the United States of America realised US$ 106 billion in 2011. The financial contribution of business events to a country's economy is clear and the United States of America figures indicates the potential for business tourism.

Table 2.2: The economic contribution of business events to an economy

COUNTRY	BUSINESS EVENTS GENERATED EXPENDITURE/VALUE GAINED
Australia 2003-2004 (Jago & Deery, 2009:4).	Business events generated expenditure and value gained annually in 2003-2004 was, "Australian $17.3 billion in 2003 and 2004 based only on the [business] tourism dimension [events activity] and makes no claim to recognise the industry's broader value".
Canada 2008 (Meeting Professionals International, 2011).	The 2007-2008 Canadian study states that business events contributed annually in that period: • "Thirty-two billion Canadian dollars in direct spending ; • Eleven billion Canadian dollars in direct contribution to the Gross Domestic Product; • A direct employment of two hundred and thirty-five thousand people; • A total of seventy-one billion Canadian dollars in industry output."
United States of America (Convention Industry Council, 2010a).	The 2011 U.S. study states that business events contributed annually: • US$263 billion in direct spending; • US$106 billion in Gross Domestic Product; • US$60 billion in labour hiring; • US$ 25.6 billion in taxes. • And 1.7 million jobs.
South Africa 2011 (Nkosi, 2011).	South African minister for Tourism Mr Marthinus van Schalkwyk opening Meetings Africa 2011 commented on business tourism in 2009: "Business tourism accounted for 4.7% of total tourist arrivals in 2009, an indication that leisure tourism still dominates the sector. Business tourists spend about R5 300 ($740) during their usually short stay in the country, representing an economic value of about R4-billion ($556-million)".

What is not given in the economic survey figures of these 4 countries is the value of business events in terms of intangible asset creation such as BECA states: collaboration; education; promotion; and communication. As intangibles they cannot be seen or touched and so are difficult to value. Yet emphasis is placed on them by BECA as important outcomes in a business event. So what role are intangibles playing in a business event?

The answer is suggested in the research of Galanakis (2006:1231). This author indicates that a business's ability to innovate and create is not an intrinsic organisational attribute. Business events are part of what Galanakis refers to as, "the concept of a creative factory" in which many knowledge inputs are required by the factory to influence improved creativity (Galanakis, 2006:1231). The creative factory concept recognises the complex interrelationship of organisation(s) and nation required to drive innovation (Galanakis, 2006:1230).

Nations create innovative climates for their organisations by attracting business events which give opportunity to collaborate, communicate and learn. BECA's stance introduced in Chapter 1 corroborates that business events be considered of great importance as influencers of the degree of innovation shown by local businesses. As such, business events become crucial in planning the future economic course of the (Australian) national economy (Jago & Deery, 2009:8-9). South Africa takes a similar stand by having its premier tourism body, South African Tourism, focus specifically on bringing business people to South Africa through business events.

2.3.1 The link between intangible and tangible

Business tourism is a catalyst for innovation in industries. Several authors have shown how new knowledge leads to tangible technical innovation in the form of "new processes, products and services" and administrative innovations such as improved "procedures, policies and organisational forms" (Jiménez-Jiménez & Sanz-Valle, 2011:409). This makes spontaneous sense in that some knowledge can immediately be applied to improve the quality that already exists in an organisation.

But for intangibles, evaluating where value is created is more difficult. For instance, it has been shown for manufacturing industries that organisational learning (knowledge) has a stronger, direct effect on influencing innovation than it does on discernable improvements in organisational performance (Jiménez-Jiménez & Sanz-Valle, 2011:413).

Yet in service industries, there is a more discernable and direct relationship between learning and organisational performance (Jiménez-Jiménez & Sanz-Valle, 2011:414).

This suggests that knowledge behaves in slightly different ways in different industry types. In manufacturing, knowledge seems more useful in making new ideas perhaps because manufacturing processes are adequately measured by process indicators so new ideas would need to be tested first and take longer to be seen in business performance. In the service industry, employees often immediately exhibit new learning in their service to customers thus immediately affecting organisational performance.

Jiménez-Jiménez and Sanz-Valle (2011:415) note that further research is required to explore the differences between value in the relationships of learning and performance for service versus manufacturing organisations. This would indicate that the design of an event could be influenced by whether its outcomes are required in terms of tangible benefits or intangible benefits.

Knowledge in either case definitely influences the overall knowledge of an organisation although it may act on its potential in different ways as seen above. An organisation that actively recognises the influence of knowledge has been termed a 'learning organisation'. This organisation continually monitors and adjusts its knowledge repository by re-skilling employees with new learning as soon as a gap in knowledge is noted. Learning organisations know that new knowledge bestows the ability to deal better with the changing environments mirrored in changing customer needs (Senge *et al.,* 1994:48). People in a learning organisation are encouraged to develop their capacities to think of better ways to interact with the systems in which they work. They do this by "continuous testing of experience and the transformation of that experience into knowledge that is accessible to the entire organisation and relevant to its core purpose" (Senge *et al.,* 1994:48). Senge *et al.* use the term 'transformation' indicating that the knowledge is in some manner converted when it is shared between employees. Making new information accessible to others in the organisation is a valuable characteristic of value creation. It follows therefore that a learning organisation can create a competitive advantage by

having better learning methodologies and processes than others. Sharing knowledge is an important point to be considered in business event design. The next consideration of the design is how to encourage the knowledge to drive productivity.

2.3.2 Knowledge productivity as an organisational asset

Stam (2007:628) notes that ensuring future productivity and growth has become as dependent on gaining competitive advantages from intangible resource application as it has historically been on tangible resources. Tangible resources such as money and raw materials are not unique assets since they are available to any who can pay for them. On the other hand, knowledge can be entirely unique to a particular organisation. Organisations particularly seek knowledge that is rare, unique and specific to the organisation. This knowledge provides not only a distinctive barrier of entry to new competitors but inimitably differentiates it from existing competitors. The content of Table 2.3 reviews how the concept of managed knowledge productivity has only recently become recognised as critical to creating competitive advantage over the past sixty years (Stam, 2007:631). In terms of doing business this is a new development for strategic thinking (Warren, 2008:607).

In 1958, Machlup found that almost 29% of the United States of America's gross domestic product was as a result of knowledge application by organisations (Table 2.3). In 1981, Drucker observed that the macro environment, the external environment in which the organisation exists, constantly creates variability in knowledge and in turn this influences the productivity of the organisation. Managing the external variation influences successfully aligns completely with the ability of the organisation's employees to be able to access and use knowledge of the external environment in designing a suitable response (Drucker cited by Stam 2007:631).

Between 1991 and 2001, Harrison and Kessels extend the value attributable to knowledge and organisational success by showing how knowledge becomes even more productive

when employees share their individual knowledge and create new interpretations of productivity from their joint knowledge.

By 2002, Kessels and Van der Werff note that due to changes in the way organisations work, becoming geographically dispersed with many diverse units contributing within a single organisation, each individual employee becomes even more essential in manipulating all available knowledge to improve overall organisational productivity. They felt this change was driven by the fact that employees spend less time on physical operational tasks and thus spend more time socialising and sharing knowledge at work. Each individual should now be empowered by their organisation to use individual knowledge to reflect on the current productivity and look for ways to improve it. This reconfirms Drucker's sentiment of 1981 in that change driving a better organisational future has a direct relationship with the extent to which each employee is used to create that future.

Stam (2007:631) importantly notes that knowledge management is essentially closely related to knowledge productivity but is different from knowledge productivity. When knowledge is managed by actively planning what is needed and how to collect it, then it is being managed. Productivity is the final outcome of managing in that there has to be strategies to make the new knowledge productive in terms of monitoring how it improves organisational performance.

Yorks' research corroborates that many organisations understand that it is the individual employee's capability to gather new knowledge that often leads to improved organisational performance. Attendance at a business event activity should endow an employee with improved competencies and capabilities to do work better than they did previously (Yorks, 2005:5). The employee is contributing to their organisation's ability to create sustainable competitive advantages over competitors with their efforts**.** This improves the organisation's opportunity to be profitable. Understanding the complicity of the individual employee in knowledge productivity is an obvious consideration when designing business events.

Table 2.3: Knowledge management and productivity development

Source: Adapted from Stam (2007:631)

Year of Concept and Author	Knowledge Management and Productivity Development
1958 Machlup	The macro-economy discovery of the value of knowledge as a product. A study of the value of knowledge production as a contributor to the gross national product (GNP) of the United States of America, Machlup found that almost 29% of the gross national product was accounted for by knowledge. Machlup concludes that there had to be relationships between, "Knowledge, value creation and economic growth" (Machlup cited by Stam, 2007:631).
1981 Drucker	The macro-economy of knowledge is applied in the micro-economy - the organisation's level. "The real power of productivity in organisations is determined by the ability of the so-called knowledge workers to make knowledge productive" (Stam, 2007:631).
1991 & 2001 Harrison and Kessels	The concept of knowledge productivity is introduced. "Knowledge productivity concerns the way in which individuals, teams and units across an organisation achieve knowledge-based improvements and innovations" (Harrison & Kessels cited by Stam, 2007:631).
2002 Kessels and Van der Werff	The individual employee becomes pivotal in the concept of knowledge productivity. Linked to this is the necessity of a work place that provides a learning environment. "Routine work is more and more taken over by machines and computers. The work that remains requires independent decision-making and creative thinking; the physical activities of the employee are being replaced by mental and social activities….it is inevitable that the work place turns into a learning environment" (Kessels and Van der Werff quoted by Stam, 2007:631).
2004 Kessels and Van der Werff	The "Corporate Curriculum™". "[The Corporate Curriculum is] A plan for [organisational] learning to increase knowledge productivity, leading to constant improvement and radical innovation and ultimately economic advantage" (Kessels and Van der Werff cited by Stam, 2007:631).

A process was needed that guided knowledge management for productivity and, in 2004, Kessels and Van der Werff suggest the 'Corporate Curriculum™' as a generic template that would ensure organisational productivity from knowledge management practices (Stam, 2007:631). Stam advocates use of the template in research presented in 2008 (Stam, 2008:14).

2.3.3 A model to guide knowledge productivity - the Corporate Curriculum

The Corporate Curriculum™ model of Kessels and Van der Werff is shown in Table 2.4. The model gives seven, "intended and unintended conditions affecting learners in an organisation" labelled 1 through 7 on the right hand side of the table (Stam, 2008:9). The seven learning conditions that these authors see as integral to any organisational learning process were further grouped into management focus areas by Van Lakerveld *et al.* (quoted by Stam, 2007:632). These three areas are reflected in the left hand column that links each of the seven conditions to three distinct characteristics required of the organisation's environment: A - the knowledge learning processes required to gain and use knowledge; B- the skills of the knowledge worker to be developed; C - the organisational conditions required for learning and new knowledge to create value**.**

Function 'A', "The knowledge learning process" is composed of three processes which define normative or policy conditions required of the organisational culture for learning processes that will be conducive to employees applying knowledge for the benefit of the organisation. The first process requires that the employee has opportunity to understand both the organisation's mission and objectives and the key competencies that will deliver these. The second process requires that the organisation encourages the employee to look for problems in how well the mission and objectives are met and use capabilities and skills to minimise the problems. The third process requires that the organisation encourages actions from employees that encourage them to think deeply about the mission and objectives and seek ways through knowledge acquisition and application to deliver them better.

Function ‘B’, “The knowledge worker function”, reflects the two conditions that are related to developing the employee social and self-regulation skills required to multiply the value of knowledge and make it more productive. The first is the skill of being able to create, belong to and to learn from others through developing knowledge networks. The second skill is that of enjoying learning and of physically being in the workplace so that it is a pleasure to apply personal professional learning to improving the organisation.

The final function area ‘C’ defines the last two conditions of the Corporate Curriculum™. These are organisational conditions that will enhance and encourage learning and knowledge productivity. The first is to create peace and order in the workplace. The purpose of peace and order is to allow employees opportunity to focus on specialisation and on incremental improvements without interruption.

The last is the opposite of peace and order. The organisation uses a designed strategic action to fashion once-off creative turmoil knowledge situations. The last is employed as a response to dealing with change that is outside of the scope of normal activities. It is not part of policies and processes and has not been dealt with before. When this happens, the organisation requires new knowledge to handle a unique situation.

Six conditions would be set by established rules of the organisation that ensure a standardisation to learning for knowledge productivity. The seventh condition is a unique one where very specific knowledge is needed from business event attendance.

The model clearly indicates the inter-relatedness and inter-dependencies of the individual employee’s behaviour and motivation to apply the knowledge; the degree to which the organisation supports opportunity for the individual to exhibit new knowledge; and the flexibility of work processes within the existing systems to support both a nurturing atmosphere or, when required, a radical environment (Yorks, 2005:5).

Table 2.4: The Corporate Curriculum™ conditions affecting learning

Source: Adapted from Stam (2007:632-633)

Three Types of Learning Function **A = A learning process** **B = A knowledge worker function** **C = The organisational condition for learning.**	**The Seven Learning Functions and Their Associated Conditions for Success**	
A. Knowledge Learning Process	**1.**	"Acquiring subject matter expertise and professional knowledge directly related to the organisation's business and core competencies;
A. Knowledge Learning Process	**2.**	Learning to identify and solve problems using the acquired subject matter expertise;
A. Knowledge Learning Process	**3.**	Cultivating reflective skills and meta-cognitions that contribute to finding, acquiring and applying new knowledge;
B. Knowledge Worker Function	**4.**	Securing communication skills that provide access to the knowledge network of others and that enrich the learning climate within the workplace - individual competencies and motivation;
B. Knowledge Worker Function	**5.**	Acquiring skills for self-regulation of motivation and affection related to working and learning - individual competencies and motivation;
C. Organisational Condition of Learning	**6.**	Promoting peace and stability in order to enable specialisation and incremental improvement;
C. Organisational Condition of Learning	**7.**	Causing creative turmoil in order to stimulate innovation".

The model importantly demonstrates the need for the organisation to have both a specific management policy to assure the conditions that influence knowledge productivity and a strategy for knowledge acquisition and multiplying to enable enhanced future performance (Senge *et al.,* 1999:48-49; Yorks, 2005:5).

While organisational culture, learning policies and processes are integral to the framework set up in the model, in all seven conditions the employee is pivotal. Employees are a resource to be drawn upon by the organisation. The next section explores the function of the organisation's human resource development actions in relation to organisational knowledge development.

2.3.4 The process of human resource development

Nadler and Nadler were the first researchers to use the term 'Human Resource Development' (hereafter referred to as HRD). They defined HRD as, "organised learning experiences in a definite time period to increase the possibility of improving job performance growth" (Nadler & Nadler quoted by Yorks, 2005:5). This definition was seminal as it moved the concept of learning away from the concept of learning occurring at a team or organisational level (organisational development) to that of learning to influence individual job performance level (Yorks, 2005:5). As has already been shown productivity from knowledge is tied to individual performances.

Liestner notes that sharing knowledge as information is currently enhanced in organisations by Information Communication Technology structures (hereafter known as ICT) or Information Technology processes (hereafter known as IT). This makes the information accessible to many people enabling recombination with other knowledge to make new knowledge. Variations of knowledge composition for innovation become endless. Deciding aspects such as which database to buy and how the database will be filled with data is part of current knowledge management. The database is made up of individual elements or items that collectively contribute to its overall richness and relevance. Getting people to share and apply information to make new knowledge is

when the knowledge becomes interactively productive (Liestner, 2010:8). This situation assumes that somehow the right information is flowing into the knowledge ICT and IT structures through a knowledge generation process.

It can be argued that knowledge acquired from business events needs the same management. A business event cannot be an unstructured, single event if knowledge of value is to flow from it to the organisation. A business event has to be part of a knowledge strategy, the purpose of which is to add value to the organisation. A desired outcome is an 'improved' employee who in turn is an 'improved input' resource to the workflow process thus influencing improved outputs. Knowledge management and productivity requires a strategy for many aspects of the organisation's knowledge not limited to IT communication channels, databases and policies but to additionally include guidelines on using knowledge production interventions such as a business event. Conditions in an organisational strategic knowledge policy applicable to a business event intervention would include deciding what design of business event provides a forum for the additional elements of knowledge required and, secondly, how the knowledge acquired at the event and taken back to the organisation after the event will be encouraged to be productive.

Nadler and Nadler cautioned that, in becoming a learning organisation, the human resource department could not alone be responsible for the knowledge learnt, being applied or easily recognised in such variables as improved individual performance (Nadler & Nadler, quoted by Yorks, 2005:5). This is because, as already discussed in the Corporate Curriculum™ model, that other variables such as the opportunity to share knowledge or the ability to access existing information have to be in play for the full potential value of new knowledge to manifest. This can be argued to be relevant in considering any ROI model that measures changes in individual performance as the measure of the success of a learning intervention. The ability of the individual to apply the new knowledge has a dependency on other variables as identified in functions A, B and C of the Corporate Curriculum™ and an ROI model would need to acknowledge

these influences when calculating ROI. So what role does strategic HRD play in knowledge productivity?

Yorks (2005:7) provides several definitions of human resource development (HRD). One is of particular interest in this literature review as it is a definition of HRD proposed by Beer and Spector in 1989 which highlights the interrelatedness of organisational systems and HRD.

Beer and Spector define HRD as, "A proactive system-wide intervention linked to strategic planning and cultural change". This contrasts with the traditional view of training and development as consisting of reactive, piecemeal interventions in response to specific problems" (Beer & Spector, quoted by Yorks, 2005:7). This definition is of importance because it places HRD as being part of the larger system of the organisation definitely linked to knowledge strategies, additionally influencing organisational culture, that plan a desired state of future knowledge (Yorks, 2005:7; Thompson *et al.,* 2010:41). Thus learning goes beyond a random inflow of new knowledge becoming a managed knowledge acquisition, retention and application plan linked to strategic goals. It follows that a planned change in the level of knowledge could be further integrated to a system to bring about multiple planned influences on other variables with which this knowledge activity (the business event) interfaces. It would be a causal loop of planned changes in many variable performances.

Additionally, this definition infers that Organisational Development (hereafter referred to as OD) is, in fact, dependent on individual learning. The latter becomes a lower system that creates value for the higher system of the overall organisation. Change is being introduced to that system by an individual employee who has been affected in their behaviour (capabilities, skills and/or knowledge) by the HRD intervention (the business event) and applies this change in the work she/he produces (Yorks, 2005:12).

Yorks (2005:9) defines the principal purpose of the Human Resource Management (HRM) function as, "Positioning the right people to achieve the highest possible

performance in order to meet strategic goals". It is easy to see the causal link between HRM actions and HRD activities. The knowledge is managed through plans and strategies such as business events and made productive for the organisation by focusing the knowledge efforts of the employees with these management efforts.

A key principle of improving organisational performance is highlighted as the literature and research clearly indicates that knowledge management through employees as human resource management and development is linked to the organisation's overall management. Human resources is a function of the organisation and the function serves to contribute and deliver, with the other organisational functions such as finance and operations, a service or product of use to its customers.

2.4 The causality of knowledge in organisational performance

This section deals with reviewing the link between an organisation's mission and the importance of developing the human resource.

The success of an organisation lies in the degree to which it successfully delivers against its stated purpose of doing work that serves its customers needs (Scholtes, 1998:176; Drucker, 1968:67). The customer expectations from use of the organisation's products and services are to "Successfully acquire and apply [new] capabilities [from use of the service or product]; achieve quality characteristics [from the product or service]; and fulfil their [customer] needs" (Scholtes, 1998:63).

The organisation owes its existence to its customers, so the success with which the organisation manages the interplay of these three interdependent customer expectations thus defines the organisation's degree of success. An organisation should then design and administer all internal systems for the sole purpose of creating a product or service of value to their customers (Scholtes, 1998:59-65).

2.4.1 The relationship of an organisation's tangible and intangible variables

Fluctuations in customer demand reflect in system key performance indicators such as the organisation's financial reporting (Warren, 2008:38; Scholtes, 1998:66-68). Financial performance is the one of the tangible results of the many inter-related functional systems at work simultaneously within the organisation (Warren, 2008:167; Marx & Lechner, 2005:138-140). By maintaining a good relationship with a customer there is opportunity to create a long-term income stream (Figure 2.1).

The result of the good relationship is tangible in terms of sales made although the value of the good relationship is intangible. Intangible factors are driving the sales. It follows that actions to review and answer the customer needs as they change should be paramount in every organisation's strategic planning but need to include a review of both tangible (such as the physical process of making the product or service) and intangible elements (such as customer need knowledge) (Jones & Hill, 2010:117). To maintain such a relationship requires that the organisation has continual information about the customer's needs as Drucker stated earlier when referring to the need to be aware of the macro-environment.

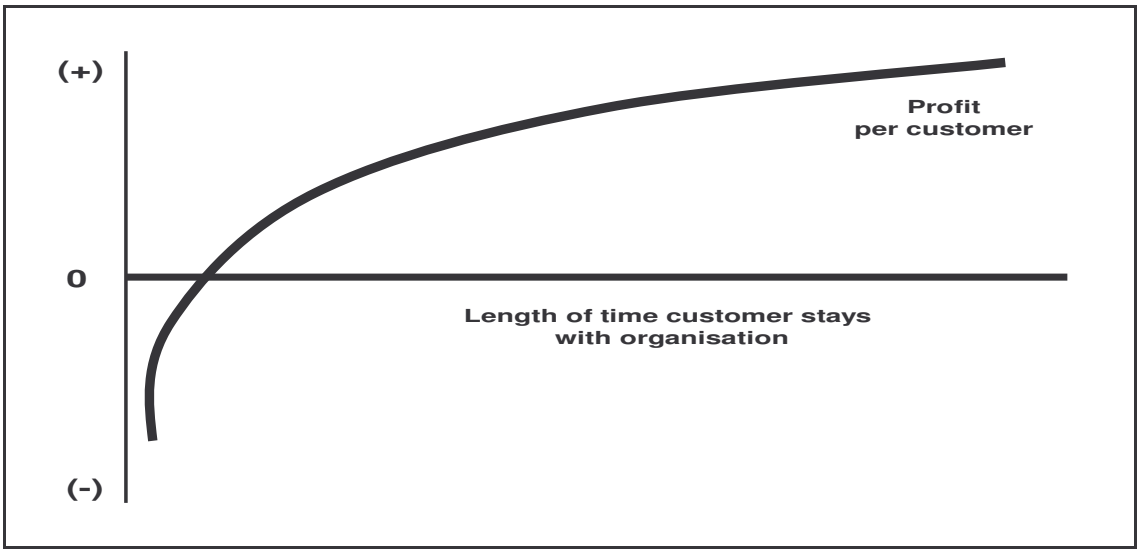


Figure 2.1: The relationship between profit and customer retention
Source: Jones and Hill (2010:117)

A high level overview at the level of the organisation is depicted in Figure 2.2. The degree of utilisation of tangible assets in creating organisational value is generally the basis for the feedback loops or Key Performance Indicators (hereafter referred to as KPI) chosen to measure the success of a system.

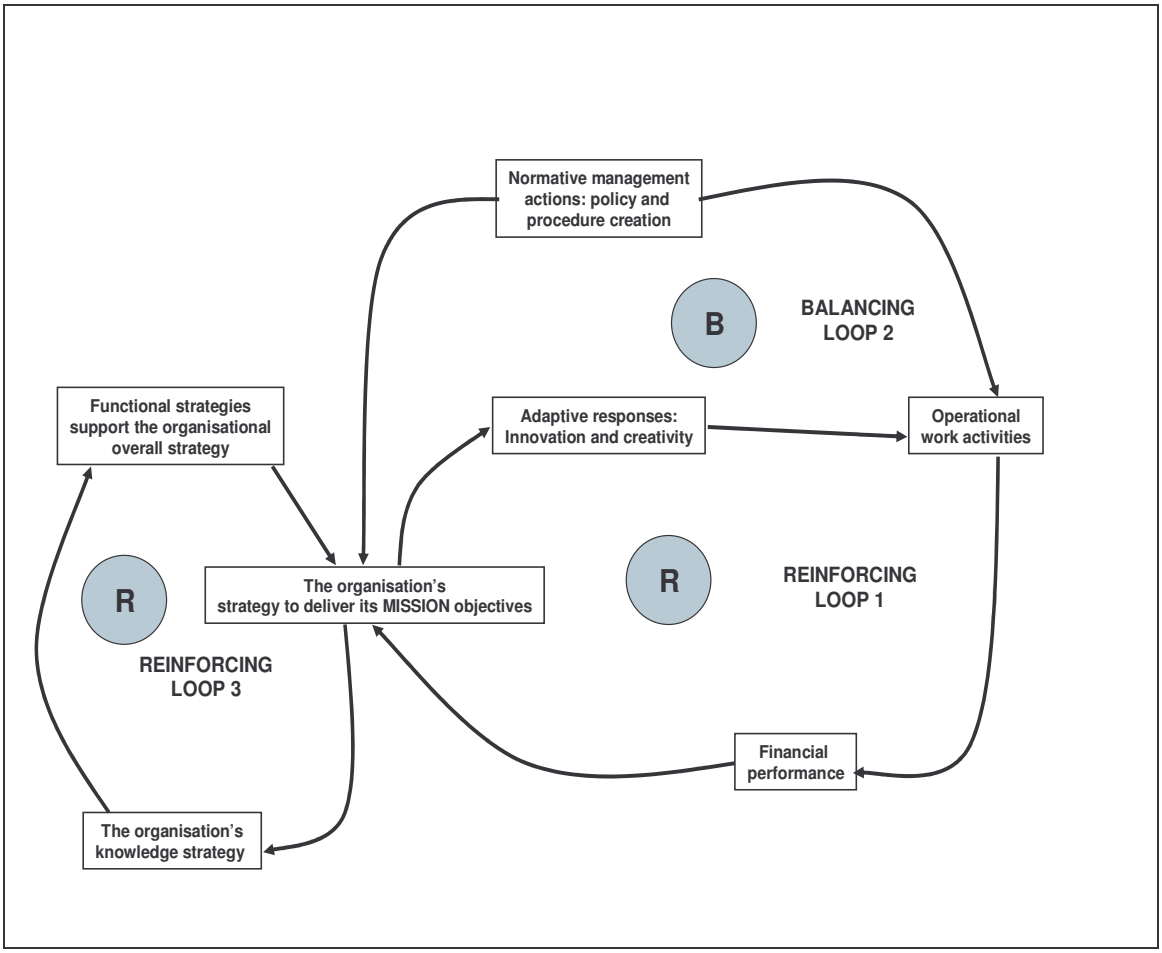


Figure 2.2: Theoretical variable behaviour causal loops for an organisation's mission delivery strategy and its knowledge strategy
Source: Author's own compilation (2010)

Traditionally feedback loops accumulate data generated by activities that have already happened. For instance, calculating the efficiency of a process in creating customer products from raw materials is done after the goods are produced; and the year-end financial report looks backwards at activities undertaken in the past time period reporting

in terms of their financial benefit to the organisation. These are examples of traditional key performance indicators. The data arising from KPIs is feedback on organisational performance and should be interpreted and used to influence the effectiveness of the processes and the efficiency with which inputs are transformed. Individual functions within the organisation may well have individual KPIs and their own functional unit strategic plans but all should serve the overall organisational strategic plan to maximise the organisational performance (Thompson *et al.,* 2010:40).

Logically, knowledge and learning of individual functional units should follow a single organisational strategy for knowledge. From the literature reviewed, a causal loop diagram is proposed of the relationships of the major systems variables found to date (Figure 2.2).

The organisation's overall knowledge strategy drives specific goals that the organisation sets as ways in which to maintain its productivity and deliver against its mission statement. The strategy uses both learning gained from previous experience and new information gained from continuously scanning the external environment to adapt. This should be a reinforcing loop as depicted in R3 so that new value added is always creating more value for the organisation. In response to change, strategic activities seek to design a range of responses and choose the one that best deals with the change. This delivers a desired future (Porter, 2004:183; Thompson *et al.,* 2010:43). These strategic plans continuously evolve in response to continuous change. These are adaptive responses that require knowledge that stimulates creativity and innovation. Reinforcing loop 1 proposes that adaptation creates conditions that encourage operational units to remain viable. R3 affects R1 and adds its own energy to R1 (Figure 2.2).

Variables chosen to create strategic change often become drivers. Their effect is to improve the value contribution of many aspects of the systems of an organisation. In this case assuring operational units of the most suitable conditions under which to be productive, helps assure financial performance (R1). R1 delivers on the organisation's mission by reaching financial and production goals and feeds energy back into R3. In

turn, this will either reverse a negative effect that the organisation is experiencing such as a loss in productivity or, as in loops 2 and 3, reinforce the strength of the entire causal loop (Figure 2.2).

The normative actions of the system are designed to attenuate repetitive and common causes of variation in organisational performance (Scholtes, 1998:27). Normative actions guide operational and strategic decision making setting standards that are known to deliver value in a certain way.

Normative actions create a balancing effect and a stable environment to which new knowledge is introduced as demonstrated in balancing loop 2 (Figure 2.2). Normative actions help to keep specific known variables within acceptable ranges of variation. For instance, normative actions will dictate a policy that ensures only personnel who use a piece of equipment attend training on that piece of equipment. Every function of the organisation contributes to creating the desired future by designing their own strategy as a system whose work output contributes to the overall goals (Figure 2.2). As all the strategies depend on past and future learning experiences, the relevance of having an organisation-wide knowledge strategy is that it creates known elements of consistency and control in all the strategies (Figure 2.2).

2.4.2 Creating competitive advantage

The relationships between tangible and intangible resources, personnel capabilities and normative routines create distinctive competencies unique to an organisation. The manner in which distinctive competencies combine seeks to create a competitive advantage over similar competitor offerings and thus influence above average organisational performance.

In figure 2.3, Scholtes (1998:103) diagrammatically demonstrates with a modified SIPOC model how the organisation's purpose guides the design of all the organisation's workflow processes. The higher the degree of accuracy in meeting customer needs

throughout the organisation's workflow systems the better the customer needs are being met. The product or service is assembled in a manner that meets predefined criteria. Key performance indicators give management information feedback loops on which to base decisions to adjust system variables. The effectiveness and efficiency of each organisational system needs to contribute to overall optimal performance (Scholtes, 1998:137).

Over time, changes in the external environment in which the organisation operates have a corresponding effect on the consumer demand for the organisation's output (Davies, 1991:30).

The value of the capabilities and actions of the stakeholders who participate in or influence the production process are unseen. As they are unseen, they can be overlooked as to their influence on organisational performance. In Figure 2.3, organisational purpose falls into the 'known' of a system.

An organisation always has a mission, a vision and strategies to deliver on these (Figure 2.3). Feedback loops are the way the organisation learns what it needs to change to continue to satisfy its customers (Scholtes, 1998:136; Christensen, 2010:22).

Christensen (2010:21) notes that an organisation can be seen to successfully create competitive advantage when the value it creates with its products or services has a customer buying its product and services over competitor products and services (Figure 2.3).

Organisational success is associated with identifying and applying *distinctive* patterns of resources as input to the SIPOC workflow (Figure 2.4) (Huff *et al.,* 2009:29).

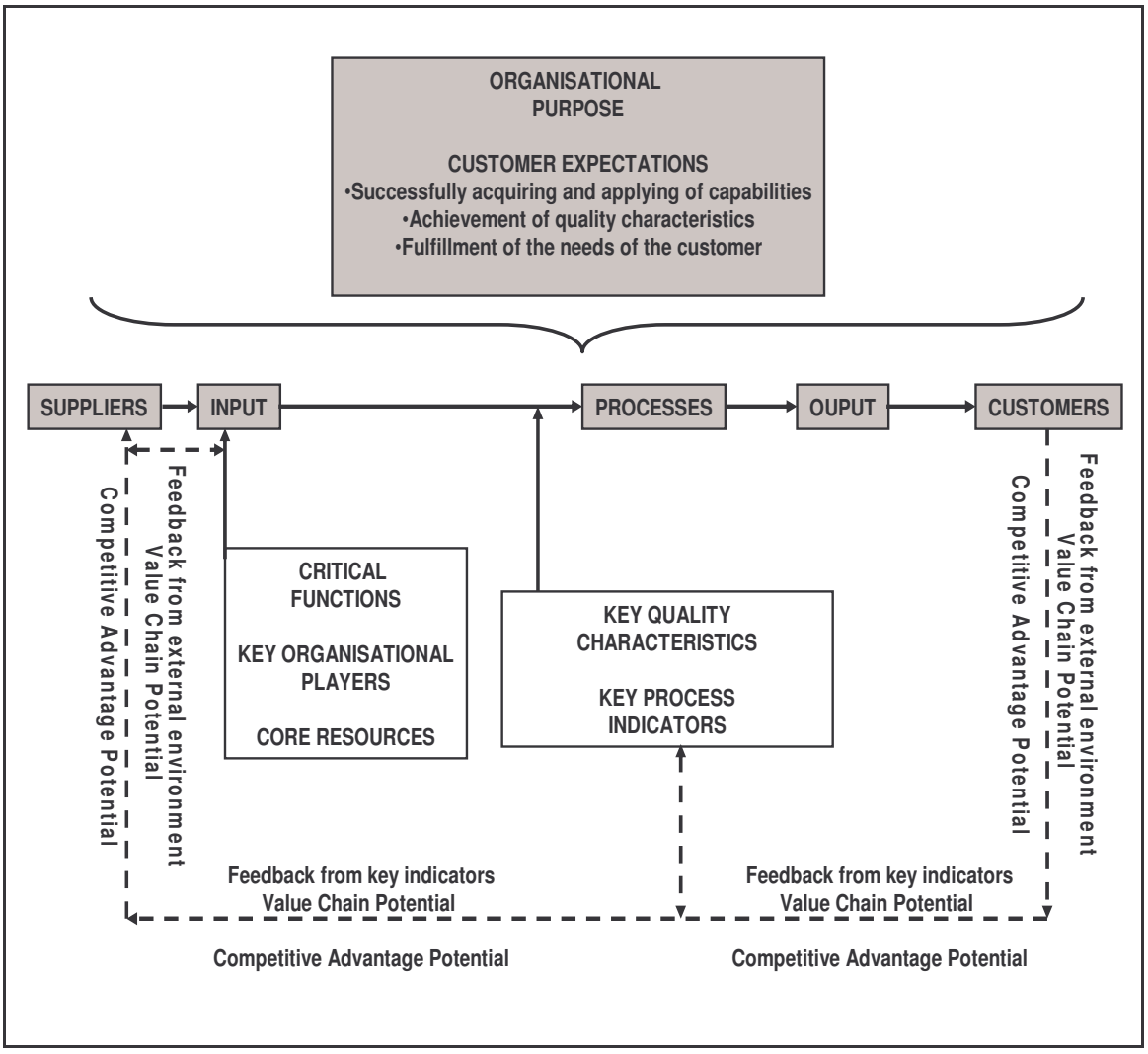


Figure 2.3: The purpose of the organisation's work

Source: Adapted from Scholtes (1998:103) and Scholtes (1998:137)

The problem is that, while KPIs on tangible results are easy to set (monetary units, units of production and others), what constitutes the tracking of feedback loops and setting of KPI for intangible value creation is much harder because they are intangible. Authors note that the systems that create competitive advantages are often very complex because they are combinations of both (Huff *et al.,* 2009:44). Analysing feedback from complex systems and deciding appropriate actions to maintain competitive advantages is therefore associated with a high degree of causal ambiguity as to how to interpret and to respond to

the feedback information - especially if little is known about the intangibles acting with the tangibles (Figure 2.3).

Knowledge exists in contexts such as the degree of consciousness of the actions that develop the strength of the relationship between sales staff and customers, or the degree of attentiveness of the organisation to its target market needs when building brand awareness (Figure 2.4). Variables arising from knowledge clearly affect the tangible manifestations of organisational success seen in sales orders and profit. It follows that actively managing the effect of knowledge in organisational systems can have positive implications for the quality with which organisational work gets done. The most elusive of these assets are those that are hard to see and thus hard to measure – the intangible assets (Huff *et al.,* 2009:29).

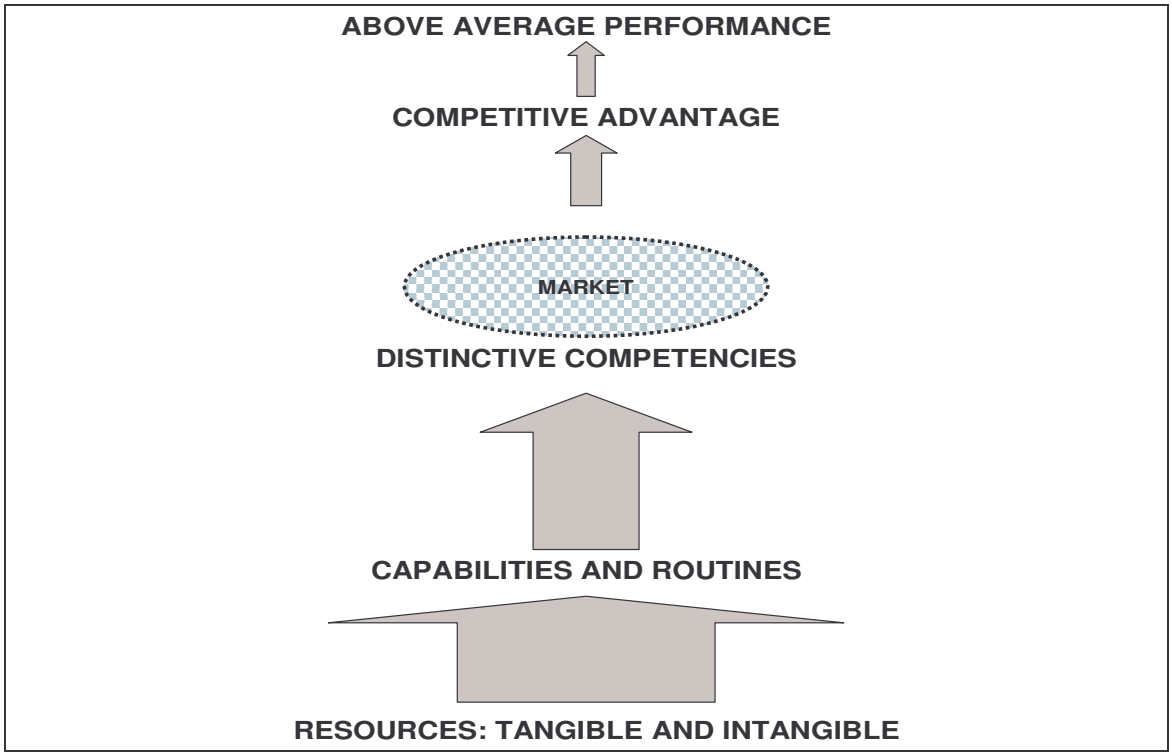


Figure 2.4: A resource based model of the organisation's performance
Source: Huff *et al.* (2009:29)

Any actions that help name intangible variables and create the feedback loops and KPI required to monitor them would help in maintaining competitive advantage and optimising organisational performance. The Corporate Curriculum™ model did not diagrammatically represent the relationships between the seven conditions but an overview of a model that shows the three functional areas of process, employee and organisation is shown by Holton's model in Figure 2.5. Holton's model reflects the three relationships and was designed as a guide for the HRD function in identifying the variables to consider when designing learning interventions to influence the organisational knowledge system.

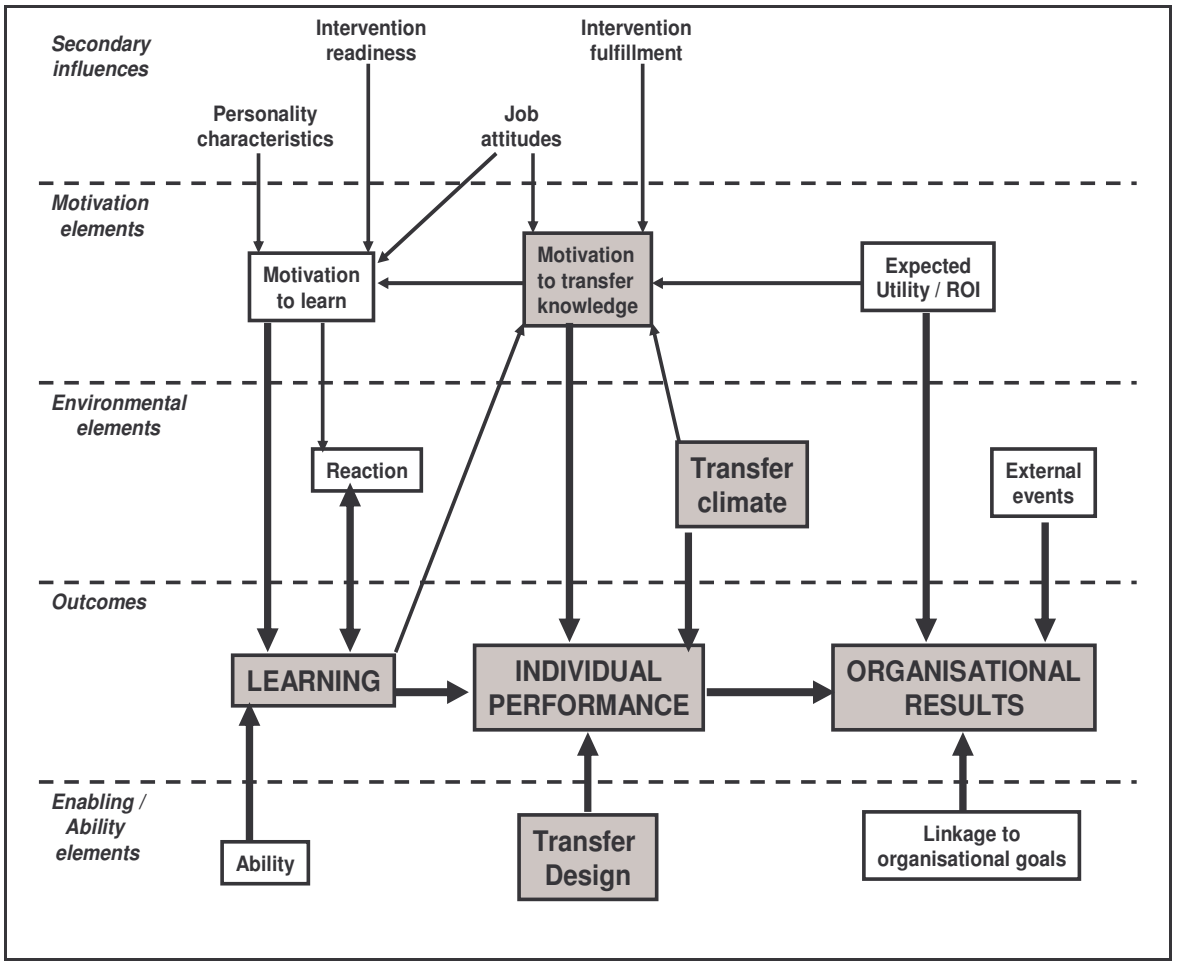


Figure 2.5: An overview of the causal relationships in a knowledge system

Source: Holton quoted by Yorks (2005:215)

It is immediately apparent in Holton's model that there is a high degree of complexity to ensuring success for the organisation from new knowledge. Within each layer shown, for instance 'the motivation to learn', there are other known and unknown variables influencing 'the degree of motivation to learn'. In this layer rewards and incentives are often applied in organisations to improve employee performance. However, whether these are appropriate or influential in providing improved performance is often not linked to an indicator, but rather assumed through a backwards facing lens focused on financial performance. Additionally, employee personality variables manifest influences such on the, 'the motivation to learn'. The latter is affected before a business event by variables such as the readiness to undertake a learning intervention or personal job attitudes (Holton quoted by Yorks, 2005:215).

Holton argues that the models commonly used to measure learning such as the Kirkpatrick Return on Investment model (hereafter referred to as ROI) and subsequent models based on Kirkpatrick's model such as the Phillips extension of the Kirkpatrick model, inadequately deal with intangible variables. In turn, this has considerable impact on the true valuation of the learning intervention ROI (Holton, quoted by Yorks, 2005:214). Holton contends that unexpected results in the ROI outcomes are due to not initially identifying as many of the variables as possible, both tangible and intangible, acting in the organisational systems before the learning transfer takes place. These variables, once recognised, can be anticipated by stating their possible outcomes (Holton, cited by Yorks, 2005:214). Recognising and then strategically planning to influence selected intangible variables will lend to narrowing the gap between expected outcomes and actual outcomes in terms of ROI.

Holton's argument is of interest to this research as the Phillips Evaluation and ROI Model™, has a broad following in the business event organiser global industry. It is often the ROI model of choice for business event outcomes management and measurement. The Kirkpatrick-Phillips model is recommended by event organiser communities of practice such as the 24 000 member strong Meeting Professionals International (hereafter referred to as MPI) association. It is taught in the programme of the Certified Meeting

Planner (hereafter referred to as CMP) a professional business event planner designation supported by over 10 000 certified CMP-MPI members**.** The application of the model to business event design and business event ROI calculations will be considered further in chapter 4. As knowledge is often seen in modern organisations as having high organisational value and as a resource, it suggests that measuring the knowledge value created from a business event could in some way help to firstly ensure the knowledge repository's quality and secondly give a more accurate description of the intangible potential of the organisation.

2.4.3 The challenges of valuing knowledge

The value placed on knowledge as an asset is influenced by three intangible variables which form part of the organisation's culture. These are "state-of-mind factors, information-related factors, and quality issues" (Warren, 2008:618). Business events are opportunities for intangible asset creation so a brief review of what currently happens with intangible asset valuation versus tangible asset valuation, follows.

Rodgers (2007:213) reviews the changes in financial accounting over the past decades and concludes that a knowledge-intense world is driving change for asset valuation stating that there is "an evolutionary change from industrial age financial reporting to an information age financial and knowledge-based asset reporting". The author continues, "the fundamental law of diminishing returns for tangible assets may be replaced by a new manifestation of increasing returns for intangibles". As most organisations currently do not manage optimising the value contribution from their intangible assets, this author suggests the influence of knowledge workers, business internal repository knowledge and organisational intellectual property future business may contribute to "volatility and uncertain capital markets" (Radebaugh *et al.,* 2006:202; Rodgers, 2007:207).

In support of the effect of the subjective valuing of the worth of intangible assets (and thus their importance) Bose and Thomas (2007:654) offer the examples of the multi-nationals Walt Disney, Merck, and Johnson and Johnson where, in each case, the market

value of these companies is four times the value of their tangible assets. Unaccounted for organisational value lies in their intangible assets as: innovative knowledge leading to unique trademarked patents and processes; goodwill and brand equity arising from products and the organisation's service ethos; and human capital knowledge in the form of the ability to have the capacity to do research and development (Radebagh *et al.,* 2006:201). Markets potentially become unstable because the knowledge of what these variables contribute to economic activity is unknown. The value of intangible assets becomes subjectively linked to the unique, personal perspective of each investor (Sriram, 2008:353).

Actions such as random, unjustified attempts to optimise one intangible over others by an organisation's management to elevate performance, or to estimate intangible value in a traditional accounting methodology could potentially lead to massive spikes and drops in the valuation of market shares of competing organisations This has implications for the stakeholders and investors in organisations. For instance, asset value is always ascertained before capital funding is made available for growth. But, what steps can be taken to prove intangible asset values?

2.4.4 Intangible assets and organisational valuation

Potential investors seem to evaluate intangible value by their own calculations before investing (Sriram, 2008:353). Bose and Thomas (2007:655) quote Sullivan who concludes that as much as 35% of an external investor's decision to invest is driven by their own valuations of aspects such as the intangible of the organisation's knowledge and intellectual capital. Sriram studied methods of predicting future bankruptcy based on both a model of traditional tangible asset based calculations and a second hybrid model estimating both intangible and tangible asset contributions to long term economic viability.

Sriram (2008:354) importantly notes that investors typically strategise the possible future performance from current initiatives The author suggests that traditional valuation

methods suffice but are improved by considering what the lack of intangible asset management contributes to a productive future when evaluating an organisation's performance (Sriram, 2008:363).

So intangible valuation by any stakeholders - external or internal - is currently highly biased by lack of any real understanding of how an organisation values or uses its intangible assets. State of mind is an example of an intangible variable of the organisation's stakeholders (both internal and external) that affects how seriously knowledge is considered as important. Subjective valuations of knowledge hamper efforts to maintain its quality and these, in turn, affect the degree of appropriateness and the rigor (validity) of information used for making decisions in which tangible and intangible resources are leveraged for organisational performance (Warren, 2008:619). The degree of importance the organisation attaches to knowledge acquisition and application will affect the variety of strategies that the organisation will evaluate correctly when using its knowledge repository. The quality and pertinence of the knowledge of employees or information drawn from the ICT and IT has relevance to the valuation of intangibles as an asset. The relevance of this is that if variables that influence state of mind are drawn to the attention of an organisation, would the organisation not strive to maintain a highly alert state of mind?

It follows that a methodology that can facilitate unique designs as interventions that name and seek to change the behaviour of an intangible variable contributor of knowledge would be valuable in influencing the economic outcome. The traditional logic exhibited with valuing an organisation through its tangible assets is ignored or not available for intangible asset valuation. A financial trail is clear from years preceding a buy out or valuation with the behaviour of the organisation over long periods historically saved in financial records for the purpose of proving the organisation's worth. The strategies of the organisation to make money are reported in year end reports and investors can measure strategy against year end performance and make a judgement about management styles. None of this is available for intangible asset valuation. No audit trail of strategy versus intangible asset growth exists. Methodology to set down knowledge strategies and

link these to year end financial performances plus the growth of intangible resources would be as valuable as a financial trail in making judgements on an organisation's viability.

Existing models for ROI calculations as to how and where new knowledge contributes to the organisational asset base have been found frustrating and time consuming (Bartel, 1997:151; Burkett, 2005:104-105; Kline & Harris, 2008:49-55). It is then difficult to establish the value of a business event in enhancing existing knowledge or introducing new knowledge to an organisation. Intangible benefits of the value of a new idea for a product, or the influence of training for improved front line employee behaviour on customers and hence sales, are hard to quantify. As already discussed, management would tend to extrapolate that knowledge arising from a business event such as training had enhanced performance by extrapolating the 'knowledge effect' from numeric indicators. For instance how many units a new product sold after attendance at a trade show where knowledge of competitor products was gleaned or sales that occurred after a sales training session. The value of knowledge gained from a business event and improved performance are implied not proven. Researchers such as Jiménez-Jiménez and Sanz-Valle who have shown a positive relationship between learning and performance, and learning and innovation, recommend attendance at business events to acquire new knowledge for these improved performance (Jiménez-Jiménez & Sanz-Valle, 2011:416).

There is a traditional dependency of the organisation on monitoring variables of tangible assets performance to guide management decisions. In a similar manner, the indicators of the value of knowledge attained from a business event attendance in organisational performance would need to name the variables being tracked, show how the business event intervention will add value to the variables and prove the influence of their new behaviour on organisational performance over time.

2.4.5 Where do tangible and intangible assets meet and create value?

Tangible assets are easily seen either in raw materials, or in buildings and machinery. Their value is traditionally tracked by accounting practice with performance monitors and

financial indicators. This means that the attention of the organisation may be skewed towards managing tangible assets because they are easily seen and are associated with historic and tested tools. Brock and Yaniv (2007:838) studied accurate replication of organisational information and note that the organisation's attention is like human attention with a limit to the capacity it has to give attention to multiple sources of incoming data. Replication can be achieved by designing a template that sets up a process for knowledge acquisition and storage as a set of standardised steps. This helps ensure known and new information is stored and reused by specific methodologies, and not lost. In turn, any process that is standardised can be used to gather standardised sets of data that can provide information such as standardised measurement criteria (KPI) and long time series trends. The authors called the degree to which information is not overlooked as the degree of "attention capacity" of the organisation (Brock & Yaniv, 2007:835).

A proposition follows that, due to the huge daily inflow of intangible and tangible information to an organisation, it is natural to begin to filter out what it cannot absorb at the upper limits of attention capacity. Specifically, if the inflow of information arises from predominantly tangible sources, to perhaps ignore or not value as greatly what is subtle or intangible.

The ability to pay attention to the value of incoming information in terms of future organisational performance is linked to the degree to which the organisation is able to link information existing in the knowledge repository to new incoming information and create value from the combination of the two. The organisation has an absorptive capacity that is dependent on its attention capacity (Cohen & Levinthal, 1990:133; Brock & Yaniv, 2007:833).

Organisational performance dependency on knowledge both old and new means that its importance and its forms must be recognised by the organisation for success and growth. Leveraging the attention and absorptive capacities of the organisation to focus on knowledge as a value adding variable of organisational performance is discussed in more detail later in this chapter when considering the SECI model.

A demonstration of organisational filtering to attain a desired future is shown in the Hill Model (Table 2.5). The Hill model uses overarching organisational measurement indicators of "rate of business growth; profitability; net return on assets; cash flow; and financial gearing". These are a reflection of organisational viability measured by numerous tangible performance indicators. The indicators monitor the value of each type of sub-system and process that, in turn, contributes to the overall value of the organisational activities (Slack *et al.,* 1998:95).

The Hill methodology predominately focuses on tangible elements of the organisation following the traditional managerial attitude of identifying and managing the behaviour of variables that are tangible. This model shows the connection between corporate objectives and the organisation's operational activities to attain them such as the marketing strategy; satisfying customer needs by defining the organisation's offering as appropriate products and services; creating a supporting operations strategy composed of the elements of process control and infrastructure (Slack *et al.,* 1998:95).

The Hill model has only vertical flow not linking horizontal blocks with employee and knowledge relationships. The model of operations clearly shows actions of normative management such as standardisation and quality. The model also shows the importance of strategic actions for design, product range and price.

Yet the value of the people who deliver the interrelated systems in terms of skills, creativity and innovation as inputs of value creation is not mentioned. The tangible is separated from the intangible in this model which has a subliminal impact when interpreting the operational system by the model user. The intangible is not recognised as creating any value.

Table 2.5: The Hill methodology of operations strategy formulation

Source: Slack *et al*. (1998:95)

STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
CORPORATE OBJECTIVES	**MARKETING STRATEGY**	**HOW DO SERVICES AND PRODUCTS WIN ORDERS?**	**OPERATIONS STRATEGY**	
			PROCESS CHOICE	**INFRA-STRUCTURE**
growth rates	product/service markets	price	process technology	function support
profit	range of products/services	quality	trade-offs embedded in process	operation planning and control
return on net assets cash flow	specification mix Volumes	delivery speed	role of inventory capacity size location timing	work structure payment systems
financial gearing	standardisation	product/ service design		organisational structure
	Innovation	brand image		
		supporting services		

The Hill model for operations formulation strategy contributes little to the understanding of the influence of unseen elements such as the effect of employee behaviour on operations (Table 2.5). Yet every employee will be responsible to some degree for the efficiency and effectiveness with which each corporate objective is obtained. Employee knowledge would influence a variable such as the degree of innovation shown in step 2 of the Hill model. Innovation is recognised in the model as being a strategy to meet changes required in other areas which, in turn, would have a relationship with the attainment of corporate goals. Yet acquiring and embedding knowledge is not prioritised as a corporate objective of step 1. Innovation is seemingly treated as 'just another input' yet it is so much more.

It is an input resource but it is also a driver that releases unharnessed value potential in other variables. Another model of operations management by Du Toit *et al.* (2009:496) shows information and human resources as two inputs to the operational process. The value of the information and knowledge arising the human resource elements (the employees at work in the process) would require acknowledgement by leadership and management as being something more than just process 'inputs'. A cultural change would be required by the organisation to acknowledge that real value release from the process may lie in the role of knowledge and information as drivers to release untapped value in tangible assets. Value creation is dependent on the efficiency with which the organisation's infrastructure lends to product and service creation (Jones & Hill, 2010:124). Intangible variables influences are not typically documented in any operational process. The gap between recognising an interface for value creation at the operational level by defining the mix of tangible and intangible assets can be argued to invalidate the completeness of processes as described by Du Toit *et al.* and the Hill model.

Intangible and tangible asset variables of influence such as "[the level of] market capital, [the degree of] decision effectiveness and [the level of] innovation capital" are inseparable in their importance to value creation. The degree to which they can be encouraged to manifest can improve organisational performance but to do this there needs to be support from the astute and simultaneous application of organisational "human capital, process capital and technology capital" (Andreou *et al.*, 2007:68).

A background of constant internal and external environmental change requires continuous adjustment of the application of all the organisation's resources to achieve strategic goals (Hoebeke, 2000:7-8; Warren, 2008:86-87; Thompson *et al.,* 2010:43). A critical element of managing for the attainment of future goals often involves either hiring new employees or adapting the capabilities of existing employees.

It can be said that every organisational goal is only achieved with the support of its human resource element. Yet achievement of each goal and the employee role in this

process is measured only by calculating the internal organisational transaction costs (cost to organisation) of hiring, training and firing. In valuing the human resource contribution to goal achievement management is likely to look at only financial KPIs ignoring the value of knowledge or information generated in the same process.

The employee has a unique duality. She/he is both a tangible asset of cost to the organisation that the organisation accepts in return for applying individual skills and capabilities to productivity. But his/her behaviour and knowledge as an employee has unknown benefit value that can be used to influence further productivity. Leistner (2010:89) draws attention to seeing the employee as an asset for improving the margins of value creation by numerically valuing aspects of personal intangible abilities. For instance, an intangible personal aspect of the employee would be the value of a personal motivation to help the organisation succeed. Once variables such as this are named and attached to a measurement of their current state it is possible to take steps to influence the variable to a higher level (more productivity). When optimised this variable drives the opportunity for improved profitability (McAleese, 2004:116).

McAleese recognises that employee productivity cannot be known with confidence in advance of employment and yet after employment the level of employee motivation has a direct relationship with the level of the employee's productivity (McAleese, 2004:231). The level of employee motivation is an intangible but critical factor in achieving organisational objectives (Jones & Hill, 2010:120). Although management extrapolates that training results in improved productivity, the cost of employee training may not actually be recouped if either lack of motivation persists or if the employee leaves (McAleese, 2004:231). The organisation actually knows very little about the employee's motivation and so will not know with any certainty how benefit will accrue to the organisation from employee attendance at a training event. Organisational productivity would appear to be dependent on the degree to which the organisation understands its employee. Training is a business event regularly undertaken to improve organisational productivity but it appears that any value to be derived from it lies entirely with the

willingness of the employee to use the knowledge for the good of the organisation (Jones & Hill, 2010:120).

It may be said that organisational performance is as much dependent on understanding the intangible variables needed to acquire the organisational knowledge that ensures future organisational performance as it is on basing strategic management decisions on tangible asset indicators. It is then important to identify and name intangible variables so that their value to an organisational system can be managed.

2.4.6 Maintaining the value of intangible assets

Huff *et al.* (2009:41) suggests that the value of intangible assets in creating unique competitive advantages for an organisation over and above those created by tangible assets is because tangible assets are obtainable by all in an industry whereas intangibles such as employee know-how and organisation reputation take a long time to build and are unique to that organisation. A few of the organisation's intangible assets and an estimate of the time that would be needed to create them are given in Table 2.6 (Huff *et al.,* 2009:41). It is clear that the organisation has a great deal of knowledge invested in all of these resources and the time taken to create this shows how assets such as these can confer a unique competitive advantage to the organisation due to the length of time it took to create them (Huff *et al.,* 2009:41; Sriram, 2008:353).

All the items listed in Table 2.6 rely on employee actions to leverage both increasing their value and applying it for improved organisational performance. It suggests that knowledge that lends to effective and efficient application of resources is accumulated and honed for appropriateness and applicability as organisational strategies for performance evolve. This infers that organisations may think about adapting available knowledge strategies in ways appropriate to their own organisation's age of internal development (Milost, 2007:127). This author further notes that the ability of an organisation to manage staff losses is through embedding their knowledge in repositories and that this action would be defined within an organisational knowledge strategy

because the embedded knowledge may be influential in releasing future performance potential even though the employee has left (Milost, 2007:127).

A risk to future performance arises when information leaves with employees. Milost refers to this as a, "Generational change" that occurs naturally as the organisation ages and people join and leave (Milost, 2007:127). Older people who worked with the organisation as it grew know a great deal about that organisation. The impact of generational change or simply people changing jobs to the organisation's future activities cannot be underestimated. The organisation's knowledge repository needs to be actively protected by strategies to combat knowledge loss (Milost, 2007:127). The degree to which the information lost affects the organisation depends on how influential the employee is in the terms of the number of years of stored information that the employee has about the organisation.

A knowledge system, just like any other function of an organisation, requires a strategy that deals in short, medium and long term goals paying attention to the effect of generational change in these plans (Hoebeke, 2000:58-78). Milost additionally argues for human capital being the only independent variable in creating performance from the organisational assets (Milost, 2007:126-127). This argues strongly for considering the value of employee performance and of loosing employees from the organisation's systems carefully when strategising. Human capital is the independent variable on which value derived from other assets depends to unlock their potential. Influencing the behaviour of all the human capital in the workplace is pivotal in creating the organisation's desired future (Jones & Hill, 2010:86).

Improving the value of knowledge held within employees includes allowing them access to inflows of information. If the new knowledge is designed to augment existing knowledge this activity (a business event) has the potential to confer on each the appropriate requisite variety of information with which to make decisions and design adaptations to changing market place demands. Each system in a recursive level of many systems is responsible for changing the environment in which it operates to ensure its

survival and the continued value of its contribution to the organisation (Hoebeke, 2000:28). Maintaining the flow of knowledge required to keep each working as an optimised contributor to organisational performance is a continual process of review, reflection and action.

Table 2.6: The average replacement period of selected intangible assets
Source: Huff *et al.* (2009:41)

INTANGIBLE RESOURCE	REPLACEMENT PERIOD (YEARS)
Organisation's reputation	10.8
Product reputation	6.0
Employee know-how	4.6
Networks	3.4
Supplier know-how	3.1
Databases	2.1
Distribution know-how	1.6

2.4.7 Changing a state of mind – cognitive behavioural change

Nonaka *et al.* identify four categories of knowledge components as comprising the intangible assets of an organisation (Table 2.7). In each category, knowledge assets act as "inputs, outputs and moderating factors of the knowledge creating processes" (Nonaka *et al.*, 2000:20). This is an important concept of the way that knowledge acts. For example, the experiential knowledge asset of care, love and security only arises as an output of a shared knowledge process (Liker & Hoseus, 2008:301). Nonaka *et al.* use the Japanese term 'Ba' to describe the environment created within which behavioural change is encouraged to take place. Ba roughly translates as 'place' in this case place being the business event (Nonaka *et al.,* 2000:13). A shared knowledge process has been established previously because of the platform that Ba creates for the process to be enabled. Trust improves the environment for Ba and so trust now becomes an input for the degree of success at creating a platform of Ba for further knowledge sharing.

The four categories of knowledge assets are experiential, conceptual, routine and systemic (Table 2.7). Each has a relationship with one of two types of knowledge, tacit or explicit. Creating an enabling Ba platform for improved knowledge would need attention to be paid as to what type of knowledge asset was to be developed. The business event design should be guided by the type of knowledge required. By influencing the defined attributes required for each asset to develop it follows that an improvement in their value adding behaviour could improve overall organisational behaviour. But, how often is an employee sent to an event with specific knowledge objectives? Attending the event is not enough to ensure the absorption of specific knowledge.

Table 2.7: Four categories of knowledge assets
Source: Nonaka *et al.* (2000:20)

Experiential Knowledge Assets	**Conceptual Knowledge Assets**
Tacit knowledge sharing through common experiences: • Skills and know-how of individuals; • Care, love, trust and security; • Energy, passion and tension.	**Explicit** knowledge articulated through images, symbols and language: • Product concepts; • Design; • Brand equity.
Routine Knowledge Assets	**Systemic Knowledge Assets**
Tacit knowledge placed in routines and embedded in actions and practices: • Know-how in daily operations; • Organisational routines; • Organisational culture.	Systems of **explicit** knowledge recognised and packaged: • Documents, specifications and manuals; • Database(s); • Patents and licences.

Nonaka *et al.* note that Ba operates at every level from individual to organisation, organisation to organisation and organisations to industry. The degree of coherence between these entities that results is as a result of their degree of shared Ba. The level of Ba is as a direct result of the entities ability to be able to interact with each other (Nonaka *et al.*, 2000:19). This explanation of an environment in which knowledge dynamically grows fits the concepts of Beer's Viable Systems Methodology (hereafter referred to as VSM) mentioned earlier where an organisation is reliant on its viability and success for the individual functions of each autonomous unit (Espejo, 1989:90; Nonaka *et al.,*

2000:26; Walker, 2001:11). In the case of knowledge assets the autonomous unit is the employee who is essential to creating all four categories of intangible assets.

Green (quoted in Andreou *et al.*, 2007:54) suggests that management should focus on encouraging a framework for knowledge management based on attaining four key objectives, innovation (new ideas), organisation (operational structure), socialisation (networks and knowledge flow), and culture (a learning environment) (Table 2.8).

Table 2.8: Knowledge management objectives
Source: Adapted from Green quoted by Andreou *et al.* (2007:54)

OBJECTIVE DESCRIPTION	KNOWLEDGE MANAGEMENT OBJECTIVES
INNOVATION	The generation of new ideas to improve the efficiency and effectiveness of identifying and implementing new products, new services, advanced skills, improved activities and best practices for economic gain.
ORGANISATION	The structuring of resources (technology and human capital) to improve the efficiency and effectiveness of capturing, transferring and sharing knowledge throughout the enterprise for economic gain.
SOCIALISATION	The establishment of interactions between human capital resources to improve the efficiency and effectiveness of capturing, transferring and sharing knowledge throughout the enterprise for economic gain.
CULTURE	The establishment of an environment of visions and values to improve the efficiency and effectiveness of collaboration, creativity, communication, trust and sharing throughout the enterprise for economic gain.

These four objectives would be part of the structure of an organisation's knowledge framework. The degree to which these would be influenced by a business event would become part of the standard, expected outcomes in an event design. However, they would only be clear to an event attendee if they had been alerted to these needs before they attended the event.

Andreou *et al.* demonstrate how each objective for an intangible asset can be linked to a value driver, in all identifying eight value drivers as seen in Table 2.9. These value

drivers affect an organisation's value creating environment (Andreou *et al.,* 2007:54). If focused upon in the design of business events, they can be enabled as intangible asset drivers creating more value.

Table 2.9: An intangible asset taxonomy of value drivers of intangible assets
Source: Green quoted by Andreou *et al.* (2007:54)

VALUE DRIVER	DEFINITION
1. CUSTOMER	The economic value that results from the associations (e.g. loyalty, satisfaction, longevity) built by an enterprise with consumers of its goods and services.
2. COMPETITOR	The economic value that results from the position (e.g. reputation, market share, name recognition, image) built by an enterprise in the business market place.
3. EMPLOYEE	The economic value that results from the collective capabilities (e.g. knowledge, skill, competence, know-how) of an enterprises' employees.
4. INFORMATION	The economic value that results from an enterprise's ability to collect and disseminate its information and knowledge in the right form and content to the right people at the right time.
5. PARTNER	The economic value that results from associations (financial, strategic, authority, power) established by an enterprise with external individuals and organisations (e.g. consultants, customers).
6. PROCESS	The economic value that results from an enterprise's ability (e.g. policies, procedures, methodologies, techniques) to leverage the ways in which the enterprise operates and creates value for its employees and customers.
7. PRODUCT OR SERVICE	The economic value that results from an enterprise's ability to develop and deliver its offerings (for instance products and services) that reflects an understanding of market and customer(s), requirements, expectations and desires.
8. TECHNOLOGY	The economic value that results from the hardware and software in which an enterprise has invested to support its operations, management and future renewal.

As they have been recognised and named in the design as part of the expected outcomes of the event, they can be influenced to help deliver improved economic value. Improved economic value can potentially be generated by these eight drivers of a business event. By selecting and mixing the drivers, an assortment of possible outcomes could be deliberately designed.

Understanding the 'needs' of organisational knowledge renewal affects the designing of a potentially successful business event. Success follows in a degree dependent on how well the need was interpreted (Getz, 2007:178-179). The event process hopes to bring about a behavioural (state of mind) change in the attendee. Adding new knowledge to the event attendee's existing knowledge via the vehicle of an event is solely focused on creating opportunities for future organisational competitive advantage. Lewin's equation for creating opportunity for behavioural change in a person (chapter 1) shows that there is a dynamic interrelationship between a person and their environment (Lewin, 1951:25).

Lewin (1951:25-27) notes that the degree of behavioural change as a result of this relationship will also be dependent on the mix of values and needs existing within that person including their future goals, past experiences and personal needs. McClelland (quoted in Spencer, 1997:5) notes that it is the employee's competencies that manifest in their thoughts and behaviour applied in their job that allows some employees to give a better job performance than others in the same job. The effect of personal competencies on the organisation's performance will be looked at again in chapter 4.

McClelland and Lewin's statements have obvious implications when considering the organisation's opportunity for future performance. The same dynamic applies to people in a group and here the group is part of the environment of change. This is the effect on each person's "life space" (Lewin, 1951:xi; Lewin, 1951:25). It follows then that to create an event that manifests an environment conducive to creating change in individual life spaces, there must be an understanding by the event designer of the needs of the targeted attendees. Establishing antecedents based on the attendee profile would influence event knowledge flow.

Getz (2007:236-241) suggests that both antecedents and constraints need to be considered when designing an appropriate event experience. Getz (2007:179) emphasises the importance of these elements in establishing an effective event liminal zone where, "the conative, cognitive and affective dimensions of experience are modified by the level of involvement/engagement".

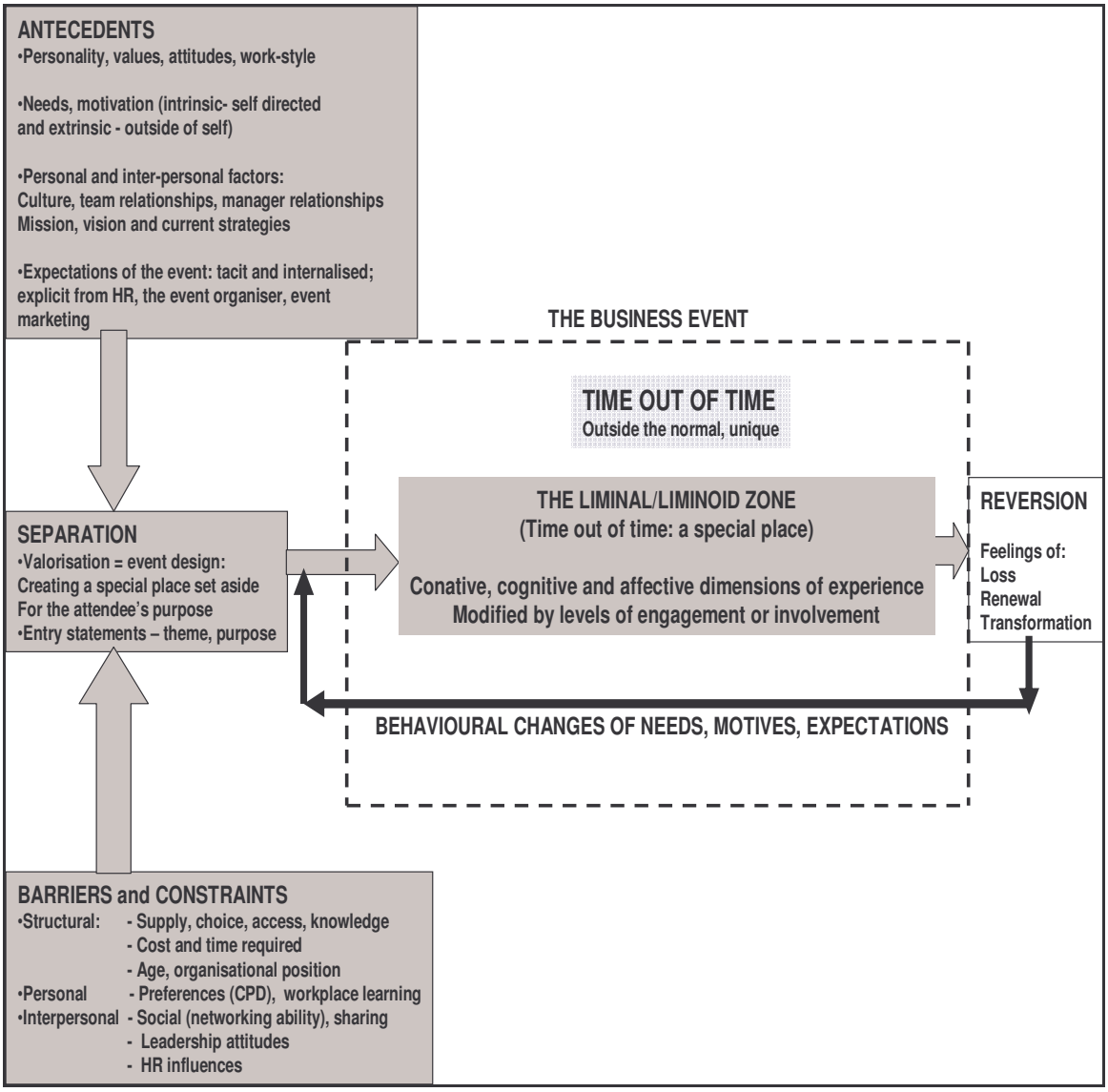


Figure 2.6: A model of the business event experience

Source: Adapted from Getz (2007:179)

Figure 2.6 shows the flow of the event and Getz proposes that the liminal zone create the communitas of "belonging and sharing" that could be interpreted as an important antecedent in event design. Neumann (2007:272) notes that the reason that a liminal zone is important is because it allows participants in this event to play a liminal role which "places them betwixt and between more permanent social roles" and, in so doing, "making them able to accept events of the production [event content] as both real and not real" to their current sense making. In this state, a change of behaviour may come about as the individual feels free to test and use new knowledge and thoughts. Design features can also encourage communitas at a business event which, in turn, creates an event atmosphere that lends to successful networking and knowledge sharing (Getz, 2007:179). Ba can be thought of as the building blocks and attributes that create the opportunity for liminality and communitas. Acknowledging the type of knowledge asset and its relationship with a type of knowledge (tacit or explicit) has been shown to be a platform in itself known as Ba. Ba becomes an important part of the pre-event design.

Getz's statement confers that the attendee experience has a profound relationship to their level of involvement with the event. As a result of the event, there are associated degrees of change in the attendee: their conative dimension would change, reflected in purposeful action(s) taken by the event attendee as a result of the event; change in the cognitive dimension attest that the event has had an effect on the attendee's thinking; and affective dimension response triggers the emotional response which, in turn, links the other two dimensions.

2.4.8 Managing the timeline of cognitive change from a business event

Getz's argument for events creating change in a person supports Lewin's model for behavioural change in chapter 1 which claims that behavioural modifications result from the two-way mix of people and environment. Bandura (1986:23), however, suggests that the relationship between person, the person's behaviour and the environment is, in fact, a three-way causal relationship. Bandura (1986:23-28) proposes that the actual behaviour of individuals at meetings can affect the degree of change in that person or the group. For

instance, a person with a defensive attitude to change hinders others in the group by creating dissonance. This, in turn, limits the opportunity for constructive knowledge sharing**.** Champoux (2007:125) notes that it is as a result of these multiple stimuli coming from the environment, the other people acting in that environment and the consequent cognitive changes that take place in the individual as a result of this social interaction that causes new behaviour.

Conversely, it can be seen that while individuals might be restrainers of change, some individuals may facilitate change through their actions and attitude and these people are drivers of change. Ketsi and Syväjärvi (2010:214) concur, noting however that over-controlling creative tension in groups can inhibit major breakthroughs so a degree of opposition should be encouraged but, at the same time, they note that if an individual's defensive actions are to such an extent that they create a high degree of dissonance, they should be minimised. Facilitation is then one variable that can be managed when establishing an effective liminal zone by dampening obstructive behaviour or encouraging positive behaviour for effective knowledge transfer.

Bandura (1986:29) draws attention not only to other people's behaviour as triggers "recognising reciprocal causation" in change but also the importance of the meeting setting being one that promotes convivial influences so triggering more diverse knowledge exchanges (Bandura, 1986:28-29). The importance of the environment and the people in it is recognised by Lewin and Bandura. Bandura extends the effect of environment and the people in it to include an equation component that takes into consideration the effect of personal behaviours of the people present on the process of behavioural change. In addition to this new variable, research that examines the environment (e) of Lewin's equation suggests that (e) is affected by both the internal environment and the external environment in which the individual is operating (Andreou & Bontis, 2007:357).

Finally, it can be argued that behavioural changes, as instigated by all types of business events, take place in a very finite window of opportunity for behavioural change so the

level of change of behaviour is dependent on the success of the design in delivering the knowledge content required in the time allocated**.** This is at the event. The transfer has to be timely, scheduled as to impact, and appropriate to have any chance of influencing a person's future performance.

It seems that behaviour, environment and people are all variables of influence in behavioural change and in liminal zone creation. To understand how aspects of these can be isolated as variables influencing knowledge flow at an event, it is important to evaluate how knowledge accrues to companies from business tourism event attendance. Linking a behavioural change from event attendance to understanding how the new knowledge works to improve the organisation's performance is important. The goal for effective liminal zone design would be to identify all the antecedents and constraints conducive to controlling a desired behavioural change in a business event attendee. The next sections will establish what happens inside an organisation with regards to knowledge management because only then can interventions for business tourism event design be contextually applied.

Resources are managed in a manner that strives to satisfy customer needs. Tangible assets are applied to the problem but intangible assets often provide the elements that create the opportunity for innovation to uniquely meet changing customer needs. Employees are each a unique intangible asset and can be one of the key control mechanisms for creating long term viability in organisational systems, but the problem is to be able to assign economic value to the human capital element of the organisation. Uniqueness can bestow competitive advantage, yet creating the conditions for uniqueness is relatively unknown. Unless an asset has a measurement associated with its value, it will be unmanaged in the value contribution weighting.

Change to customer needs is addressed by new strategies and resources both tangible and intangible by adapting old and sourcing new knowledge. Every intervention is to improve the organisation's capability to meet the fresh challenges and comes at a cost to the organisation so ROI must be measured (Humble, 1967:17-43; Warren, 2008:85-111; Huff

et al., 2009:30-52). Future performance is then ensured by the attention to the levels of existing and future resource requirements both tangible and intangible (Kakabadse *et al.,* 1988:6-8; Warren, 2008:124-135). Future performance requires planning a desired future as strategy.

2.5 Information and the employee influences on strategic management

It has been noted earlier in this chapter that little is documented by organisations about the effects of knowledge on organisational performance. It has been shown that management quite rightly plan interventions applied as strategy decided after reviewing relevant and accurate knowledge to inform future actions (Davies, 1991:63-65; Armstrong, 1999:248-249). The quality of future performance is as a direct result of the organisation's effectiveness in considering the applicability of knowledge from the resources available such as the people both inside and outside of the organisation, processes, documents and policies. Information underpins all decisions taken for future organisational viability (Kakabadse *et al.,* 1988:28; Wickens, 1995:219-237; Handy, 1999:325-330; Getz, 2007:91). The discussion presented has shown that business events and a knowledge strategy have roles to play in organisational management, but what constitutes 'enough' knowledge on which to base future strategy?

2.5.1 The right knowledge at the right time

Warren (2008:121-165) notes the value of knowledge available in an organisation is dependent on the organisation's strategic actions to ensure its availability as knowledge depletes over time so someone in the organisation must have the right to seek knowledge that reduces knowledge decay (Andreou & Bontis, 2007:355).

Recognising the importance of a steady flow of information into the organisation if the decision-making process were to be of value to future performance Drucker (1968:75) stated, "constant improvement of our ability to 'do' by applying to it our increased

knowledge is one of the tasks of the business enterprise and a major factor in its survival and prosperity".

Drucker then described the "knowledge worker" (1970:2) as the employee who embodies the principle that every individual's knowledge contributes to future organisational success if they are allowed to apply it effectively (Drucker, 1970:1-25). This infers a pool of knowledge created by employee contributions but Drucker did not elaborate on what is required in applying it effectively. Kriger (2005:168-169) reviews how every individual's knowledge is added to that of a larger network of the people operating both inside and outside the organisation, thus creating a knowledge pool and greater opportunity from a matrix of knowledge for creating a unique action leading to competitive advantage through improved performance.

Kriger (2005:171) suggests workers be encouraged to seek new information in a visionary capacity (about markets, developments and opportunities) while maintaining the quality of existing organisational systems that reflect the existing goals of the firm. Kriger (2005:171) concurs with Drucker in concluding that a diversity of employee views and knowledge (about the firm's existing systems and in change in external environment) contributes to better sense-making of complex organisational situations thus ensuring the firm an improved opportunity to run an adaptive response well.

The value in the human capital of the organisation is hard to measure but makes an important organisational contribution as an intangible but valuable sense-making asset.

Furthermore, the exact properties of this asset are unique to each employee (Baron & Armstrong, 2008:8-9). So understanding how individual employees can become a multitude of sensors and feedback mechanisms for their larger organisation is important in defining startegies that assure future organisational success.

2.5.2 Employees as sensory monitors of the organisation's environment

Pickering (2004:499-521) suggests using Stafford Beer's viable systems modelling which makes an analogy to the uniqueness of the human capital contribution as follows: Beer suggested business behaves in every way as a living organism would by striving to thrive in a world of complex environmental change. Beer noted that the organism has systems that 'feel' the need for change in order to survive, persistently seeking at all times the best way to remain healthy (Walker, 2001:10). Beer's identification of the need for an attribute of 'feeling' for the organisation's survival encompasses the importance of the innate qualities of human capital – an individual's intelligence, skills and expertise (Dalkir, 2005:134; Baron and Armstrong, 2008:8-9). The employees are the instruments of 'feeling' and their participation is requisite to improving the organisation's viability. The employees are the links that move freely between lower and upper systems (processes and levels) of the organisation and, in so doing, sense the health of the organisation.

Beer's and Kriger's views advocate that information is, in fact, the life blood of survival and future performance. Knowledge empowers change. Beer (quoted in Pickering, 2004:499-521) advocated that management define the channels of information flow thus ensuring accentuation of data's' importance to those that can respond when requiring immediate reaction. Beer also recommends managing the volume of the content of the flow by attenuating data-overload scenarios to succinct packages such as policies and manuals (Pickering, 2004:509).

Ashby's Law of Requisite Variety goes further, encapsulating the importance of information when seeking to endow the organisation with the ability to deal with change. The law states that, "Only variety can destroy variety" summating that when change impacts a system to the extent that the system does not have the required response within its existing set of responses, the system needs to create a new response if it is to survive (Nonaka *et al.,* 2000:28; Pickering, 2004:502; Boisot & McKelvey, 2010:421).

This supposes that the firm will seek new and enlightening information to be assimilated when fashioning a response to the shifting environment. The information will be sought by those who understand the processes best, these being the people who work with them. These people reflect on what is wrong in their system and seek learning to address change for improvement.

Ashby's Law of Requisite Variety can be managed by and through the people in the systems. Appropriate information flow grants the employee the knowledge to understand what variables to change and what effect they can anticipate the change having (Hoebeke, 2000:27-28).

There are environmental conditions required for Ashby's Law of Requisite Variety to play a meaningful role in organisational knowledge development are discussed in more detail.

2.6 Conditions that can influence requisite variety

Having established the relationship of new knowledge and the employee to future organisational success, several authors have noted that it is a competitive advantage to set in place concrete organisational guiding principles if wanting to manage knowledge acquisition and the latter's application fruitfully (Senge *et al*., 1999:48-49; Gilbert, 2000:111; Powell & Swart, 2005:49-55).

Gilbert (2000:112) notes that the success of an organisational learning system in bringing added value to all other systems in the organisation is dependent on the commitment of every employee to adopting a willingness-to-learn perspective. The organisation needs to facilitate conditions that encourage individual knowledge acquisition, in so doing, extending the employee capabilities and adding the potential for value in future organisational performance. These conditions include planning business activities for training, networking and exposure to new trends.

Drucker and Gilbert establish that the responsibility for finding knowledge for innovative interventions lies with every employee whether a member of management or an operational employee competent in the area of change. The employee is the resource in the knowledge mix competent to engage in information seeking and assessment of relevance in seeking adaptive actions (Darroch, 2005:101-113).

Woiceshyn and Falkenberg (2008:98) identify four key components existing in all companies and used for problem solving: Individual knowledge (including skills, experience and personal networks); the tools/infrastructure within the organisation to gather and maintain the knowledge stored in technical systems (operational process documents); methods of controlling knowledge flow and levels (managerial systems such as policies and directives); and the value the firm assigns to knowledge creation. Woiceshyn and Falkenberg (2008:85-98) comment that whether the value-adding activities of the organisation are reiterative with little variation (like a production plant) or, unique solutions bespoke for each problem, that the four types of knowledge components remain the same but the levels required of each varies.

With repetitive processing (such as on a production line) which experiences similar small deviations in running process, the value adding action of seeking new information drops because the emphasis is on old knowledge. Old knowledge is based on past experience and training applied daily to maintain the usage of available resources within acceptable levels relative to output. One-off solutions or innovation for existing re-iterative processes requires unique, new solutions and the requisite variety of information existing in the organisational system will limit adaptation. In this situation the organisation looks outside for new knowledge. This idea reinforces the principle that the purpose of learning is to increase and renew the requisite informational variety available on which to base informed decisions for change (Deschamps, 2000:134-138).

Actions taken by individuals in knowledge acquisition are a characteristic of a learning, adaptive organisation (Von Krogh, 1997:477; Bahra, 2001:76-77; Gorelick *et al*.,

2004:26-32). Optimised use of knowledge is a feature of high performing companies (Bahra, 2001:120-129; Darroch, 2005:111-113). The authors note that the resulting architecture of an organisation's knowledge system should ensure that the knowledge is contextualised so users understand its importance to themselves, their functions and inter-related functional areas.

Research by Porter and Siggelkow, and Toivianen concurs that contextualisation is critical when creating solutions – the knowledge alone is not enough (Toivianen, 2007:347; Porter & Siggelkow, 2008:52). Moreover, Appel-Meulenbroek identifies the use of "co-presence" where employees sharing meeting and working space and holding informal discussions often trigger each other to formulate new ideas by blending together their personal ranges of new and old knowledge (Appel-Meulenbroek, 2010:189-201).

Erden *et al.* notes that this is the group working as a "collective mind and body" with a shared sense of unified timing for change and innovation (Erden *et al.*, 2008:7-10). Each individual alters their individualistic behaviour for the good of the whole and, as a result, the knowledge becomes embedded in their group social and intra-organisational network. Darroch recommends that sharing the same knowledge makes all in the group mindful of what they seek to achieve, swelling the pool of knowledge from one to many (Darroch, 2003:52).

Group sharing is a manner of multiplying the value created from the knowledge over that created by a solitary individual holding it (Sveiby, 2007:1649-1652; Baron & Armstrong, 2008:9-11; Erden *et al.,* 2008:4-9).

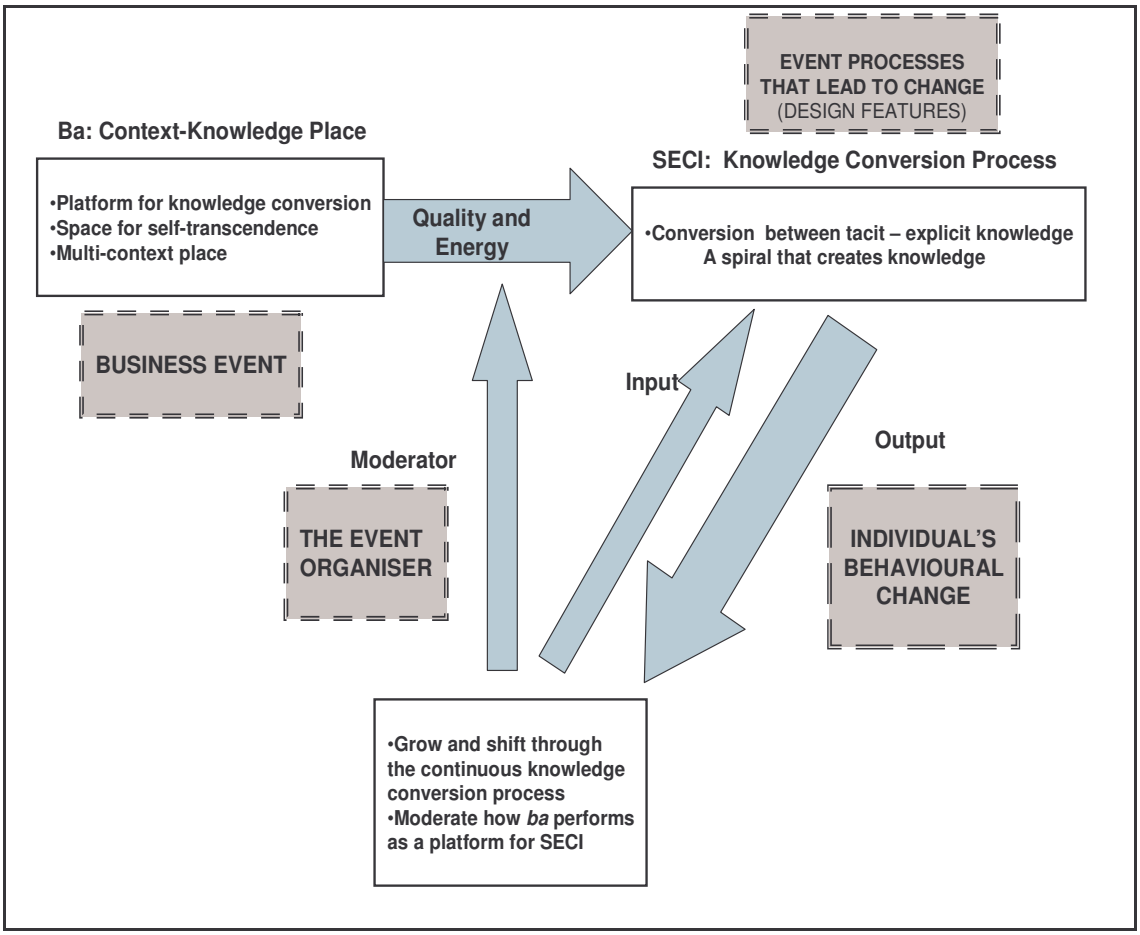


Figure 2.7: Three elements of the knowledge creating process
Source: Adapted from Nonaka *et al.* (2000:8)

Nonaka *et al.* explains this as 'Ba' (Figure 2.7) (Nonaka *et al.*, 2000:14-16). Ba is an interaction in which participants share a specific time and space contextualised by that moment and activities in that moment. This moment creates new knowledge specific to the energy in the Ba at that moment. The energy comes from the people and the place and its relevance to their concern at that moment. Ba may be initiated in both virtual and physical meeting places. The place is not particular as long as it gives Ba the opportunity to manifest itself (Nonaka *et al.*, 2000:18).

The dotted descriptor boxes in Figure 2.7 are added to Nonaka *et al.'* original diagram to highlight connections noted previously between the business event and its effect on

knowledge acquisition. Ba has an interesting relevance to building transforming experiences as postulated in Getz's concept of designing a liminal zone - the requirement for creation of special, specific places in space and time. Nonaka *et al.* additionally note that Ba is the designed stage set for a behavioural change in an individual "from being to becoming" following the equation proposed for behavioural change set out by Lewin and discussed previously (Nonaka *et al.*, 2000:8).

The moderator function in Nonaka *et al.'* diagram would be responsible for matching event content and delivery processes to knowledge needs and suggests the actions of the event organiser (Figure 2.7). In this diagram, Nonaka *et al*. introduce the acronym for the way in which knowledge flows through an individual and from the individual to others. They named this flow process SECI (Figure 2.7).

Based on the variable relationships reviewed, the causal loop diagram explores the theoretical relationship between the organisation's overall strategic objectives for the organisation to thrive, grow and generate profit; the strategic knowledge actions taken by the organisations functions; and the way in which these would affect the design of a business event intended to improve their ability to attain their goals (Figure 2.8).

Causal loop 4 is proposed as a balancing loop. This means that the best value from the loop is generated by the variables of the loop being in balance. The overall strategy of the organisation dictates the overall knowledge strategy. The functional operational units of the organisation follow the overall strategic objectives but design their own knowledge strategy in a manner that adds value to the overall knowledge strategy.

The design of the business event sets goals that meet the functional knowledge need but attenuating or dampening the behaviour of the variables picked to modify in line with the overall knowledge strategy. This is because the overall knowledge strategy dictates the encompassing path of all functional units for the organisation's growth and profitability.

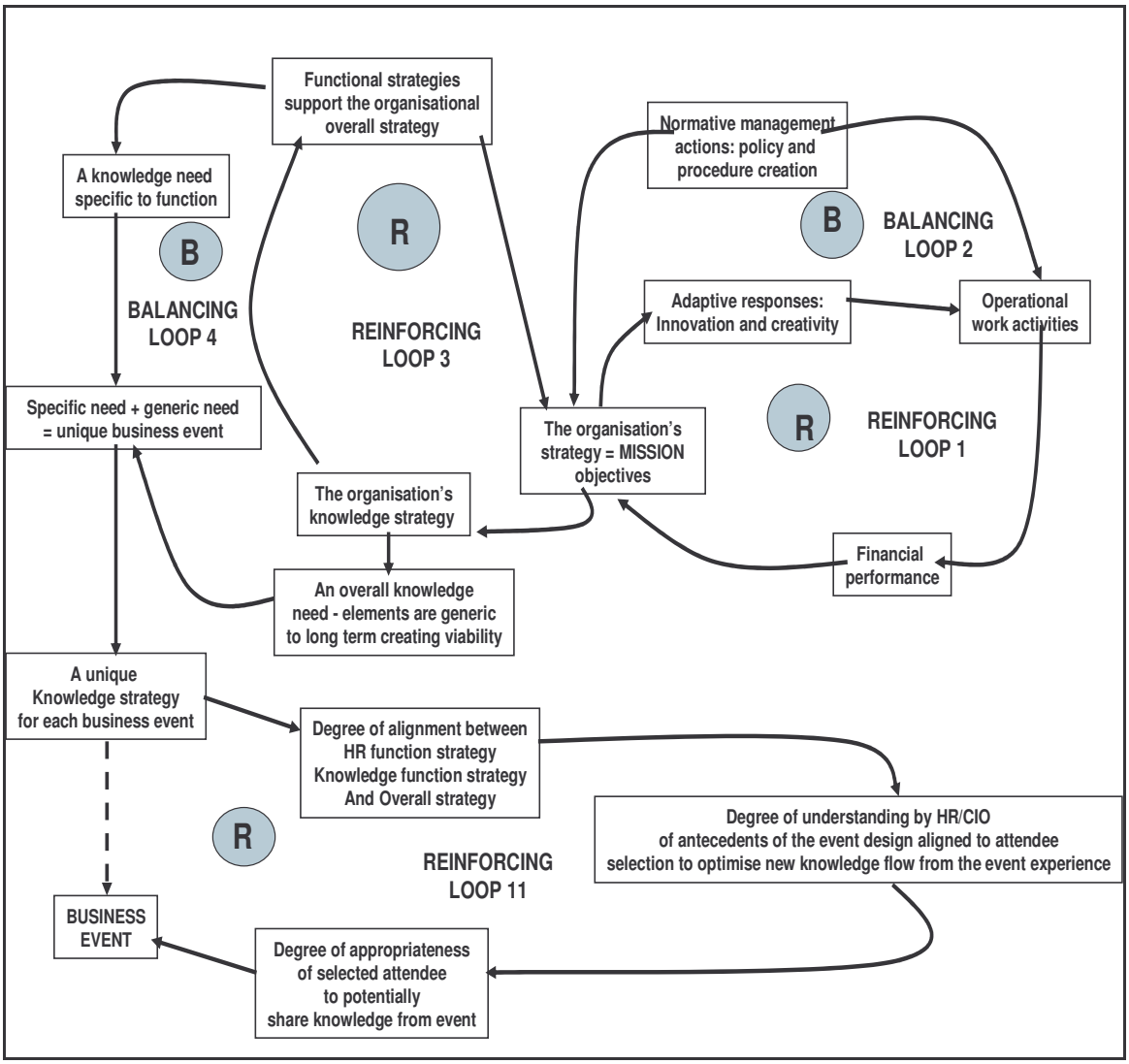


Figure 2.8: The causal loop diagram of the organisation's relationship to a business event

Source: Author's own compilation (2010)

Creating directives for communicating planned change arising from application of new knowledge to employees has definite implications for reducing risk from making inappropriate decisions (Von Krogh *et al.,* 2001:430-435; Boisot & McKelvey, 2010:420-428). Managing organisational risk is one of the key responsibilities leaders and managers carry out for their stakeholders. Von Krogh *et al.* (2001:430-436) point out that, due to the complexity of organisations, when establishing new knowledge in the

organisation's systems, it may create the requisite information variety for adaptive reactions but may also bring unanticipated results. The authors note that the potential for the unanticipated lies with every change to any system. This is because adding new knowledge to old can create previously unknown stresses between processes.

This phenomenon occurs because the level of complexity of the system inter-relationships was not initially understood. Minimising disruption to the running of the organisation and thus risk of loss of earnings can be enhanced by a set of directives or a policy on how new knowledge will be created and disseminated (Sveiby, 2007:1636-1638). The policy would define the attributes required to aid an "intelligent, complex, adaptive system" (Dalkir, 2005:67). This statement bears out the diagrammatic representation by causal loop of the organisation's policy and procedures (normative) management actions (Figure 2.8).

The literature review has so far established that in the process of seeking information to ensure its future viability, an organisation involves internally its people as individuals (both employees and leaders); its people in teams; and a communication network to spread knowledge to all these people. It has also been established that knowledge flows from external sources into the network from many places but in particular from customers and peers. The internal knowledge pool is also depleted by people leaving. Time erodes the pool's value to the organisation unless constantly renewed in response to change.

To this end, it is important to review the literature on how knowledge is created in employees if an event is to be designed that includes triggers to induce cognitive and behavioural change.

2.7 Nonaka on instigating behavioural change

Ikujiro Nonaka, as mentioned briefly in the previous section, is one of the foremost authors in the field of the theory of relationships between knowledge and business. His work and that of co-researchers lends to the view Getz has given that to manipulate a

behavioural change in a person, there are variables that can be managed to influence a behavioural change of a specified type- as an outcome. Examining Nonaka *et al.'* model lends to understanding how a business event becomes a useful tool of a knowledge strategy.

In the 1990s, Nonaka *et al.* termed the phrase "organisational knowledge creation" when considering how companies created knowledge (Nonaka *et al.*, 1996:203-204). Nonaka *et al.* theorise that knowledge exists in two forms for humans. Firstly, they describe tacit knowledge which encompasses a type of knowledge entirely unique to each person, the content of which is contextualised by the individual's experiences, existing only as a personalised mental state and therefore not easy to express. Then, secondly, they brought into focus explicit knowledge in which knowledge can be shared by visually representing it to others and elements by which it can be processed, transmitted and stored. Nonaka *et al.* expand the knowledge creation theory to explain four forms of knowledge conversion: socialisation (from individual tacit knowledge to group tacit knowledge): externalisation (from tacit knowledge to explicit knowledge); combination (from separate explicit knowledge to systemic explicit knowledge); and internalisation (from explicit knowledge to tacit knowledge). This became known as the SECI model and this model has relevance to understanding the relationship between business event activities and business performance (Nonaka *et al.*, 1996:205-206).

2.8 The SECI model

2.8.1 Socialisation – the 'S' in the SECI model

The 'S' of the SECI model describes the process of socialisation which is required to create tacit knowledge (Figure 2.9). The socialisation process involves two steps, an individual and then a group creation of knowledge in a tacit manner. The process is often referred to as tacit to tacit knowledge transfer (Gorelick *et al.*, 2004:12).

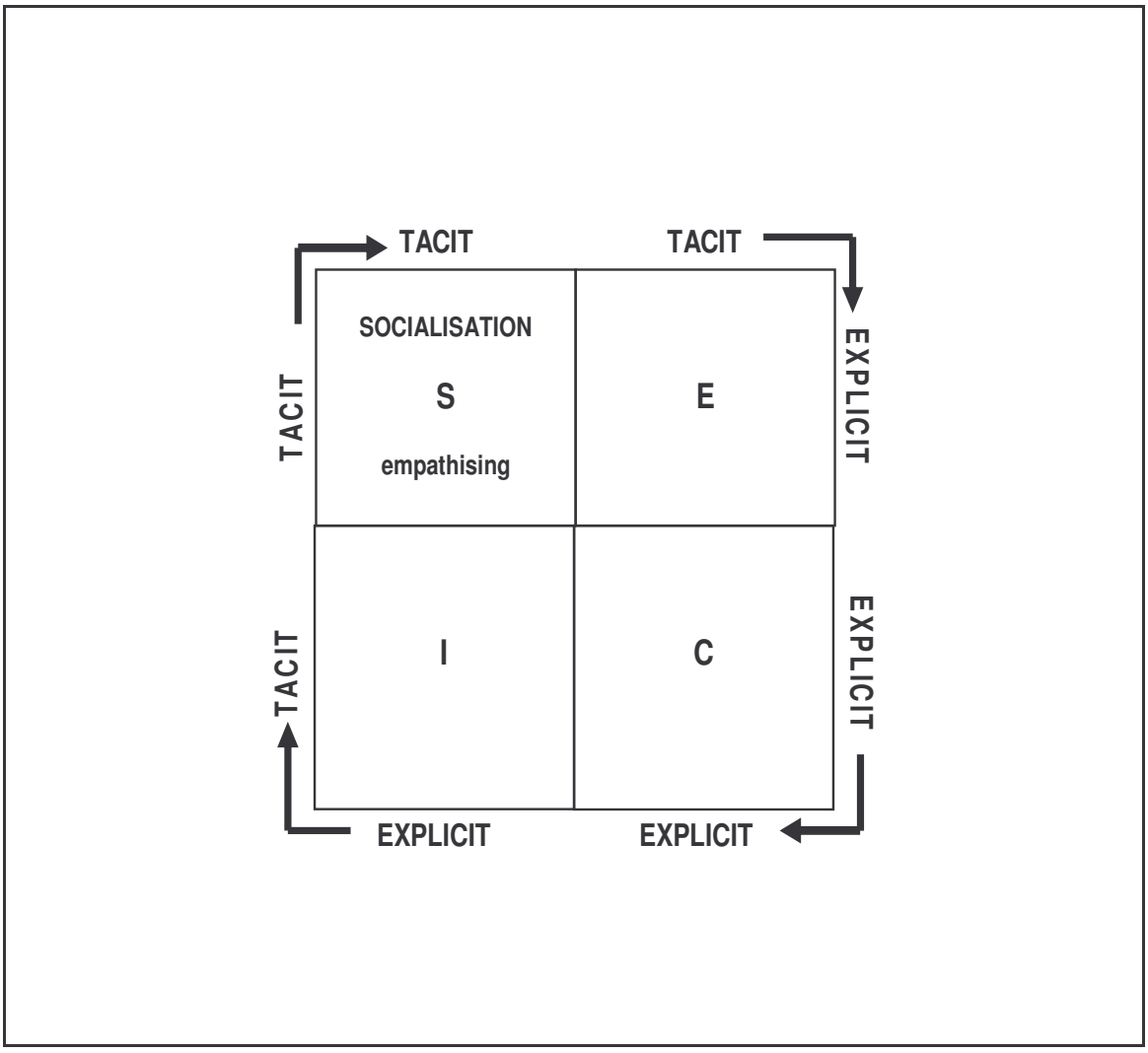


Figure 2.9: The 'S' for socialisation in the SECI process
Source: Adapted from Nonaka *et al.* (2000:12)

First, the learner acquires new tacit knowledge (a knowledge transfer) as an individual development. The person watches or works with someone such as in an apprenticeship of master and student, or listens to someone who is a peer in the field of interest or reads around a new subject (Nielsen, 2009:59-62). Secondly, the individual's tacit learning is embedded and extended to several other people interfacing with this learner through the vehicle of informal discussion (Floyd *et al.,* 2005:137-140). The learner's knowledge and that of the group is joined.

The joining action often results in multiplications of the initial value as innovation and creativity from others' minds act as triggers. Steps 1 and 2 do not need to occur simultaneously. The individual may have attained the learning at any point in their lives but it is within the unique combination of the work of this particular organisation, the organisation's objectives for viability and other employees in this organisation, that step 2 takes place evolving in a unique way relevant to these circumstances alone.

Floyd *et al.* (2005:124) suggest that the value creation of tacit to tacit transfer can be improved by the use of facilitators or "boundary spanners". Floyd *et al.* note that these individuals are often from the sales function of the organisation. Sales have exposure to the external environment (the customer, competitors and trends often on the vehicle of a trade show) and are a feedback link for new information to the organisation. Changes to products and services may result and this affects the organisation's operational systems which, in turn, change their own systems, processes, policies and networks to adapt (Slack *et al.,* 1998:179-181). Employees at every interface from sales to operations have to meet and have constructive input for successful change. Their personal capabilities are responsible for future sales successes and yet Slack *et al.* report how creativity can be stifled or ignored by applying control systems that emphasise efficiency over creativity, only recognising senior staff input as creative, only expecting creativity from certain organisational functions such as research and development and, most importantly, by not recognising and rewarding creativity (Slack *et al.,* 1998:813). Organisational frameworks can be constraints to organisational knowledge inflows if this type of socialisation is not encouraged.

Evers and Knight (2008:546) citing the research of Shipley *et al.* (1993) concur that employees can influence organisational adaptation and report on a similar occurrence with the importance attached to a trade show event by the organisation's marketers. Marketers see the event as not only a product sales opportunity but also a "public relations, corporate reputation and market research" exercise. These are exercises in information sharing about their organisation and although intangible and seemingly immeasurable, the marketers consider these activities important to influencing future

organisational performance. It would seem that marketers also act in the role similar to sales personnel of being internal boundary spanners feeding data back to the organisation. Evers and Knight (2008:546) cite research by Rosson and Seringhaus (1991) that shows that 49% of the companies in Rosson and Seringhaus's research sample did not generate significant sales from the trade show or within the following year from participants at the trade show. Yet these organisations continued to support trade shows so must be achieiving value from attendance in some way.

Evers and Knight (2008:546) note that several researchers question the benefit of cost to exhibit against sales generated but this brings into focus the problem of intangible assets. It can be suggested that the researchers were too focused on measurements of success based on tangible assets and are not valuing the marketers perspective of the showcasing of intangible knowledge about the organisation in the form of brand building by participation. After all, the brand is tied to a market position the value of which is derived from the degree with which the organisation successfully gains a competitive advantage from successfully mixing employee capital, technology and processes within to outperform others (Andreou & Bontis, 2007:355).

In support of the argument that many benefits of trade show attendance are intangible is evidence from Hansen (2004:9) where traditional measures of sales and sales leads are certainly part of the trade show outcomes but so are many information based outcomes (Table 2.10).

Marketing activities have the opportunity to build the image of the organisation so the event has branding value (Table 2.10, item 4). Hansen interestingly ties in that there is a motivational benefit to employees of attendance (Table 2.10, item 5). This is discussed again in chapter 3 where the use of business event participation used as a motivation to encourage employees to participate more freely in knowledge sharing is reviewed.

Table 2.10: Dimensions of the organisation's reasons for trade show attendance

Source: Adapted from Hansen (2004:9)

1. Sales related activities:
Test new products; Develop new market/product segments; Introduce and evaluate reactions to new products; Actual sales to customers.
2. Information gathering activities:
Collect information about competitors prices, products and strategies; Collect information in general; Search for information about competitors, suppliers and customers.
3. Relationship building activities:
Maintain and develop personal contacts with existing customers; Use the trade show as an arena where management can develop relationships with customers.
4. Image building activities:
Enhance and maintain organisation image perceived by customers, competitors and professional press; Market communication in general at trade show; Convince customers that the organisation is strong and solid; Gain an advantage over competitors who are not exhibiting.
5. Motivation activities:
Train and develop the sales team; Strengthen sales people motivation (travel, break in daily routine, meeting customers at the show and outside the show area); Motivate sales people (sales people met the customers).

Jiménez-Jimenez *et al.* (2008:405) note that the degree of awareness of the market-place orientation is an antecedent for the degree of success with which an organisation innovates to meet customer needs. However, sales staff often do not have the knowledge or capabilities to adapt the organisation's production processes and managerial objectives to reflect the external demands. Boundary spanners need to interface with those who have those skills needing the catalyst of others' tacit knowledge to make their own knowledge of value to the organisation.

A boundary spanner is then someone who uses their knowledge to change the perception of others. Beer and Spector have already been mentioned with regards to boundary spanning as they see employees moving around in the organisation as they undertake their tasks being the only way change is often sensed. Lewin (1951:57) extended this notion of a boundary to be crossed to create change with his concept of the "life space" boundary zone. Lewin (1951:57) described this zone as the interface of individual's personal life space to the physical and social world in which the person exists. Corroborating the importance of a boundary spanner such as the sales person, works when applied in Lewin's life space boundary zone concept. The sales person brings thoughts, ideas and concepts from the outside environment into the life space of the individual or group within the organisation.

It has already been established that the usefulness of the knowledge is extended by group knowledge. The group sets unspoken but binding precedents as to the common purpose of application of their knowledge. Their joint knowledge pool is reviewed regularly as to application by informal meetings over activities such as coffee. The collaboration process builds trust and mutual understanding in the group members (Nonaka *et al.*, 1996:205-206; Gorelick *et al.*, 2004:11-13; Masqood *et al.,* 2007:124). Bahra presents a model of the importance of collaborative interfaces in the "content-based knowledge management framework" of the global organisation, Shell (Bahra, 2001:201). Bahra and Serenko *et al.,* note that encouraging a 'collaboration space', a place to meet, plays an important step in the creating and extending the density of information that an organisation has to work with (Bahra, 2001:200; Serenko *et al.,* 2007:613).

Huff *et al.* note that resources that are intangible such as tacit knowledge are the very resources that, when combined with an organisation's tangible resources, are likely to create an enabling environment for creation of competitive advantages and thus improved performance (Huff *et al.,* 2009:29). Huff *et al.* further state that if the resource is rare (and in this case tacit knowledge of the individual is indeed unique to each individual and thus rare) and flexible in application (tacit knowledge becomes flexible in its application when exposed to a group review), the resource having fulfilled two criteria considered

important in creating competitive advantage, and will mostly likely prove advantageous to its organisation (Huff *et al.*, 2009:33). The authors write though, that the contribution of the individual to the good of the organisation cannot be guaranteed by assuming tacit to tacit socialisation activities will occur. The opportunity for socialisation needs to be planned if the initial value of the individual and the multiplier effect of the group are to become available to the organisation (Huff *et al.,* 2009:42-43).

The relevance of knowledge about the external environment in persuading changes in the internal organisational environment argues for the value of a formalised socialisation policy to encourage the creative process required for innovative and adaptive knowledge creation. This is borne out by research carried out on trade shows as a value generator for companies (Evers & Knight, 2008:553-555; Reychav, 2009:143-155).

Reychav (2009:153) corroborates the important role that trade shows play in cementing relationships between suppliers and customers. Reychav (2009:153-154) and Evers and Knight (2008:554-555) note that suppliers and customers found benefit for their joint relationships in the potential of new relationships established or existing relationships reinforced. The socialisation of customer and supplier gave both parties useful tacit knowledge for the success of their relationship into the future. Research by Nonaka *et al.* corroborates that the parties (customer and organisation) must meet for this knowledge to originate and suggests that organisations actively seek to provide the meeting forum (Nonaka *et al.*, 2000:676-679).

Evers and Knight's research supports Nonaka *et al,* that meetings encourage companies to lower their normal barriers to socialising and sharing because the meeting environment is neutral – not their home territory which they defend (Evers & Knight, 2008:553-554). Evers and Knight note that the spatial proximity of people at the trade show was an important driver for relationship development (Evers & Knight, 2008:555). These authors suggest that the trade show is an excellent forum for small business to gain significant business advantages because they can link into existing strong social networks and they have instant contact with an international pool of expertise (Evers & Knight, 2008:556).

Reychav further suggests that suppliers used the trade show to investigate market trends and possible new sales opportunities (Reychav, 2009:154). Suppliers participate because attendance is expanding their individual tacit knowledge about customer needs, competitor products and other suppliers in a broad manner. Customers, on the other hand, went specifically to review that they were using the right supplier when compared with other similar suppliers, thus developing tacit knowledge about possible future prospects. The researcher does not mention whether a formalised organisational process (post-event) sought to take the tacit knowledge accumulated in each attendee and incorporate it via group socialisation back into the organisation.

Reychav does draw attention to the fact that knowledge flows at the trade shows are "hasty and highly dynamic in nature" (Reychav, 2009:143). The researcher did not query with respect to this observation whether the event attendees had a preconceived set of the organisation's objectives to be fulfilled by their attendance in which case although "hasty and dynamic", the organisation would reap a predefined ROI in addition to any unexpected extra value. An important point raised by this is it is safe to assume that the attendee has a personal set of objectives. It would be unknown as to the degree to which the attendee's objectives are aligned to the organisation's objectives. The attendee would be looking for new information based on their personal tacit understanding of the organisation. The change in attendee's behaviour in the workplace manifested through applying a combination of tacit and new knowledge to organisational situations would not necessarily be as productive for the organisation as it might have been.

The importance of applying pertinent filters when focusing organisational effort to bring about changes in organisational performance is confirmed by Boisot and MacMillan (Boisot & MacMillan, 2004:516). Boisot and MacMillan urge the consideration of the implications of using both tacit and new information in the organisation's body of responses to changing situations or stimuli (Figure 2.10) (Boistot & MacMillan, 2004:516).

Boisot and MacMillan argue that the best use of organisational resources lies with making future decisions after reviewing existing knowledge to see what is already known about stimuli balanced with applying new information to guide modifications to existing responses or when creating new responses. Their diagrammatic representation of Ashby's Law shows a balance needs to be struck between the influence of tacit knowledge and the influence of new knowledge (Boisot & MacMillan, 2004:516). It can be argued that this balance can be influenced by the degree to which the attendee seeks new knowledge in relation to organisational knowledge needs. It follows that the gap between organisational need and knowledge of organisational value attained by event attendance could be narrowed by influencing the future behaviour of the attendee at the event.

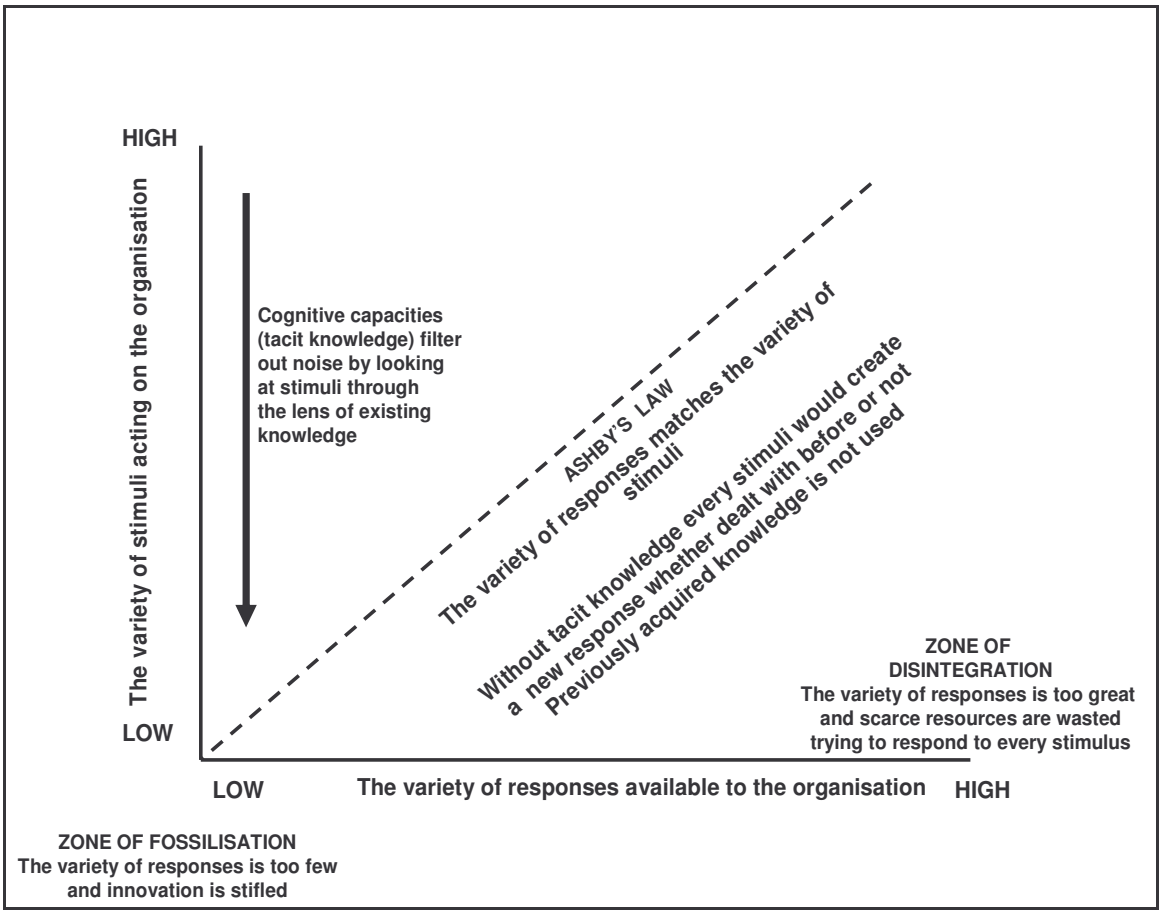


Figure 2.10: Ashby's law of requisite variety

Source: Adapted from Boisot and MacMillan (2004:516)

A pre-event brief would act as a filter to focus attention away from misinterpretations of organisational mission and vision, goals and objectives. The latter may well be areas of causal ambiguity in that they are coloured by the employee's own needs or inaccurate knowledge of organisational strategy (Boisot & MacMillan, 2004:517; Su & Lin, 2006:798). Refocusing an individual's perceptions of organisational needs to a desired reality suggests an associated relationship with improved absorptive capacity and is discussed in more detail in chapter 3 from the employee's perspective. Corroborating the value of using an event template is contextualised by Brock and Yaniv's theoretical work that humans have only a limited capacity to absorb and by establishing templates of how-to-work to guide actions raises the capacity for accurate knowledge transfer and absorption (Brock & Yaniv, 2007:834).

The use of matching ROI to predefined outcomes for training is investigated by Kline and Harris (2008:45) whose research found "a haphazard approach to corporate spending and tracking training, one of the major expenses in the lodging industry". Kline and Harris (2008:54-57) note that in their survey group the human resource (HR) function of the organisation did attempt reviewing the value of training received via post-event on the job observation and by asking trainees their opinions of the benefit of the training.

The authors note that methodology for ROI calculations varied from organisation to organisation but predominantly focused on reviewing tangible organisational performance indicators such as sales as reflective of earlier successful training interventions. Many of the survey group were aware of ROI calculation models such as of the Kirkpatrick and Phillips framework that recommend methodology for measuring intangible assets**,** but do not apply it or apply it poorly (Bersin, 2004:166; Kline & Harris, 2008:45). Most preferred to extrapolate training success from the fact the current sales and profit remain good compared to previous years' organisational performance. The authors believe that this negligence is, in part, because managers find the tracking required to ascertain learning value takes place over extended periods so is wasteful of their resources. Managers also extrapolate that if profits remain good the investment in training must be working). Aditionally, most of the companies reviewed had no high

level managerial directive or policy that a return on knowledge investment as a Return On Objective (hereafter referred to as an ROO) must be shown so there was no incentive to optimise the value created by a business event.

Predefining learning goals before the learning event would have focused both the learner and HR on why the training was important to the organisation's future thus influencing the success of knowledge transfer. Post-even, the results of the gap analysis begin immediately to give the organisation an evaluation of the event ROI value. The longitudinal time span for this first evaluation would be a matter of days after the event not over months and months - a condition of current ROI measurement methods already seen as irritating to organisations.

This bears out the need for an organisational policy on guiding knowledge acquisition and a stepwise, planned progression of capture of knowledge from the start in the pre-event phase to a planned finish in the post-event phase. From the evidence presented, it would seem that only in this way can learning or a knowledge creating intervention such as a business event, deliver optimised organisational benefit.

Reviewing the work of Nonaka *et al.* and other authors earlier established the importance of tacit to tacit group knowledge embedding through socialisation and externalisation. Yet, it is not apparent in the Kline and Harris study that HR (or anyone else in the organisation) used group socialisation as an activity post-event to amplify the intangible value derived from individual learning. Embedding knowledge is how the organisation ensures the new knowledge adds to the existing pool and the process of embedding is examined further.

2.8.2 Externalisation – the 'E' in the SECI model

Nonaka *et al.* were aware of this need to embed knowledge and examined ways of capturing the tacit-to-tacit information for the benefit of others in the organisation. These authors named the process 'externalisation' as the value attained from translating

thoughts and concepts into notes and diagrams (Figure 2.11) (Nonaka *et al.,* 1996:206-207).

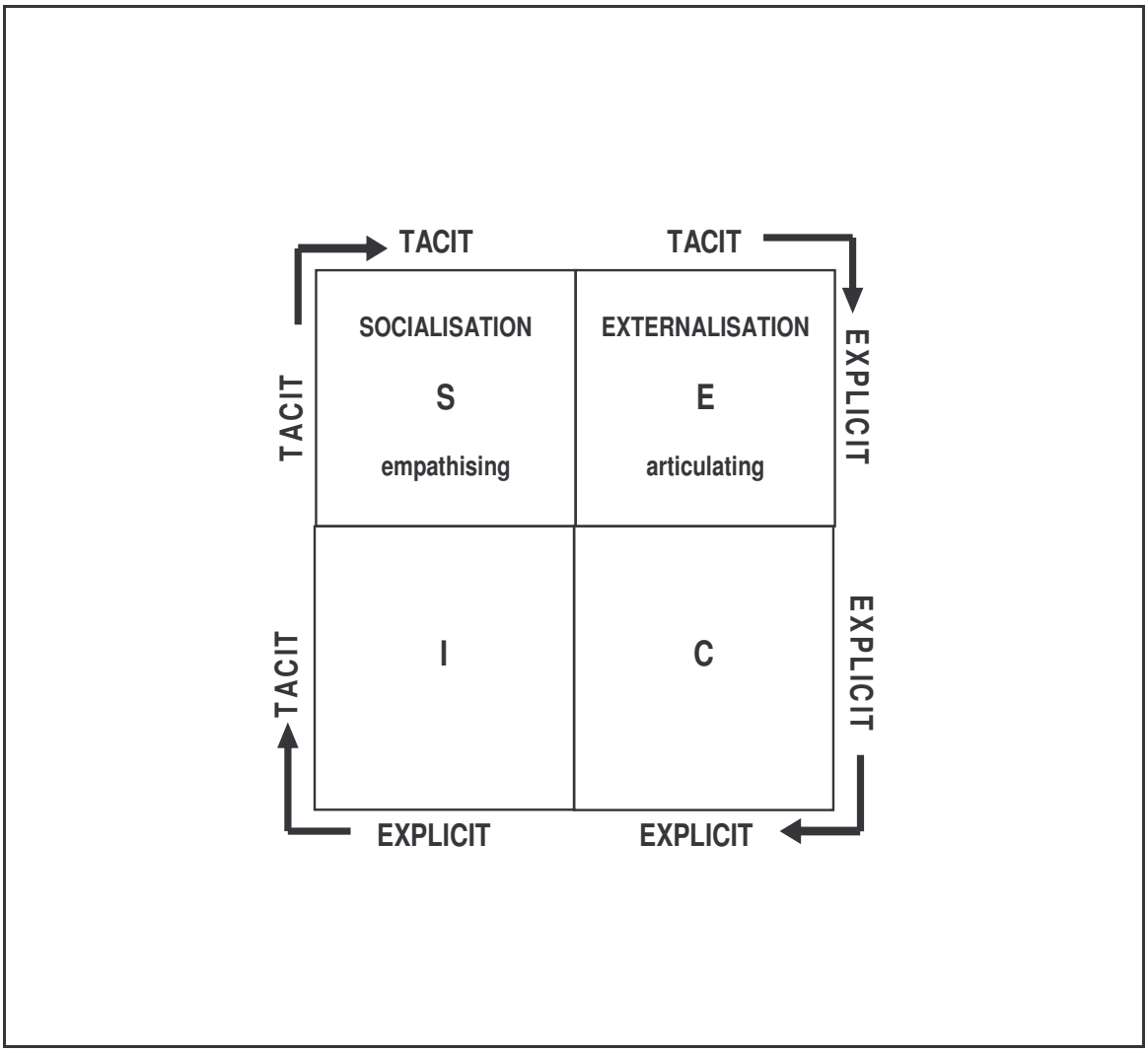


Figure 2.11: The 'E' for externalisation in the SECI process
Source: Adapted from Nonaka *et al.* (2000:12)

The first version of a conversion might well be hand drawn until the new knowledge is clearly understood in its application. Nonaka *et al.* (2000:9) noted that this process takes place in meetings and discussions. This suggests that the process can occur at the business meeting event. Premeditated facilitation of an informal meeting can support the transfer of tacit to externalised information (Mayfield, 2010:24-26). Application of the

externalised knowledge will appear visually in the organisation in perhaps new product creation or modification of an existing process for greater efficiency.

Externalisation is then the process whereby the value of new knowledge becomes shared in a documented manner with several others who were not privy to the original tacit knowledge-building experiences. This allows the group to combine individual knowledge with their own tacit knowledge. Socialisation and externalisation are not limited to internal firm members and the knowledge pool can be extended by external meetings with others outside of the firm holding their own unique tacit knowledge. External contact creates the potential for new data value for the organisation (Dalkir, 2005:155). The externalised knowledge triggers a new round of thoughts and ideas about how to apply it (Nonaka *et al.,* 2000:12).

It is obvious that meetings can play an important role in unlocking knowledge from work contemporaries, peers, competitors and customers. Documenting the knowledge encourages organic growth of the uses of the knowledge.

2.8.3 Combination – the 'C' in the SECI model

'C' is the combination process in which an organisation's employee, often from top management, suggests a new organisational concept they would like to see incorporated in the firm. Pockets of external information held in existing internal process, documents, databases and in external knowledge sources relevant to the concept are joined (Figure 2.12).

Via discussion and meetings, the concept is gradually contextualised by what is already known by the organisation (Nonaka *et al.,* 1996:208). Nonaka *et al*. advocate that the organisation uses "basho" (Nonaka *et al*., 2000:677-679). Basho entails working with others who embrace the concept of knowledge sharing (Ba) and gain new knowledge by connecting with customers' willing to establish Ba, or suppliers' Ba to manifest a platform for Basho to work.

Bennett (2001:188-199) sampled 16 800 employees to ascertain whether the affect of encouraging Ba could be seen in business performance results. Bennett (2001:196) concluded that, "Ba exerts a beneficial impact on sales force performance". Bennett's research points to a relationship between successfully manifesting Ba when creating a liminal (time out of time) transforming experience and business performance.

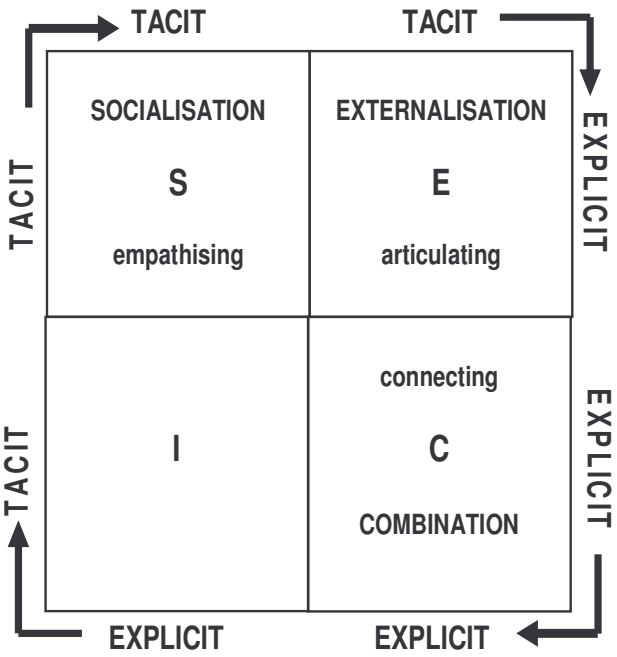


Figure 2.12: The 'C' for combination in the SECI process

Source: Adapted from Nonaka *et al.* (2000:12)

Nonaka *et al*. and Mayfield note that the combination and the externalisation stages are both highly appropriate for knowledge spread by using IT based applications (Nonaka *et al*., 2000:677-679; Mayfield, 2010:25). IT will both store new knowledge for many to access (via databases) and aid in extending the global reach of the concept development by making knowledge flow by way of the Internet. This brings into focus the usefulness for considering extension of face-to-face meetings value by creating opportunity for ongoing e-meetings and e-learning and embedding post-event. These e-working groups could be formalised by knowledge champions at the event.

Woiceshyn and Falkenberg's research confirms the importance of meetings and IT knowledge e-meetings / communication in their study on improved value creation (Woiceshyn & Falkenberg, 2008:92-98). The authors reviewed application of the model for creation of "value shops" (production units creating value through concept development) within petroleum companies (Woiceshyn & Falkenberg, 2008:92). The creation of niche value shops at a business tourism event such as a trade show or conference could be a value adding action and a strategy for enhanced attendee knowledge development.

Their research found that future strategy and therefore future performance value lay in how well the petroleum companies they were studying matched their future use of resources to problems when solving dilemmas. Efficient resource application was found to be promoted when the petroleum organisation subscribed to applying a defined framework to access new knowledge. Each problem required a unique knowledge (content) framework that supported the knowledge flow needed by this problem. This framework included a knowledge base, a value attached to the knowledge (by policy declaration or managerial vision), networks, technical systems and managerial systems. Woiceshyn and Falkenberg termed the knowledge network of people inside and outside the organisation whom the organisation drew on for knowledge to drive the value shops as "value constellations" (Woiceshyn & Falkenberg, 2008:94). These were specialist, focused teams optimising all the knowledge the organisation could access for competitive advantage creation.

Dőős *et al.* report a similar knowledge framework for focused problem solving by the multi-national Ericsson (Dőős *et al.*, 2005:481-483). In Ericsson's case the value constellation was called the "tiger teams" but the point being that large companies who have the funding see value in setting up special frameworks to guide knowledge flow (Dőős *et al.*, 2005:486).

Dalkir mentions the Honda Corporation placing great value on more generalised information-generating meetings called "knowledge days" or "knowledge cafes" (Dalkir, 2005:54). Toyota sets meetings schedules by types, frequency and length (time of meeting) and the meeting planning is a sub-system in a bigger system of communication designed to support key performance areas such as safety, KPIs, and process improvement. The meeting schedules are not random and these schedules are posted several days before the meetings occur (Liker & Hoseus, 2006:296). Toyota schedules meetings specifically to allow people who might never get to talk specifically to meet and talk face-to-face. These are formal in that they are scheduled and the participants are specifically invited to attend but the meeting purpose is "a time to build relationships and identity and resolve issues" (Liker & Hoseus, 2006:297).

Slack *et al.* draw attention to the creativity-inducing, "Wings" project by Adtec, Sweden in which individual employees are given a mentor and two hours a week to work on projects of potential benefit to the organisation. The results are recognised, analysed and contribute to the knowledge pool. The project answers the employee need for motivation and affirmation of their position in the organisation. Additionally, the mentor gave one-on-one training of benefit to the employee. Adtec saw results in valuable innovations for organisational productivity and creating greater potential to reap benefit from a motivated employee (Slack *et al.,* 1998:814). Learning and meeting were the vehicles for change and increasing the potential for organisational performance in all these cases.

A value constellation is recognising the value of peers/experts in knowledge expansion - a theory which has already been discussed in this chapter. Woiceshyn and Falkenberg

note that in the context of petroleum companies, the constellation can only be achieved by partnering research groups with technology champions (Woiceshyn & Falkenberg, 2008:95). These champions will actively lead knowledge through personal actions to "acquire, filter and disseminate information" to the rest. Von Krogh *et al.* recognised the same need for knowledge campaigners and described these motivators as "knowledge activists" (Von Krogh *et al.*, 1997:475).

Indeed, the hotel companies reviewed earlier show only understanding for recognising tangible measures of benefit from the training event, not for leveraging further value through knowledge sharing. In such circumstances having a knowledge champion would have helped the organisation understand the power and prolonged benefit to be acquired for the organisation by astute management of the knowledge pool for future performance in much the same manner as managing sales for profit.

A champion's role would include the responsibly of co-ordinating knowledge sharing meetings, involving internal staff of all levels relevant to the problem at hand. Additionally they would identify others (peers and specialists) who may have unique or specialised input. Intangible value driver components for these meetings are described in more detail by Andreou and Bontis (Andreou & Bontis, 2007:348). The authors identify eight drivers conducive to creating unique resource interactions or concept extension as "employees, customers, competitors, partners, information, technology, processes, products and services".

Woiceshyn and Falkenberg noted that the getting the 'right' mix of knowledge at meetings is often so powerful that it leads to unexpected valuable spin-off concepts over and above the initial concept discussions (Woiceshyn & Falkenberg, 2008:95). Bennett has noted that high levels of innovation such as displayed in the value shop mixes also have high levels of Ba (Bennett, 2001:192). This infers a direct relationship between the platform (liminal zone that encourages Ba) and future business performance.

Bennett's research importantly notes that this learning innovation differentiates this type of organisation from others in times of turbulent external environment such as a recession (Bennett, 2001:192). The presence of Ba is so strong that the organisation innovates and survives (Bennett, 2001:196). From the evidence presented it can be said that the value of the meeting to create new knowledge is multiplied in direct relation to the mix of people and externalised knowledge available at the meetings. Creating a successful meeting liminal zone creates opportunity for this organisation to outperform others.

Woiceshyn and Falkenberg found that the value shop approach of the petroleum companies provided the context for identifying interactions of value for the more elusive assets of knowledge pools held in databases, employees, customers, competitors and partners with those of the more recognisable tangible assets (Woiceshyn & Falkenberg, 2008:95). These innovative combinations create exclusive value propositions for competitive advantage. Companies with the capacity to meet challenges faster than closer competitors are survivors (Jimémez-jimenez *et al.,* 2008:392).

With the value shop lens, problems are often resolved by recognising isolated pockets of resources (tangible and intangible) that might otherwise have been ignored in the traditional value chain analyses when seeking solutions to customer needs. In the latter, Woiceshyn and Falkenberg point out that the recognised stages of value chain value-creation activities (inbound logistics, operations, outbound logistics, marketing, sales and after-sales service) are very restrictive because they do not cross functional boundaries (Figure 3.7) (Woiceshyn & Falkenberg, 2008:96). Crossflows or sharing of resources are not indicated by the model. Thus the opportunity to look for unique mixes of resources (tangible and intangible) is correspondingly restricted. The authors note there was more proficient resolution of both normal and one-off problems with the focused value chain approach than with the traditional value chain approach.

The value shop methodology is extremely effective in application because it sources the specialised information required for a specific problem as and when required but contextualises it by seeking knowledge across the entire range of the organisation's

resources available. Thus the mission and vision is retained in the value shop because the main stream of the value is arising from the organisation's knowledge. Companies using a value shop methodology have focused intensely on addressing a customer need so have created an opportunity to possibly out perform close competitors. It follows then that the value shop concept of focusing on unique mixes of intangible and tangible resources to find solutions is an important dimension one could expect to be presented as an antecedent in the design of each business tourism meetings.

2.8.4 Internalisation – the 'I' in the SECI model

Nonaka *et al.* described the final step as completion of the knowledge spiral with explicit knowledge being re-integrated to individual tacit knowledge through use in operational know-how (Figure 2.13) (Nonaka *et al.*, 1996:208).

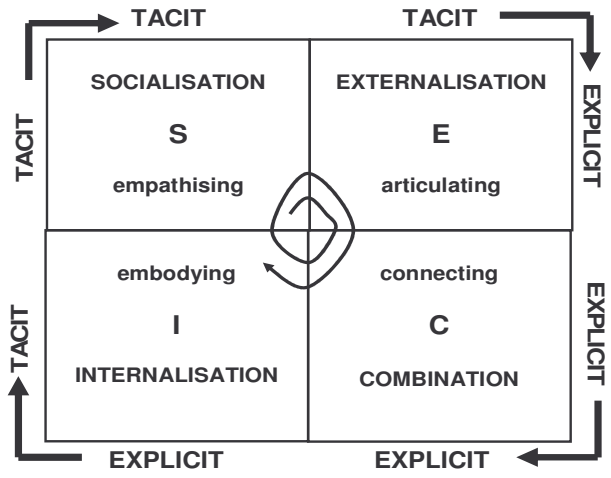


Figure 2.13: The 'I' for internalisation in the SECI process
Source: Adapted from Nonaka *et al.* (2000:12)

This individual, for instance the apprentice, watches the old master, learns, but reflects with new explicit knowledge available to them alone on how to improve their own work methods. In this stage of knowledge development, the application of a period for reflection about existing and available knowledge is key to encouraging future success with managing change (McCormack & Rauseo, 2005:72).

Van Winkelen and Clarke support Nonaka *et al.* in that there is a critical focus on the need for an understanding of knowledge flow as represented in the SECI model if behavioural changes are to influence organisational performance. At the final step of SECI, reflection on new knowledge is critical if it is to aid in organisational performance (Van Winkelen, 2010:18; Clarke, 2010:135-137). These authors note that the organisational absorption capacity which is the ability of the organisation to leverage individual knowledge for the good of the organisation is improved by processes that encourage reflection on learning.

Buchanan *et al.* draw attention to the need for "stickability" with knowledge if it is to be sustainable for use by the organisation into the future (Buchanan *et al.,* 2005:189). The authors refer to Lewin's research about moving a group from one level of knowledge to a higher level and taking actions to make the overall knowledge level stay at the new, higher level. Lewin saw this as a three-step process with: forces to unfreeze the individual or group from the current level; forces to move people's knowledge to the next level; freezing the group knowledge in this new higher level (Lewin, 1951:228). These forces may well be variables that can be influenced by the event organiser designing the event and is examined further in chapter 3.

Buchanan *et al.* note that the refreezing process requires a special step that ensures time for individuals to think about, adapt and embed new knowledge in their existing knowledge repertoire (Buchanan *et al.*, 2005:202). Without this step, the knowledge will soon be lost. Their argument supports Nonaka *et al*. in that knowledge must be given time to be reflected if it is to embed becoming part of an individual's capabilities and a value-adding feature for the organisation. Once successfully embedded in one person and

affecting that person's capabilities and organisational function, there is occasion for further integration from this individual to other people, processes and policies. The knowledge flows and in doing so may find applicability in other areas of the organisation. The multiplier effect of good knowledge flow is seen again.

2.9 Creating requisite variety for informed decision making

Creating requisite variety in complex systems sounds as though it should be a simple enough thing to do by listing as many ideas as can be thought of. However, every individual holds a unique perspective of their world and while getting them to meet can help them all to voice their personal perspective, unless the process is managed the results may not be useful in creating variety that has relevance to the problems. Facilitation, boundary spanners and knowledge champions have specialist roles to play as has already been discussed. These meeting specialists depend on the operational design of the meeting to enhance their chances of successful creating new knowledge.

This section looks closely at two workshop types proven to create informational variety of pertinence to a specific problem in an attempt to identify what variables of operational meeting design have influence on knowledge creation.

2.9.1 The syntergration workshop

White and Lee (2009:687) recognised the need for strong operational elements in their meetings set up to share knowledge about the role of communities in sustainability. The authors choose the vehicle of meetings to address a series of community-sustainability problems. Their goal was to create a variety of possible actions acceptable to all stakeholders. However, both the large variety of stakeholders and the great variety of issues they all needed to discuss made it operationally very difficult to pool everyone's knowledge. This brought them to design an operational framework for their meetings that would handle not only the "multiple conflicting values" in this "complex environment" but would specifically guide these diverse groups to a place of common understanding

and then singular commitment to future actions (White & Lee, 2009:687). The goals of this workshop-based event was to deepen the group body of knowledge around the problem; broaden individual perspectives to recognise that views other than their own have validity; and set out clear policies defined by the group of how all actions for problem resolution would by handled. Their solution was to create a "syntegration workshop" based on creating synergy around a plethora of ideas and perspectives in order to integrate them into an appropriate variety of choices (White & Lee, 2009:687).

Their research cited Beer's systems modelling as hugely influencing their creation of the meeting environment. Their design took a complex system of people and goals and manipulated and managed them in such a way as to allow opportunity for the requisite variety of actions to manifest (White & Lee, 2009:687). The meeting design they created minimised many elements of waste such as: wasted time from creating poorly informed decisions that would not be used; wasted knowledge of individuals not encouraged to share their knowledge; wasted tangible resources – time, paper, venue space.

Applying the design over the entire period of the consultations acted to reduce the possibility of unwanted deviations from the goals. The design also ensured that the variety of knowledge held by individuals was shared amongst as many as possible and this resulted in the uncovering of hidden tensions in what seemed initially to be unrelated systems. This last step was of great benefit to the project as it identified previously un-thought of linkages between existing systems and this, in turn, helped in postulating appropriate solutions.

The authors furthermore identified three types of uncertainty to be aware of when engaging multiple stakeholder perspectives: uncertainties evident from the workplace which are political influences such as leadership values or self-interest that block change; uncertainties to do with the value prescribed to choices to be made such as procedural constraints that create anxiety and conflict to change; uncertainties arising from the effect of those choices on the technical options that change the processes and change the future by looking backwards at current status and forwards to a desired future (White & Lee,

2009:686). The authors concluded that each of the three has to be addressed in the meeting design to ensure that the right scope of variety is allowed to develop unhindered by the effects of uncertainty variables.

Godkin and Allcorn (2009:40) bring the business impact of uncertainty on organisational future actions into sharp focus. They discuss the negative impact of "institutional narcissism, arrogant organisational disorder and [emotional actions that bring] interruptions to organisational learning". The authors conclude that only facilitated interventions that lead the management and employees to feeling safe to express their views without judgement will overcome this barrier to learning and knowledge flow (Godkin & Allcorn, 2009:40).

In more recent opinion, Gregersen *et al*. (2011) found key skills in leaders of innovative organisations. After interviewing the founders and the current CEOs of the world's most innovative organisations together with a further 500 entrepreneurs and social innovators, and 400 business executives, the authors conclude superb innovators have five common skills (Gregersen *et al.,* 2011:1). In their workplace they establish an environment for innovation to manifest by constantly mixing the following personal abilities: questioning; observing; experimenting; networking; and extending thinking by making associations across disciplines. The authors note that the first four can be improved by learning and encouragement while the fifth is more of a personal ability. The authors draw attention to organisations such as the Japanese Keyence Corporation who have actively focused on improving the skill of observing to gather knowledge. The authors found that many company leaders assume that their employees are looking for innovative changes but their research leads to the conclusion that innovative companies are only those who have leadership that encourages repetitive rounds of questioning of who (is responsible or can do the job), what if (a process or ability were to change) and why (is this happening or why are we not doing this) questions ((Gregersen *et al.,* 2011:1-2).

It is the leadership which leads innovative behaviour as a strategy. The use of these 'who', 'what if' and 'why' strategies in driving meeting value enable the warrant that this

strategy drives organisational performance. Strategic intent with use of knowledge and organisational performance is discussed further in chapter 4 in relation to capturing this intent in a template for standardised business event design. In the next sections, the relationship between a business event having a well-defined purpose and the influence of the purpose on the overall value derived from the event is explored.

It is important to look closely at White and Lee's (2009:687-689) methodology for these syntegration meetings seeking implications for the design of business tourism events. The authors selected a topical problem of relevance to the group and created a meeting of fifteen people of whom five were participants (vocally active), five were critics (active and constructively criticising ideas and thoughts) and five were observers. Hoebeke (2000:22) draws attention to the influence of group size on knowledge sharing stating that smaller groups generally have a propensity to be creative while larger groups use debate and are reflective about past actions. This identifies an influence from a variable for group size affecting the type of knowledge arising from a business event.

It is interesting to note an aside here that the authors limited group size and this action has significance for event design. Serenko *et al.* (2007:620) found that the larger the group unit, the more interpersonal communication diminished in relation to the increasing size. Increasing group size has a direct relationship with impeding knowledge flow.

In the syntergration exercise, the participants were advised of the problem and current research around this problem before the meeting. This ensured that tacit knowledge processes were underway by the time the meetings began. The meeting had a strict agenda and a facilitator specialised in the topic. The process was repeated three times with different participants to collect a broad variety of actions. Additionally the meetings explored the topic key issues at the first meeting, followed by identifying barriers to the future at the second meeting, followed by possible actions to be taken at the third. Along the way the connections between actions and ideas became apparent to the many divergent stakeholders and effortlessly the individuals became a cohesive group. After every meeting feedback was given to the entire group by web-based postings, written

reports, plenary discussions. All three forms asked for feedback. At the end of the process twelve statements about the problem and its possible solutions were created by the group (White & Lee, 2009:689-690). This exercise resulted in a variety of responses to the problem drawn from peoples' diverse tacit knowledge.

Using multiple feedback loops and transparency on all issues, the group was unified as to their future action. Facilitators and a strict agenda of meetings over a specified period ensured the results remained time-relevant to the problems. The groups looked both backwards and reflected on past issues around the problem and forwards reflecting on future trends. The facilitator provided pertinent information around the problem to trigger provocative thinking. The final range of possible actions was narrowed to a group of twelve from many demonstrating the requisite variety required for this problem. The twelve were the most efficient and effective within the boundaries of this problem's environment. The process of social learning (a willingness to acknowledge others views even if divergent to one's own and work together for a purpose took place joining many tacit knowledge bases to make a whole that engaged all in a cognitive immersion of the problem situation (Selamat & Choudrie, 2007:342; Clarke, 2010:125). In doing so, the restraining force of tension between stakeholders was minimised.

A final but important point brought out with research by authors Dechawatanapaisal and Siengthai (2006:50) is that the process of learning can be negatively influenced if the learner has an embedded belief system contrary to the learning material. What this implies is that it would be pointless sending such an individual to a business event. However, it could be argued that by using a syntergration type workshop methodology prior embedded dissonance could be eroded. Alternatively Van Winkelen (2010:20) suggests that a selection process is undertaken by the organisation that sends only "skilled and open-mined individuals".

Fox and McCormick (2009:213) note that novice event attendees absorb more if sent with another colleague. These actions help ensure that cost of attendance is covered by organisational benefit to be received. The problem with Van Winkelen's solution is that

someone within the organisation has to make the decision of who is competent or not competent to go.

White and Lee (2009:691) found that the final hurdle in their research scenario was personal accountability for future action: who had the authority to make things happen and how would the new knowledge become frozen into the existing systems. The actuality of creation of information and ideas would probably mean more to the group had they some vision prior to their meetings of who could deliver their vision. It follows that within every network it might be an idea to identify, as an antecedent, that a campaigner will take the project forward (Deschamps, 2000:140). The campaigner would also become the knowledge repository caretaker. Failing to deliver on conclusion of an intense round of knowledge sharing such as described would surely add to future dissonance because the group would be sceptical of investing such effort in the future. This concern was not addressed by these authors' research but their work did prove that the group had grown to a cohesive Community of Practice (here after referred to as CoP) through the application of the syntergration workshop operational research methodology.

In this section it has been seen that meeting design did much to dampen dissonance that may have arisen when working with inputs of diversity on organisational problems. The results of the operational application of the design were not only a focused variety of problem responses but unified support for future actions. The design created a liminal zone that supported a high degree of social learning.

2.9.2 The scenario planning workshop

The work of Burt and Van der Heijden takes the planning for a desired business future one step further. They emphasise in their research the role of scenario planning as a way to focus the group on a range of desirable futures, not a single option. Their argument for this need is that many managers focus only on daily problems filtering out what seems irrelevant because they do not contextualise it correctly (Burt & Van der Heijden, 2003:1011). The managers use only their current systems feedback data (sales, staff

losses, production costs) to interpret anomalies in their existing systems. Their research reviewed small and medium sized business where manpower was limited. They found managers looked backwards reflecting on financial figures for the past month against existing process efficiency and effectiveness in the traditional financial manner of "transactional / task environment" (Burt & Van der Heijden, 2003:1017). Like White and Lee, these authors found the solution to expanding opportunity for consultative change arising from this historic review process was to manage the managerial meetings so that the meeting place became an environment conducive to creating future variety.

Essentially, the behaviour of the managers had to be changed from a reflex sensitivity that they were being criticised if anyone disagreed with their decisions to openness to participate dialogue to see if critical input other than their own, had value. Managers had to "walk the walk" of a learning organisation disciple showing that they, too, were continually learning from others and "talk the talk" by promoting the knowledge of others in their learning (Ellinger & Cseh, 2007:445).

Interestingly, managerial inhibitory effects can go further. Campbell (2003:382) showed when reviewing customer relationship databases (CRM) as tools for growing organisational future performance, that managers can even tend to neglect the needs of their customer failing to recognise the need for organisational processes that link internal organisation functional areas and inputs to enhance the value of the CRM data components. This managerial type influence will be shown later in this review to be an intangible inhibitor of the value that a business event could create.

Burt and Van der Heijden (2003:1018-1020) found that a group of managers could act very differently from White and Lee's groups. Instead of manifesting multiple, different perspectives the researchers found that, in many cases, the managerial group inflicted unspoken constraints on each other that actually discouraged an individual voicing an opinion different from his contemporaries. Consequently, the group thinking was to produce only one answer based on looking inwards and backwards at data - not a variety of informed responses offering alternative paths to managing change. If a different

individual answer from the group was forthcoming its suggestion to the group was curtailed by fear of lack of competency to manage future change and fear of being seen to suggest a wrong path for the future. All contributed to a state of inertia thus not helpful to producing the requisite variety of responses for a viable organisational future. Managerial behaviour could be a primary inhibitor to the value that a business event can add to an organisation's future performance.

The authors introduced a scenario planner who, although not knowing specifically the business / industry under observation, facilitated by insightful questioning and by posing critical questions as to business processes, customer needs and future trends. The facilitator discovered the group concern and then purposefully led the group in defining future actions surrounding the concern.

Burt and Van der Heijden (2003:1021) conclude that what occurred in their scenario type workshops was a building of trust brought on by the facilitator setting up a neutral meeting space. Old barriers fell away and the group began to trust that they could make important individual contributions. The authors finish with an interesting list of how to build an unthreatening organisational environment that would seem to have application in event design: help develop the knowledge of new realities; help the group make sense of these new realities within their own environment; examine current resources to establish possible future actions; hold strategic conversations where all perceptions contribute; create the space for these discussions; develop a variety of future options; link these to an action programme but ensure that the new group thinking allows for proposed actions to be stopped if someone identifies a problem; engage in experiential learning (Burt & Van der Heijden, 2003:1022).

2.9.3 The impact of the event design

It is apparent from the literature review that the business event design can encompass a broad range of intangible value creators**.** The theoretical interpretation of this complex situation is shown in Figure 2.14. It can be seen that the design is influenced both by

designing for SECI knowledge flows and for incorporating elements that drive manifestations of the intangible elements of Ba and basho. It can be argued that the more the variables influencing SECI and the variables influencing the degree of Ba and basho are named and their distinct behaviour as to its influence of value creation, understood the more the value attained from a business event can be managed.

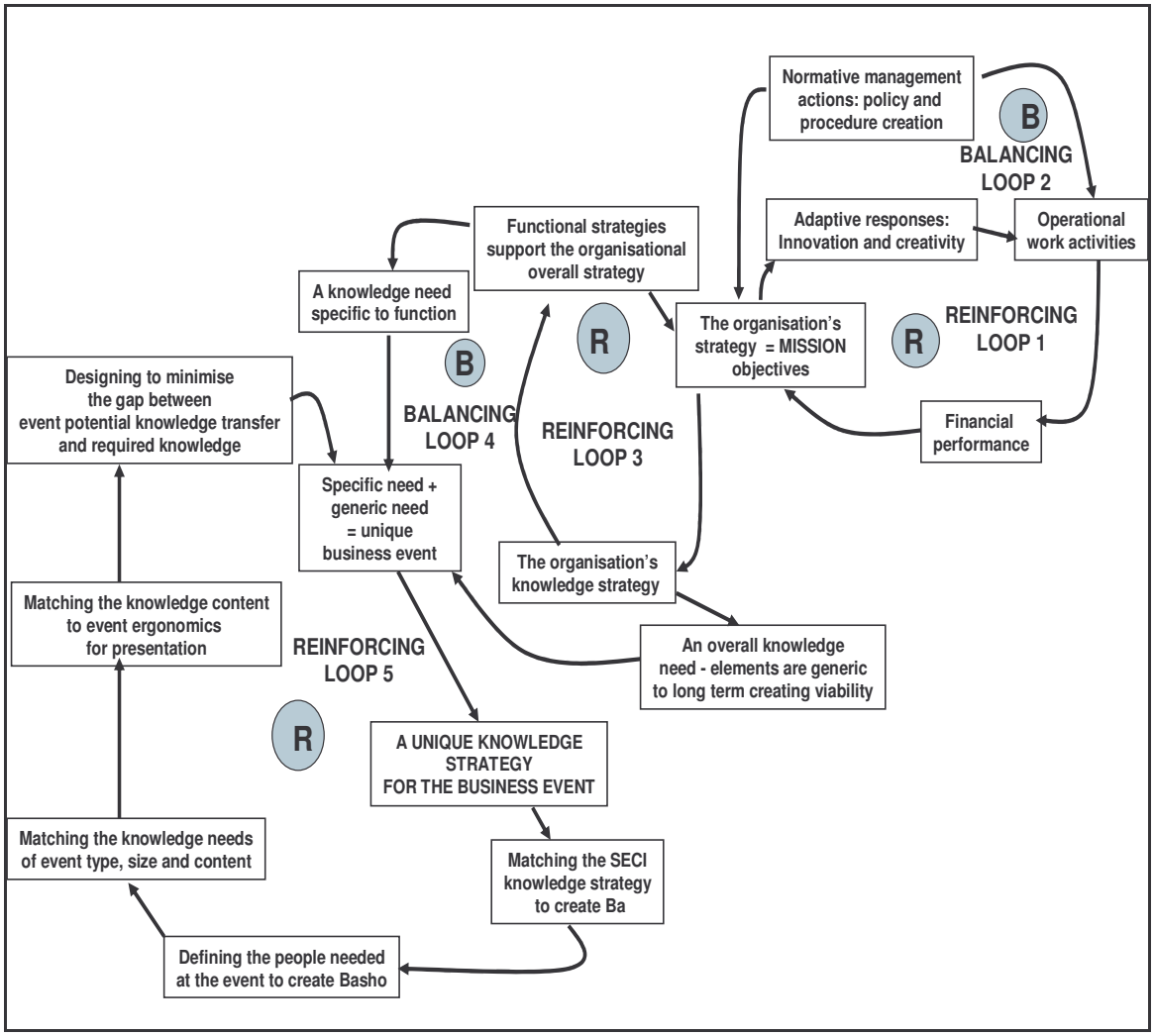


Figure 2.14: The causal loop representing the importance of event design
Source: Author's own compilation (2010)

The conclusion to the relevance of the discussion on structuring meetings and which variables will act as drivers and inhibitors of knowledge flow is to better design an event.

Organisational performance has been shown to be linked to new learning and the delivery (facilitation and ergonomics) of the knowledge content is as important as the behaviour of the attendees, the physical suitability of the venue and the knowledge held by the attendees. Vidal presents research that supports the need for having a systematic design to a business event if a business event is to be a strategy to "develop visions in the form of ideas or projects for developing an organisation or community" (Vidal, 2004:403).

Vidal brings attention to three phases of an event that he stipulates as being equired in the process of design for an event that creates vision as "the preconference planning; the conference in action; the post conference output" (Vidal, 2004:395). In terms of Vidal's conference, the role of these three stages fell to facilitators to evaluate and respond to the knowledge needs of attendees as with the syntergration and scenario planning workshops. This argues that typically the role of facilitators is required to multiply the usefulness of knowledge. The event organiser would typically need to address this in the event design. Where the responsibility of facilitator and event organiser begins and ends in generating value from knowledge would need to be understood when creating the event design.

2.10 Experiential learning

Experiential learning seems to have an empathy with business learning and thus business events. It is described by Reynolds and Vince (2007:4) as having a "richness and importance that comes from the desire of management education to highlight the complexities involved in organisation and organising". Business events deal with members of organisations who aspire to rise in their professions so experiential learning methodologies could be argued to have direct applicability to business events.

Tangible resources applied to the event are: meeting spaces; IT support; room set-ups; audio-visual support; digital voting and feedback systems. Review of the roles of support technology for learning at the event includes access to resources such as databases specific to the knowledge expansion exercise, exposure to new manufacturing technologies or new learning and training. Intangible aspects that elude more to

stimulation of the human senses include lighting, smell, colour, sound and more indiscernible aspects such as communitas, comfort, and enjoyment. All are found to be important in aiding new tacit knowledge development (Getz, 2007:66). Lewin notes that stimulating the personal senses through activities which take place in the physical world creates opportunity for change in a person's life space contents – a change in the individual's actual cognitive structure (Lewin, 1951:69-72).

The requirement for each event attendee is to unfreeze current behaviour, introduce new thoughts and concepts and refreeze so that the knowledge stays intact and useful. Stimulating senses through environmental cues or triggers helps change a person's future behaviour so would be integral to event design. It would be important in event design to understand how to trigger and produce a permanent behavioural change.

2.10.1 Aesthetic experiences

Welsh *et al.* (2007:59) quote Tufte who describes creating a branded experience as creating a "visual confectionery". Tufte (quoted by Welsh *et al.,* 2007:59) depicts the business event designer as having a duty as a "confection makers [who] cut, paste, construct and manage miniature theatres of information – a cognitive art that serves to illustrate an argument, make a point, explain a task and show how something works, list possibilities, narrate "a story". This eloquently describes the role of business event designer. Welsh *et al.* (2007:59) continue that to change tacit behaviour it is necessary to challenge existing knowledge and they suggest that one of the best methods for this is to use art forms that are a challenge to "the dominant intellectual forms of knowledge". Again Welsh *et al.* (2007:60) draw on Tufte who makes the strong recommendation for the use of design strategies specifically aligned to what knowledge changes are required.

The advocacy is that no business event design takes place without a strategy.

2.10.2 Visual Confectionery

Further to having a strategy for the overall event design, behavioural change relies on elements of social theory (interaction with other people) and cognitive theory (environmental stimulus). Experiential learning encompasses these but includes the step of post learning reflection (Champoux, 2007:125). The purpose of the event design must be not only to create a liminal zone but also to ensure that the new knowledge changes future behaviour. Many tools are used to provide content and reflection. With regards to creating miniature theatres of information, Styhre (2006:101) points out that using storytelling to unfold another's knowledge ensures that temporality (the time - year/day/hour - that the incident that generated the knowledge took place) is not as relevant as the content of the story to the current learning need (Leistner, 2010:127; Gherardi & Poggio, 2007:165).

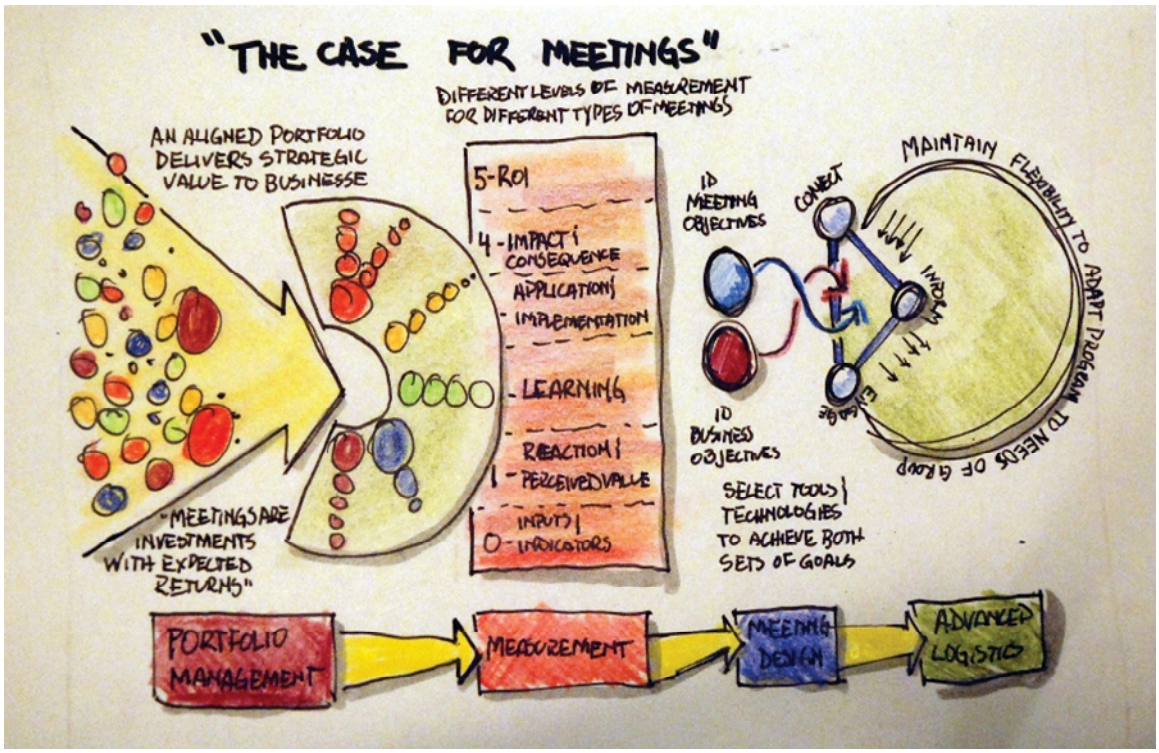


Figure 2.15: The case for meetings

Source: Smethurst (2009)

The historic experience is a virtual one as it is drawing on historic experience but having applicability in this current time because it addresses a current need. It draws in all its participants in "co-constructed creative activities" (Styhre, 2006:101). When not historically based, the story can become a way to reflect on current activities and investigate theorised futures arising from the here and now situation (Gherardi & Poggio, 2007:165).

Smethurst's drawing (2009) is a visual representation of a lecture given at the World Education Congress targeted at the continued professional education of business event organisers, event suppliers and anyone associated with the creation of business events (Figure 2.15). The story of the lecture at the conference is represented by the drawing. The drawing was made during the lecture and attempts to capture key concepts of the knowledge presented. The drawing was posted after the lecture in the informal coffee meeting area. The drawing acted as a stimulant for attendees to debate the value of meetings post-lecture thereby moving the lecture from tacit knowledge into the arena of externalisation, and socialisation (Jensen *et al.,* 2007:357). The value multiplier effect kicked in and ideas for ROI are brought to the forefront of attendees' minds. The knowledge begins to link with others in the discussion group. Additionally, the potential for new knowledge loss after a business event is exacerbated by the fact that a great deal of new knowledge is delivered to the attendee in a relatively short, finite time.

As another tool of visual confectionery, Warren (2008:664) advocates playing games that model organisational scenarios and possible strategic futures. Reflection takes learning from a passive imbibing of new content to a practical arena where the new knowledge value is applied and tested in innovative ways. Many experiential tools exist and the point of a competent business event design would be to choose and integrate only those that fit the purpose of the event. There is an underlying variable though that needs attention if the tools are to be effective in their purpose. This variable is the purpose of the learning – and it has to be considered whether the event design is to be a single loop learning experience (which may define the continued professional development learning as found through

associations and personal networks with the organisation not necessarily supporting this activity) or a double loop learning experience (where the organisation uses the business event for an organisational purpose).

2.10.3 Single and double loop learning

Welsh *et al.* (2007:60) draw attention to the important step of a reflective process to be introduced to the final stage of every behavioural change design. It is this process that makes complete the embedding or synthesis of new knowledge and is sometimes referred to as single loop learning. This recommendation corroborates the need for a point of consolidation and internalisation of new information to make it a permanent part within an individual's knowledge repertoire as described by Nonaka *et al.* earlier in this chapter and substantiated by many other authors who advocate cycles of plan, do, study and act processes (here after referred to as the PDCA processes) seeing every evolution of this process as improving the quality of an entire system of complexly interlinked recursive levels as seen in an organisation, its industry and country (Scholtes, 1998:275; Senge *et al.,* 1999:60; Getz, 2007:149; Warren, 2008:663).

However, in the single loop the individual learns but the system in which they operate this new learning remains unchanged by their learning and so this latter constraint acts to nullify the full potential multiplier value of the new learning in the value chain. It follows that the double loop evolves when the new learning acts to change not only behaviour but also changes the environment thereby enhancing or improving the value to be obtained from this behavioural change. The environment or system or system processes need to adapt in ways that support the new way of behaving.

Kolb's theory notes that not all learning experiences immediately bring out new learning behaviour because Kolb maintains that only in the reflective phase can new learning be linked to past experiences and become useful in a new way (Kolb cited by Hornyak *et al.,* 2007:138). It follows intuitively that the degree to which this new knowledge adds to organisational performance will be affected by the degree to which the individual reflects

by themselves on learning and then in a second stage, to the degree to which that individual can apply the old knowledge extended by the new knowledge in the workplace. Supporting Kolb's research is Getz's liminal zone dynamics discussed earlier (Getz, 2007:179). Kayes (2007:427) notes that experiential experiences require social dynamics to make experiences. This argues for social dynamics to be a part of every event design (Figure 2.14).

This infers that to have a greatly improved chance of influencing the knowledge value chain, the individual is not empowered by the organisational culture to use the new knowledge to change underlying organisational systems. As discovered previously, the new learning is rapidly lost to the old imprinted and designed way of doing things if the new knowledge is not actively applied. This suggests that an organisation that sends employees to a business event has a critical role to play with the event designer in making sure the new knowledge has a chance to enter the organisational knowledge repository (Argyris, 2007:25). Thus ROI on an event is affected by what happens once the individual gets back to the organisational environment. The variables of the degree of managerial and the degree of organisational policy support for a learning environment has been discussed earlier in this chapter and the constraining effect of the organisational environment can be seen as a hugely powerful constraint to any value that would be derived from a business event.

Warren takes the importance of a reflective stage to a higher level of importance in organisational performance by recognising that if new knowledge leads to questioning existing systems and looking for ways to improve them, then action based on learning will improve organisational performance. This assumes that Ashby's law holds true and that the new knowledge gave the individual the diversity of knowledge to make recommendations for improved systems. Warren advocates that, through reflective practice, a person can move from individual new knowledge learning attributes to "learning to learn" (Warren, 2008:663). This is a cognitive step that certainly needs organisational support but also requires that the event design somehow alters the way that the individual takes new knowledge and stops trying to fit it into the 'here and now' of a

current organisational situation but learns to see themselves in the 'there and then' of a new situation that they themselves have influenced into reality (Neumann, 2007:263). Delivery to this antecedent of event design requires the co-operation of both the organisation and the event organiser/designer and further requires that this is developed after the event and back at the organisation.

Learning to learn about their organisational environment means the individual has developed a mindfulness of the systems around them and constantly seeks ways to improve them. The individual feels free to express opinions that change organisational behaviour based on individual learning and this is integral to double loop learning (Figure 2.16). It is from this advanced level of reflection that the organisation evolves people who will develop strategic intent for future improved performance by modifying poor quality existing systems and using their internal knowledge in innovative and creative ways (Argyris, 2007:25; Warren, 2008:663).

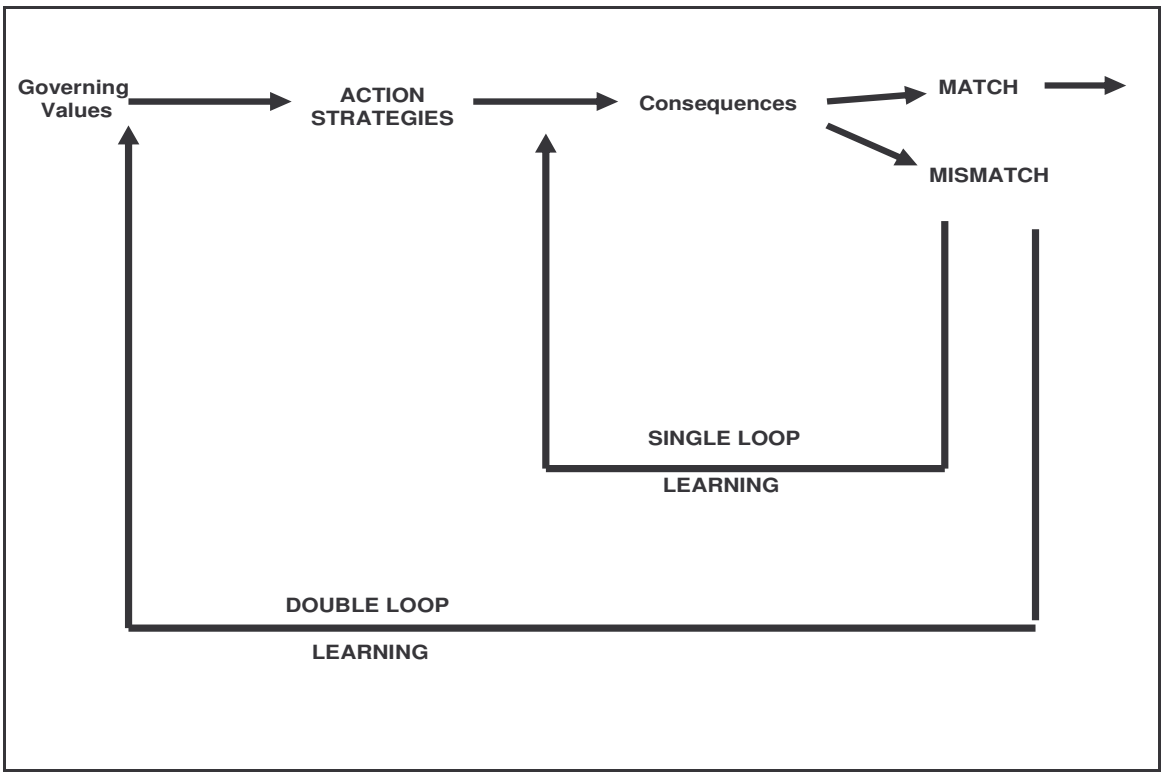


Figure 2.16: Managerial versus organisational learning

Source: Adapted from Argyris (2008:25)

2.11 Branded business events

Business events are often branded by an organisation. The branding includes everything from banners and signage, to branded give-aways and promotional messages.

A financial value is attached to the branding identified by the organisation and known as its brand value or brand equity (Argenti, 2006:38). Cliffe and Motion note that brand strategy requires that "marketing and external communications help build the brand but nothing is more important than the customer's experience" (Cliffe & Motion, 2005:1068). The relevance of this statement becomes moot when considering how business events apply branding for the products and services of the organisation(s) the event is promoting and the relationship between the branding, the employees representing the brand who attend the event and the latter's relationship with other attendees at the event. The question is, where and how does intangible new value from branding arise? Employees who are event attendees critically reflect the same values (mission, vision and objective values) as the branding portrays and does the business event become a memorable and behaviour-changing event for other stakeholders such as customers and suppliers. The overall intangible value of the organisation is affected by all these influences.

As branding has such importance in the perceptions of an organisation's value, the next sub-section reviews factors that sway this value. This section also looks at the knowledge created about an organisation by a business event before the actual event.

2.11.1 Enhancing brand equity as a business event objective

The brand equity could be considered as a form of explicit knowledge of the organisation's products and services expressed as "images, symbols and language" (Nonaka *et al.,* 2000:20). Argenti defines brand value in the wider scope of an organisation's "corporate communication" and as an integral part of the organisation's intangible asset base. The intangible value of a corporate communication by this

definition includes “brand value, customer relationships, corporate reputation and workplace productivity” (Argenti, 2006:38).

While workplace productivity has been reviewed as often measured by performance indicators in terms of units made and sold or similar key performance indicators that monitor the fluctuations of the asset output related to raw material inputs, this literature review shows that changes to intangible assets are far harder to monitor as to their value-adding influence. Yet Argenti (2006:39) argues that, although generally unmeasured, communication activities are critical influencers in successful organisational performance. Their role in business events can not then be ignored.

However, Campbell (2003:378), while considering many researchers who endorse Argenti’s view that marketing activities such as communication enhance organisational performance, draws attention to the fact that there is a low degree of information flow between overall organisational customer relationship management and information databases kept about customers (technology based). As a result,this, when shared between the organisation’s internal functions, led to a mismatch between correctly anticipating customer needs and what is offered to the customer by the organisation. This showed that no matter how good the organisational communication lines between functions, if the organisational knowledge repository was of low quality this negatively affected performance.

Although Campbell’s work examined the value of technology-based Customer Relationship Management (hereafter referred to as CRM) databases, the same logic argued by Campbell as to the value of CRM for future organisational performance must be applicable to any aspect of CRM whether IT based or not. The inference is that a business event needs to ensure good communication channels with vigorous flows of new and useful content. Back stepping this means that the flow has to stem from a knowledge repository that is reliable and is constantly updated with new and valid information (the business event). Additionally, that same information needs to replenish the organisation’s own knowledge repository. Logically, information arising from branded business events

must be captured into mechanical (IT) based repositories and must be the same message that all internal organisation functions share as their combined organisational purpose.

Campbell (2003:381) notes that considerable strategic advantage could be gained from focused, specific attention to the content of each organisational message sent to customers. The business event communication strategy becomes part of the customer relationship management (CRM) model planned with the purpose of adding value to the strength of customer-to-business and business-to-business relationships.

Additionally, but outside of the scope of this research, the effect of the marketing tools such as the business event promotion and registration website, the promotional material associated with the event and how and to whom it is targeted, the public relations that follows initial contact with the event via the website the process for the closing of the delegate attendance sale and so on. In turn, this draws in the more tangible aspects of the value for which the attendee contracts when buying business event attendance such as event content, surrounding hotel room quality, the event venue suitability, and transport convenience.

2.11.1.1 Event sponsorship as an element of branding

Cliffe and Motion (2005:1069) cite three distinct and traditional fields of research based on the acknowledgement that sponsorship of events by an organisation seeks to build the customer's experience with the brand as positive. These are: "recall and recognition of the sponsorship; image transfer of the sponsorship; and corporate branding and the sponsorship" (Cliffe & Motion, 2005:1069). However, the authors draw attention to further intangible aspects that add value. These include the experiential sponsorship characteristics that strengthen or weaken relationships built between the customer and the brand; the influence of emotionally charged sponsorship aspects on the future behaviour of the customer from a sociological aspect of identifying with the brand as it has become part of the imagery associated with that brand as represented in that time and place (the business event) (Cliffe & Motion, 2005:1069; Getz, 2007:11).

The relevance of branding including sponsorship is that branding is an intangible asset and within the context of an event it needs to have objectives tied to overall organisational strategy. Cliffe and Motion (2005:1069) quote Johar and Pham, "Relatedness [between sponsor identification for a customer] need not be restricted to a semantic association between the event and the sponsor's product features; it may also capitalise on other semantic associations between the event and the sponsor's image and personality". Business event branding in terms of sponsorship becomes part of the strategic objectives defined in designing a business event.

2.11.1.2 Branding as a value contributor in the organisational value chain

Argenti advocates that all corporate communication influence is measured and statistically analysed to gain an understanding of how much value accrues from these activities (Argenti, 2006:39).

Argenti (2006:30) states, "Business leaders are interested in investing capital in activities and assets for which risk and return characteristics are objectively measured, analysed and predicted with some degree of certainty based on data and figures" and Argenti (2006:38) continues, "[Intangibles] explain how two companies that look similar on paper have very different share prices".

This supports the statements of Rodgers (2007:207) and Sriram (2008:353) reviewed earlier that intangibles drive both share prices and volatility in the investor markets. As such, this intangible asset can be seen as critical when considered at the upper recursive level industrial performance - that of the industry to which the organisation belongs. By Beer's Viable System Diagnosis (hereafter referred to as VSD) the corporate communication of every individual organisation in an industry will affect the overall health of the entire industry and thus have impact on the economic health of a country (Walker, 2001:14-17). This is because the quality of the business event communication at the operational level of the business event is a unit of value contribution to the overall vitality of an organisation and thus the industry in which it exists, and logically its

country's economy. The business event communication sends messages about organisational viability and health to both internal and external stakeholders of the organisation and the industry.

This evidence for outbound communications as seen with branding and sponsorship (often entailing branding) at business events supports the existing facts presented that intangible assets are largely unmeasured about the quality of the organisation's image (an intangible asset) being delivered by business events.

2.11.2 The brand experience as a driver of behavioural change

Consider now who attends a business event. Who constitutes the target market that is either invited or who the marketing pre-event targets as an attendee? The attendee mix at a branded business event will arguably depend on the event purpose. The mix varies widely but it is obvious to ask, does the communication message change to address each type of mix as it has a direct relationship to the degree of attendee behavioural change that is anticipated as an outcome of the event? The outcome is as a result of an objective set before the event. The outcome must add value and can only do so if the attendee undergoes a behavioural change that in some way favours the productivity and profitability of the organisation.

Sometimes a branded business event is held only for attendance by the organisation's staff. Sometimes it is the staff and invited guests representing external interests and relationships. Sometimes it is open to the public and anyone interested in the industry may attend. Sometimes the event belongs to a strategic partner such as government and the branding is a form of sponsorship. Many big companies such as Microsoft hold an annual conference to which a mix of delegates attend such as staff members, media, other business associates, and potential business partners.

Argenti (2006:30) indicates the role of the communication strategy value as critical to changing behaviour "from gaining employee buy-in to engaging customers to managing

relationships with investors". The stumbling point is again the inability of organisations to identify and measure the cause and effect relationships of intangible asset value and a behaviour change in a recipient. An understandable reluctance on the behalf of organisational leaders to commit budget to business event attendance on these terms would not be unreasonable (Argenti, 2006:31). The question arises, to who does the responsibility of managing ROI for business/organisational objectives from communication at a business event, fall? This may well be where the possibility of managing and measuring ROI begins. This is discussed further in chapter 3 when the role of the event organiser is examined.

Argenti (2006:33) argues that the way in which value is acknowledged has changed in terms of measurement and its corresponding value to an organisation (Figure 2.17). Data on organisational performance traditionally drew on counting measurements as realisations of organisational objectives from tangible outcomes defined in numeric terms such as profit in dollars, productivity measured by sales, and items made. This is not however an indicator of how these outcomes will look when strategising a desired future. Currently efficiency is tied to these numeric valuations by measuring the quantities of inputs to a transformation process and thus gauging performance by the quantity and quality of outputs. The diagram (Figure 2.17) suggests that in a twenty-first century organisation, the focus will be on the many underlying variables that deter or enhance performance and how to manage these.

Argenti (2006:33) argues that it should be recognised by every organisation's leaders that there is more to creating organisational value than just what is seen as a tangible manifestation such as traditional data (Figure 2.17). The 'present' condition of organisational analysis for performance currently recognises that there is a relationship between outputs and what actually contributed to that output – both the visible (such as raw materials used) and the invisible (such as behavioural changes).Value derived from a strategic action can only be measured if all the variables of the situation, both tangible and intangible, are analysed as to their individual value adding contribution. Currently

intangible variables such as communication still remain as largely unidentified and thus uncontrolled.

Argenti (2006:33) concludes that the 'future' realistic interpretation of the intangible value contributors lies with clearly establishing the causal effect of intangibles (such as communication) in relation to the value they add to the outcomes.

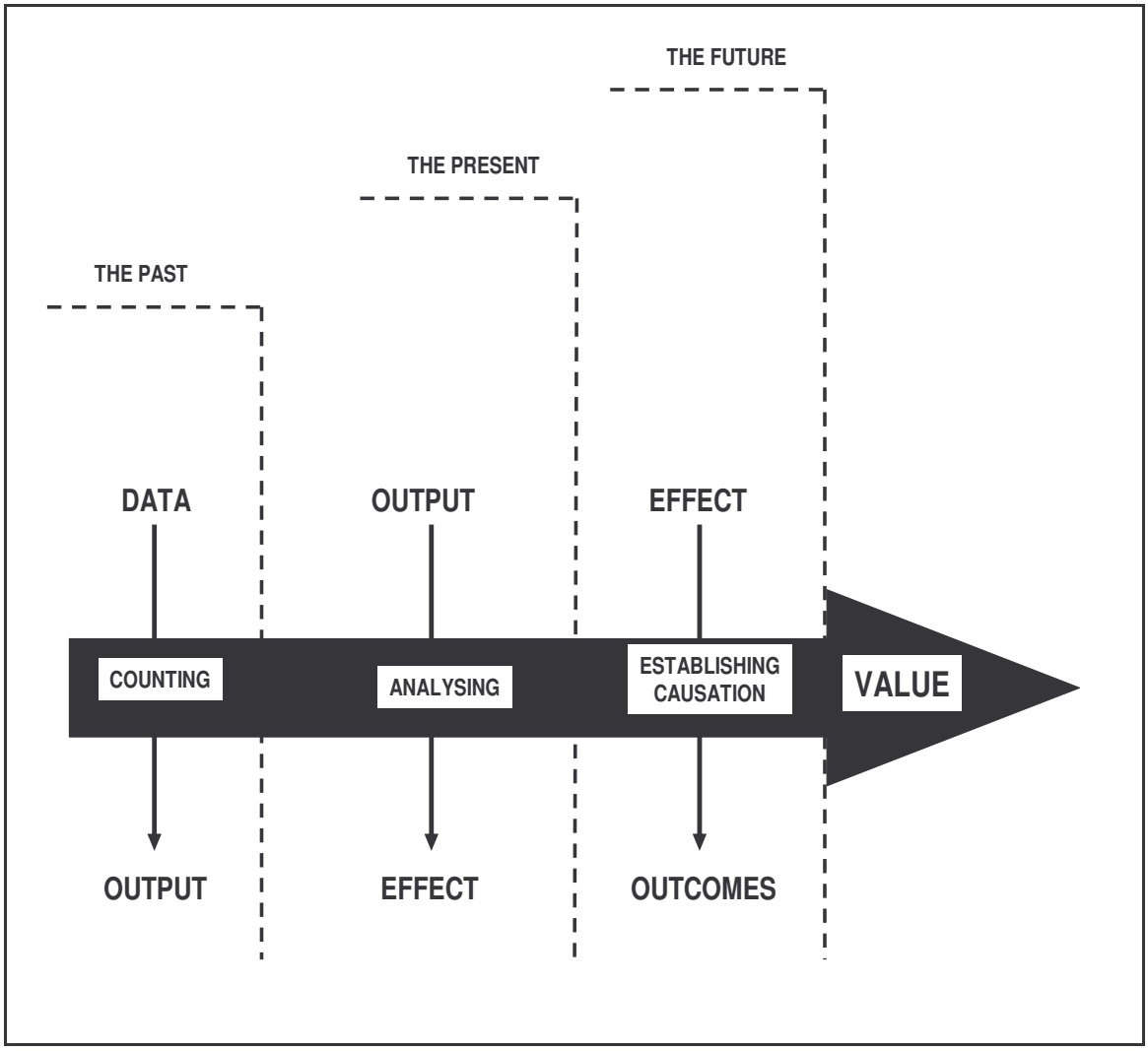


Figure 2.17: The evolution of communications measurement
Source: Argenti (2006:33)

Branded events carry a message and become a physical manifestation of the organisation. The perception of the product or service by internal and external stakeholders relates to the degree of trust individuals and other organisations have for this organisation. The degree of trust is an external manifestation of the organisation's social capital which is an intangible asset and thus affects the organisation's ability to perform (Nonaka *et al.,* 2000:20; Liker & Hoseus, 2006:39; Allee, 2008:6).

Allee (2008:7) suggests that knowledge has a "negotiable" economic form in that people will trade either their own knowledge for knowledge or money (in the case of the event delegate fee).

The question now follows, based on the discussion of this section, as to how the pre-event and event organisational communications affect behavioural change. In line with Argenti's argument that the future of both measuring intangible value and managing intangible value (in terms of behavioural changes) lies in establishing the causation effects of intangibles, it follows that intangible variables, if identified, could be managed and measured. The overall result being improved organisational performance in terms of tangible outcomes influenced as an outcome of intangible casual relationships between intangible assets and behavioural changes.

2.12 Creating expectation of the value of an event

The impact of aspects of the event such as the appropriateness to the attendee of elements of the event: the country in which the event is held; transport (plane, bus and car) to get to the event venue; the quality and variety of the hotel accommodation; the degree of support of local and national authorities for business tourism events.

All play a role in building the expectation and anticipation of the event in the mind of the attendee. Getz (2008:413) notes that little research has been done on what creates the feeling of expectation linked to attending a business orientated event.

2.12.1 Linking organisational communication strategy to event expectation

Apart from the tangible elements of expectation identified above by Getz, the question arises after the review of the previous section as to the degree to which the event communication message contributes to expectation about both the event and the organisation and begins to unfreeze the current behaviour of the potential attendee making them more ready for change as noted by Lewin (1951:228). Cliffe and Motion (2005:1075) suggest that their research indicates that there is a strong relationship between an organisation recognising that activities such as event sponsorship have potential as an opportunity for creating positive attendee behavioural change - looking more favourable upon an organisation which is associated with a successful business event – the behavioural change coming as a result of the positive event experience. The business event can be argued therefore as being a symbol of quality in the minds of the business attendee and potentially creating a new customer for the sponsor so sponsorship is more than just communicating a branding message. If follows that if the business event leaves a bad impression the sponsor may loose a customer.

The experience is the defining element in changing behaviour and supports Getz's argument for the focusing on elements that influence the event design when creating a liminal zone where attendee behavioural change has the most opportune elements for success (Getz, 2007:179). This argues that branding and sponsorship organisational marketing as described in the previous section are variables that must be managed to create event experiences to generate improved intangible organisational value as the customer becomes more organisation-centric as a result of these experiences. This in turn positively influences future organisational performance.

It can also be argued that the utility of pre-event communication and its relationship to expectation is in the value it begins to create by reducing barriers to behavioural future changes. The Ba of the event could be construed as beginning in the phase of expectation and the tacit behaviour of an individual becomes more open to change. Expectation may be extrapolated to incorporate the basho of a relationship between and attendee and the

organisation now becoming open to change. The product that the organisation is offering becomes more interesting and thus perhaps more needed by the attendee. The value is intangible but essential to influencing future organisational performance.

It is then not easy to say how much these aspects of the event contributes in both positive and negative ways to an individual's mindset before attendance but, in studying intangible influences, it is important to acknowledge the presence of these factors. Since a person with a negative attitude can affect group dynamics negatively as has been discussed, it follows that a person with a positive attitude will affect the group dynamics in a better way.

2.12.2 Further elements to consider in building pre-event expectation

From the literature review research presented thus far, it seems that creating a feeling of positive expectation for the event with a potential attendee will make the attendee likely to be ready for cognitive change. To this end, it seems evident that the event content needs to address the event attendee as the consumer with needs to be fulfilled by the event. Mair and Thompson point out five steps to a typical attendee decision-making process: motivation; information search; evaluation of alternatives; decision; post-decision behaviour. Motivation to attend was not investigated by Mair and Thompson in the form of pre-event expectation contributors. Contributing aspects include such examples as the degree of success in communicating the event content to drive an event ticket sale, the relationship of the content with the excitement it engendered in the potential attendee or, pre-event mechanised processes such as the attendee's satisfaction with event registration functionalities such as online registration, faxed registration processing, payment processes, pre-conference programme availability (Mair and Thompson, 2009:401).

Lee and Back (2008:340) and Severt *et al.* (2007:406) note that event expectation is greatly affected by past good experiences which, in turn, drive advertising as word-of-

mouth. So positive word-of-mouth reflects positive cognitive feelings about the event and all it promotes.

This being the case, formal and informal networks especially with the power of cellular and Internet tools can be powerful in passing on judgment about the event before it happens. Customers have become part of the creation of expectation. This is reflected in personal research of the event carried out by possible delegates before they make their 'buy' decision to attend. Mair and Thompson sum up the components affecting the decision to attend the conference in a flow chart based on their research findings (Figure 2.18). In this flow chart, Mair and Thompson point out that the Internet provides a source of information which affects the decision to attend. Information of interest to the potential delegate is shown to originate from the host country's local and national tourism offices (Mair & Thompson, 2009:407).

It is not stated in this research what the tourism offices are promoting - business and/or leisure aspects. The degree of a country's support for the business event, however, is still a contributing factor to developing future economic income for that country (Mair & Thompson, 2009:401).

Mair and Thompson indicate that the appropriateness of pre-event information available affects the decision to attend (Figure 2.18). Word-of-mouth on experiences at past events is powerful as this is the opinion of other peers and contemporaries as to the value they attached to attendance. A match or gap between pre-event expectations of value to actual value attained by attendance will affect word-of-mouth feedback. Measuring the delegate event experience is a recognised performance indicator of many ROI models. Generally the attendee is asked to rate the event while still at the event site or shortly thereafter. While this is a valid action, it has to be considered against what prior to-the-event experiences built the attendee's sense of expectation about the event and this now affects how the attendee gauges satisfaction .in the present or post-event time (Mair & Thompson, 2009:401).

The need to include and measure what an attendee expects, having been exposed to the pre-event phase against what they have been delivered when at the event or post-event would provide interesting information about building successful pre-event experiences. This further suggests that ROI measurements could, by assessing variables associated with pre-event expectation against post-event experiences, assess not only the degree of satisfaction with an event but also begin to identify the variables associated with influencing intangible knowledge acquisition and thus by inference assessing whether the liminal zone and degree of communitas had been successful in creating potential for behavioural change. There is a cost to building pre-event expectation. The event cost falls to the event financer and co-supporters such as brand sponsors in terms of money invested and the potential for damaging or enhancing the expectation of this and future events. This suggests that, while the role of the event designer is key, that the event design cannot be undertaken by a designer without a full understanding of the event expected deliverables at every phase of the event and not onsite at the event, or post-event. There must rather be a comparative analysis as value to aspects such as branding equity may occur at the pre-event and be carried though in future behavioural buying patterns.

Mair and Thompson highlight that many researchers have found that the attendee decision-making process is particularly affected by cost to attend. Delegate fees are found in the research to always be of relevance as a constraint to attendance particularly in professional association conferences where the attendee may have to pay all or most of the cost his/herself (Mair & Thompson, 2009:403). Their review highlights that attendees look at the geographic location attractiveness when making their decision. Apart from the event content value, this research shows that the decision is influenced by the degree of attractiveness of such extra points as event travel add-ons as pre-/post- event opportunities for sightseeing, business, family and friend visits that help qualify the spend to attend; personal health and security concerns; personal time available to attend; convenience of the location; networking opportunities from attendance; conference activities; continued professional development opportunities (Lee & Back, 2008:340; Mair & Thompson, 2009:402).

Getz (2008:416) draws attention to the 'pull' of the event for the attendee in that the event offering has to appear to be able to fill a specific set of needs. Mair and Thompson's flowchart of the degree to which expectation influences an attendance decision underlines that a degree of expectation builds to a capacity that drives the buy to attend decision (Figure 2.18). This research confirms Getz's model of a business event experience where designing for antecedents, barriers and constraints that will influence its success (Figure 2.6).

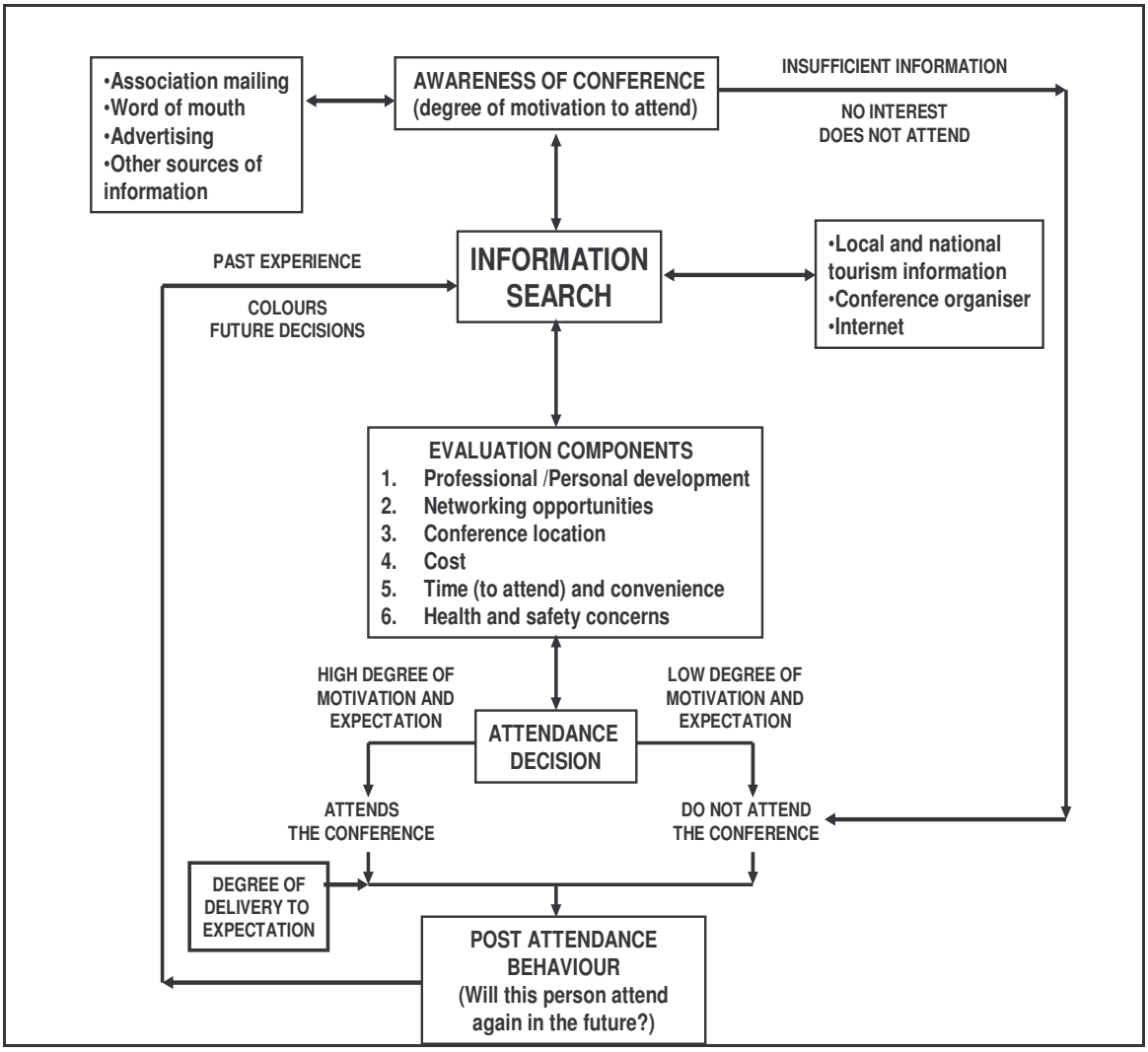


Figure 2.18: The creation of a degree of expectation prior to conference attendance
Source: Adapted from Mair and Thompson (2009:407)

In this research, Mair and Thompson did not focus on identifying gaps that may exist between the expectation created and the actual delivery of the promoted components. However, these authors infer from their results that the experience received will affect future decisions to attend a business event (Figure 2.18). This suggests that someone, perhaps the event organiser, has to be responsible for delivering what is expected which can only happen if variables of the event are managed from the outset of planning.

2.13 Promoting global networking

Many aspects of the previous sections allude to the role of supporting structures of events - host countries in both influencing decisions to attend and attracting the variety of people who will bring new knowledge with them for the host country. It is important to remember the concept of inter-related systems affecting the health of the whole as described by Stafford Beer's work reviewed earlier to fully understand how a business event could be a value-adder for a country's knowledge pool.

The literature review has clearly shown the link between employee knowledge, the organisation's knowledge and the organisation's future performance as being inter-dependent as to their contribution to an organisation's performance. Knowledge flows from the individual into knowledge pools (groups, networks) from where it can be used to create a variety of responses to be used in adapting to changing needs and environments. It has been seen that business events provide the medium to replenish these knowledge pools. The organisation relies on the quality of the pool to create the best quality responses to the changing environments in which it operates. Good choices lead to viability and future health. In turn, every organisation is part of the bigger system of their specific industry.

It follows that if the organisations within an industry are healthy, then one could expect the industry of the country to be contributing in a positive way to the gross domestic product. It might be said that a country has a vested interest in creating business events that grow healthy industries if the country is to show significant economic performance

and distinctive competencies over that of the same industry in other countries. In turn, success attracts others to invest in the best performing country. The recursive effect of the knowledge acquisition is that the event leverages acquisition of new knowledge for an organisation, which performs better, in turn contributing to an industry giving a competitive superiority to this country's industry over similar others in other countries. It can be argued that every country should support the importance of business events to drive economic growth.

What Rycroft finds is that not only is networking happening on a global level via the Internet and face-to-face meetings but it is also occurring on a national and regional level within countries. Many countries have clusters of collaborating companies geographically situated close together (Rycroft, 2007:568). These groups hold not only planned collaborative face-to-face meetings in their geographic region but still link to their geographically remote alliances for new knowledge. Physical proximity is a key as it develops "common values and strong levels of trust" (Shaw & Williams, 2009:329).

A huge value-add for the host country is that the regional knowledge meetings often lead to spillover concepts as described earlier in the value shop scenario of an organisation. To this end, Rycroft notes that many countries are encouraging niche technology industries to be geographically located within them, and encouraging global collaboration by networking both virtual and face-to-face through business events (Rycroft, 2008:573).

In corroboration and as an example of the impact countries believe these knowledge enclaves have on the economy of a country is the National Business Events Strategy for Australia 2020 issued by BECA (Business Events Council of Australia, 2011b). BECA have developed their business tourism events strategy with consideration of knowledge flowing from hosting business tourism events as a keystone.

Not only does the strategy set out a framework for how the Australian government will actively assist in hosting business tourism events but the strategy notes, "The intangibles that flow from having convention and exhibition delegates coming to Australia arguably

provide the most enduring advantages for the nation" (Business Events Council of Australia, 2011a:ii). The strategy document continues, "Business events also promote and showcase Australian expertise and innovation to the world; attract world leaders and investment decision makers who would not otherwise come to Australia; provide world-class opportunities for young Australian professionals and students; and build professional networks between Australians and international companies and associations" (Business Events Council of Australia, 2011a:4).

Rycroft (2008:575) notes that the degree to which a geographically clustered group of allied organisations use a global network for knowledge varies, dependent on how fast change drives the need for innovation. Industries needing to constantly innovative to remain competitive need a high degree of external network support to create the variety of knowledge inflow required to meet change (Freel & de Jong, 2009:875). These latter authors found that unique innovation necessitates a great diversity of knowledge to trigger unique thoughts. Rapidly changing industries also require rapid learning of new employee skills and capabilities to create new processes and products. National business event strategy should incorporate ways to promote meetings with specialist knowledge holders.

There seems to be no doubt that the business event, whether virtual or face-to-face, is a medium for knowledge acquisition. The geographic clustering trend suggests that it is probably worthwhile for an attendee will travel to a cluster of interest holding a conference because it will represent access to a very specialised information node. The conference may be the way for an attendee to gather contacts for a creation of a unique network for thinking and innovation which will exist even after they return home. Designing and promoting such a conference requires not only that the event organiser and their collaborative support (the country and industry leaders) be cognisant of the target market's variety in specific skills of that industry (to ensure they are invited) but also of horizontal integration with other industries of interest to trigger a broad variety of innovation. Acknowledging a geographic region of interest as the conference venue will build expectation of the abundance of knowledge to be available moreover making

industry site visits a possibility in the event repertoire. The possibility for network creation and thus organisational value creation is the chance for the event organiser to pre-qualify the reason for attendance expenditure.

A current route of gaining access to specific networks is via professional associations. Many associations have formalised meeting event schedules and many rotate the globe having meetings. The relevance of these associations to knowledge development will be discussed in chapter 3.

A final comment on the relationship of the face-to-face meeting and its value to a country's economy must be made. Research by Bauer *et al.* (2008:233) concludes that attendees at a business event rated the importance of networking, business opportunities and learning quality as being much more important to them than the location or even safety aspects of the event. Getz (2008:416) suggests that business delegates will make a conscious effort to identify and attend business events which display positive attributes for attracting other business delegates that have relevance in terms of expertise and knowledge to their own organisation.

As business delegates generally contribute as an important economic driver in the hospitality industry of a country and this makes hoteliers to some extent dependent on successful business tourism events to fill beds. This suggests that a national, provincial or town strategy for support of business events of both regional attendees and international attendees be supported by government and parastatals, local business chambers and think-tanks actively contributing with value-adds to building the event. Bauer *et al.* (2008:233) further conclude that a marketing campaign highlighting the knowledge attributes of the particular geographic region rather than its geographic attributes (sun, sea, shopping) would help to fill hotel beds with business delegates. These authors recommend that the attendees are surveyed post-event to make sure that the expectations of business knowledge and business opportunity were indeed met as advertised (Bauer *et al.,* 2008:233).

2.14 The relationship between the organisation and knowledge

This chapter has given an overview of the drivers and restrainers at work in strategy created to manage an organisation's business events. Knowledge acquisition needs to follow a plan. The value knowledge management creates for an organisation can be influenced and business events can be effective tools for this.

Five gaps that need to be minimised to optimise the output of a knowledge management system are shown in Figure 2.19. The authors note that gaps 1, 2 and 4 contribute to organisational future performance but only indirectly (Lin & Tseng, 2005:171). Research by Lin and Tseng attributes two gaps in particular as having a direct detrimental influence on knowledge management: "The gap [3] between the plan for knowledge management and the implementation of knowledge management; the gap [5] between the knowledge upper management believes necessary to support future performance and the knowledge the other employees feel is relevant" (Lin & Tseng, 2005:164). Business events are definitively part of an organisation's activities for knowledge implementation so can potentially contribute to, or diminish gap 3.

The second gap that requires attention to be minimised is that of "the knowledge upper management believes necessary to support future performance and the knowledge the other employees feel is relevant" (Lin & Tseng, 2005:164). The authors note that the degree of magnitude of this gap will have a direct detrimental effect on future performance (Lin & Tseng, 2005:171). While the influencing variables of such organisational aspects as leadership, culture and event design have been reviewed with regards to knowledge management from the organisation's perspective, this gap draws attention to the need to understand the perspective and role of employees and their attendance at business events as part of the knowledge management system and its knowledge facilitating activities (Figure 2.19).

In order that gap 5 be manageable and be diminished, the next chapter reviews the relationships of knowledge management and business events from the perspective of the employee.

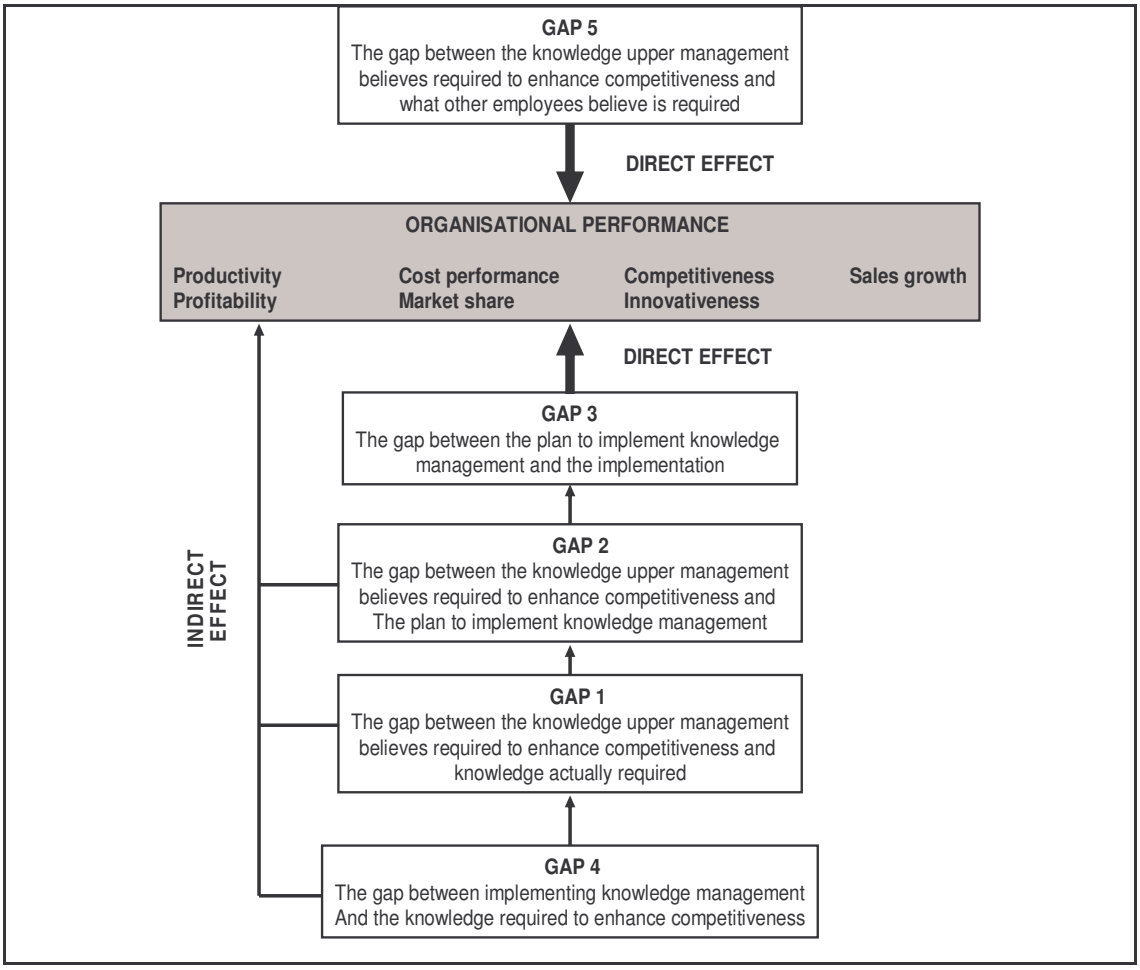


Figure 2.19: Gaps that affect the knowledge management system
Source: Adapted from Lin & Tseng (2005:164-169)

2.15 A review of variables of business event design identified

The business tourism event such as face-to-face and online meetings, trade shows, training and workshops provide the forums for knowledge acquisition.

From the literature reviewed, it is clear that the key initial input in the value creation chain of knowledge in an organisation, is the degree of receptiveness of the employee to new knowledge. For the employee to fully utilise new knowledge and participate actively in its scope of application, the knowledge need of the organisation must be contextualised pre-event for the employee. Management needs to plan strategically how to maintain an appropriate level of employee receptivity to new knowledge. This could be addressed by developing a knowledge acquisition strategy that plans with different organisational functions what business events to attend externally, what business events to hold internally and who will attend the events. The strategy would have a budget and expenditure would have to be validated by beneficial changes in organisational behaviour that help deliver on the desired futures envisaged for the organisation's performance.

The literature review suggests that the employee preparation phase for knowledge acquisition should begin before the event takes place. Contextualising would mean discussing with the employee why she is attending the event. This could be done by reviewing specific aspects for organisational viability such as future strategy or current problems with the employee. The employee would then participate in more focused socialisation activities. Linking future knowledge needs to current organisational challenges is an antecedent of contextualisation. These actions would be repeated for every employee attending an event and this suggests that normative managerial actions of creating policies and processes to guide event attendance could help ensure that the organisation reaps benefit from attendance by cueing the attendee as to organisational expectations of the event.

The next phase of knowledge acquisition moves to the physical location of the event where learning takes place. Value drivers such as the knowledge of people present and the physical space are critical components of the knowledge transfer facilitation. The literature reviewed suggests that the knowledge held by the variety of people who interface with the attendee are significant in the latter's uptake of knowledge that has value for the organisation. Concurrently, so are the physical spaces and places that provide opportunity for the attendees to meet and talk. Knowledge content and topics

have been shown as important as jolts in starting a cycle for new knowledge development. Three antecedents for successful onsite knowledge transfers are: the suitability of the physical space to meet; the knowledge of the people present; and the appropriateness of the content presented. The literature review noted that different types of learning presentations produce different types of tacit knowledge extension. The value-shop scenario is highly specialised and focused on specific problems. An organisation might see a value shop workshop drilling down on one specific industry problem as well worth the cost of event attendance. A second more generalised focus is on spontaneous sharing of the knowledge of suppliers, partners, customers and peers. Both focused and general interactions for knowledge creation are important as they are antecedents for socialisation (S) types of knowledge transfer.

Evaluation of the business event benefit to the organisation could be controlled by creating normative management actions such as a standardised pre-event analysis instrument. Someone in the organisation is specifically appointed to the role of analysing the cost, venue, range of event activities, range of speakers and content, opportunities for networking and other variables of interest ranking each with a Lickert scaling on appropriateness for the knowledge need in the organisation at that time. The employee would also need to indicate on a Lickert-type form, their perceived benefits to themselves and the organisation from attendance and, in turn, their perception of what is to be acquired by attendance could be aligned to what the organisation needs from the event. The pre-event valuation would give indicators of the event's potential in such aspects as the degree of socialisation; the degree of learning sub-divided into skills, trends and competitors; and the degree of networking and relationship building.

Finally, a post-event knowledge acquisition phase needs to be considered because it creates the opportunity for externalisation, combination and internalisation (the 'ECI' of the SECI model) to add further value to the organisation's investment in the event. Again, since the process of 'ECI' will be repeated in a generic format for most events, a normative management tool would ensure that the knowledge was deposited in the organisational knowledge repository. By doing so, the organisation creates a record of the

potential value of the event and can use this as a baseline for measuring future employee performance and productivity arising from the event activity.

2.16 Conclusion

A research question has been created from the literature reviewed. The research question that the field survey will seek to answer is how management actions are currently influencing knowledge acquisition from a business event.

RQ1: How do an organisation's staff members affect the design of business events?

Chapter 2 evaluated the relationship of improving organisational performance through business events. The purpose of the chapter was to understand what research exists and contributes to an understanding of organisations and the intangible asset of knowledge. This analysis of secondary data has been focused on the level of the organisation and its functions with relation to knowledge acquisition and its use to improve organisational performance. The value of business events and business tourism has been shown to be of value in both the gross domestic product of countries and as a value attributable to the knowledge that these events create for individual organisations. The analysis has created several propositions demonstrated with causal loops of what sort of framework an organisational knowledge strategy would need and where business events fit into this strategy.

This chapter review has highlighted that the human resource function represented in the organisation's employees can be significant in its contributions to organisational knowledge both from arising knowledge from business events and knowledge multiplication and productivity post-event. Chapter 3 reviews literature that gives a deeper understanding of knowledge and business events from the perspective of the employee. The literature review of chapter 3 concludes with a research question which contributes to bringing focus to the objective of this thesis' primary research.

CHAPTER 3

EMPLOYEES, ORGANISATIONAL PERFORMANCE AND BUSINESS EVENTS

3.1 Introduction

The purpose of this chapter is to look more closely at how the organisation replenishes its organisational knowledge repositories through business events. With regards to knowledge arising from business events, it is the event attendees such as an organisation's employees who have the potential to absorb new, useful knowledge and bring it back into the organisation. The employee, whether employed in a leadership or operational capacity, is the only asset of an organisation with the ability to apply knowledge flexibly in response to the organisation's constantly changing operating environment. This flexibility is a unique attribute of the organisation's human resources that leads to innovation and creativity.

Chapter 2 examined the role of the organisation and the business event as a system within and below the business tourism industry system. This chapter will investigate the system below the organisation and business events – that of the employee and business events. This is done to gain a better understanding of how the employee, who is part of the human resource component of the organisation, adds value to the higher system, the organisation.

The chapter also investigates how models to manage knowledge through strategic initiatives such as the Kirkpatrick-Phillips ROI model and the Balanced Scorecard contribute to the outcomes of a knowledge intervention such as a business event.

3.2 The knowledge worker

Understanding these variables' behaviour is conducive to improving long term organisational viability and profit by using business events to influence the value they

create or inhibit. The effect of variables such as levels of dissonance, competitiveness and motivation (introduced in chapter 2) on knowledge absorption are reviewed further in the context of what this means to employee knowledge in terms of constraint or as a driver of knowledge creation. Literature that investigates the relationship of employees and business events is limited so an interdisciplinary view is again taken to establish how intangible value in the form of knowledge is created or lost in the relationship between business event, employee and organisational performance

The employee as a 'knowledge worker' who potentially uses personal knowledge, skills and capabilities to the benefit of the organisation, was introduced in chapter 2. It follows that a knowledge worker's contribution to an organisation plays a pivotal role in releasing improved future organisational performance. Yang (2008:346) notes, however, that the outcomes of uptake and application of personal employee knowledge "can be significantly determined by individual attitudes to learning, sharing and storing knowledge". This suggests that it is important to understand organisational performance in terms of its dependence on an employee's attitudes and how this has relevance to business events. Business event outcomes seek to create cognitive change so any constraints to creating this change need to be minimised.

Chapter 2 established that cognitive change can drive workplace behavioural change in a positive way. Grant and Schlesinger draw attention to the fact that the new knowledge has to be useful to the organisation to be of any value in improving performance. Campbell agrees noting that the challenge of realigning employee behaviour to share new knowledge is in many respects the same as that of the challenge of realigning customer behaviour because one is an internal customer and the latter is an external customer. Both are customers looking for value from their exchanges with the organisation (Grant & Schlesinger, 1995:60; Campbell, 2003:380). Customer buying behaviour is moderated by actions that the organisation plans to attract and retain customers. This includes moderating employee-customer relationships. Moderating a customer's buying behaviour is a strategy linked to the organisation's mission and strategic objectives which, if successful, lead to changes in the organisation's economic performance (more sales).

Employees need to align to the organisational mission and its objectives and apply these to serving customers to benefit organisational performance (Campbell, 2003:382).

Campbell (2003:380) highlights the value of linking employee behaviour to organisational objectives. She presents findings that show that some of the organisations that were part of her customer relationship management research exhibit positive organisational benefit when organisational objectives are set to link employee behaviour training to improving individual employee customer-centric behaviour. The employees strengthened their relationships with customers by being more attuned to their needs and this drove improved sales performance. Campbell's research is a confirmation that it is the worker's behaviour in the workplace that creates tangible organisational benefit through aspects such as improved sales. The intangible of greater knowledge about their customers resulting from a business training event improved organisational performance.

Campbell's (2003:382) research also highlighted the importance of employees sharing knowledge. Her findings indicate that it is necessary to build internal processes that carry an individual's useful knowledge across the organisation's internal functions ensuring that this information is given opportunity to flow to other employees. Successful customer-centric support by employees and thus better satisfied customers also relied on knowledge about them being carried throughout the organisation so that everyone could help in creating a satisfied customer. An employee with unique knowledge is valuable in their individual capacity but even more valuable to the organisation when this knowledge is shared and used by others to improve overall performance.

Uniqueness can drive productivity so the next section reviews the current understanding of how uniqueness can be encouraged in employees.

3.2.1 Acknowledging the uniqueness of the employee's knowledge

Chapter 2 established that the individual is part of many inter-related systems both internal to their own organisation and externally through individuals in other organisations and customers. Knowledge is derived by employees from all these sources.

The systems perspective of Campbell's findings is that value added in one area can flow through the nested relationships of employee within group, organisation, and inter-organisations producing innovation of great variety and possibly more value (Van Winkelen, 2010:10). Conversely decisions taken based on inaccurate knowledge flowing from one part of a system affects all the inter-linked systems negatively and reduces performance (Zulauf, 2007:490).

Some organisations have been seen in this literature review to recognise the value of business meetings that bring together employees of the same organisation but different work functions such as the tiger teams and knowledge cafes. Organisational normative processes can actively drive these meetings to happen. The question now arises as to what extent the employee can be encouraged to throw the weight of personal attributes and attitudes into building the organisation's future. Variables that could be influenced in the employee to encourage changing personal tacit know-how into shared, public domain know-how need to be identified.

Yang (2008:345) found variables of interest in his research which sampled over 400 service employees in international hotels in Taiwan. The first finding in this research is that a particular type of employee proactively contributes to organisational knowledge. These employees seek out opportunities for sharing their thinking and learning. In doing so, they naturally act as amplifiers for what is in their personal knowledge repository. They became a knowledge pathway that knowledge flows through, much as a node in a network (Yang, 2008:352). The author noted a further interesting reciprocal effect attributable to these 'sharing' employees when they work with others.

The sharing employees are more open to listening and learning from others and others shared with them more because of this personal sharing environment created by the

natural sharers (Bennett, 2001:197; Yang, 2008:352). These natural sharers create informal, peer-based networks of learning of their own volition (Styhre, 2006:101). So while tiger teams are organisational methods that insist on meetings for linking functional areas, certain employees do this naturally.

Traditionally, holding superior professional knowledge over others often results in a more prestigious organisational role so this sharing action infers that this type of employee did not feel a diminishment of their power position in the organisation if they gave away knowledge. Nor did they exhibit superiority from gathered knowledge as they continued to act as sharers by forwarding the knowledge. They did not apply a silo mentality to their personal knowledge repositories and even broke down the silos of others with their natural tendency to share knowledge.

Yang's research reflects how a healthy, self-sustaining and complimentary dependency relationship between an individual's knowledge, shared knowledge and the overall growth in the capacity of the organisation could exist. It would be possible through employees with the right 'sharing' attitudes. Yang suggests that sharers can be developed by the organisation. Yang (2008:353) argues that formal recognition of sharing and continuous learning as exceptional, personal attributes highly valued by the organisation improves employee willingness to be part of a knowledge strategy.

Yang's (2008:352) next finding of interest was that managers can make an important contribution to creating an internal organisational environment conducive to knowledge flow. Managers can reinforce formal recognition by encouraging every employee to actively participate in knowledge replenishment activities such as learning, sharing and storing knowledge. This reverses the influence of individual employee knowledge silos where someone gives orders without explaining why, and thus keeps their end objectives to themselves, or who does their job without understanding their role is part of a bigger value creation system. It has already been seen that a single manager can influence the attitude of an entire management team in a negative manner by discouraging new knowledge. Yang's research found that managers positively changed the internal

environment of the organisation by influencing the attitude of the employees to believe that their knowledge was important to all. Management intervention of this kind contributes to dampening dissonance because everyone has a better understanding of their personal role and overall objectives and are free to discuss it and improve the way they work.

Research by McClelland and Winter (quoted by Spencer, 1997:7) reports similar findings to Yang. The authors developed the 'iceberg model' to demonstrate how operational skills and qualifications on which an individual is recruited are only the tip of an iceberg focusing on the 'above sea-level' personal traits of a recruit (Figure 3.1).

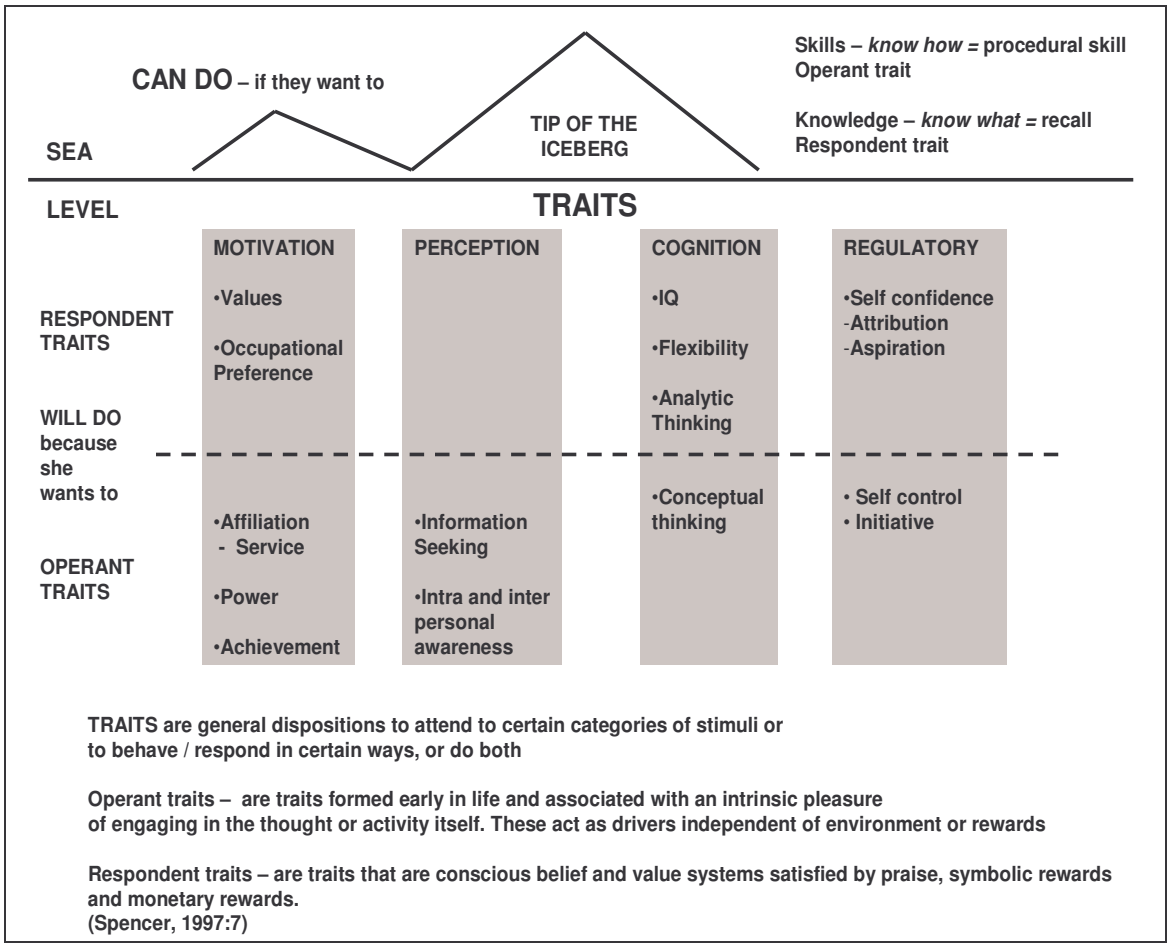


Figure 3.1: The iceberg model of personal traits

Source: Adapted from Spencer (1997:8)

The analogy of an iceberg is used to make it clear that there is so much more to an employee that just the skills they are recruited for. The authors suggest operant traits are a person's natural tendencies to participate, share and learn while respondent traits can be developed through praise and rewards (Figure 3.1). McClelland and Winter show links to higher organisational systems that identify the manner the traits manifest in the workplace as personal - motivation, perception, cognition and regulatory actions. It is interesting that McClelland and Winter see operant traits as being independent of recognition and reward systems meaning they will, as Yang said, manifest even when not encouraged (McClelland & Winter, cited by Spencer, 1997:7-8).

These traits that deliver value for the organisation have been briefly reviewed in chapter 2 in research by Andreou and Bontis where, at the organisational level, the traits were mentioned in the context of 'human capital'. The authors considered them to be a 'knowledge asset' that contributes to the organisation's human capital value. Andreou and Bontis see personal competencies such as content knowledge (information) or the ability to engage in social interactions with colleagues as organisational "resources" that individual employees can leverage to "facilitate business performance" (Andreou & Bontis, 2007:370).

For instance, the mix of above and below the sea-level competencies can be summed up by Vroom's equation (Figure 3.2).

P = *f* (A x M)

Where P is the individual's ability to perform at the job
A is the level of abilities of the individual to do the job
M is the degree of motivation the individual has to do the job

Figure 3.2: Vroom's statement of an individual's [job] performance value
Source: Vroom quoted by Yorks (2005:235)

What is becoming clear as the literature is reviewed is that for every intangible variable there are one or more other variables acting in a system below the level of the variable in focus. This equation seeks to describe an individual's job performance in terms of only two intangible variables acting in combination (Figure 3.2). Individual's ability (A) and degree of motivation (M) create a value for job performance (P).

Performance (P), however, is dependent on the degree to which the individual understands how best to apply their abilities (A) in any organisational situation. Ability to perform is linked in turn to the individual's capacity to learn new knowledge about customer needs and satisfying customer needs.

Hult *et al*. provide research that shows that an understanding of the market in which the organisation operates (which reflects the customer's current needs) together with the degree of learning orientation undertaken to deal with that environment leads to improved ability for innovation which is linked to superior organisational performance (Hult *et al.,* 2004:436). Logically, it follows that an individual's job performance has a direct impact on the organisation's performance.

Yorks (2005:235) expands Vroom's equation in Figure 3.3 to show further levels of competencies required in eliciting performance levels. This equation strongly supports Spencer's assertions that performance is dependent on the individual's personal competencies to do their job. This equation integrates Lewin and Bandura's concepts that the environment in which the employee is situated has a relationship with that employee's behaviour and thus performance.

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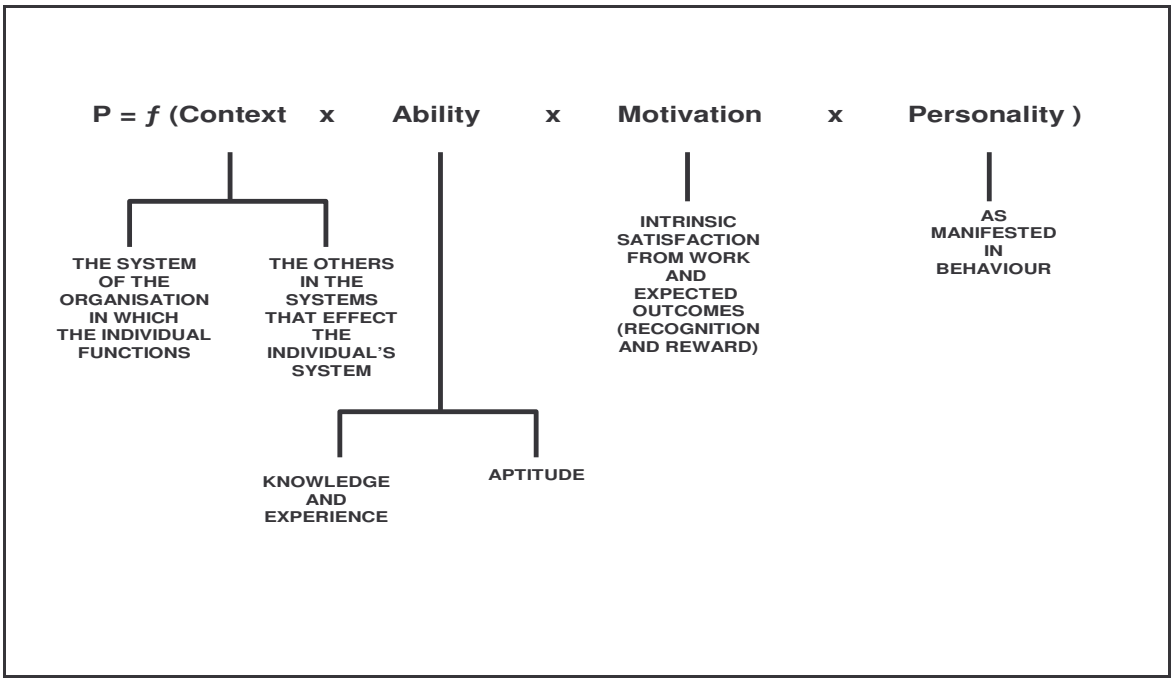


Figure 3.3: Yorks' equation for an individual's [job] performance
Source: Yorks (2005:235)

These last paragraphs serve to highlight the complexity of systems of variables. These facts strongly suggest that organisational strategic intentions have to encompass a knowledge strategy that focuses on changing the behaviour of specific variables.

Spencer notes that research has found that while traditional training of theory and knowledge for the job increased job performance by an average of 87% return on investment, training that focused on competency building where trainees practised motivation and behavioural skills resulted in an average return on investment of 700% (Spencer, 1997:22).

Liker and Hoseus (2008:315) advocate that HR should be acting as the monitors of the success attained through training and other business events for intangible value improvements in employees.

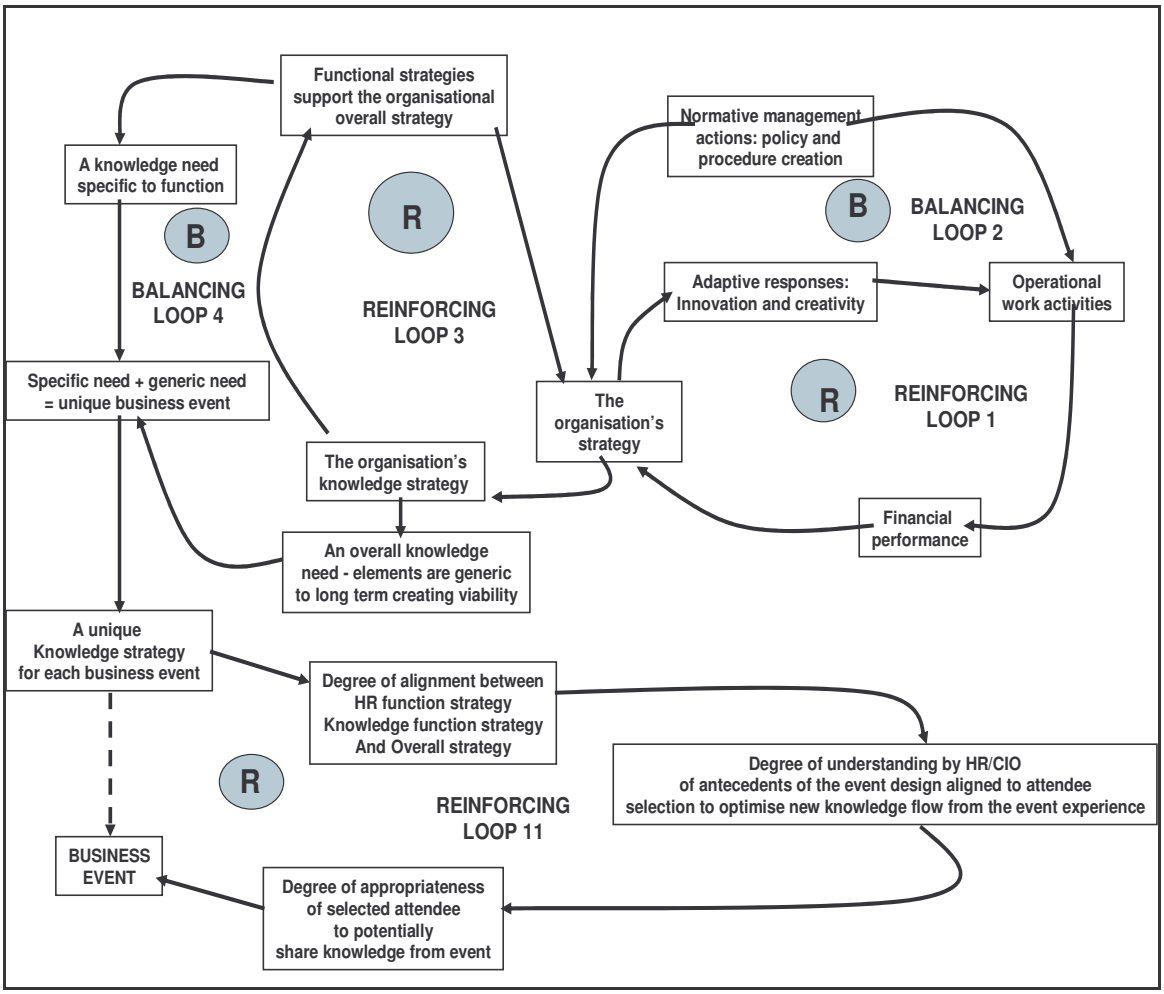


Figure 3.4: The causal loop for knowledge from an event and the event attendee
Source: Author's own compilation (2010)

Using instruments to select an event attendee such as SDLRS and competency assessment which can highlight certain traits is discussed further in chapter 4.

The value for the organisation in this is that recognising employee-related antecedent variables when picking who attends an event can influence the ROI an organisation can hope to attain from business event attendance (Figure 3.4).

3.2.2 The influence of the organisation's mission and vision on knowledge flow

Having seen that both management employees and individual employees can contribute to an environment conducive to knowledge growth, Su and Lin (2006:798) investigated two more variables considered to have an underpinning influence on the success of an organisation. These were the mission and vision statements. Vision guides the way the organisation wants to look (the future) while the mission sets out the purpose of the organisation (what customer need it serves) and what competencies it considers its core proficiencies required to serve the customer and maintain its existence. The vision statement is a strategic framework for the future waiting only to be filled by current operational actions to attain it.

Su and Lin (2006:787-800) sought to prove that corporate mission and vision are environmental variables whose content could guide organisational success through learning. As support for their beliefs, the authors presented the relationship of service quality and profit to an organisation's mission and vision statements. The service ethos of the chain of franchised beauty stores they studied was designed in response to the outcomes stipulated in the mission and vision statements. The corporate mission and vision stated that employees commit to undertake learning (training was free) because the more they satisfy customers with their product knowledge, the more the customers would buy the organisation's products. Employees took a cut of every sale which was tangible proof to them of why learning was important. Paramount in the mission statement was that the employees learn about each of their customers intimately and match beauty products to specific customer needs. The quality of this relationship made sales because the needs of the customer were always the priority.

The mission and vision of this chain specifically addressed the value of learning about the products from peers, applying this knowledge in the customer-seller relationship and by doing so ensured a desired future of growth and profit. Management's responsibility is to guide the creation of a knowledge framework that helps to make the organisation's mission and vision part of day-to-day work (Ndlela & Du Toit, 2001:164; Desouza &

Awazu, 2005:61; Yeo, 2007:546; Van Winkelen, 2010:20). The authors show how the mission and vision has to reverberate to the individual employees and in turn this is manifested as a service attitude on the sales line if the organisation is to be successful.

This bottoms-up approach that includes personnel at the operations level while actively managing from the top has been seen as a successful method of creating knowledge flow and ensuring all employees are collectively focused on improving the organisation's performance (Yeo, 2007:525). This can be extrapolated to apply in business events in both the organisation to customer context such as a trade show, a conference or a meeting or the business to business context in which the organisation meets suppliers, bulk retailers, regulatory bodies and others who have knowledge of customer needs.

Su and Lin's research (2006:798) suggests three matters of interest to an organisation's future. The first is that if the mission and vision statement are not addressing the importance of knowledge in future success then it is likely that management are not invoking any organisational benchmarks for knowledge, suggesting that knowledge is not considered an organisational asset. The second is that management needs to regularly revisit and relearn the mission and vision statements, being able to transfer their implications contextualised by the current situation and future goals of the organisation to their employees through meetings, team-building and other events. How well managers and employees do this has implications for future performance. The third is that knowing the implications of mission and vision in daily work helps bind the employees to a common goal. It will contextualise their networks, their learning and the application of their skills.

Sales training attuned to mission and vision as seen in this research was a value creator both for the employee and for the organisation. These were valid goals for a sales training business event (Yeo, 2007:546). It can be extrapolated from these findings that every business event held by an organisation or attended by an organisation should itself have event goals relating in some way to the mission and vision as these will become the

indicators by which to measure the event success as a knowledge intervention aligned to organisational goals.

To ensure that an organisation's vision and mission is regularly revisited to set an envelope of acceptable current and future organisational behaviour for every type of business event suggests the need for an organisation-specific generic template of a business event that always invokes the mission and vision as an underlying principle. The event goals chosen will, of course, be interpreted uniquely by each organisation dependent on the change that the organisation is trying to manage but it can be suggested from the evidence presented that they must relate to adding value through every employee understanding the organisational mission and vision. The concept of a generic template that sets the mood of a business event attendee will be discussed further in chapter 4.

It must be noted that the type of incentive for value-adding actions does not always relate to money or incentivised travel as typical of sales team rewards. The type of incentive is indeed a personal choice linked to the employee's own perspective of an appropriate reward. Many companies promote to higher ranks to acknowledge exemplary performance but this is often an award made after considerable service. It seems that employees need and can be motivated to contribute by "public recognition of skill and contribution" (Lee-Kelley *et al.,* 2007:215).

Some employee actions have been seen to be influenced positively by new knowledge. Lee-Kelley *et al.* found that internal working-lunch seminars where knowledge contributors get to expound on their knowledge interventions for productivity, sharing their own learning while being recognised publicly motivated them even further to perform for the organisation (Lee-Kelley *et al.,* 2007:215). The authors found that such employees seemed happier to work longer and contribute even further after being acknowledged. Implicitly, these seminars acted as both a reward and as knowledge combiner events with participants sharing knowledge for creative trigger stimuli leading to further intangible benefits but a promise for future organisational adaptation and

viability (Ellinger & Cseh, 2007:448). The authors found that using Internet tools such as formalised online discussions from which outputs were sent to management to review and subsequently acknowledge through organisational actions, have again been successful as a business event intervention to recognise employees who are generators of intangible benefit (Lee-Kelley *et al.,* 2007:214-216).

A final note of warning is raised by Szulanski *et al.* (2004:608). The knowledge of the mission and vision and, in fact, knowledge related to guiding performance such as sharing information about how processes work assumes that this is interpreted correctly by the knowledge giver. The more the source is trusted the more causal ambiguity as to the degree of accuracy of the information transferred creeps in (Szulanski *et al.*, 2004:602; Brock & Yaniv, 2007:834). The source blends their own interpretation or perception of interpretation to the knowledge and the information begins to diverge from its true form and becomes a broken link in the transfer process (Brock & Yaniv, 2007:832).

Based on this, it can be argued that knowledge transfer meetings can have a great effect on the value obtained from the meeting and should whereever possible be guided by documented data of what has happened at the primary business event to give a fall-back, referral point if the innovation that occurs as a result of the meeting goes wrong. Creating a process that ensures the quality of knowledge transfer arising from a meeting is an antecedent for successful organisational performance and discussed further in chapter 4.

3.2.3 Pre-event expectation

This suggests that a behavioural change of the would-be attendee could begin from the moment the employee is aware of the goals of attendance. The process of raising an expectation that something of value will be attained from event attendance has begun for the attendee. On the recursive level above the employee, that of the employee's department and above the department, that of the organisation, the employee has been primed by the pre-event goal setting to maximising a value adding opportunity for both.

Getz (2007:179) has earlier been reviewed in chapter 2 as noting that three dimensions in the individual of conative, cognitive and affective need to be modified for the event experience to have significance.

This suggests that the following statements may be true when the conditions for causing change in these three dimensions are examined at the pre-event stage. The conative change would be reflected in the employee now having a purposeful reason(s) and a context for the attendance. Contextualisation greatly enhances the individual's ability to make sense of new information. The cognitive change has begun but is not fully formed by the thought of acquiring new knowledge to meet the specified goals. The attendee has a practical explicit framework set by the goals and a tacit untapped framework to add to it. The affective dimension may have been triggered as an emotional response, possibly enthusiasm or excitement, at attending the event and being able to learn now knowing how it will be useful at work. The level of affective engagement would be particularly important as this stage as it will enable opportunity for optimised linking of the fulfilment of the reason for attendance (conative) with the useful knowledge collected at the event (cognitive).

It is the role of the event organiser to identify the performance variables within the mission and vision statements that could be used as measurements of benefit from a learning event and to explore whether the organisation has existing methodology to signal encouragement of employee learning willingness and refer to this at the learning event. Finally, it would be incumbent on the organisation, perhaps HR, to ask the employee to write before attendance and after attendance how they see this new knowledge improving their organisation's functionality.

3.2.4 Self-directed learning outside of the organisation

To reflect on new and old knowledge, mix it and apply it as new thoughts and actions to the work environment, the employee must be empowered by an organisational culture with the vision to embrace a degree of creativity and individuality from their employees

that may not always be in line with the operational policy (Peters, 2003:312; Serenko *et al*., 2007:613; Clarke, 2010:136).

Peters (2003:313) notes that employees have several jobs in their lifetimes and in each job they gather information. This leads to each individual holding exceptional pools of tacit knowledge. If the organisation allows a degree of self-expression of learning appropriate to the employee function in the workplace it leaves itself open to employees creating unexpected but welcome innovation. This would definitely be a small but welcome win for competitive advantage building.

It follows that an organisational culture that recognises the individual who funds self-training and then allows them to express this new tacit knowledge in an externalised form at work is indeed leveraging employee knowledge for the good of the organisation (Beitler & Mitlacher, 2007:526-533).

Willingness to share knowledge with the organisation cannot be assumed. Beitler and Mitlacher (2007:527) and Jiménez-Jimenez *et al.* (2008:393) review self directed learning and suggest that while an individual undertaking self-directed learning at their own cost is certainly a potentially positive influence for overall organisational absorptive knowledge capacity, their actions in applying their knowledge for the organisation benefit is somewhat random.

Beitler and Mitlacher (2007:533) did find a positive relationship between highly self-directed learners and a high degree of willingness to share knowledge for specific organisational problems. This is an echo of the value shop scenario – a specialist focusing in on a specific problem – and, as such, has high potential value to the organisation. Although the authors did not explore the reason why participation sometimes occurs and sometimes doesn't, it may be based on the fact that the employee sees benefit for themself rather than the organisation – such as participation improves their existing capabilities so has a value to them personally. This participatory action is intangible in

that companies cannot guarantee it and only see it when it happens. But it can be considered as instrumental in creating competitive advantages.

This suggests that information on self-directed learning courses that have potential benefit for the organisation should be made available to the employees because this has no cost to the organisation other than making the information available but could have unexpected benefits. This would be a component of the organisational knowledge strategy and perhaps HR would be responsible for implementation.

Nonaka *et al.* suggest that a knowledge strategy would be defined by firstly establishing a knowledge vision for the organisation (Figure 3.5) (Nonaka *et al.,* 2000:23).

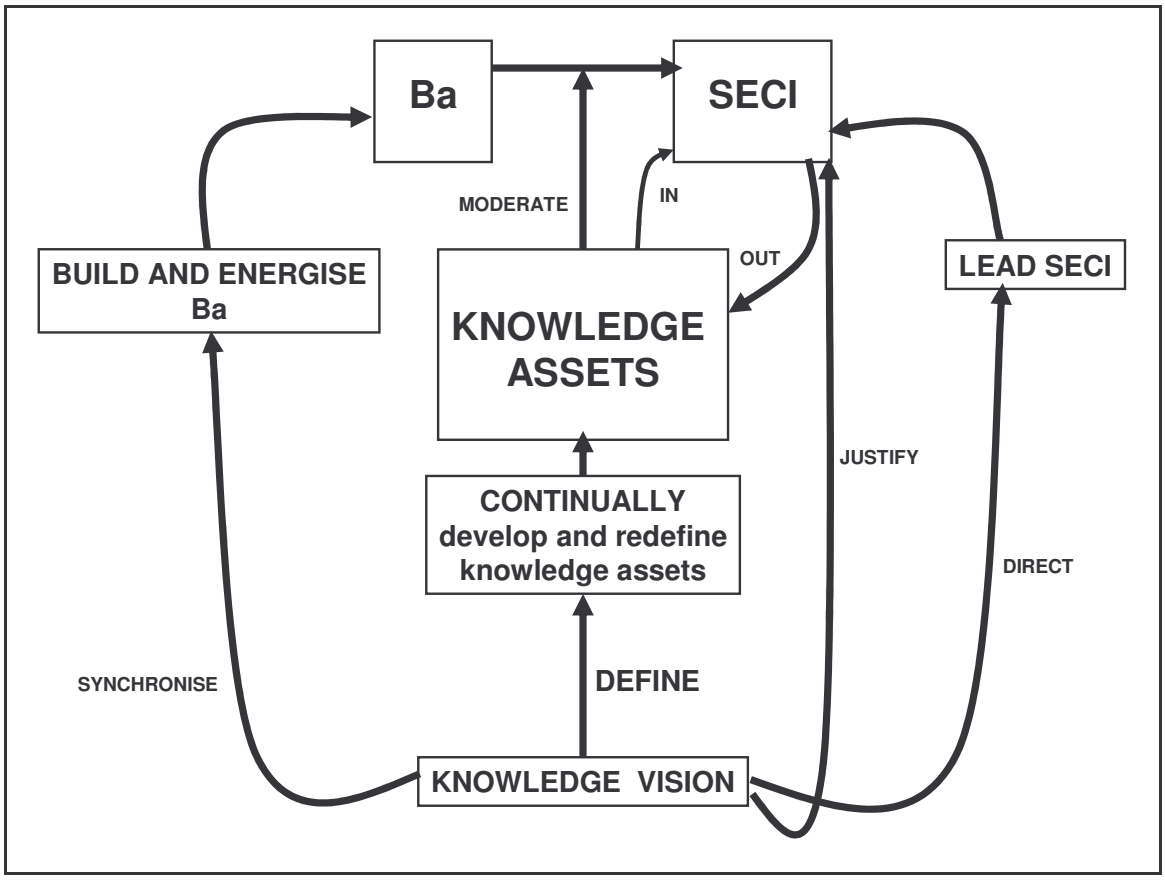


Figure 3.5: The knowledge vision guiding the knowledge creation strategy
Source: Nonaka *et al.* (2000:23)

The event organiser would have a relationship with HR to ensure that this department was updated with upcoming events. HR would need to specify what types of courses would benefit the organisation.

Beitler and Mitlacher (2007:533-534), Serenko *et al.* (2007:613) and Van Winkelen (2010:20) all agree that a defined role for the employee of helping others (in the capacity of a mentor) can be a strong influence when seeking to encourage organisational knowledge sharing. Ellinger and Cseh's (2007:442) research shows many value-add effects including the mentor or facilitating employee gaining self-esteem while others in the organisation gain value to their own innovation and competencies from mentoring and facilitation. It is important to note that in many large companies the meeting planner is actually a full-time employee often situated in the Public Relations function. But, whether contract or full-time, the meeting planner is definitely a facilitator of learning and this role will be examined more closely later in chapter 3

The process of integrating knowledge especially informal knowledge sharing such as employee to employee knowledge sharing for the benefit of the organisation requires several antecedents and triggers to be successful (Figure 3.6).

Ellsinger and Cseh review how specific triggers can successfully set off a new learning cycle in the organisation. They note that the triggers come in many forms from new project challenges to new organisational technology and processes and these triggers drive individual employees to take on new responsibilities which, if to be widely applied, require of them to share knowledge about them. Informal learning business events are of importance in creating opportunities for future organisational performance. They provide the forum for a multiplier effect of value to manifest (Ellsinger & Cseh, 2007:442).

The informal learning cycle is iterative with the cause and effect relationships of a new process being examined, modified, the process begun again and this cycle repeated as often as is necessary until acceptable levels of process quality emerge (Figure 3.6).

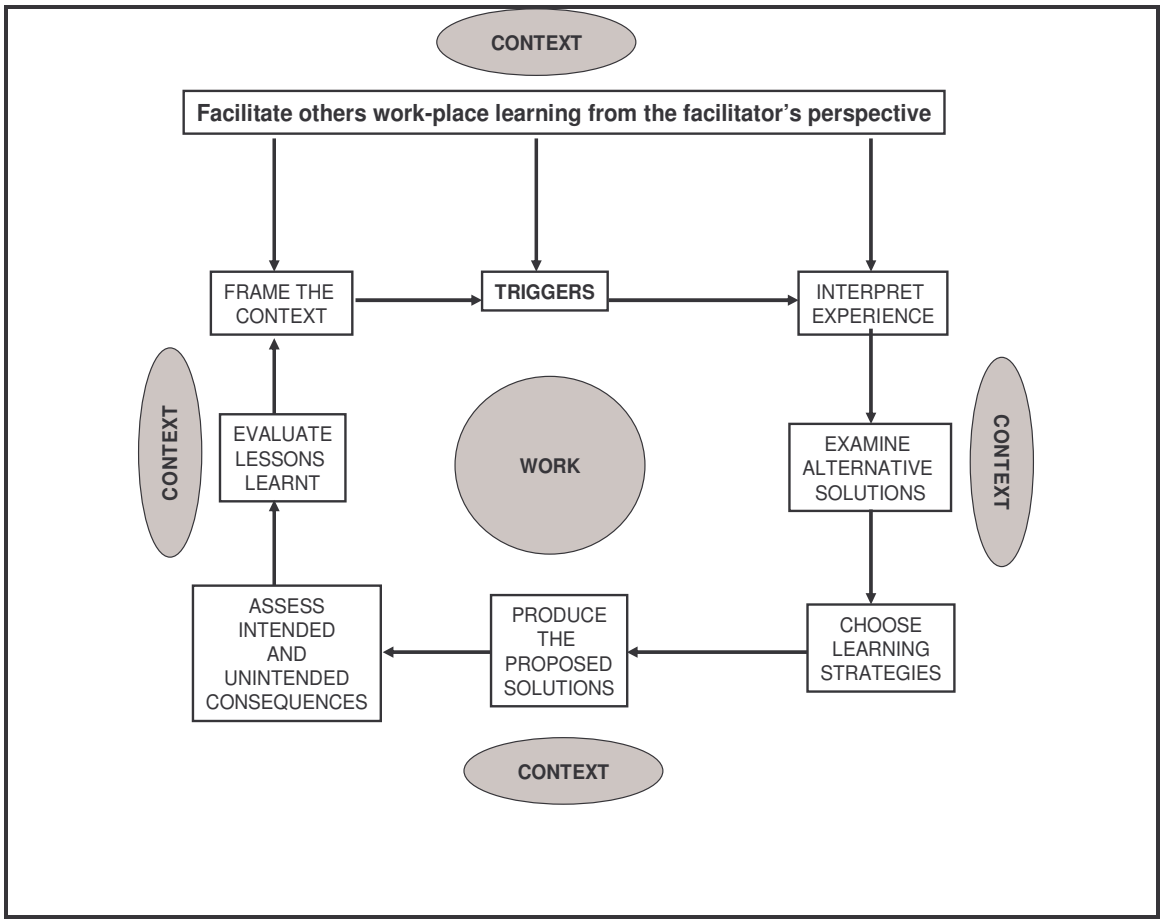


Figure 3.6: The informal learning process

Source: Marsick and Watkins quoted by Ellinger & Cseh (2007:438)

Looking at the relationship of formal workplace based learning programme and informal work-based knowledge transfers suggests that formal learning can drive informal. The informal value creation requires only the opportunity for Ba and a zone of co-construction to manifest to bring extended value benefit (informal discussions around innovation with ideas flowing from several people) with little or no cost to the organisation. Other benefits of the formal workplace learning are that the people who mentor become self-appointed knowledge drivers for the organisation and their personal act of sharing helps to establish a co-operative atmosphere of trust between employees. Thus informal business events trigger and add further value. Trust encourages knowledge sharing long after the learning event finishes giving rise to opportunities for ongoing

innovative collaboration. Holding internal meetings that are designed to deliver knowledge would seem to hold value for improving the organisation's performance (Van Winkelen, 2010:20).

Companies that can identify self-appointed knowledge sharers might find advantage in sending this employee type to external business meetings ahead of others who do not naturally share (Van Winkelen, 2010:20). This would be because these people naturally have the urge to share and mentor, thus the organisation optimises its chances of knowledge inflow. Rhodes *et al.* (2008:255) confirm this with research linking social capital value (the ability to network and gather knowledge from others), organisational learning, learning intention and organisational absorption capacity as all integral to building an effective knowledge system. Business events facilitate this.

3.2.5 Continued professional development (CPD)

Influencing the outcomes of self-learning in favour of organisational benefit is brought into focus by the work of Nielsen (2009:66-68) who emphasises the elevated opportunities for business performance if individual professional development takes place in synergy with the workplace learning needs. Shih *et al.* (2010:1508) supports Nielsen in that their sampling of business managers and head academics proved that both rated continuous learning as a core competency. However individual CPD is often undertaken by an individual aligning it to their own personal development plan as is seen in self-directed learning.

The use of the word 'professional' suggests alignment to industry norms and standards. Therefore there is reason to question whether CPD should actually align an individual with the organisation's objectives thus benefiting the organisation but perhaps to the detriment of the employee because of influences from the workplace. Questions could arise about whether the organisation pursues a workplace of excellence when measured by industry standards. Or, that CPD is a private employee affair undertaken with an

association that specialises in this profession and works closely with the industry on standards, or a mix of both (Adanu, 2007:293).

From a systems relationship perspective, the addition of a professional association to the learning value chain would be a very viable option for every industry. Associations could be the guardians of the use of the benchmark of learning quality required in each industry. Ensuring a standardised and holistic form of CPD through association activities would establish continuity of standards across an industry - an idea suggested by Cardno (2005:303) when investigating the relationship between teachers' CPD and the value this brought to the competencies of a school. This would require that the association is dynamically responding not only to industry requirements but is also listening to its membership.

As has been seen previously, as an antecedent for knowledge generation there would need to be a knowledge policy with a statement that outlines the conditions for creating the link from association to the organisation by defining the work environment conducive to CPD (Sense, 2005:190; Adanu, 2007:303).

Alleviation of workplace negative symptoms such as the stress and demotivation seen in modern organisations has been discussed earlier. It is counter productive to organisational goals as much as sharing knowledge is a driver for organisational performance. Perhaps associations need to take on a role that facilitates addressing the social exchange aspects between the organisation and employees by promoting business events as work-life benefits that potentially improve organisational performance (Lambert, 2000:803).

Lambert (2000:811) dealt with work-life benefits in terms of correlations between an employee's perception of the interest of the organisation in their welfare and the employee's response in terms of willingness to support the organisation's activities such as meetings. Lambert (2000:813) points out that the degree of success of work-life benefit and improved organisational performance is tentative, but could be an interesting motivation for working for the health of the organisation in aspects over and above their

job description. Bontis and Fitz-enz (2002:243) concur and refer to this work-life relationship ability to create organisational value over and above what expected from the employee capabilities, as the degree of an employee's "sentiment" towards the organisation. Panari *et al.* (2010:175) draw attention to two major problems in modern organisations that come at a cost to the organisation: as "burnout" - the loss of worker motivation, and "disengagement" from their organisation's goals. The authors note that both have been proven to be balanced by HR learning interventions which, in turn, create a feeling of well-being and job satisfaction (Panari *et al.*, 2010:175).

The opportunity to learn reduces workplace stress and suggests a relationship with improved productivity although exactly how personal learning is driven into usage for organisational productivity is discussed later in this section. Business events may well be a role player in reducing workplace stress (for instance team-building exercises, informative conferences, exciting trade shows) and improving the organisation's performance.

Lee-Kelley *et al.* (2007:217) indicate a strong relationship between retaining knowledge workers and understanding clearly the elements that motivate them and give them job satisfaction. The research of Lee-Kelley *et al.* (2007:217) reflects that organisational factors of "[workplace] comfort, challenge, [appropriate] reward and relations with co-workers" which, if managed well, reduce employee turnover. Traditionally, incentives have been tied to tangible measurements of performance such as the number of sales and the sales team has received bonuses and leisure activities as rewards.

Knowledge workers are the new competitive edge for organisations, so understanding the affirmation required by knowledge workers and providing a framework that can value their inputs to the organisational knowledge value chain is a strong argument for human resource activities ensuring that this type of employee does not suffer burnout or a feeling of disengagement and resign. There is an immediate tangible cost to the organisation in recruiting a new employee but there are more ominous long term effects of leaving, such as the reduction of the organisational knowledge repository. Such costs are intangible but

of concern (Warren, 2008:124-125; Liker & Hoseus, 2008:39). The relationship between the retention of knowledge workers because they have a value attributable to them by their knowledge and its impact on the organisation's performance is evident. Attempts to value this asset to understand the organisational cost-benefit relationship of knowledge worker mobility will be discussed further in chapter 4.

A low degree of sentiment may have a direct relationship with the number of voluntary resignations, with training and knowledge leaving the organisation and migrating to competitors (Bontis & Fitz-enz, 2002:244). Shih *et al.* provide further evidence of employee personal qualities affecting organisational performance such as the degree of "attitude, personal initiative and conscientiousness" which these authors refer to as "emotional stability" influencing the degree of continued professional development (CPD) (Shih *et al.,* 2010:1507). These authors concluded that business seeks high levels of emotional stability so that a high level of CPD is attained which results in improved problem solving skills. Improved problem solving abilities lead to improved capacity to innovate and create as well as the probability of improved organisational performance (Shih *et al.,* 2010:1508).

The responsibility for monitoring an intangible knowledge link such as sentiment would have to lie with the HR function or knowledge officer and is discussed in more detail later in this chapter. Both Adanu, and Sobiechowska and Maisch suggest that the knowledge generation policy can describe not only the environment of the CPD in the workplace but clearly state the responsibilities of employer and employee to supporting CPD activities in a learning agreement (Adanu, 2007:303; Sobiechowska & Maisch, 2007:184). This is formalised as part of a skills development plan in many organisation that recognise the benefit of life-long learning by employees. The concept of a formal skills development plane with associated expected outcomes aligns to outcomes based learning and thus outcomes-based business events.

Sobiechowska and Maisch identify constraints to CPD activities in the workplace as follows: no time at work to study; not enough time at work to practise reflection on how

to improve processes; no prioritisation of time for CPD over work; creation of portfolios of evidence of skills generated within the workplace, which was slowed by limited access to the organisation's information (Sobiechowska & Maisch, 2007:187). Sense (2005:183) found similar evidence of the influences that the lack of the organisation's consideration of these and similar constraints inadvertently place on employees even though the organisation believed it was a learning organisation supporting the creation of "learning space" workshops. This suggests that CPD may have a better chance of attaining its potential if removed from the physical location of the workplace for specified periods and that a mediator/teacher ensured specific work was completed in the time available – a role for business events.

Technical knowledge updating and contextualisation has been described by Romiszowski (quoted by Wall & Ahmed, 2008:186) as the 'formal' role of CPD and may well be the role that associations should fill in a quality assurance capacity of knowledge essential to the health of the entire industry. Romiszowski (quoted by Wall & Ahmed, 2008:186) also draws attention to informal CPD being "resource-based (magazines, articles); practice-based (observation and on-the-job learning); practice-related (giving lectures, leading discussions); and interpersonal (improving networking amongst practitioners). Romiszowski's framework suggests there could be two types of notional hours given as certification of CPD. Notional hours could be attained both formally and informally.

It can be concluded from the authors reviewed in this section that CPD has some very interesting causal links. CPD and CPD events have implications for the health of industries and thus for the economy of a country. CPD for an employee is important for generating new knowledge to improve working capabilities but has further implications. CPD is also linked to organisational performance. However, the degree of organisational encouragement and support for CPD activities may affect the degree of work-life sentiment of the employee for their organisation. In turn, the degree of employee work-life sentiment affects organisational performance. The need to monitor an intangible employee attribute such as sentiment and the need for CPD opportunities is discussed

later in this chapter with regards to the role that the human resource function might take to ensure organisational health.

The business tourism event, whether electronic or face-to-face, provides the vehicle for both formal and informal CPD.

3.2.6 Knowledge supply chain (SCM) management

The quandary of knowledge being an intangible organisational asset is brought back into focus when considering ways to encourage the organisational and individual action that supports knowledge development. Qualifying the need to apply resources (money, time) to maintaining a high degree of individual employee knowledge in support of possible but not guaranteed future organisational viability again exposes the difficulty in making the value of knowledge flow significant and visible to management. The value creation dynamics of work groups is hard to ascertain.

Allee (2008:6) notes that he and other several authors have suggested that networks (virtual and face-to-face), teams, and work groups exchange information so that they can achieve specific goals. In doing so, these actions generate value for their organisations. Social learning theory relies on a social aspect to learning in that people observe others within a social context and this causes interactions and thus learning (Champoux, 2007:125). Allee (2008:6) describes the network effect of people connecting to people as "the primary economic mechanism for value creation". The network effect takes place at two levels: the knowledge of individuals organised as parts of organisation's systems with their personal activities combining with those of other employees to produce value; and on a second level in extended networks outside of the organisation.

Champoux (2007:127) notes that, in a virtual context, the learning needs pre-planned experiential experiences and exercises in groups as it would in a face-to-face setting. This helps to generate most value from new knowledge. This leads to greater person-to-person involvement and enhances the opportunity for a value multiplier effect to result from the

new knowledge. In a virtual way, people observe each other while completing these exercises (Champoux, 2007:134).

In the virtual context, the value of the possibility of increasing the number of linked nodes in a network to increase the unique combinations of such possibilities is emphasised by Metcalfe's Law which states, "For any communications network, the number of nodes (N) on a network yields that number squared (N^2) in potential value to users." (Marchand, 2000b:305). The ability to seek information from multiple nodes would be amplified by membership of a business network both formally constituted, for example by business associations, and informally constituted, for example by communities of practice (Jones, 2007:338). Extending a communication network and the opportunity for learning through application of tools for virtual networking extends the possibility for potential information flow and has been shown to have the potential for improving organisational performance (Chen & Hsiang, 2007:581; Kayes, 2007:428).

Champoux (2007:124), referring to Bloom's taxonomy of learning goals in relation to online experiential meetings, exercises and training makes note of four areas that design for online knowledge value creation should seek to enhance. These differ little from the goals for Bloom's research for best practice for face-to-face events. They are seeking to enhance learner involvement, learner self-awareness, learner analytical skills and practical application of new knowledge through event design.

3.2.7 Knowledge as an influence in competitive advantage creation

Every organisation has a business idea that defines the work it does. Within the scope of this activity there are opportunities to do things better than competitors and, in turn, this creates competitive advantages for the organisation. The Porter's Value Chain model is well known and widely used to identify and monitor nine areas of activity which can add value to an organisation's performance (Figure 3.7) (Porter, 1998:41).

In other words, these are the activities that serve customer needs. The vertical activities are support activities for the horizontal transformation (work) activities which are an organisation's primary activities (Porter, 1998:40). The manner of combination of the nine is directed by the organisation's strategy. Combinations of the nine areas of activity create unique competitive advantages and result in changes in the organisation's performance.

It is here that it is important to remember that the American Sarbanes-Oxley Act requires a quality of financial reporting that is led by an integrated framework of quality controls. The framework has already been briefly discussed in chapter 1, but its value is understood when its relevance to the Porter's value chain is examined. The holistic framework seeks to ensure optimised value creation for the customer and, to do this the Porter's value chain is used as the organisational activities framework to identify each of the primary and secondary activities that together create overall value (Ramos, 2004:48). It follows that each activity has an associated risk that must be managed by planned strategies. To do this, management requires information flow if it is to reach the organisational objectives while guiding day-to-day optimal organisational performance. The information has quality characteristics described as those that affect financial reporting quality and those that support activities to derive financial reporting quality (Ramos, 2004:52).

The first critical qualities of organisational information are integrity relating to the correctness and completeness of this information; availability relating to being available when required (and further acting to safe guard the resources and capabilities that will deliver this availability) and, thirdly, compliance with legal requirements (Ramos, 2004:52).

The second group of supporting characteristics of information quality are: effectiveness in that the information must be "relevant, pertinent to business purposes and delivered in a timely, correct, consistent and usable manner" (Ramos, 2004:52); efficiency ensuring the provision of information by optimal application of resources; and confidentiality

protecting unauthorised disclosure of certain organisational knowledge (Ramos, 2004:52).

Porter notes that the strength of the linkages between the nine elements influences the effectiveness of the value creation activities (Porter, 1998:41). Linkages require co-ordination and thus communication. Strong channels for information flow enhance the strength of the linkages (Porter, 1998:42). The value chain is used to understand where cost advantages can be gained in a financial sense and identify possible areas to differentiate with selected strategies (Porter, 1998:43). It is follows that, based on Porter's value chain model, the proposition that an underlying knowledge system will influence the value added in each of the nine areas has validity.

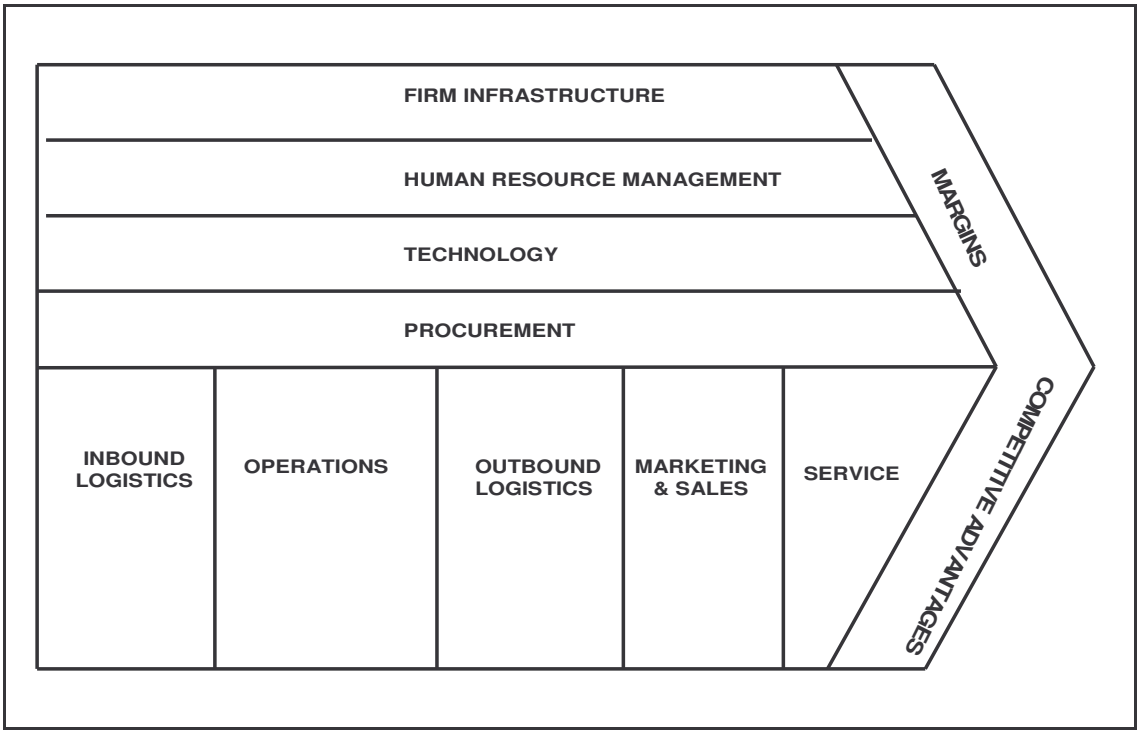


Figure 3.7: Porter's value chain model
Source: Porter (1998:41)

The degree to which knowledge influences competitive advantage can be related to the ease with which it flows through and is shared by each of the nine internal systems.

Porter's value chain forms the bridge for logical actions between strategic planning and strategic implementation (Holsapple & Singh, 2001:78).

It can be argued that creating the right conditions for knowledge variables to influence value creation will be dependent on the degree to which the stages of knowledge creation (the SECI model) get the opportunity to affect the nine areas. The SECI process can enhance the individual strategies designed for value creation in each of the nine areas. The knowledge strategy would seek to match the variety of knowledge acquired with the knowledge needs of each of the nine value areas. Each of the nine becomes an internal customer to the knowledge strategy. The purpose of all the strategies is to create competitive advantages that can improve the organisation's performance. Improved performance would be recognised by indicators such as "productivity; profitability; cost performance; market share; competitiveness; innovativeness; sales growth" (Lin & Tseng, 2005:164).

Further to the value chain, Porter developed the Five Forces model that defines five forces that affect the degree of value created by an organisation's value chain. The five forces are: the bargaining power of suppliers; the bargaining power of customers; the threat of new entrants; the threat of substitute produces/services; the degree of competitive rivalry within the industry (Porter, 1998:35). Together, these forces create the degree of competitive rivalry at work in an industry. Understanding the push and pull of the five forces gives understanding of the recursive effect of the forces on each organisation within an industry (Porter, 1998:36-37). It can be argued that the vitality and performance of an industry under the influences of the five forces rests with the performance of each individual organisation within the industry. Each develops its own unique strategy to respond while competing strategically for a position better than similar others.

It follows that, to develop a powerful strategy, information about the external and internal environments is critical as an input. The requisite variety of information must be present to decide the most suitable, adaptive response. The research of Tseng (2009:490)

acknowledges the co-dependent relationship between Porter's Value Chain and Porter's Five Forces model. Tseng (2009:490) adapts the Five Forces model to define five competitive knowledge forces as follows: "the competitive rivalry within the same field of knowledge; the threat of new knowledge; the threat of substitute knowledge; the knowledge of suppliers; the knowledge of customers". Tseng's research classifies competitive rivalry, the threat of new knowledge and the threat of substitute knowledge under a single heading as "competitor knowledge" (Tseng, 2009:490). Tseng links the knowledge value chain and the knowledge forces at work on the value chain in a framework defining organisational knowledge (Table 3.1). The framework has been adapted to include the SECI model but clearly shows the relationship of internal and external environments on an organisation's knowledge system.

Table 3.1: A framework for the organisation's knowledge

Source: Adapted from Tseng (2009:493)

PORTER'S FIVE FORCES MODEL Bargaining power of suppliers and customers; threat of substitute products/services; the threat of new entrants; the degree of competitive rivalry **ADAPTATION FOR A KNOWLEDGE THREE FORCES MODEL**		
COMPETITOR KNOWLEDGE (threat of rivalry; threat of new knowledge; threat of substitute knowledge)	**CUSTOMER KNOWLEDGE**	**SUPPLIER KNOWLEDGE**
Gather knowledge on the competitive external environment Learn from rivals in the external environment Seek knowledge from other industries of interest	Interact with customers Learn form changes in the customers needs Involve customers in product/service development	Learn from upstream and downstream suppliers Develop knowledge sharing relationships Involve suppliers in product/service development

The strength of the three knowledge forces at work on the organisation will be influenced by the knowledge flow in operational activities (Table 3.2). It is easy to follow the rationale for management of the three knowledge forces in that this is a value-adding

proposition for the organisation. A low level of supporting knowledge operational work systems such as planned business events to meet suppliers, competitors and customers and learn about them will increase the ability of a competitor to out compete, a customer to substitute their allegiance to a competitor or a supplier to push up their prices and lower their quality.

Table 3.2: The effect of the three knowledge forces on the process of SECI
Source: Tseng (2009:493)

SOCIALISATION S	EXTERNALISATION E	COMBINATION C	INTERNALISATION I
Establish knowledge communication channels Maintain internal and external environment interactions Encourage knowledge creation Seek knowledge for competitive advantages	Encourage knowledge owners to express their knowledge: Verification, evaluation and presentation of knowledge Apply ICT components to enhance knowledge flow and knowledge storage	Encourage knowledge creation from unique combinations of old and new information Enhance the ability of employees to manage and interpret new knowledge Verification, evaluation and presentation of knowledge Store and transform knowledge for staff needs Apply ICT components to enhance knowledge flow and knowledge storage	Maintain conditions suitable for a learning organisation culture Enhance the ability of employees to manage and interpret new knowledge Create competitive advantages

It is easy to see how business events can provide the platforms for designed information flow processes matching both the internal and external environment information to knowledge acquisition needs highlighted by this framework. The content of business

events should be designed to plug specific knowledge gaps (Tseng, 2009:492; Lin & Tseng, 2005:169).

3.2.8 A strategic approach to attaining value from value chains

Masqood *et al.* suggest that the concept of knowledge acquisition and flow leading to superior organisational performance lies with actively managing the knowledge flowing through an organisation's supply chain. Supply chain knowledge management (SCM) brings organisational benefits by creating extended "learning chains" (Masqood *et al.*, 2007:128).

The vitality of the chain depends on supplier's knowledge of information (the links created person to person) contributing to the principal organisation's performance and, in return, receiving knowledge value that enhances their own performance. Reychav's work on the value of customer-supplier relationships attained from trade show attendance confirms the need for a win-win type transactional encounter indicating that the people in a link must have a "joint action" or joint vision to link their separate ambitions if the link is to be maintained (Reychav, 2009:154). The strength of links being important to organisational performance is justified by theory as discussed by several authors, yet very little is known about how the mechanism works (Tseng, 2009:488).

The success of this collaborative network depends in part on a high degree of trust and commitment between all entities in the chain. Figure 3.8 clearly reflects the concept of supply chain knowledge links discussed above in Nonaka *et al.* with the argument for a zone of "mutual understanding and trust through shared experiences" being created (Nonaka *et al.*, 2003:13). This can take place when an organisation links the tacit to tacit knowledge with "outside constituents" such as suppliers and customers (Nonaka *et al.,* 2000:13; Tseng, 2009:489). Dialogues and relationships established by such events as trade shows and business meetings or through virtual networks facilitated by ICT bring the value created by the linkage process to a level where knowledge in the link can take a

tangible form. When this chain is this strong, the knowledge content of the chain can influence the future performance of the organisation (Tseng, 2009:491-492).

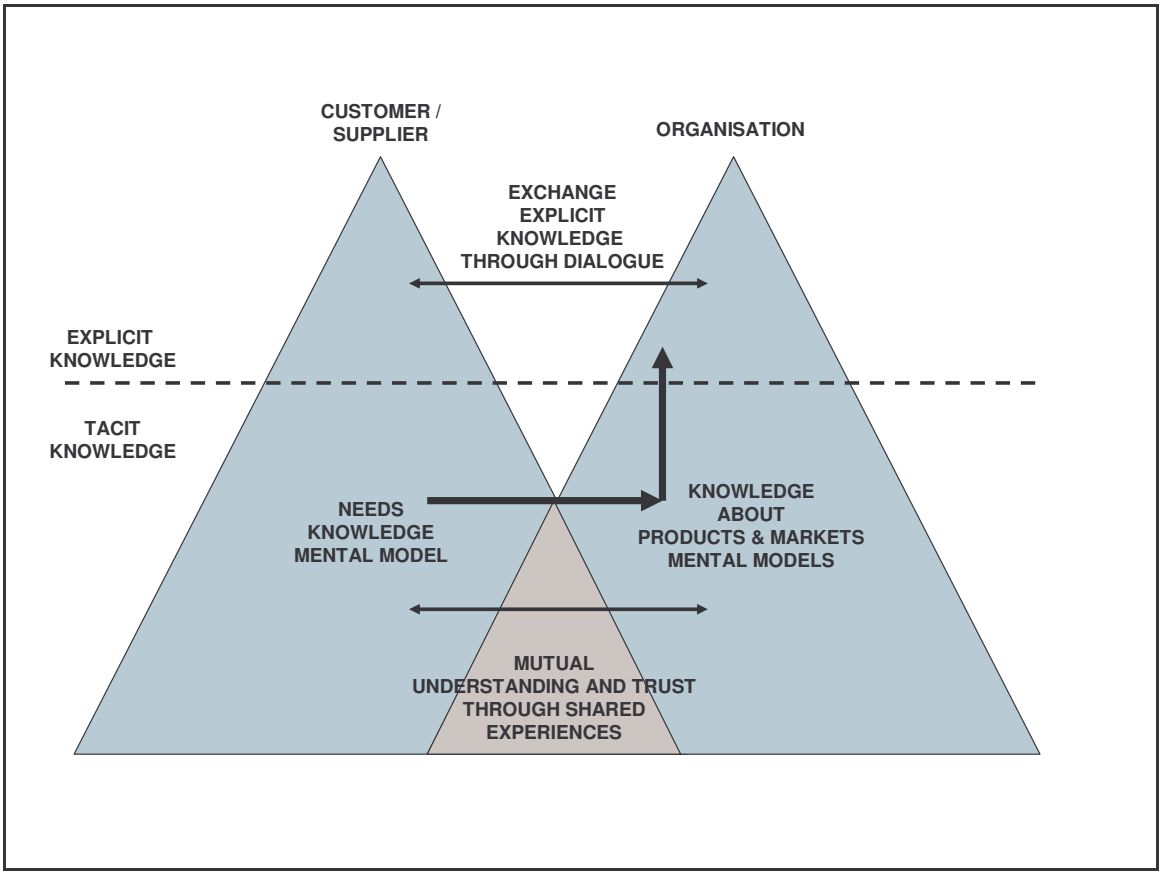


Figure 3.8: Creating knowledge with outside constituents
Source: Nonaka *et al.* (2000:13)

While the link creation process is clear from the Nonaka *et al.* diagrammatic representation (Figure 3.8), having a defined strategy for knowledge such as the K-Adv strategy ensures that these links are actually made. Every tangible asset in the organisation requires that it is used as effectively as possible, ensuring superior organisational performance. Much of an organisation's management falls to creating strategies to do this.

The same principle that a strategy will help ensure future performance can be argued for the intangible resource - knowledge It is important to note that the flow of tacit knowledge described by Nonaka *et al.* in the SECI model occurs in a continuous, unbroken, spiralling upwards direction. Knowledge builds the potential or can be said to multiply existing knowledge. Knowledge in the SECI model is routed from customer/supplier to organisation, then externalised (policies, processes, documents) entirely within the organisation, then re-enters the shared knowledge domain of customer/organisation through further dialogue and, in turn, again becomes tacit and is now embedded with the customer / supplier.

The higher the level of trust and commitment between chain links, the greater the chances that the value of tacit and explicit knowledge in the chain works to benefit all (Masqood *et al.,* 2007:124). The chain depends concurrently on steps taken by the organisations to ensure opportunity for these transactional knowledge exchanges (Maqsood *et al.,* 2007:128). The realisation of value from the chain has a high degree of dependency on technologies that enhance information communication such as e-mail and communities of practice (Maqsood *et al.,* 2007:132).

Maqsood *et al.* set out parameters for "knowledge sharing and transfer" by establishing four factors that help development of a knowledge chain. These authors contend that "the strength of the network of (people) ties configuration; the anticipated value of sharing knowledge; the desire of the people in the chain to share; the capacity of the people in the chain to share" (Maqsood *et al.,* 2007:136). When these conditions are apparent, then many variables can find the conditions conducive be combined to achieve additional value. Creating the atmosphere for these four parameters would be worthy goals for an organisation to strategise in influencing linkage establishment and strength both between internal departments and external business event interventions (Tseng, 2009:492).

The concept of a chain of people inter-relating to produce organisational health and vitality can be argued to have parallels to the VSM technique of Beer discussed in chapter 2. The chain is dependent on its vitality for its many individual links (nodes)

communicating and co-ordinating their knowledge. The chain is the organisational communication network extending over both the internal and external environments within which the organisation exists. The chain is the equivalent of the sensory mechanisms found as the underlying elements of Beer's VSM technique discussed earlier. Bontis *et al.* (quoted in Andreou *et al.,* 2007:56) supports the principles of an over arching organisational knowledge strategy such as the K-Adv model (Figure 3.9) and a methodology to map the knowledge chains (such as Beer's VSM) stating that there is a management need to identify both:

> (1) The value creating path or focus areas that generate value
> (2) The key/critical success factors (CSF) and indicators that contribute to the value creating path.

Documenting an organisation's knowledge system of diffusion and application can be based on concepts such as VSM as a specific strategy that seeks competitive advantages through knowledge such as K-Adv. This will be discussed as to their contributions in tracking organisational knowledge in the context of tracking ROI and ROO from business events in chapter 4.

Masqood *et al.* (2007:137) draws attention to the fact that the success of each of these knowledge value creating activities lies totally with being able to raise the level of each individual's consciousness of the significance of their own knowledge to the welfare of all in the chain. Figure (3.9) presents a diagrammatic summation of the knowledge advantage framework (K-Adv) created by the Royal Melbourne Institute of Technology University and the Co-operative Centre for Construction Innovation, Australia (Masqood *et al.*, 2007:133).

The K-Advantage framework has a large component of dependency on functioning information communication technology (ICT) hardware and software. ICT is considered within in the context of this research as an attribute that enhances knowledge flow. ICT has become so critical in supporting activities that seek to create competitive advantage

that it has to be recognised for its role as a contributor to the value chain (Ndlela & Du Toit, 2001:164; Chen & Hsiang, 2007:586). However, while many refer to this function as knowledge software for knowledge management, a better term that anticipates its value to the organisation's knowledge flow has been described. The ICT software and hardware falls into the role of "motivation software" as in the motivator required to facilitate knowledge flow (Leistner, 2010:8). Employees still need to be motivated to use it (Leistner, 2010:17). Further to having the organisational attributes for desired superior performance through motivation software and employees motivated to use it, there is the requirement for a hand in creating an intelligent linking network of ICT. A network that intelligently links people to people through a commonly shared purpose encourages the optimised knowledge flow (Leistner, 2010:35)

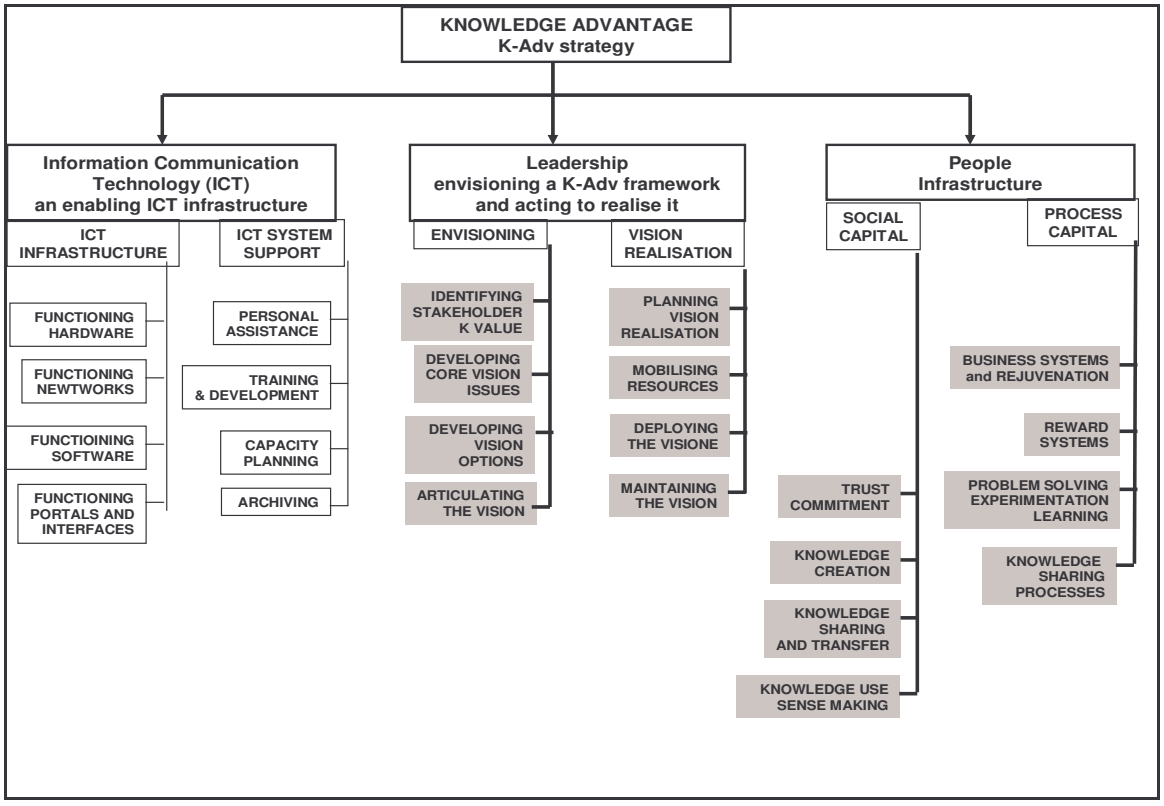


Figure 3.9: The K-Adv framework key components

Source: Royal Melbourne Institute of Technology and Co-operative Research Centre for Construction Innovation quoted by Masqood *et al.* (2007:133)

Of particular interest is how the attributes for "leadership" and "people infrastructure" components have been defined as guidelines in knowledge strategy creation (Masqood *et al.,* 2007:133). These components will be revisited in relation to the Beer model for VSM which includes the relationship of strategic intent to a viable system, in chapter 4.

Authors, Eisingerich and Bell (2008:496) note that the integrity of the links in a service industry knowledge chain, where most links are intangible, needs to be exceptionally strong - more so than in production industry driven learning chains. This is because the knowledge transfer in service is more dependent on value-adding tacit-to-tacit transfers because service products are very fluid in nature, requiring continuous adaptation to the environment to differentiate them from similar others when maintaining organisational viability (Hallin & Marnburg, 2008:379).

The importance of the network and the relevance of Metcalfe's Law in the spread of tacit information can be seen in Marchand (2000b:306) quoting Butler *et al.* on the findings of a McKinsey study of the relevance of the level of person-to-person interactions in organisational performance. The McKinsey study found that person-to-person interactions account for over 50% of all work done by employees in service industries. At a firm level, the same study found that as much as 58% of employee activity was in person-to person-interfaces whether the organisation was industrial or service orientated. Finally, at the individual employee level, the study found that managers and supervisors of every industry type expend up to 80% of their labour input as face-to-face interactions. This study shows that over 50% of all organisational activity leading to success and growth arises from person-to-person knowledge interface activities.

It can be concluded from the McKinsey study that the degree of an organisation's success in creating competitive advantage is influenced by its effectiveness in the area of useful knowledge transfers. Shaw and Williams (2009:326) quoting Enz *et al.* draw attention to studies in the tourism industry that show that investing in learning programmes for the professionals of a tourism organisation, usually positioned in management roles, did not

guarantee the increases in profitability that would be expected. The value to the organisation from this manager training was not seen in tangible ways. This would seem contradictory to the findings of the McKinsey study where 80% of the work done by management relates to face-to-face knowledge transfers. It has been established that front-line service staff such as are found in tourism organisations as the first point of contact for a customer, is where the value construct for a sale begins (Shaw & Williams, 2009:326). At a glance, it would be fair to suggest that there is a breakdown in transfer of knowledge from professional to operational staff that potentially results in the poor effect on profit.

Shaw and Williams (2009:331) quote researchers Yang, Wan and Rodriguez who present an argument for the culprit being the continuous knowledge decay that results from high operational service staff turnover rates. This may indeed be the contributing factor to the unexpected low result of investment resulting from the training of the organisation's professionals. Shaw and Williams' work does not confirm this but it may be that management is communicating knowledge as the McKinsey study establishes, but the knowledge transfer is continually lost as operational staff move on. Very little, if any, of the knowledge held by the individual at an operational service level is documented, so the knowledge drain is ongoing.

Leistner states that there is a need for "knowledge stewards" (Leistner, 2010:49). Individuals are made responsible for capturing the knowledge held or generated by other individuals and for placing it as information in knowledge repositories. This ensures that existing value in the value chain is not lost. Steps are required to actively embed the knowledge as information accessible to many, in line with the SECI knowledge flow proposed earlier by Nonaka *et al.*

Leistner notes that the degree to which an organisation successfully implements the embedding process creates a competitive advantage as the knowledge becomes part of a collaborative community (of employees) and thus its benefit is harder for a single departing employee to take away (Leistner, 2010:90).

Shaw and Williams, and Leistner conclude that key concepts for protecting service industry knowledge lie with placing knowledge in accessible repositories such as knowledge repositories held by CoPs or, at the minimum, individuals who act as boundary spanners (Shaw & Williams, 2009:332; Leistner, 2010:118).

The same requirements have been seen to exist for production-dependent industries such as the petroleum value shop scenario evaluated earlier in this review. Here is was noted that value shops considered access to information repositories stored in tangible formats (policies, documented processes, information technology based databases) very important as well as the value to be attained from networks such as CoP forums and boundary spanners. It would appear that industries have essentially the same needs for knowledge but some rely heavily on only tacit knowledge transfer forms (such as the front-line service staff example) while others excel at tacit to explicit documentation (such as the petroleum industry). The inference is that some organisations have established methods of acquiring and retaining high value knowledge repositories while others do not. Further, it would seem that some industries recognise that their unique asset of knowledge is hard to acquire and thus must be stored safely.

One of the capabilities of a business event organiser would be to design the business event to create tangible outcomes aligned strategically to the organisation's future performance. Chapter 4 reviews how the event organiser works with the organisation to create opportunity for maximised benefit from business event attendance.

3.2.9 The knowledge value arising from business events

Masqood *et al.* (2007:124) note that the K-Adv concept can be applied to bridge the boundaries of the organisation to any supplier willing to become a link and thus a collaborator in a knowledge chain of benefit to all.

Event promotion marketing correspondence has the opportunity to bring the value of the event knowledge and the concept of knowledge as a tool to the forefront of the minds of

possible attendees. This creates value for the event organisation if more attendees come as a result of the marketing because through the marketing the attendees now understand why attendance would have value for them. Benefit is also created because the event marketing helps to provide outcome related goals for the knowledge take-home value before the event.

Fox and McCormick (2009:213) note that a better knowledge uptake does indeed occur if the delegate has a strategy on how to gain best value created before attendance. For those organisations that do not have an internal policy that encourages knowledge flow (which seems, from the literature reviewed, to be predominantly the small and medium business market) this link of benefit to cost could be the qualification for accepting the expenditure to attend the event.

The event manager is now taking an active part in SCM providing and promoting suppliers of knowledge that can potentially strengthen learning in the chains. Thus expectation of the value of the business event is raised and motivates attendance because it is now tied to an unlimited variety of possible futures for the organisation's performance each of which is dependent on how an individual organisation views the offerings from their own perspective (Getz, 2008:416). The event organiser plays a critical role in deploying the organisational K-Adv vision to event attendees (Masqood *et al.,* 2007:133). It follows that a business event organiser must be aware of the knowledge vision of the organisation for which it creates learning interventions. The concept of a knowledge vision has been previously described in the context of the organisation having a knowledge replenishment strategy just as it would have a strategy for best application of tangible resources.

Severt *et al*. (2007:406) draw attention to the fact that mixes of different business events (trade show or conference or training workshop) with different target audiences (small business, medium business, regional business, global business, and individual CPD) result in different sets of event design needs. The concept of seeking to help develop competitive advantages by actively influencing the strength of links (people) in existing

supply chains or providing possible new links (people) can be argued as central to excellent business event creation and management.

3.3 Communities of Practice (CoP)

Communities of practice in the context of business events are primarily business networks which have a collective knowing (Andersson *et al.,* 2005:521). This collective knowing is a knowledge flow between the people (network nodes) and in this way is continually useful to the network members because it is continuously adapting. From a viable systems methodology viewpoint, the CoP is part of the negative entropy system and, as such, is the way in which organisational systems import new energy to balance and facilitate the work of the operational functions which are an integral part of the homeostasis required for viability (Walker, 2001:43; Mele *et al.,* 2010:127).

This law of negative entropy relates to Ashby's Law of having the requisite variety of quality information on which to base organisational strategic decisions. Strategic action often reviews several feasible alternatives before deciding on a course of action and this argues that there is a need for more energy entering the system (possible alternatives) than comes out to maintain viability. CoPs are both formal and informal and follow the process of a business event as set out in chapter 1

The CoP of a business network and its contextualisation as a business event needs consideration as to how the value it adds to the value chain can be optimised.

3.3.1 The applicability of a community of practice in knowledge development

Von Krogh *et al.* (2001:422) used the term "knowledge initiative" to describe meetings for knowledge creation held by the global food organisation, Unilever. The authors describe how the meetings brought together peers in the particular field under investigation from across the world. The purpose was to create a common vocabulary and to identify knowledge gaps across the organisation's value chain in a specific subject or

process of interest to the organisation. Using facilitation and pre-planned structuring, the meeting encouraged attendees to create a CoP which was a network to nurture co-sharing of knowledge and best practices of this particular knowledge domain (Von Krogh *et al.,* 2001:423; Jones, 2007:337).

Bandura (1986:35) noted that being part of a group supplies its members with benefits and rewards that encourage each individual not only to be part of the group network but to support the group norms and values for a defined goal. Two benefits are that the individual's need for a sense of self-direction is reinforced by being part of the group and, co-incidentally, the group knowledge can be used by the individual to help in securing a personal desired future (Bandura, 1986:38). Chapter 2 reviewed the benefit of tacit to tacit knowledge amalgamation and the networks created by this action show that there can be considerable benefit from being part of a group.

Van Winkelen (2010:15) notes that an important driver in encouraging an individual to belong to an inter-organisational CoP was that their niche area of expertise is so specialised that they need to look outside their own organisation to find similar others to converse with and learn from. Toivianen (2007:355-356) notes that many networks spring up as a result of a researcher seeking others. This author concludes that the inclusion of a dedicated "learning interventionist" in a network or CoP would be valuable (Toivianen, 2007:356). This individual would seek out specific information of relevance to the network. The learning would then be learner-created as opposed to being presented by a person not knowing all the needs of the learner (Toivianen, 2007:356).

This is not dissimilar to the identification of a knowledge champion to facilitate event content discussed in chapter 2. This evidence would support the argument that whether the entity is an organisation, an informal network or a formal CoP as in an association type of CoP, the use of a learning interventionist or knowledge champion is a driver for knowledge creation.

A note of warning on CoP is raised by Nonaka *et al.* when considering creating the environment suitable for knowledge to grow. Nonaka *et al.* note that as a CoP arises only because of the need by an individual to find similar others to share and learn with, the environment tends to make the members more like each other (Nonaka *et al.,* 2000:16; De Man, 2008:22). This is an environment where ideas outside of the specific target knowledge do not flow in randomly. The CoP creates boundaries to external sources of knowledge. Within the boundaries the members share and grow each other's knowledge. Their purpose is served by exactly this environment. Ba success, which results in high degree of possibility for innovation and creativity, arises from a dynamic and random flow of individuals and their unique knowledge constantly arriving and leaving the platform.

Lewin (1951:226) and Buchanan *et al.* (2005:202) draw attention to the fact that the group or organisation's norms can sometimes contribute to resistance to thoughts that could bring future change because anything other than the norm is not seen as typical of the organisation's current thinking. The process of unfreezing the individual's cognitive process to be receptive to change may be undermined because of the individual's need to conform to group or organisation norms that resist change. This suppresses individual opportunities to act for creativity and innovation beyond those promoted by the group.

Clarke (2010:137-139) agrees that overcoming barriers to discussion - the unfreezing of the degree of the individual receptivity - is important to group success. The author draws attention to the emotional intelligence levels of group individuals and their influence on knowledge flow dynamics. Clarke (2010:137) notes that those individuals more socially adept at expressing their views and experiences adding nuances from their emotional repertoire (for example appropriate hand, eye, facial movements and voice modulation), are often better trusted. In turn, the better the individual is at this, the more she feels she fits in and is part of the group. Typically, the level of conflict between an emotionally adept individual and others is lower and the emotionally adept person shows stronger overall social ties to others (Clarke, 2010:139).

Clarke (2010:140), as have other authors reviewed in these chapters, reinforces the importance of a facilitator to get other members of the group to participate rather than letting the most accomplished orator dominate the group thinking. The facilitator's role in this case would be to develop a stable emotional platform for knowledge acquisition and sharing trusted by all group members. Those that are not socially adept need help to articulate to become significant in the group think. Facilitation will manage the level of conflict allowable. The facilitation would be tailored for each group's specific dynamics.

When considered in the context of Getz's suggestion that knowing the constraints and antecedents of an event will lead to the creation of a more successful liminal zone, this presupposes that there are two broad networking types of environment. In the first, the individual professional profile of the attendee may be an event antecedent for others working in the same field to attend. The networking required is characterised as being extremely specific as to the knowledge being sought. In the second scenario, the knowledge being sought is broader more Ba-like in its dynamic nature. In this case, a profile of an event very specific to purpose would act as a constraint to the types of attendees who would participate. It seems that facilitation roles such as building platforms of trust in workshops; acting as knowledge champions to trigger tacit to tacit activity; being a boundary spanner – are types of antecedents for event success. The type of facilitation required will be dependant on what is required to create the correct liminal zone for the targeted attendees.

3.3.2 Emotional and tactical knowledge development

Connecting the importance of a network or a CoP to individual knowledge needs will help to understand the elements that can be incorporated in the design of a business event that would lend to knowledge transfer.

Tolsby (2005:8) introduces a concept of "hands and heart" to explain the types of inter-relationships that appear in a CoP. On the social side, the heart construct rules that the more personal, informal links are of high importance for learning new information. These

relationships are helpful for gathering the data required to form a decision or to put body to visualisation of intuitive feelings. The individual who seeks these interfaces critically but discretely chooses those individuals she wants to interface with. They are chosen for the purpose of fulfilling a need for knowledge in an area she feels unsure of (Tolsby, 2005:8). The individual is looking for input to develop her own unstructured ideas.

Tolsby (2005:9) notes that these interfaces are in the affective psychology domain because those involved observe the emotions, reactions, face and hand expressions of those with whom they interface. The interface brings non-conscious thoughts to a more conscious level, simultaneously altering individual perspectives. Ketsi and Syväjärvi (2010:213) emphasise the importance of creation of individual tacit knowledge in a group such as a CoP through "social intercommunication" activities including watching, talking together and peer lectures.

When in the 'hands' role Tolsby (2005:10) explains that the learner is looking to others in an informal, trusting, open manner for practical, hands-on support in application of new-found knowledge. Jones (2007:340) found similar results in doctoral candidate communities of practice. After 'heart' discussions, the learner is better able to distinguish her problem, perhaps has heard several ways the problem could be solved, and has made a decision as to which solution best suits her resources. This informal meeting time does not place obligations on her from a personal or organisational perspective. However, she does not have the specialist skills to document specifically how the problem will be tackled practically. The individual now seeks explicit, practical advice from experts who use their special skills and knowledge with the employee guiding its application with her 'heart' information.

Jones (2007:339) found proof of this in the role within the CoP of the doctoral supervisor among the doctoral candidates. Candidates first sought inspiration from equal members of the CoP (other candidates) then presented their new knowledge to their supervisor. Tolsby (2005:10) concludes that learning involves both 'hands and heart' relationship opportunities in a satisfying CoP. The fact that other people's business experiences are

told in a narrative way helps the 'hands and heart' develop for someone else who, in turn, takes this new knowledge, reflects on it in a manner applicable to their own contexts and creates another new form of knowledge value. Using business examples by design falls into business event design and has been termed "negotiated narrative" where others' experiences studied and reflected upon are used in a designed, predetermined way to trigger new knowledge (Watson, 2007:379).

Both processes bear out the need when designing a business event to consider carefully the mix of time for informal and formal interactions if the individual is to benefit fully from an environment suitable for knowledge transfer to occur. A great deal of research work has been done on leisure and mega-events, but not much of the theory originating in this area has been applied to business events. For instance, Chalip (2006:120) reviews anthropological work as to why creating the right event liminality carries such importance in relationship to attendee satisfaction. Apart from imparting knowledge through content, Chalip (2006:120) concludes that the mega-event or leisure event provides a "safe space" in which to explore nodes (people) in new networks, and discuss sensitive issues that might not be suitable to broach in the workplace.

An external business event atmosphere such as at a trade show or conference is similar in constitution to a leisure event in that it takes place on neutral ground. Chalip notes that leisure events bring together groups who might not normally meet and opportunities for broadening networks are created (Chalip, 2006:121). Similarly, conferences and trade shows do the same.

The 'neutral ground' aspect of business events for knowledge development has been reviewed earlier in this literature review and suggests that leisure event and business event liminality both fill an attendee need for a place where a degree of exploratory behaviour for new relationships of benefit can be pursued without long term consequences if unsuccessful. The attendee controls the degree of intensity of the new experiences. The event organiser needs to provide the safe spaces and people of interest

to fill it. Again, Lewin's law of environment affecting the level of future behaviour change comes into play.

To understand how the employee can be supported in transferring the knowledge into the organisation, it is necessary to look again at the work of Lewin (1951:229) in chapter 2 who defined learning as "unfreeze-move-refreeze". Carter (2008:20) expanded on these three steps, defining them as forces at work on the learning domain and therefore having repercussions with their strength on the learning for a new, desired organisational future. Carter (2008:21) expands Lewin's model to a seven-phase model in which each of the seven stages of unfreeze-move-freeze have a co-dependent relationship on two underpinning phases.

The first is a "leading change phase" which is developed by expanding knowledge through social and emotional activities (meetings, discussion). Attention to creation of this phase allows for the individuals involved evolving a range of possible strategic actions to address the desired future of the organisation's goals.

The second co-dependent phase is a "managing change phase" that depends on the organisation's structure (leadership, commitment (vision) and communication) supporting and freezing change into the organisation's structure.

Carter's work reflects the impact of these underpinning phases on knowledge uptake and supports Tolsby's argument for having both heart opportunities equating to Carter's phase 1 "emotional and social" (Carter, 2008:21) and hands opportunities equating to Carter's phase 2 "tactical and technical" (Carter, 2008:21) within networks if seeking to improve knowledge and thus performance.

The work of White and Lee (2009:691) discussed in chapter 2 showed that developing an environment for a 'leading change' phase was appropriate and necessary, but if there was a gap in knowledge transfer, in their case the lack of someone appointed to turn ideas into tactical process change, the exercise immediately lost its value. Furthermore, the group

who created the ideas for change has a gap between expectation and delivery which does nothing to encourage their future support. How the gap between expectation and delivery could be narrowed is discussed later in this chapter when considering the role of human resources and organisational future strategy. Actions to narrow this gap would be an antecedent for ensuring successful knowledge sharing.

Carter's models (2008:21) supports Lewin's argument that the phases at work in the environment of the network either support or inhibit the change process of unfreeze from old behaviour to a state ready for change to refreeze in a new desired behaviour (Lewin, 1951:224). Forces push or pull at the organisational environment in which the phases operate. Cognisance must be taken of resistor forces which are the inhibitors of learning. This could be restrainers such as: individual or team mentalities where a system or individual actively chooses to operate in isolation of other organisational systems not sharing knowledge; leadership not allowing for heart and hand meetings; a knowledge externalisation process not being in place. Van Winkelen (2010:20) concurs with Lewin and Carter and suggests that an organisation seeking productive inter- and intra-relationships should be "creating a collaborative ambience to build trusting relationships and create a shared identity".

Sveiby (2007:1649) draws attention to leadership inhibiting knowledge sharing within the organisation through apathy. In his survey, 15% of respondents were management and all respondents worked in professional services. In this instance, Sveiby (2007:1641) defined the survey group members as knowledge workers described as "people who use IT, have a minimum of intermediate vocational training and are allowed independent design of important aspects of their job". Of the total negative comments received about knowledge-sharing 52% of these pointed to management showing a lack of encouragement for knowledge sharing. Employees felt that managers took information from them but gave little back.

Sveiby (2007:1650) suggests this managerial apathy might arise from the fact that managers see no point in sharing financial results, vision, mission and strategy as they

feel it has little to do with an employee's daily job of work. Sveiby (2007:1651) concludes that "management apathy is a disabling behaviour" for organisational knowledge systems. Powell and Yalcin identify another contributing factor with regards to a type of apathy to supporting knowledge sharing arising after managerial training interventions. These authors report that while outcomes based testing shows that managers do indeed take away new knowledge of value to the organisation from a business event intervention, they do not always share it in the organisation (Powell & Yalcin, 2010:235). Powell and Yalcin (2010:235) suggest that a solution may lie in having a management mentor or providing action-learning based implementation in the workplace - concepts that have already found support for their value-adding to a knowledge system in this literature review.

It can be argued that if the design and application of a business event is guided by the internal knowledge framework of an organisation, the event will be, to some extent, reliant on that framework for its success in generating new knowledge in the employee.

Ketsi and Syväjärvi (2010:211-229) agree, and draw attention to the importance of tacit signals at work in any group, in the case of their research - an organisation. The authors note that the actions of a person, such as a leader, versed in the organisational goals to be achieved for a desired future can guide a team (Ketsi & Syväjärvi, 2010:212). Their attitude seeks to raise individual levels of self-awareness so each team member is confident to identify gaps between actual and desired performance, then notify the team and seek knowledge to fill these gaps (Serenko *et al*., 2007:613; Zulauf, 2007:497; Selamat & Choudrie, 2007:342; Ketsi & Syväjärvi, 2010:214; Clarke, 2010:135).

Ketsi and Syväjärvi (2010:216) reviewed how organisationally held knowledge of existing capabilities and competencies can be seen as a human resource information system linked to these self-aware groups for its inflow and outflow. The group's role is to maintain the integrity of the knowledge in the information system keeping the knowledge in the system applicable to organisational performance goals. This research supports the application of Ashby's Law of Requisite Variety discussed in chapter 2. This research

also supports the importance of the individual as the 'feeling' of the system as in the organisation being a living organism in touch with its environment by feeling change in its internal and external environment. Ketsi and Syväjärvi (2010:216) take this further by noting that the individual has to be self-aware of their importance to the viability of their system if they are to be encouraged to contribute to its health.

Included in these phases are competencies such as management by supervisors of daily complexity, visionary leadership, culture skills and processes (Ndlela & Du Toit, 2001:164; Ketsi & Syväjärvi, 2010:219). Creating such an ability in the organisation to be able to understand how to push knowledge value from one level to a higher level in effect alters the organisational absorptive capacity for knowledge in a positive way. This reflects as having the attitude required to leverage new knowledge in as many ways as possible. The use of a balanced scorecard for measurement of the intangible value of learning and organisational knowledge growth to organisational performance will be discussed further in chapter 4.

3.3.3 Knowledge acquisition through events held by professional associations

In chapter 2, the role of membership of an association in personal continued professional development (CPD) was mentioned. These associations are sometimes statutory such as lawyers and accountants wherein the regulatory laws governing the professional body require regular skills updating. Alternatively, individual participation is on a voluntary basis.

It is interesting to discuss the latter as an example of an association, business events, and member satisfaction. Membership of this association that is not statutory in its CPD requirements but its members activities are highly regulated by legislation - the Direct Marketing Association of South Africa – DMASA (2012).

Direct marketing involves the dispensation of product information through interactive and direct channels to consumers. These marketing activities are regulated by

Information and Communication Technologies (ICT) legislation in many countries including South Africa. The DMASA is not a regulatory body and acts to bring attention to its members of information pertinent to their successful business operation. Yet it has over three hundred members representing a cross section of business giants such as Hollard Insurance, Alexander Forbes, BMW, Cape Town Carnival, MTN, Vodacom, Cell C, the Post Office, banks and many others. Its members obviously consider the association's role in the business activities as important to the organisation's performance. Association events include a conference and trade show, peer-reviewed award of excellence ceremonies and guidance on CPD activities such as interactive and direct marketing, professional designations.

In the case of event organising, professionals their associations' roles are currently non-statutory but, as with statutory body associations, event associations aim to encourage a high degree of professional behaviour amongst their members. The degree of regulatory role of the association varies from association to association type. Many associations now recognise the yearly need to undertake CPD learning and reward CPD with notional hours that equate to hours of continued learning participation. Both formal learning such as tertiary skills and learning (degrees, diplomas, technical training) and informal such as attending lectures of peer speakers are recognised as CPD as long as the learning better equips the individual to perform capably within their industry. In most cases, attendance for CPD is self-regulatory and the knowledge gleaned from CPD is tested only by its appearance in employee application at work.

Lee and Black (2008:340) showed that the quality of the professional education delivered at an association meeting was directly related to the degree of positive feeling a member would feel about the association's value to them. Lee and Black offer their own research results as proof that attendees value well organised events about business that spend less on lavish banquets and flowers and more on good application of venue facilities appropriate to the learning presented, and high quality educational materials including keynote speakers (Lee & Back, 2008:340; Fox & McCormick, 2009:213).

Fox and McCormick (2009:213) noted that conference delegates liked add-on value such as delegate contact lists, prescribed pre- and post- reading, content summaries, speaker expertise briefs and electronic links to further resources**.** Lee and Black, among other authors, note that attendees appreciate informal networking opportunities (Lee & Back, 2008:340; Fox & McCormick, 2009:213). Lee and Back (2008:342) interestingly note that the attendees of the conference they researched did not feel an improved level of self-awareness after attendance.

This may indicate that the role of self-awareness was not actively promoted but it has been seen previously in the literature review as important to network building and group innovation exercises. Self awareness and self confidence have been seen to be important employee attributes for a learning organisation and antecedents to encourage self-awareness should perhaps be one of goals of the CPD association business events (Morosini, 2000:251).

Wall and Ahmed (2008:188) brought in the role of academic faculties as the interface for learners, which brings into focus an interesting question whether, if meetings held for CPD via associations are to relate to maintaining the quality of the industry's professional standards, there is a link between associations and academic bodies of knowledge (tertiary educational institutions)? It would seem that there should be a link which would definitely be a knowledge value-chain link between associations and academic institutions. Academic institutions are the dispensers and guardians of a nation's education. Alumni groups seem to somewhat fill this role with guest peer lecturers although CPD is informal at present with no award of CPD notional hours.

It can be argued that many of the drivers and constraints to knowledge flow in the environment of an individual employee can be managed by a knowledge strategy that receives support from the organisation's leadership. Leadership, in turn, can lead to an organisational culture that embraces knowledge as a valuable resource (Figure 3.10). The employee is then immersed in work systems and management practice that acknowledges and supports knowledge flow.

Personal learning that the employee undertakes outside of what is required by the organisation has utility to an organisation that encourages the employee to share this knowledge. The employee's personal knowledge becomes part of the organisation's knowledge repository and is part of the reversal of the continuous knowledge depletion process. The type and quality of the employee personal learning will be dependent on: personal ambition and motivation to gain knowledge; legislation that drives personal competencies; and the competency of the networks, communities of practice and associations to match the employee's knowledge needs (Figure 3.10).

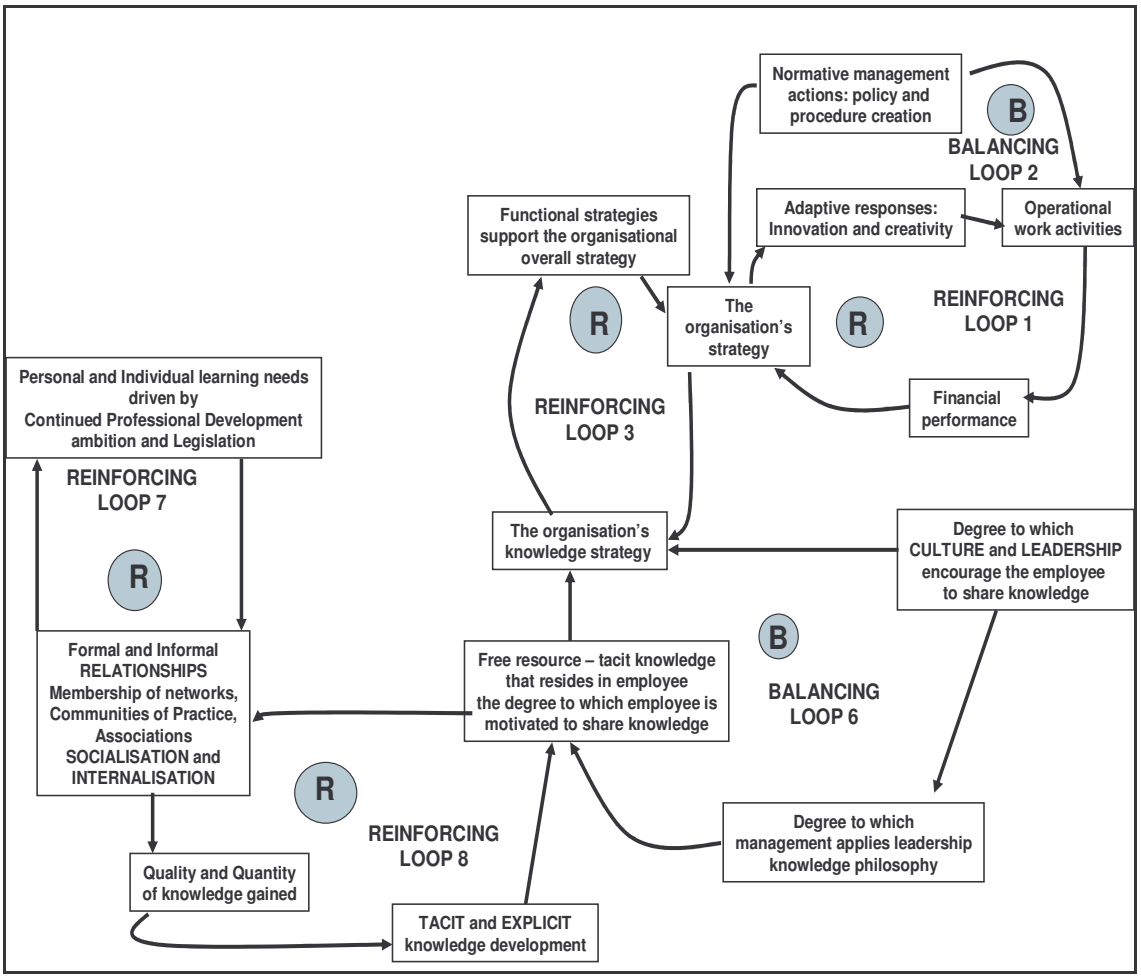


Figure 3.10: The relationship between employee knowledge and the organisation
Source: Author's own compilation (2010)

3.4 The degree of coherence between workplace needs and event content

The knowledge worker has been seen in the previous sections to be solely responsible for knowledge gathering activities and thus pivotal in future organisational performance.

The degree to which the knowledge worker gathers useful information has been shown as being dependent on both personal and external environmental factors. Changing levels of knowledge in the individual, and subsequently the organisation, can often be encouraged by pre-defined actions such as participating in a business tourism event. It is has been discussed how many aspects of the event will affect the success of knowledge transfer. It has been noted that it is paramount to consider the nested relationship of individual, group, organisational, inter-organisational learning and external environmental influences (Van Winkelen, 2010:10). Nielsen (2009:68) notes that learners need exposure to varied contexts to fully appreciate the range over which their new knowledge can be applied.

Van Winkelen (2010:19) and other authors reviewed earlier indicate time and again that the employee can be the lever for knowledge and this can be applied for organisational process, policies, communications, collaborative relationships and general capacity building. This raises the question of who in the organisation actually links employee to managerial objectives and selects the appropriate vehicle of business event to be used as the knowledge creation tool.

3.4.1 The role of human resources and knowledge officers

York (2010:187) clearly states the problems for the organisation in justifying investment in human resource activities such as employee training and development. The first problem is justifying the benefit of this intangible asset to the organisation. Unlike a tangible asset, for instance machinery, whose initial cost can be legally depreciated over the years ahead and whose impact is measurable in terms of aspects such as faster production, less waste etc. and its purchase can be aligned to a strategic future motive, the benefit of training and learning is not clear.

The second problem is that a training investment in an employee makes them very attractive to competitors and as such the value held by the employee after training interventions is likely to drain away if the employee is taken by a competitor. The loss is then not only a cost for new recruitment but also to retrain to a specific standard not to mention any loss of intangible knowledge about what makes the organisation work that this employee takes to a competitor. The value attached by the organisation to helping with employee work-life balance which helps to keep employees within the organisation is another variable that affects the knowledge system. Never the less, companies do invest in training but perhaps if HR could more accurately gauge its impact for them, the recognition of the importance of activities that create knowledge, would spontaneously follow.

3.4.2 Human resource activities as an antecedent to knowledge creation

Dechawatanapaisal and Siengthai (2006:45) review the role of traditional HR activities in the light of the accelerating pace of change in which an organisation needs to exist and thrive. They note that the "rigid practice" of recognising only the tangible asset value of documented capabilities (the curriculum vitae, the training certificate) and of placing staff in skills groupings aligned to specific functions that their tangible profile seems to suit them best to do - leaves little room to determine intangible benefits that might be available to the organisation.

Dechawatanapaisal and Siengthai (2006:50), Davis and Daley (2008:65), Leistner (2010:50) and Lee-Kelley *et al.* (2007:215-217) all provide research findings that show HR is the driver that can create or diminish constraints such as cognitive dissonance, reluctance to train or share knowledge and encouraging self-serving behaviours all linked to perceptions of how that the employee believes the job should get done because that is the way it has always been done. These behaviours affect productivity, innovation and competiveness deep inside the internal systems of the organisation. Their effect ripples into other functions.

Davis and Daley (2008:64) and Watson *et al.* (2007:31) suggest that HR drill down on how effectively management is leading, identifying where leadership and culture associated with knowledge flow is adding to environmental discord around knowledge activities and devise interventions that seek to address this. Management has been seen in this literature review to be pivotal in creating a knowledge system. Management is, however, a day to day managing of the organisation's activities to achieve a strategic purpose. It is dependent on leadership to create a culture that supports knowledge flows if the value of knowledge in creating competitive advantages, as explored in Porter's Value Chain and influencing the effect of the Five Forces, is to be harnessed.

Watson *et al.* (2007:45) found that another constraint arising from management on the effectiveness of knowledge systems was that only those managers involved in creating strategy understood the need for this requisite variety of knowledge in effecting high quality management actions. This requisite variety could only stem from HRM actions that influenced knowledge creation and flow and acceptance of HRM activities as a part of knowledge creation activities would require the buy-in of all management. To this end, Leistner suggests that the senior management who should be very concerned about the quality of knowledge flow include the heads of human resources, IT, finance, internal communications and marketing (Leistner, 2010:45).

3.4.3 Human resource contributions to a learning organisation

The authors note how important aspects of the organisation's performance such as "time to market" of new products and services is influenced by the degree of information flow on which dissonance acts as a constraint (Davis & Daley, 2008:65). These authors advocate applying levels of acceptable performance on systems guided by HR activities in creating a learning organisation.

Ketsi and Syväjärvi (2010:216) cite the balanced scorecard methodology of Kaplan and Norton (1996) to guide the effectiveness of HR strategic actions for improving the organisation's performance. Kaplan and Norton's balanced scorecard methodology helps

in the creation of strategically focused organisational actions (Kaplan & Norton quoted in Yorks, 2005:31). The balanced scorecard value in event design will be discussed further in chapter 4. Ketsi and Syväjärvi (2010:216) believe that tacit signals given by employees in terms of work absenteeism, productivity, and resignations (human metrics) can be used as variables that reflect the success of organisational learning and growth.

Bontis and Fitz-enz (2002:244) note that their research shows that HR should indeed be relating metrics such as resignations to intangible value drivers of performance such as sentiment defined as "satisfaction, motivation and commitment".The authors' findings show that a strong knowledge management system decreases employee turnover rates because knowledge stimulates creativity and engenders commitment (Bontis & Fitz-enz, 2002:244). The variety of costs associated with employee replacement is a financial argument to try hard to retain workers as has been identified earlier in this review.

Zulauf (2007:490) corroborates that "the structure of the [organisation's] knowledge system will influence the behaviour of its members". Creating an HR sub-system that gathers information on the employee's tacit behaviour and learning for HR decision making on how to leverage more value from an employee would be useful. Such a system would be an employee characteristics repository and part of an overall knowledge system. This concept is proposed as a Human Resource Information System (HRIS) (Ketsi & Syväjärvi, 2010:212).

Rothwell *et al.* (2006:9) find knowledge tied to performance and state that the organisation requires characteristics from research into Human Performance Improvement (HPI). An HRIS system would be dependent on the quality of HPI variables for the quality of its data. This generates a Human Capital Return on investment (HCROI) value (Ketsi & Syväjärvi, 2010:222) and gives a quantifiable and thus visual significance to calculating the value of the intangible resource of knowledge. Variables identified and tracked in the HRIS can be manipulated with the aim of improving the organisation's performance. Meetings and forums are the vehicle to carry out the gap analyses needed to inform the balanced scorecard where changes to narrow knowledge

gaps need to be made (Ketsi & Syväjärvi, 2010:220). The balanced scorecard or similar methodology becomes part of the overall ROI methodology applied to a business event.

Business events are not only the vehicle for extending organisational creation and innovation but they are also the vehicles that are the temporal and virtual stopping points in the organisational development time-line where an analysis of key variables for knowledge attainment and the value of what they assess can be revisited as to their appropriateness. However, the role of events in knowledge transfer is not fully understood making it difficult for HR to qualify their use (Fox & McCormick, 2009:214).

Rothwell *et al.* (2006:1) state clearly that "performance creates the end result while behaviours are the actions that contribute to accomplishments". The purpose of business tourism events is to be that place where planned intervention for behavioural change can manifest. These authors provide a comprehensive list of interventions to be applied by HR and measured to indicate HPI variations (Rothwell *et al.,* 2006:96-99). Gómez and Lorento conducted research on the effects of HR strategies for learning on an organisation's future learning capabilities and the degree to which improved capacity to learn improved future organisational strategic capabilities (Gómez & Lorento, 2004:249).

The HR choice of interventions proved to raise individual employee capacities to communicate with others and share information to a positive extent. This was of importance to organisational performance as the companies involved found that employee attitudes after training held potentially huge benefit for future organisational performance. The research proved that investment in training such as ongoing training, multi-skill training, job rotations (to understand others' work and perspectives) and team learning tasks resulted in a measurable improvement in individual employee attitudes making them more open to acceptance of new knowledge and to pro-actively applying it for in innovative ways of benefit to the organisation (Gómez & Lorento, 2004:247).

The research additionally established that the employees who received training as teams and on skills transfers communicated better with each other. Individuals had moved from

a lower level of ability to personally lead change and innovation, to a higher level represented by improved capabilities to communicate information with others and apply their personal skills in the workplace.

The organisational climate improved because individuals' communication and sharing knowledge improved and this is corroborated by research on the relationship of knowledge sharing and improved organisational climate and performance in Vietnamese construction companies (Pham & Swierczek, 2006:196). The type of training chosen by these organisations HR function could be tailored to lend to creating a stronger internal communication network between employees. The purpose of a Knowledge Advantage framework (K-Adv) as suggested earlier by Masqood *et al.* (2007:133) can now be seen to have real value if considered by HR in the context of developing knowledge capacity by strengthening links in learning chains for future organisation's performance. Business events would not be stand-alone entities but would be tailored to meeting the goals of a predefined K-Adv strategy. The expectation of the degree to which an event contributes to future performance via strengthened links could be ranked by management as the value they potentially contribute to the organisation's knowledge repository. The chain links would be of two types: internal worker to external source and internal worker to internal worker.

Finally, the research showed how this rippled through the entire organisation with the research results showing a positive strengthening of the "commitment to the organisation and its objectives" (Gómez & Lorento, 2004:249). Facilitating a positive change in individual actions and attitudes has implications for future improved individual performance within the boundaries of the organisation. Individuals who understand the purpose of their work activities within the organisational mission and vision and take responsibility for organisational viability and utilise their new capabilities with their group and individually to create conditions for enhanced organisational performance (Pham & Swierczek, 2006:198). This suggests the level of requisite variety to respond to changing internal and external demands may also have been improved because of more decision-making.

Li and Gao (2003:9-10) in reviewing the antecedents needed for tacit knowledge sharing throw light on the positive effects seen in encouraging group action when seeking benefit for organisational performance as reported in Gómez and Lorento findings. Their review of businesses in Japanese culture studied by Nonaka *et al.* elucidate that group behaviours in organisations where explicit expression of capabilities and information held by employees is not a normal activity (and this is reported as characteristic of Japanese business environments) using interventions for group interaction and can be powerful for business performance.

In Japanese organisations the authors found that the establishment of a group or team setting 'allowed' the individual to express themselves freely to the group. Individuals in the group reasoned that speaking out on business matters was acceptable as they were putting the welfare of the group above that of their own. The sharing could not be construed as self-serving but for a higher good. Both the aspects of geographic culture or organisational culture influence the building of knowledge activities and are both antecedents to be considered when the aim is to modify existing organisational traits through a designed business event (Li & Gao, 2003:10).

However, Li and Gao did not establish the effectiveness of the transfer from tacit to explicit and how well the new knowledge was transferred into the organisation's knowledge repository in terms of tangible documented knowledge such as improved processes or improved intranet information. Pham and Swierczek draw attention to an important aspect of knowledge transfer that, although learning interventions improved the organisational knowledge sharing climate, there did not seem to be a relationship to knowledge sharing and organisational performance (Pham & Swierczek, 2006:198).

This draws attention to a very important aspect of knowledge 'stickability' reviewed in chapter 2, in that if the aim is to engender the organisation with future performance potential knowledge the knowledge has to be deposited and retained (stuck) into the organisational knowledge repository.

Pham and Swierczek's research may have pinpointed the importance of the actions of making the knowledge stick, which is the action of taking it from the individual into the organisation. The activity of sharing of knowledge through a business event as a team or group ensures the knowledge had been to some extent 'combined' for new benefit derived from bringing individuals together – the 'C' in the SECI model. But, this process is incomplete if the knowledge is not formally embedding in the organisation within tangible repositories such as policies, operational processes and databases as required by the last part of the 'C' stage. If 'C' is not completed the new information remains unavailable to the organisation for future internalisation (reflection on its uses and usefulness) by the others in the organisation. Nonaka et al.' work establishes that completion of the SECI knowledge spiral through the 'I' stage was a requirement for gaining maximum organisational benefit from knowledge acquisition. It follows that the process of the business event used in knowledge acquisition cannot stand alone in the SECI process but must be fully integrated before and post- event to the organisational environment if maximised ROI is to be fulfilled.

From this it can be said that the type of intervention (internal environment interventions as opposed to external environment interventions) is clearly an antecedent in itself as it is highly dependent on existing conditions within the organisation being correctly analysed to enable future organisational performance. Again, the question arises as to how an organisation identifies where learning is needed, who needs it, and how to do it. This analysis would seem to fall in part to the event organiser, the HR or Knowledge officer and organisational leaders (Zhen *et al.,* 2010:1707). Yet, 'push' from employees has been seen as powerful in their individual drives for personal development opportunities.

A future trend of using Internet tools to identify customer needs could influence event content creation discussed in chapter 2 is an aspect of technology influencing opportunities to focus interventions. This, too, will be a dynamic in influencing the degree of success at creating a business event optimised in every respect for knowledge acquisition appropriate to need. In chapter 4, a possible solution to actively harnessing

and creating value via controlled 'push' interactions between stakeholder relationships such as employee-competitor or information-employee is discussed.

HR now assumes a role in the engineering of effective knowledge systems and in the system's ongoing maintenance and vitality (Zhen *et al.,* 2010:1707). Their role must now include balancing the complexities of personal employee development, events designed to address internal change in organisational performance such as communication and sharing, and events that lead to improved organisational performance by bringing trigger (new and previously unknown thought that triggers) knowledge from outside the organisation. HR is certainly historically aware of their responsibilities in guiding employee training and exposing employees to opportunities for knowledge development. However the degree to which these HR activities actually relate to an organisational strategic knowledge plan is not clear, nor is the degree to which employees, HR professionals and organisational leaders value this HR role.

The HR individual working with training and learning can have a number of titles including knowledge "Change Manager" (Rothwell *et al.,* 2006:117), or "Knowledge Officer" (Desouza & Awazu, 2005:42) and "Knowledge Manager" (Gorelick *et al.,* 2004:74). Nonaka *et al.* define the knowledge officer's function as "to develop and manage the knowledge assets of the organisation that form the basis of its knowledge creating process" and "facilitating the dynamic process of building knowledge assets from knowledge". Nonaka *et al.* add that the knowledge officer will only achieve results if top management supports their function (Nonaka *et al.*, 2000:24).

From the literature reviewed, it would seem that the unvalued and intangible role of the knowledge system may be highly misunderstood in its effects on the organisation's performance. Sveiby notes "sharing knowledge is a critical value driver because of its unique characteristic compared to other assets of the firm: it grows most – and usually exponentially – when shared" (Sveiby, 2007:1636). The role of employee management falls to the HR function to manage but knowledge generation is not often thought of a separate and critically important role in the organisation's performance because it can not

be seen and so is not valued. HR and knowledge officers seemingly have in their grasp the control of unleashing the value-generation of intangible assets held within their organisation's employees.

3.4.4 HR models of employment and their implications for knowledge systems

It has been seen that dissonance damages the knowledge flow. In particular, individuals leaving the organisation generate knowledge gaps. The challenge is to download their personal tacit data into organisational documents. Tissen *et al.* (2010:639) note that the employees of the present century do not view employment as a long term relationship with the employer. Tissen *et al.* (2010:642) discuss this change in terms of three current views of employee management typically adopted by HR practitioners. The first is the most traditional of the three, the practice of Human Resource Management (HRM). In this methodology, employees undergo training from the organisation but the flaw lies in little being known by HR about how the training results in improving the organisation's performance because of the practical difficulties in measuring behavioural change as performance related.

The challenges of measuring value are further discussed in chapter 4. The second view is Transaction-based Management (hereafter referred to as TM) where people are discarded as soon as they seem to have provided all they have to give. The flaw in this is the unknown tacit knowledge value that lies undiscovered and unvalued. The third approach is Professional-based Management (hereafter referred to as PM) where HR sees knowledge in every employee and moves and mixes it for the good of the organisation. These employees are acknowledged as having a wealth of knowledge and their presence in various functions is used to stimulate change and innovation.

Tissen *et al.* (2010:641) note that the functions of HRM are governed more by the regulatory laws of contracting people than any other motive. This leaves little leeway for knowledge management. TM practices are often tied to 'as required contracting' where they are considered as having specialised capabilities and brought into the organisation

only when needed. It is an "economic exchange relationship" (Tissen *et al.,* 2010:648). To maintain their uniqueness, these individuals may perhaps not share as much of their knowledge as expected to ensure that they extend their usefulness to the contractor. From an organisational perspective, as contract workers they may not be seen as sufficiently valuable for an investment in training. Tissen *et al.* do not investigate this, so TMs actual impact on a knowledge system is unknown. Typically, the highest bidding organisation wins their services and loyalty is not a consideration. Their personal knowledge is their key to success. They are "knowledge hoarders" because they are experts in their particular knowledge domain (Desouza & Awazu, 2005:43).

However, a condition when these individuals might share knowledge willingly is at a neutral space like a conference. Here they are not in their employer's domain and may seek relationships trading information for information to the value of both parties. Obviously one of those parties could be employed and gaining new knowledge for their organisation. The perspective of the new generation of TM type employees would be interesting to evaluate with regards to their view of events and knowledge creation.

PM practices take the approach that professional partnership with employees who are committed to learning and applying their knowledge wherever they can help to add value. In some industries these are referred to as consultants. PM types seek knowledge improvement continuously and rely heavily on business tourism events to fulfil this need (Rothwell *et al.,* 2006:96-99). As individuals, these employees pro-actively seek "continuous performance improvement" in themselves and their environments to ensure their continued use to their partner organisation (Tissen *et al.*, 2010:648).

Time and again in this literature review the importance of the organisation's performance, linked to the ability of employees to share, has been brought out. A policy for PM practice from HR would seem an optimal part of a knowledge system. Kaufman (2010:617) surveyed a number of firms and reportsthat "HRM intensive companies" extensively invest in employee training". Although there seems to be an explicit relationship between HRM practices and the way an organisation chooses to recruit and

manage employees, there was no clear explanation from many of the surveyed firms as to why they were using a particular HRM methodology and no underpinning understanding of the degree to which various HRM practices has implications for firm performance. Kaufman (2010:620) theoretically analyses the effect of HRM activities and employees on productivity and suggests that there are implications both good and bad for an organisation mixing HRM practices. Delegates of conferences themselves lament "their incomplete strategies for capturing knowledge and understanding to use back in the workplace" (Fox & McCormick, 2009:213).

Research by Keeble-Ramsay and Armitage (2010:10) indicates that many HR functions mix HR practices as required in an effort to react to different organisational strategies. Harness (2009:332) showed clear organisational links between market characteristics and business strategies, but poor links or apparently none between business strategies and HRM policies. This suggests that the HR policy mix is often variable but the anticipated effect of these variations in regards to organisational performance may not always be clearly understood by HR. What is exciting is that it makes fundamental business sense to suggest that a PM type knowledge system could be the lynchpin of the entire HRM strategy remaining constant as other HR requirements (more recruitment, more ability testing, more on-the-job training) come and go, PM type management ensures that knowledge remains (Meyer, 2007:123; Ferguson & Reio, 2010:488).

Support for an underpinning PM knowledge system is shown by Keeble-Ramsay and Armitage (2010:10) who found that employees recruited post-2000 shared more partnership-type relationships with the HR function. These relationships are typically profiled by more open communications (not just need-to-know) and more support by their host organisation for continuous professional development. Knowledge systems variables include optimised openness in the form of trust, and free flowing communication. Whether this is the influence of the new trend of often contracting TM type employees is not measured by Keeble-Ramsay and Armitage but Harness (2009:332) indicated that TM type employees in the form of specialist, hard-to-source temporary IT specialists demand more openness and benefits and, because they were a

scarce resource, HR had to facilitate their demands. TM has, in fact, helped drive some of the variables sought in a high performing knowledge system. Unfortunately, Keeble-Ramsay and Armitage (2010:12) also report that, of the HR employees interviewed, most said that the more emotional senses of the employee-organisation relationship, those that represent the paths of intangible benefits such as trust and communication, are generally still sacrificed for traditional "control and fragmentation" of functions.

The argument for HR to run a PM learning organisational system which guides knowledge is strong if seeking to ensure the organisation's performance over time. Such a system would enable HRM to have the flexibility to compensate for TM type employee turnover and multiple HRM changes while protecting the integrity of the requisite variety of data needed to maintain competitiveness.

Ferguson and Reio (2010:489) suggest just such an action since they found evidence for "intangible human resource elements strongly predicting organisational performance" (these typically represent tacit abilities); positive linkages between traditional human resource actions (such as recruitment and satisfying TM type staff while managing legal contractual obligations of all staff) and the organisation's performance; and human resource processes (training and CPD programmes) and the organisation's performance. All three relationships went into the HRM mix and change as the organisation changes but only the need for a knowledge management strategy remains constant supporting all organisational changes taking place over time.

3.5 Extending the availability of knowledge using the Internet

The concept of creating broad knowledge awareness, accessing information from globally remote or specialist niche areas through online tools may be one of the important purposes in validating the use of combinations of face-to-face and virtual business events. Desouza and Awazu (2005:146) introduce the concept of a knowledge market where knowledge specialists post specialist knowledge on the Internet. Many libraries with electronic references already provide just such portals. Desouza and Awazu (2005:146)

note that the portal is more interactive than a typical e-library function as the portal should provide ways to build more personal relationships with tools such as blogs being available to establish a relationship with a knowledge owner. Earlier in the review, it was noted that delegates relish links to additional topical information than that presented at the conference, and this e-trend seems to be important for business events in the future.

A specific problem with e-business events using predominantly speech and writing (such as using meeting software like Adobe Connect Pro®) is that the level of trust between participants needs to be constantly reinforced - more so than with face-to-face meetings. Desouza and Awazu (2005:85) report that participants dislike the clarity and lack of non-verbal cues such as being able to see the impact of shared information by absorbing facial expressions and body language.

Event organiser, Chris Anderson who is the organiser of the 'TED - Ideas Worth Spreading' conferences notes that e-video is accelerating learning based on observation. Participants learn from watching uploaded videos which gives them access to global best practice, not previously available before the Internet. He suggests that being a social species, any intervention, whether face-to-face or e-video, that allows us to be a group gives the opportunity for collaboration in a manner he terms "crowd accelerated innovation". He goes further suggesting that our personal ability to discriminate as to the value perceived in can be enhanced by crowd innovation measuring relevance and usefulness of knowledge on a website by the numbers of views, number of downloads, degree of social commentary on blogs about them. Through social networks, observers quickly advise each other of where to see the best or the worst and, in turn, provide dynamic, changing pathways for knowledge flow. The opportunity for innovation grows with each network node link created (Anderson, 2010).

Anderson suggests that e-reality such as virtual conference attendance or online meeting is easily accepted by most people because the human species watched and observed long before developing reading and writing. The human species is hard-wired to be taught by observation, so moving social and business networks to virtual connections increases the

potential of the network to create value. Anderson's conferences take place successfully in both face-to-face and virtual mediums and mixtures of both. The power of the Internet as explored by Anderson's business events in extending the potential value of the individual's network has similar implications for the organisation in creating a broader range variety of possibilities on which to base future strategy as summarised in Table 3.3 (Marchand, 2000c:278).

Marchand (2000c:278) discusses how not using the Internet affects the future performance of an organisation (Table 3.3). Table 3.3 shows how the Internet extends the possibilities of an organisation to gain competitive advantages by extending the range and flow of information reaching the organisation. An organisational Internet networking strategy leverages the potential value of information reaching the organisational knowledge repository. Utilising the global and twenty-four hour by seven-day reach of virtual networks lends to extending chains of network relationship nodes with a great array of peers, contemporaries, suppliers, competitors and customers (Bersin, 2004:72). The speed at which the information flows will depend on the appropriateness of the organisational Internet strategy, its attention capacity to deal with the information and ultimately its ability to absorb and apply useful information.

Table 3.3: The strategic value of a net strategy in network-based competition
Source: Adapted from Marchand (2000c:278)

<table>
<tr><td rowspan="3">THE LEVEL OF COMPETITORS WITH INTERNET STRATEGIES IN AN INDUSTRY</td><td>HIGH</td><td>Rapid piloting and learning.
(Excellent knowledge flows).</td><td>Searching for killer applications.
(Knowledge Innovation).</td></tr>
<tr><td>LOW</td><td>Internet time does not respect 'wait and see'.
(Poor knowledge flows).</td><td>First mover advantage.
(Knowledge Innovation).</td></tr>
<tr><td colspan="2">LOW HIGH
THE STRATEGIC VALUE OF HAVING AN ORGANISATIONAL INTERNET STRATEGY FOR EXTENDED NETWORKING</td></tr>
</table>

The potential to leverage knowledge for organisational performance in networked industry competitors versus the degree of networking of an individual organisation are as follows:

1. Condition - highly networked competitors and a low level of an individual organisational networking results in competitors having a higher level of inflows of learning and more new ideas piloted than the individual organisation. Competitors in the industry have superior competitive advantages derived from their Internet strategies.

2. Condition - low general level of industry networking and low level of organisational networking results in an overall low level of the possibility of identifying possible solutions to industry specific problems from using technology and ideas from outside sources. Industry knowledge is in decay.

3. Condition - low level of industry networking but an individual organisation is highly networked. This results in there being opportunity to discover something competitors do not know about fulfilling customer needs based on information arising from the extended virtual organisational network. This creates a first mover advantage which can be further multiplied in value by using the net strategy to rapidly disseminating the new product or service to the organisational market-place network of customers. The organisational knowledge is superior to the industry's knowledge.

4. Condition - high level of industry networking and high level of the individual organisation net strategy results in the individual organisation seeking 'killer' internet applications. These are applications designed to uniquely leverage the organisational Internet presence to extend product or service offering value potential to customers more effectively than its competitors. The industry is highly competitive in knowledge leveraging and the organisation must strive hard to differentiate itself in its value creation to its customers.

Beitler and Mitlacher (2007:533-534) found that face-to-face meetings and e-meetings have a place in the knowledge development framework with but with two different outcomes.

In the case of the face-to-face meeting, knowledge shared was about solutions they suggest for goals and tasks (creating possible futures for the organisation); in the case of the e-meeting, it was more focused on a specific problem (answering current needs in the organisation). These findings have been corroborated earlier in the literature review by the syntegration workshop (creating knowledge to change current a variety of behaviour and give scope for control of implementing a desired future) and the value workshop (dealing with a specific problem that could change the current status quo in an unwanted manner). From the argument previously presented by Marchand the potential value of knowledge arising from these events can be leveraged for further value when their concepts are integrated to a virtual medium (Marchand, 2000c:278).

Technology has been highly integrated with face-to-face and e-learning to create blended learning CPD environments specific to user and instructor relationships (Wall & Ahmed, 2008:186). The conclusion of Wall and Ahmed's study on the value of e-learning CPD versus traditional face-to-face learning in the construction industry is that a blended learning mix appropriate to instructor, student(s) and material is the best solution and one solution does not fit all (Wall & Ahmed, 2008:198).

Desouza and Awazu agree and suggest that face-to-face opportunities especially in the initial phases of a pre-dominantly virtual learning cycle are critical to establishing the trust element. These authors also draw attention to groups with high global diversity noting that there is a relationship between high diversity and difficulty in knowledge transfer (Desouza & Awazu, 2005:86).

Table 3.4: The coherence of the four types of Ba across business event mediums

Source: Adapted from Nonaka *et al.* (2000:16)

TYPE OF INTERACTION			
		Individual	**Collective**
MEDIUM	**Face to face**	**Originating Ba:** • Individuals met face-to-face: this may be informal or formal. • Creates an environment for raised levels of trust between individuals. • A platform for creating new knowledge is being established. • The origin of the knowledge is tacit. **Move to dialoguing Ba**	**Dialoguing Ba:** • Selected individuals meet face-to-face formally. • Each has the right mix of knowledge and capabilities to create new knowledge for the collective are gathered. • The environment allows for many opportunities to share and for self-reflection on new thoughts. • Hypotheses that may guide future actions result. • Facilitators are useful. **Move to systemising Ba**
MEDIUM	**Virtual**	**Exercising Ba:** • Individuals apply the test knowledge in their own environment. • Knowledge is applied through actions such as documentation and simulation. • Changes to test knowledge need to go back to originating Ba to be considered. **Move to originating Ba**	**Systemising Ba:** • The collective tests hypotheses and shares its resulting knowledge. • Explicit knowledge about the test results is shared by information communication technologies (ICT) including the Internet. **Move to exercising Ba**

Nonaka *et al.* note that it is the degree to which the medium interface is facilitated, which is the degree to which Ba can manifest to facilitate knowledge flow, that will dictate the success of the organisation in knowledge acquisition, embedding and application that ensures future performance. The flow of information is suggested by Nonaka *et al.* to be from top to bottom. Getting individual knowledge into the organisation is different from gathering knowledge from a group. Under 'individual' Nonaka *et al.* advocate that the organisation provides an environment for originating Ba. This involves meeting face to

face and developing trust so that employees will share freely in the future. Once an employee is confident that they may share their new knowledge with the organisation they move to exercising it in the workplace in an environment that supports their practice. This second process is a virtual action in the sense of the employee practises the new knowledge and makes suggestions of how the knowledge can be useful (but not necessarily using the Internet in the sense of virtuality). This process from originating to exercising Ba or simply said, working in two organisational environments that support knowledge flow, continues as iterations until all the knowledge is transferred usefully into the organisation (Table 3.4) (Nonaka *et al.*, 2000:16-19).

Nonaka *et al.* points out that when the knowledge is in a collective such as a group of people that the technique to draw it into the organisation is different. Here knowledge moves from dialoguing Ba to systemising Ba and back again in iterations until all useful knowledge is captured. The grou may use the Internet to seek additional knowledge from others to make sense and gain further value from their own knowledge. Again Ba represents the environments that the organisation needs to provide to gain value from the knowledge (Table 3.4) (Nonaka *et al.*, 2000:16-19).

Research shows that seamless interfaces between the virtual and face-to-face environments diagrammatically represented in Table 3.4 leverage maximum value from knowledge (Chen & Hsiang, 2007:578).

Bersin (2004:28) notes that training costs have to be kept realistic within the available budgets. This satisfies management. Bersin (2004:30) suggests that creating measurable goals from the outset of an intervention created to increase the organisation's knowledge helps guide the programme design process because the budgetary constraints act as regulators of the best application of funds (Table 3.5). All knowledge acquisition activities are undertaken with the overriding purpose of staying ahead of the organisation's future needs. Following the steps set out in Table 3.5 ensures that there is alignment of the goals of organisational strategy with knowledge strategy. Bersin (2004:26) comments that certification programmes adopted as benchmarks of standards

by many industries such as aviation, accountancy, and event management need special attention by the controllers of budgets for knowledge.

Certification type business events must clearly align to organisation goals because of their costs, legal requirements and complexity in aligning to an industry standard which often makes such business events higher in cost to an organisation than in-house activities taken for knowledge acquisition. The context for how best to leverage the business event medium is set by the medium serving as a vehicle to fulfil strategic and performance objectives as shown in a generic template format in Table 3.5 (Bersin, 2004:47). The business event is built to contribute to specified end goals. A template ensures that the business event design follows the same steps no matter what changes occur in the organisation or the event designer roles. Creating a knowledge strategy capable of creating high value for the organisation would depend on the individual responsible for training, the event organiser, and the abilities and skills to choose the most value-adding blends of types of business event interventions.

Table 3.5: Aligning knowledge interventions with the organisation's goals
Source: Adapted from Accenture quoted by Bersin (2004:28)

1.	**Strategic Objectives** Identify what the organisation sets as strategic objectives over set time periods.
2.	**Performance Objectives** Identify the teams and departments who will be involved in delivering the strategic objectives. Determine the performance objectives expected of each to accomplish their part of the strategy.
3.	**Required Behaviours** Identify the people in each team or department who have to be ready to support attainment of the strategic objectives.
4.	**Skills Gaps** Look for the gaps between the capabilities these individuals already have and the skills and behaviours they need to do the job.
5.	**Learning Objectives** Describe the behaviour or skill that the individual will attain as a result of the training intervention (business event).

The importance of choosing the appropriate mediums for delivering knowledge when filling the generic template with detail is highlighted in Figure 3.11. This diagram shows the typical retention rates for new knowledge using various mediums (Bersin, 2004:40).

Mentoring others and experiential opportunities arising from business events seem to be particularly powerful in encouraging knowledge transfer. There seems to be an opportunity for the event designer to increase knowledge retention by blending (mixing) various mediums of content delivery in every business event intervention. It has already been seen in chapters 2 and 3 that such as actions as the role of mentoring or the function of holding discussion meetings led by an in-house subject expert raise levels of overall trust, sharing and the overall absorptive capacity of the organisation for knowledge.

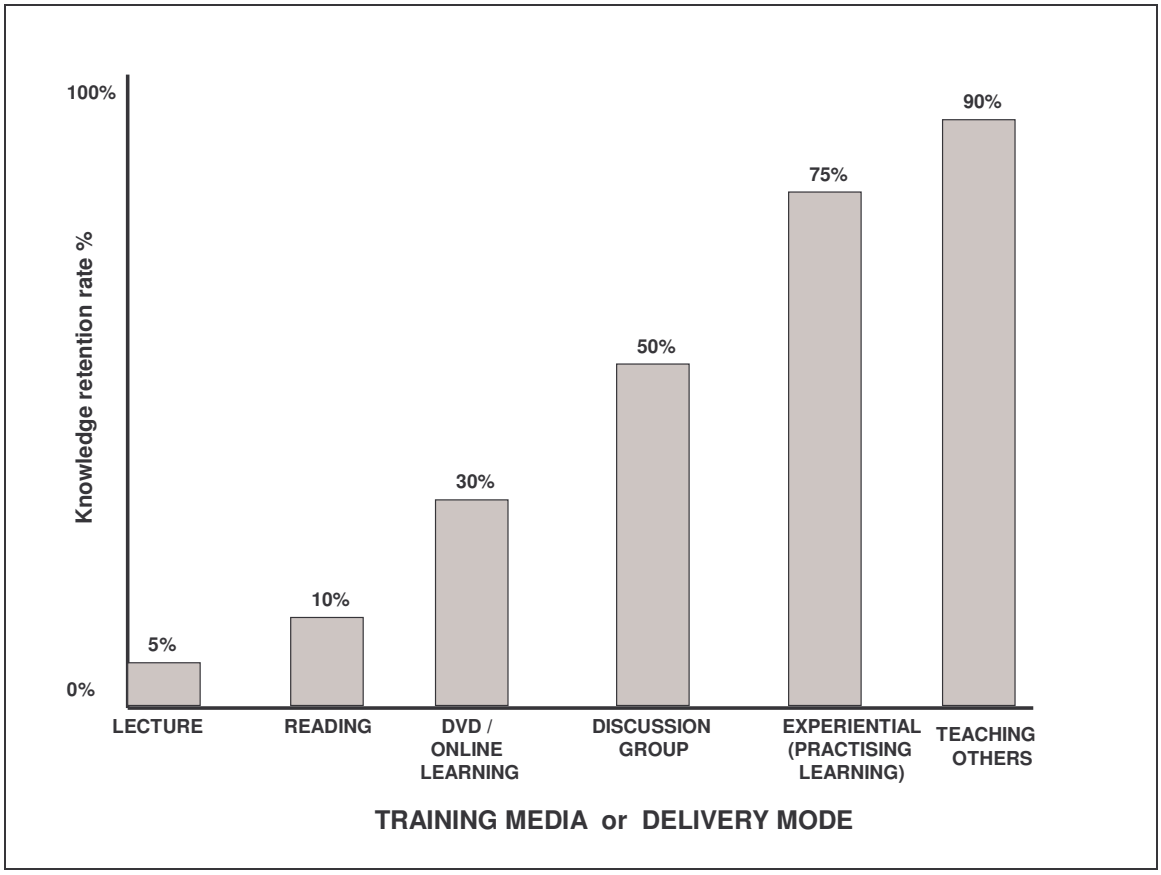


Figure 3.11: The type of business event intervention and retention rates
Source: Bersin (2004:40)

The literature review suggests companies may view value from a business event that creates opportunity for attendees to delve into both industry-specific and resource-related knowledge and individual learning. The focus of knowledge presented at business events and the interface of business event mediums will affect the flow of knowledge arising from the event.

3.6 The role of the event organiser

The role of linking knowledge replenishment needs to the business event creation process and ensuring the event brings benefits to the organisation falls to the business event organiser. Cufaude (2006:4) describes the work of business meeting planners as "crafting the learning experience". This author unpacks eleven commitments and capabilities believed to reflect the competencies expected of a professional business event or meeting planner (Table 3.6).

The event organiser, whether an employee of the organisation or externally contracted for the purpose of creating a business event, can be termed on occasion both a "knowledge broker, connecting people [to others]" and a type of "knowledge researcher, servicing others through research and discovery activities that create a certain type of new knowledge" (Leistner, 2010:49). It can be seen that the effectiveness with which event organisers do this will affect the degree of knowledge flowing from a business event and thus the organisation's future performance. It may also be extrapolated that there is a relationship between the event organiser and the organisation that may differ in its nature depending on whether the event organiser is employed as a contractor or a full-time employee.

Influences such as the quality of the registration process run by the event organiser are acknowledged as contributing to the expectation of the value of event. Aspects such as the appropriateness of the venue and food chosen by the event organiser affect the attendee in their ability to acquire new knowledge. The onus lies with event organisers, who are considered the specialists in business event creation, to use their management

capabilities to identify solutions to every need and co-ordinate all in the event design (Table 3.6). It follows that the more intimately the event organiser understands the future attendees' knowledge needs, the better the event knowledge can match these needs.

Table 3.6: Meeting management capabilities and commitments
Source: Cufaude (2006:7-8)

1	Incorporate technological advances and processes that simplify [meeting] logistics for all involved, as well as enhancing customisation and personalisation of the participants' experience.
2	Increase and demonstrate return on investment to the participants, their employers and any sponsors as well as the convener or the host organisation(s) for the meeting itself
3	Be inclusive of an increasingly diverse mix of conference attendees and their needs, learning styles, and preferred formats for content delivery.
4	Lavish attention on all elements of the meeting to create a cumulative and integrated experience that delivers value seamlessly.
5	Expedite participants' connection to the people, ideas and answers that most interest them.
6	Offer thoughtfully designed learning environments that are human scale and conducive not only to the delivery of information, but also to the facilitation of knowledge exchange, community-building and accelerated learning.
7	Embody and exemplify the mission, vision, goals and brand attributes of the meeting or conference host organisation(s).
8	Help advance the profession or industry as well as those affected by the work of the participants, and not just the sponsoring organisation's bottom-line
9	Engage the highest quality [academic] faculty [members] who are proficient in both the content areas they are addressing and in facilitation techniques that are appropriate for adult learners in general and the meeting target audience in particular.
10	Provide meaningful sponsorship and exhibition opportunities that facilitate the business that meeting participants, sponsors and exhibitors hope to transact.
11	Model best practices in customer service and customer relationship management.

It should be noted for the purposes of this research that trainers also typically undertake the role of the business event organiser concerning the operational logistics and suggests selecting a suitable venue.

In addition to the trainer role, there are also event organisers who are not trainers themselves but who undertake to provide the right trainers for classes of knowledge creation.

With regards to the event organiser who is not a trainer, many still specialise in providing content for a particular genre of business event such as creating a meeting, a conference or a trade show in addition to handling the typical operational logistics associated with any of those business events.

The importance of actually delivering as an event organiser in a manner as set out by Cufaude is highlighted in the changes seen in organisational needs for learning. In addition to personal capabilities and skills, the American Society for Training and Development (American Society for Training Development quoted by Burkett, 2005:97) note in their 2004 report that "there has been a seismic shift from training to performance improvement [that] requires trainers to drive results through business acumen and strategic thinking".

The society (quoted by Burkett, 2005:98) continues, "Essential skills are first and foremost to link learning and performance to the organisation's overall strategy and, secondly, to substantiate the payback for training efforts in terms of improved business results". This has relevance to every event organiser as there needs to be alignment between a ROI on investment for the event to the organisation and the benefit the event organiser's work is seen to create for the organisation in return for this investment (Figure 3.12).

It can be construed that the capabilities of the event organiser in creating an event that meets the organisation's need has implications beyond merely operational delivery of the event. As with any customer, the event organiser needs to know who their customer is to best service their need.

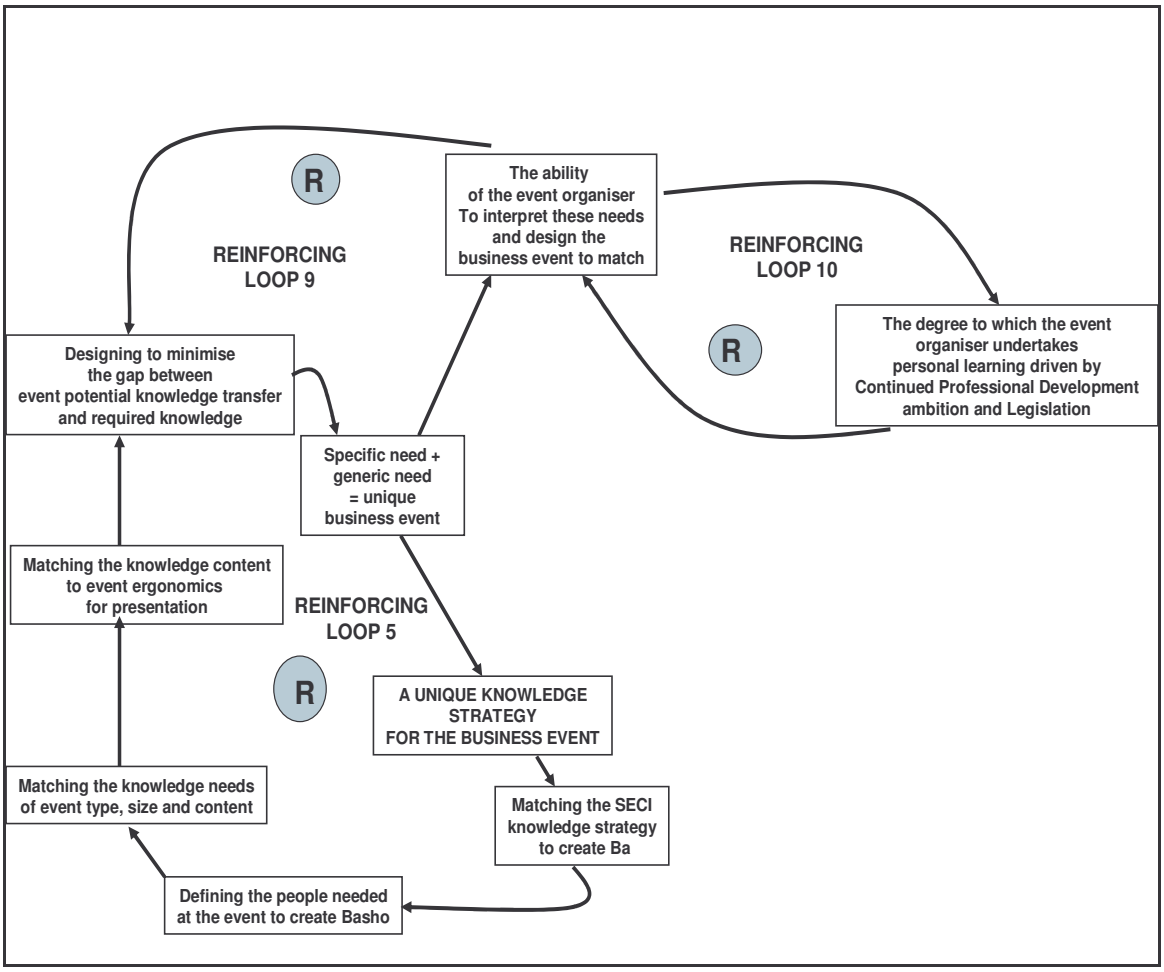


Figure 3.12: The relationship between the event design and the professional abilities of the event organisers

Source: Author's own compilation (2010)

As has been discussed when reviewing the TED conferences, virtual meetings and using Internet web-sites to evaluate user needs for products and services and using technology to extend the variety of knowledge provided at a business event is a skill now essential to an event organiser. Although not expected to be experts in information technology (IT), the need is to be able to know how to leverage IT to benefit knowledge variety.

Little research exists as to the relationship of event organisers to facilitating knowledge flow (Kim 2008:210). Generally, research about the actions of event organisers has been

limited to their actions with regards choice of venue as opposed to their contribution to knowledge generation and acquisition. Kim and Park reviewed the way event organisers use technology to manage both their personal administrative processes and to carry out event-related activities such as using virtual meetings software to facilitate meetings, and work related activities such as responding to requests to bid on business events, service event attendees' needs, and meetings with the client (Kim & Park, 2008:218).

The results of the study show that the level of work experience of an event organiser affects the ease with which they adopt environmental changes such as new IT technologies (Kim & Park, 2008:218). The study shows that event organisers with a high level of both IT experience and work experience are more likely to adopt new IT methodologies in their event design (Kim & Park, 2008:220).

It is intuitive to assume, based on the evidence of a relationship between a level of competency in event organiser skill with a concept such as IT and event design, that the degree of strategic alignment in an event design will depend on the degree to which an event organiser understands the strategic intents of the organisation they serve.

No empirical data exists on the degree to which event organisers actively seek to facilitate business event knowledge flow and relationships with their stakeholders by using IT at an event, but it is clear that both work experience and IT experience will affect the amount of IT comfortably used by a professional.

Typically, marketing uses key performance indicators such as views of a website, sms, Twitter© and number of downloads of a presentation to indicate the degree of the customer's satisfaction. These have been suggested as appropriate in such models as the Kirkpatrick-Phillips ROI model.

This suggests that continued professional development of an event organiser would include IT developments and software usage applicable to the business events industry.

The business event organiser is, however, dependent for the success of their performance on certain conditions such as management who support an internal knowledge management system; an organisation that co-operates in building a temporal bridge for knowledge inflow by actively supporting the vehicle of an event; an organisation that can verbalise methodology for encouraging learning at pre-event stakeholder meetings to explain knowledge need in terms of future strategy; taking on the role of ensuring that new knowledge arising from an event has the opportunity to be applied by actions such as tasking the employee attending the event with the temporary role of lecturer on their return; acknowledging opportunity at the event for beneficial peer-to-peer networking and learning; supporting the event organiser in canvassing employees as to whom they would like to have opportunity to meet/have at the event.

Actions such of these and many others define the knowledge culture of the organisation as to whether it is highly supportive of events or not.

New knowledge is to bring about behavioural change in the individual but, if the volume is great, it may need to have 'memory joggers' to get it to stick or embed. It can be said that the action of a tool such as a drawing of a concept or the informal coffee meeting after the delivery of new information can only help to optimise the use of the finite time available in the event for knowledge retention to occur.

Any actions that help to 'memory jog' after the event would be beneficial to further knowledge retention (Figure 3.13). The jog acts to transfer knowledge into the tacit level of the individual and embed it in the information level of the organisation.

The knowledge decay process is constant and combative responses to its effect need to be considered from many organisational aspects in the pre-event design. In contrast, the use of storytelling with active discussion, whether through drawings or vocal, is an antecedent for successful knowledge transfer.

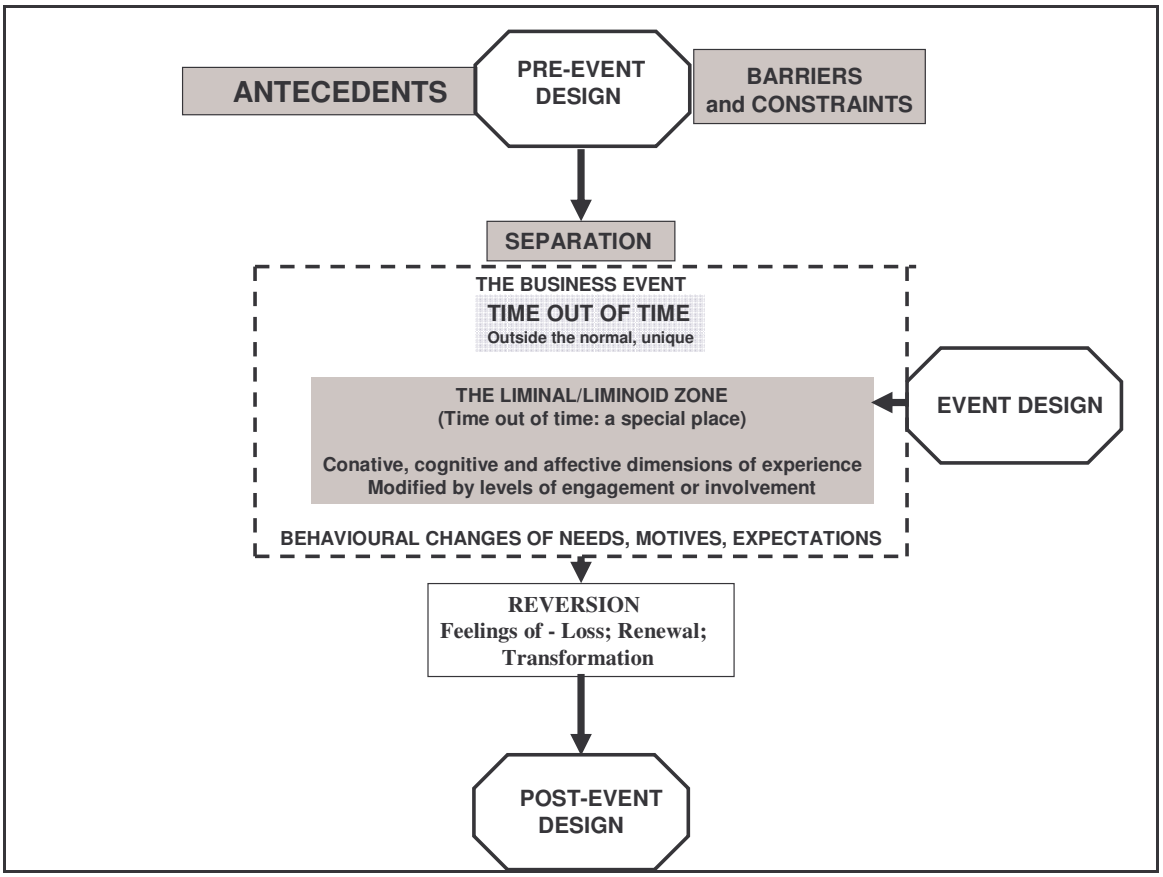


Figure 3.13: A revised model of the business event experience
Source: Adapted from Getz (2007:179)

Further value for the new knowledge presented might be leveraged from actions that influence knowledge uptake. Attendees holding specialised knowledge at this activity may need a prior brief or focusing in order to spotlight needed knowledge from their capabilities to share with the others in the group. The flow in this meeting would need to be documented to ensure it is captured in entirety to the organisation's knowledge pool.

Although the scenario of possible extensions to an event activity such as storytelling is fictional in this review, it has been used to show how much of what happens at an event depends on the ability of the business event organiser to release value potentials for the organisation over and above what is the most obvious.

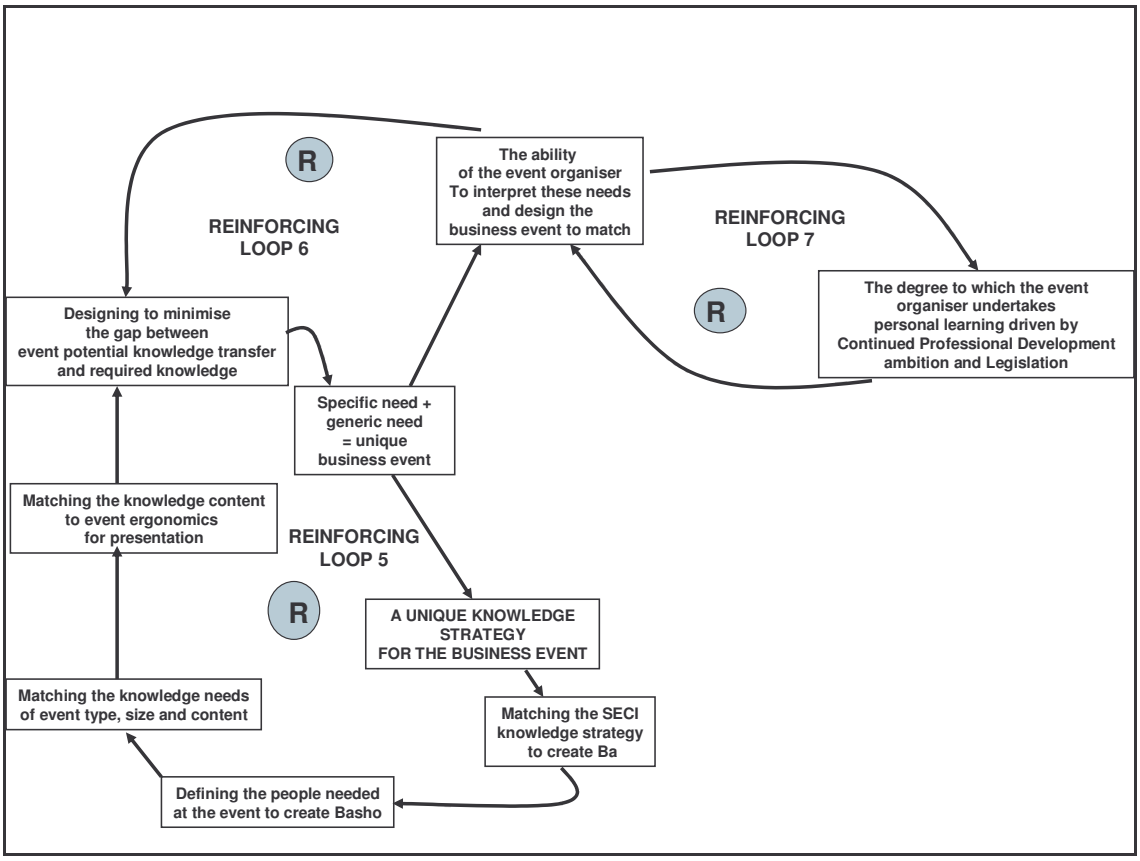


Figure 3.14: The relationship between the event organiser's abilities and the event design

Source: Author's own compilation (2010)

Hilbert *et al.* (1997:146) and Chen & Hsiang (2007:579) feel the responsibility of the individual organising knowledge events is of such importance that they suggest that trainers who are often also the business event organisers, should: Work with HR in ensuring knowledge transfer continues when back on the job; collaborate on event design with other stakeholders to get a more focused and useful design; ensure that the organisation's members understand the evaluation purposes applying both summative and formative evaluation; be trained in evaluation; understand their attendees' needs and the organisation's needs focusing on key variables.

The event organiser and the employee organisation have the joint onus of recognising and facilitating a co-constructive activity such as storytelling at a learning experiential part of an event. The value of experiential learning is discussed later in this chapter (Hilbert *et al.,* 1997:146).

The event organiser should have the qualifications necessary to add value to the organisation. They are a specialist supplier and when the organisation contracts them it expects their specialist skills to be applied on their behalf. Their actions can produce a loop into the organisation system that is reinforcing and positive with the knowledge value it creates as shown in causal loop 7 (Figure 3.14). However if their actions and ability result in a business event that is not matched to the organisation's strategic needs then the reinforcing loop may be one of negative or little value and actually harm the entire organisation system when it flows back into the organisation. Reinforcing loops 5 and 6 are affected by the value and influences of loop 7 (Figure 3.14).

In conclusion, it would seem that the event organiser's skills are an important variable in the relationship of business event value delivery and future business organisational performance. Event design value is the variable dependent on the event organiser's competency to organise a business event. The event organiser's skills are not, however, considered in the ROI methodologies which are discussed further in chapter 4, even though an event organiser is a cost to the organisation as much as is the business event itself.

3.7 Viable Systems Modelling (VSM) to explain the complexity of knowledge systems

As has been discussed previously, work at a specific level of an industry adds value to all those levels higher than itself in an industry. When considering work in a system it is easier to think of the work of an individual, the work of a team, the work of a department, the work of the organisation's operational functions, the work of the organisation and the work done by an industry of organisations. Every system in this spiral of work is capable of independent survival and is termed a viable system because on its own it can take

inputs and, in doing the work of transformation, create something of value as an output thus ensuring its survival. The input to the work is both tangible and intangible assets, the latter including employee work. From the information of the literature review it is possible to identify variables of interest active in creating organisational performance and working within these systems. The different levels of systems are named by their level in the entire system being examined. To establish the flow of value generated by work in a many layer system, the VSD technique focuses on a specific level of recursion (R) known as the system in focus at recursion level one (R1), the level of recursion directly above is known as recursion level zero (R0) and the one directly below as recursion level two (R2).

The system in focus can move and the R0 level can become an R1 and similarly so can the R2 level. The system below creates value for the one above and so on and it can be clearly seen that the many recursive systems are inter-related (Jackson, 2003:103). While each system can survive on its own, the VSD modelling shows how much more viable each system can be if the work done at the system below, that feeds up to the higher system, is optimised in value. Similarly, information about any conditions that affect the viability of the system above may need to be communicated through all the other systems below to find a solution to maintain the overall viability.

Understanding the variables at work in a system provides an opportunity to modify those variables' behaviour and optimise value generated. This is the purpose of VSD modelling which is used often in action theory to understand the complexity of the interrelationships of systems as to how their variables affect the behaviour of other variables and other systems. The virtual system diagnosis produces a Viable System Model (hereafter referred to as a VSM) that represents what the theoretical situation of the organisation may look like (Espejo, 1989:98). In this case, this system in focus at the recursive level one (R1) is the proposed situation of the knowledge system of an organisation built from information obtained from the literature review (Figure 3.16). The VSD drawings are shown on three separate pages but can be thought of as floors in a building interconnected by water pipes, flights of stairs, lifts – in this case processes that tell each level what is

affecting their own performance from another level (Figure 3.15 and 3.17). It can be seen from the VSD of R0 that together with the organisation's sub-system of work in its knowledge system that there are several other sub-systems within this level of recursion with which knowledge interfaces. These are all co-ordinated and monitored by processes that ensure viability. These processes are S2 (co-ordination), S3 (control), S4 (intelligence and strategy) and S5 (policies) specific to that level of the recursion. Each level has its own value chain of activities which the process are developed and dedicated to maintaining (Jacskon, 2003:93).

Activities that produce value from work are modified in response to change to ensure ongoing performance. Incoming information from feedback loops from both the internal system environment (R1 and R2) and the external (R0) comes into the recursive systems and is used to adapt any or all of S2, S3, S4 and S5 activities and the work-system themselves at S1. The work activity subsystems at R0 are as follows: Sales, finance, marketing, human resources and knowledge (Figure 3.15). Each has an interdependent relationship with each other as has been seen from the literature review. Each also has an autonomous identity and the ability to be viable which infers the ability to exist alone (Espejo, 1989:78). Each is regulated by the others' actions and by information given to them from S2, S3, S4 and S5. The work system of knowledge becomes the system in focus at recursion level one R1.

The way variables act in any one work system such as human resources at R0, affects the ability of the others in the same system to optimise their own individual performances. Together, these work-systems create value thus affecting the potential of the overall performance of the organisation at R0 (Figure 3.15). The behaviour of variables that affect these activities can be modified by planned actions (strategic intent). Change in behaviour of a work system will add or depreciate the value arising from the system's work. The effect of every change should be monitored by comparing predefined objectives for the change to actual information arising from the change. Comparing the two shows where gaps exist and where more actions need to take place to narrow the gaps.

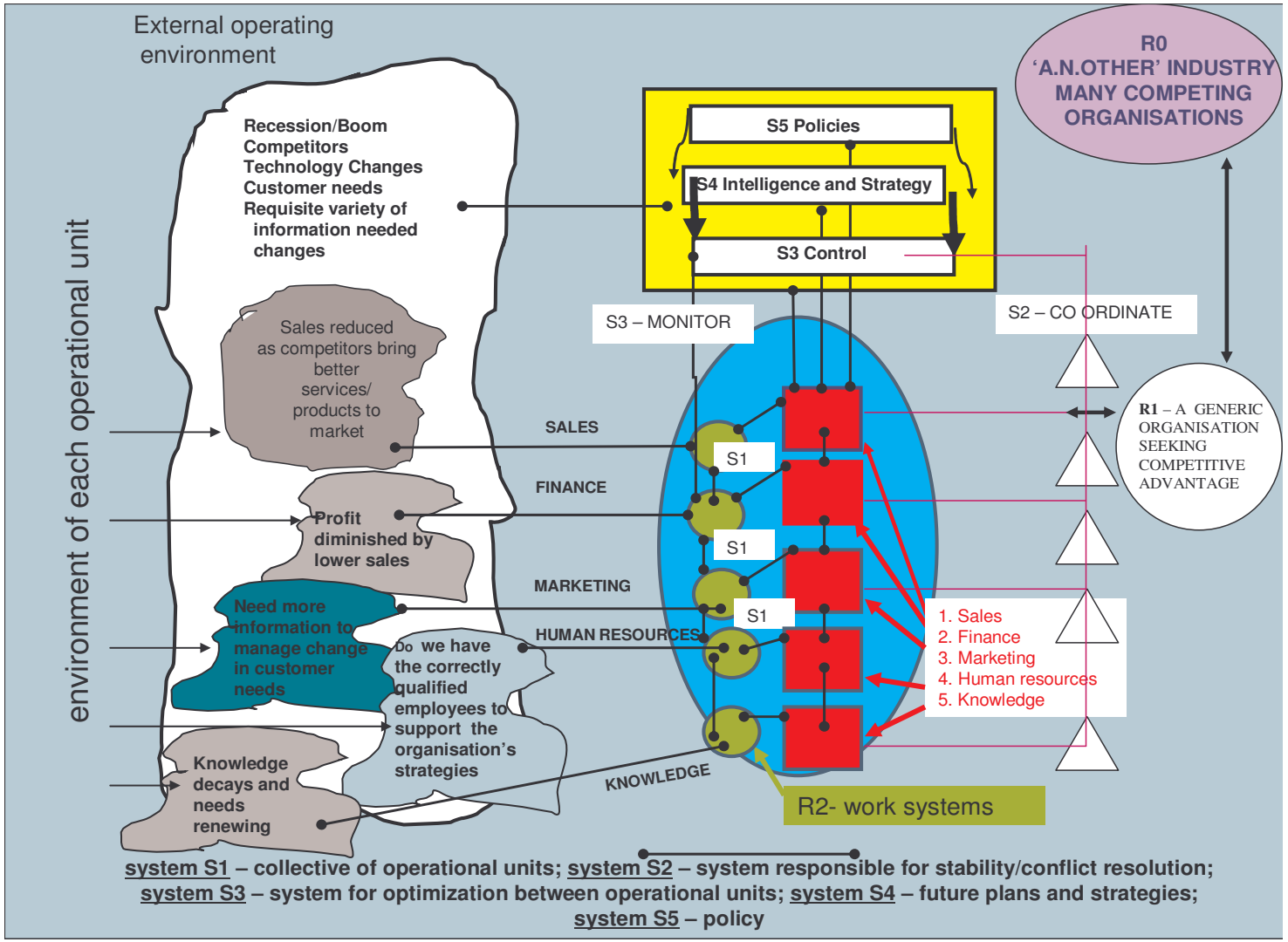


Figure 3.15: Viable systems model of the organisation within the industry

Source: Adapted from Walker (2001:9) and Espejo (1989:99)

In the iterative nature of this process of plan, do, check and act, quality is attained and quality is an intangible asset of great value to every organisation. The continuous and iterative process with feedback loops to monitor actions that modify variables of interest behaviour is known as the PDCA cycle. The PDCA cycle is later used to explain the research methodology of action theory chosen for the research instruments and described in chapter 5. The modification of a process by small incremental changes such as occurs in a PDCA cycle is further used to argue the reasoning for suggested modifications to the Kirkpatrick-Phillips ROI process.

The stage of 'plan' is both the learning and the planning phase of the PDCA cycle. 'Plan' looks for accurate information about the current situation and new information about a desired future on which to base the next strategic action or, in the case of several possible strategic actions, to decide which action best suits the organisation in its current situation. Ashby's law dictates that the correct decision can only be made if there is the requisite variety of information and this becomes paramount as an objective of this phase as the best strategic action decision will only be made if there is enough accurate information available on which to make an informed decision. The sources of the requisite variety of information are many as has been seen from the literature review and may be both internal and external. However, there has to be a knowledge strategy at this phase that ensures that there is pertinent information, that it is in a readily available form and that it reaches the right people who are making the decision.

The stage of 'do' is when a strategic action has been decided. The cost of the action has been budgeted and the resources required for the action are available. The course of this action is expected to return specific outcomes based on the allocated inputs so it is aligned to outcome goals or ROO.

The stage of 'check' is the reflective and learning stage that drives innovation and embedding of knowledge. Now the process has been changed, the purpose is to decide how closely the actual outcomes match the expected outcomes and whether it necessary to address the gap between the two and re-strategise (plan) and re-do. By altering the

variables of the process in a controlled manner, and often by influencing only one or two named variables at a time, it is possible to highlight specific key performance indicators to ensure that measurements of the actual change in variable behaviour are aligned to the expected changes in behaviour as defined in the expected outcomes.

Most critically, the PDCA cycle process ensures that the risks created by changing a system and the additional effects of the changes on other systems above and below the system in focus are limited and known. Again the degree to which the risk will be known will depend on how the analysis of the situation was based on the knowledge available, before the 'do' stage began. The 'check' phase will be looking for changes not only in the system where the process is changed but also in other systems that may be affected by the change. Check is a physical stop to ensure benefit is accruing as expected from the change.

At the 'act' stage, the process outcomes in terms of the importance of the knowledge and information it contributes to the organisation will be considered as to whether they represent outcomes for a new or improved process.

If change is made the change requires documentation in policies as an S5 function and additionally require different specific support from other levels such as S2 (monitoring) and S3 (co-ordination).

New strategies will evolve and alter S4 (intelligence and strategy). The S levels act as a change management guardians each adapting as anyone of them changes. The PDCA cycle begins again. Alternatively, if the behaviour of the process is within an acceptable envelope of performance, a new objective can become the current goal of the S4 because the existing process is acting as expected and required.

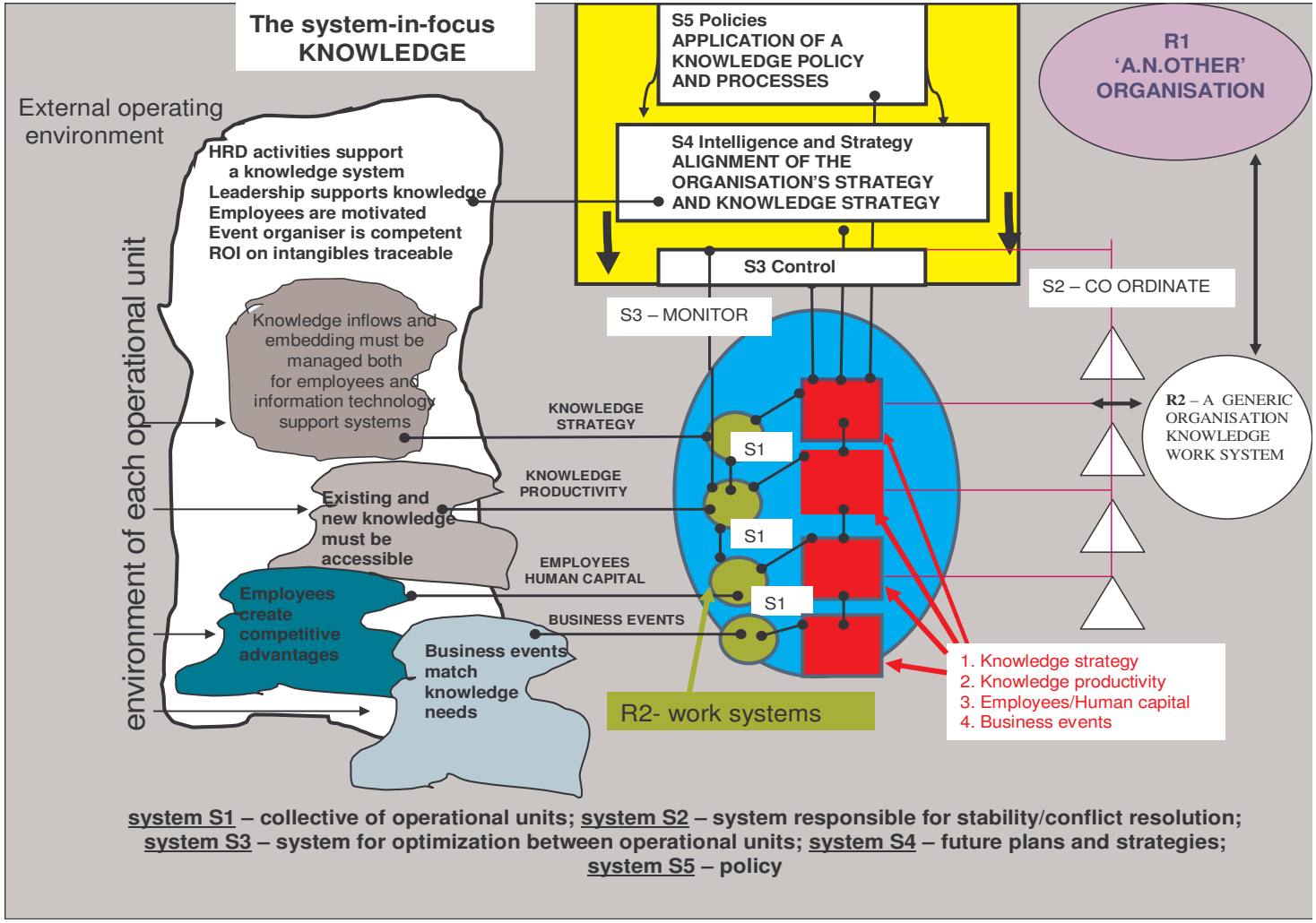


Figure 3.16: The system-in-focus at R1 is knowledge

Source: Adapted from Walker (2001:9) and Espejo (1989:99)

At R1, the knowledge work system of R0 is split into smaller viable work systems of knowledge strategy, knowledge productivity, employee and human capital value in knowledge and business events. The literature review has established that a knowledge strategy that works in tandem with the overall organisational strategy is important. Unless the knowledge strategy aligns to the overall organisational goals, it cannot be optimised for value production as it won't be seeking the right variety of information to keep the organisation viable. Maintaining the requisite variety of knowledge that ensures viability is the first work system of the R1 and is the knowledge function.

The second work system at R1 is the knowledge that the organisation accumulates which must be accessible so is kept in people, processes, policies, documents and IT storage. Only when accessible can accumulated knowledge be productive and valuable.

The third work system at R1 is that of the value created by employees and other human capital such as professional consultants, buyers, suppliers and customers. This knowledge is both tacit and explicit and needs the opportunity of business events to share the knowledge for it to be useful to the organisation.

The fourth work system at R1 is that of business events. These are the vehicles by which the knowledge strategy produces works that adds its value to attaining the overall strategic intentions of the organisation. The business type has to be designed to appropriate to the knowledge need. The business event has to invite the right people to unlock new, useful knowledge. The work-system of business vents becomes the system in focus in recursion R2.

The systems of R0 still influence those of R1 with R0 finance affecting issues such as the budget available for a business event. Or, the R0 human resource function influencing the event design with a skills development plan. Similarly, a business event that meets budget or produces value for a skills development plan is contributing value to the overall organisation.

The S2 (knowledge co-ordination to ensure the knowledge is flowing through the system), S3 (knowledge monitoring to ensure the correct knowledge is available), S4 (to ensure that there is a strategy for knowledge and that S4 has the resources to find all the intelligence that it needs to design strategy) and S5 (the knowledge policies that ensure that what is useful and repetitively used is stored and made into policies that direct future actions) exist only to serve the knowledge system function.

The work-system that supports business events for the purpose of knowledge acquisition and embedding is modelled at recursive level two, R2 (Figure 3.17).

It follows that anything that happens above R0 in the next level of system recursion, which is at the level of the industry either regional or national. The viability of this higher system will affect the ability of all the lower recursive systems to create value. The viability of the entire industry depends on the value created from the bottom up. Each successive layer upwards creates value for the next while each successive layer downwards lends to optimised conditions for performance of the work-systems at the same level and below.

The systems are highly integrated and complex.

The systems need knowledge routing that co-ordinates and controls performance to be managed not only within each work system, but between recursive layers to optimise value creation. The routes are the links of the value chain. If the business event is considered a link it must be related to other organisational systems to fulfil the criterium set out here of what constitutes organisational viability.

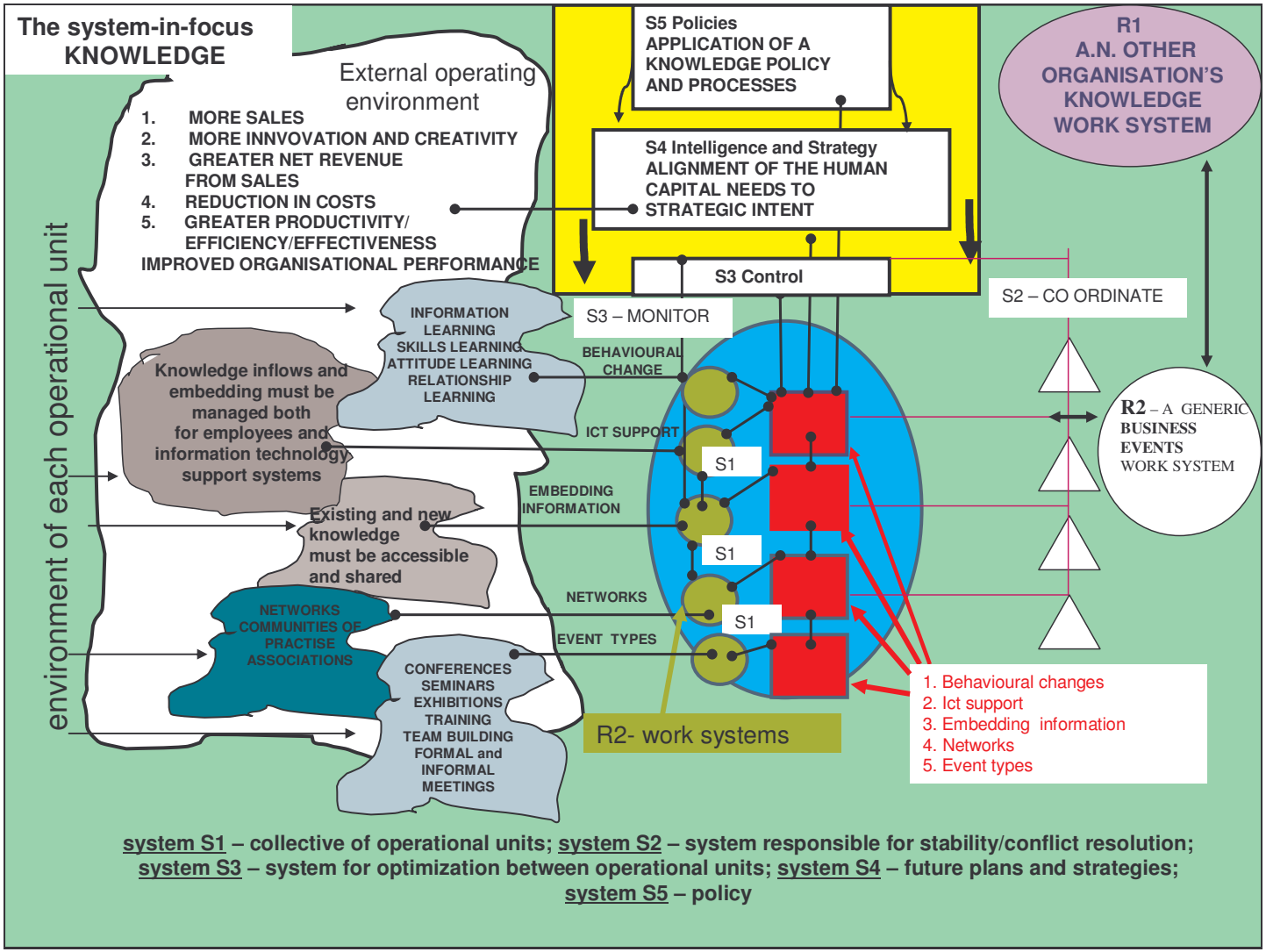


Figure 3.17: The system-in-focus at R2 is business events

Source: Adapted from Walker (2001:9) and Espejo (1989:99)

3.8 Examining value creation with the SIPOC model

The purpose of a recursive knowledge system must have meaning to all the parties involved in strategic actions to create value. To be important to an organisation's health and long term viability, it must be valuable to the definition of doing business that is to satisfy the customer's needs (Hoebeke, 2000:12).

Chapters 2 and 3 have looked closely at the types and genre of business vents undertaken by an organisation. In all business events, it has been shown that the knowledge that flows from it relies for its degree of value on the actions of people involved with the event (Figure 3.18).

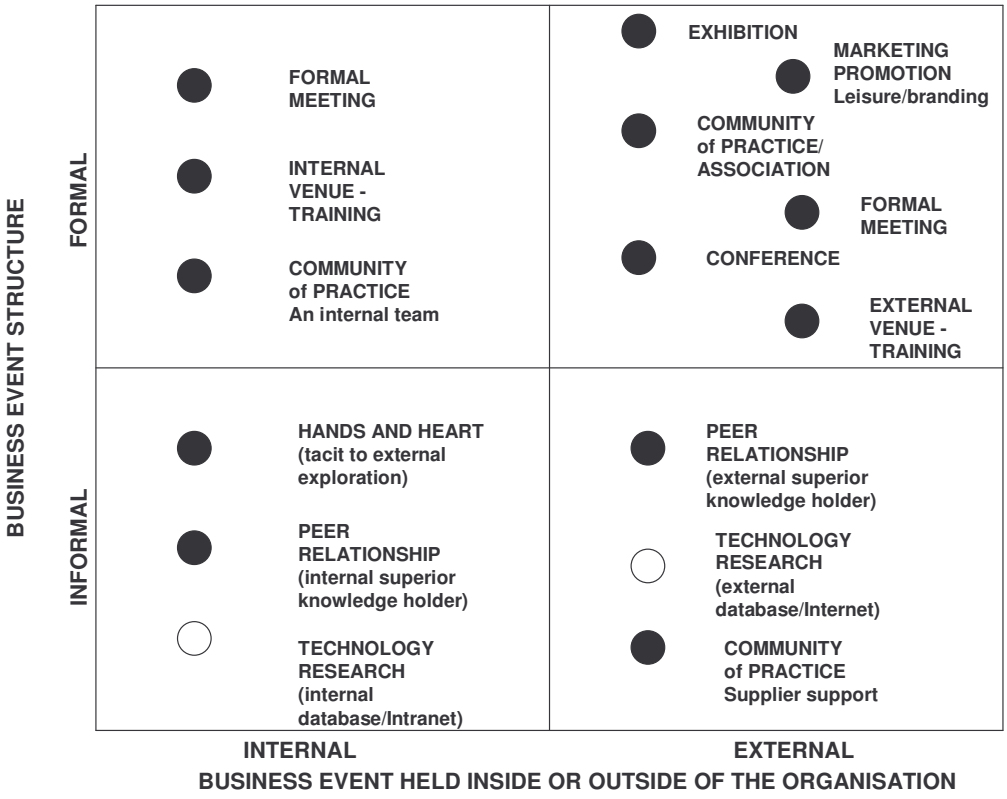


Figure 3.18: Business events create knowledge flow

Source: Author's own compilation (2010)

Figure 3.18 attempts to summarise the many business events that an organisation uses to expand its knowledge repository. This is based on the business events undertaken by individuals as reviewed. In figure 3.18, the use of technology research to add to an individual's knowledge has been argued as worthy of recognition as a viable virtual event that adds knowledge value. This argument is based on the facts highlighted in the preceding literature review that individuals in organisations can now consciously capture, store and retrieve knowledge - both their own and that of others - that used to be available only in a fairly inaccessible tacit format or in a group socialisation context. Knowledge in this format has been codified and thus must be recognised as a business event activity but, if viewed alone, it oversimplifies the knowledge repository situation (Swart & Powell, 2006:11). This is because it has been seen that even codified information value can be multiplied substantially if shared with others. It can be argued then that access to codified information creates a business event activity of a relationship between a human's knowledge repository and a codified knowledge repository that results in a third type of combined knowledge that has a new value to the organisation.

The argument from the preceding literature review of necessity takes a trans-disciplinary view of the action of work processes due to the limited body of knowledge available specific to business events. This suggests that a knowledge work system, like all work processes, can be seen to have standard elements in the work transformation process. These can be described by the acronym SIPOC which is generally accepted as describing a generic work transformation process (Scholtes, 1998:59):

- **Suppliers (S)** integral to the knowledge creation process (peers, facilitators, champions, leaders, managers, employees).
- **Inputs (I)** of raw material resources (business event design, knowledge strategy, ICT structure), and employee capabilities.
- **Process (P) –** the transformation of tacit knowledge and new information and the creation of new, possibly unique knowledge. The business event whether formal or informal influences to varying degrees an attendee' knowledge that manifests as behavioural changes.

- **Output(s) (O)** as in new knowledge and information to drive innovation, creativity and competitive advantage.
- **Customer (C)** satisfaction because the new knowledge and information ensures a high quality product or service that addresses their needs. This in turn leads to improved organisational performance.

The VSD findings for a knowledge system can now be applied to a value chain. Porter's value chain is used as a model for a value chain for value created from knowledge flows (Figure 3.19).

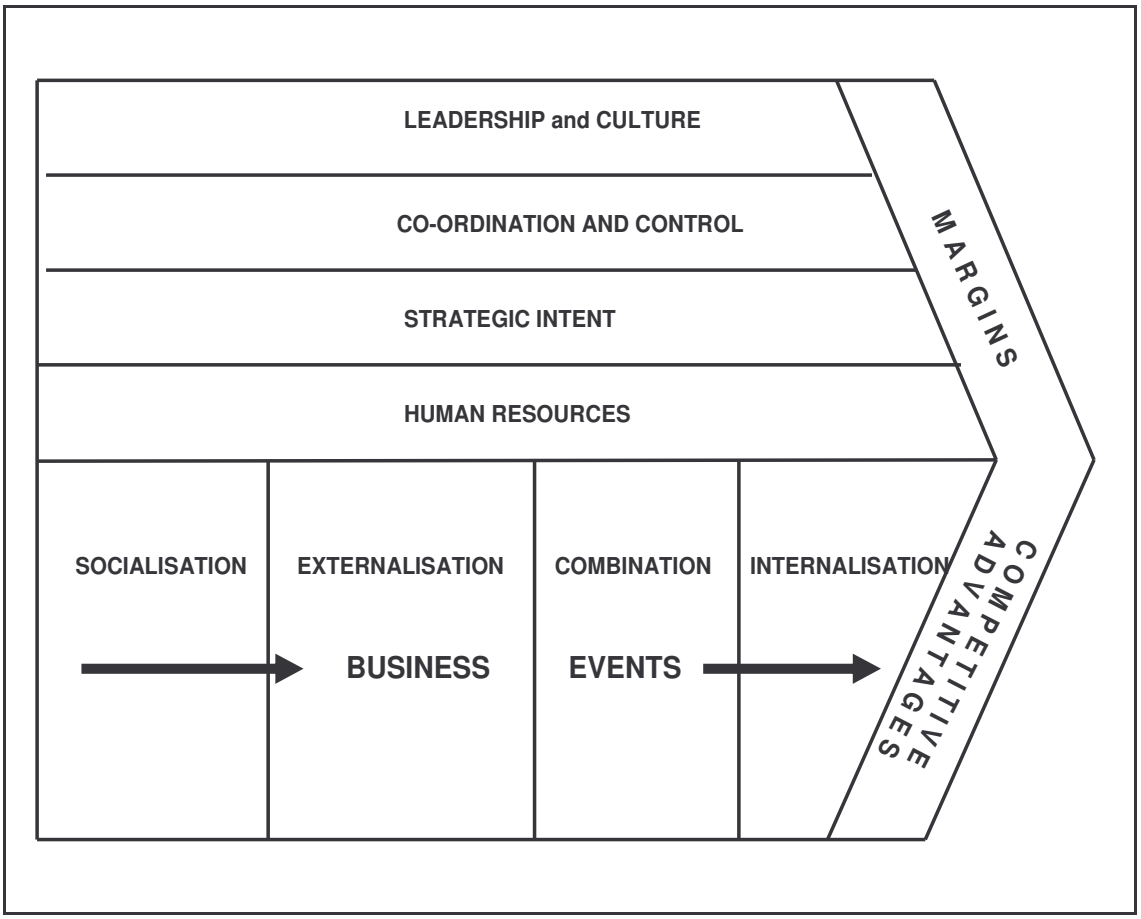


Figure 3.19: The knowledge value chain

Source: Adapted from Porter (1998:41) and Holsapple and Singh (2001:80)

3.9 Knowledge as a vertical integration strategy

Porter (2004:300) defines vertical integration as "the combination of technologically distinct production, distribution**,** selling and/or other economic processes within the confines of a single organisation. It represents a decision by the organisation to utilise internal or administrative transactions rather than market transactions to accomplish economic purposes". As it has been proven that a desired future economic performance (profitability) of the organisation can be influenced by a knowledge strategy that flows through the recursive layers of work-systems. This infers, by applying Porter's definition of vertical integration, that the framework built to support knowledge is a vertical integration strategy.

The knowledge framework strategy fulfils the first criterion of distinct production. Its distinctiveness is defined by it fulfilling the needs of its organisation. The focus of the knowledge production is focused by every business event in which the organisation participates.

The knowledge framework strategy fulfils the second criterion of distinct distribution. In this case, the distribution plays to the degree of sharing and embedding of acquired knowledge throughout the functions of the organisation. The degree of co-ordination and control of knowledge and information flows will be affected by such organisational attributes as the technology and communications infrastructure.

The knowledge framework strategy fulfils the criterion of distinct selling and/or other economic processes. It is by the application of the knowledge and information that the organisation acquires from business events that it produces a unique product or service. This product or service strives to adapt continually to fulfil the customer's needs and creates profitability.

Porter (2004:301) notes that "the decision (for vertical integration) must go beyond an analysis of costs and investment requirements to consider the broader strategic issues of

integration versus market transactions". New knowledge and information could be acquired by firing old staff and hiring new staff with new competencies at regular intervals as a strategy to gain new competitive advantages. However, it has already been shown that time and effort is required to bring about an operating environment and culture that uses knowledge and information for innovation and creativity. It follows that the organisation must make a decisive decision to pursue a knowledge strategy based on knowledge acquisition through business events. Business events become part of the vertical integration strategy for knowledge.

This argument can be supported as to its validity by the fact that intangible assets have been shown to be best developed and to provide the greatest competitive advantages when accumulated over months and years. It has also been shown that the utility of intangible assets lies in releasing new value potentials when combined with tangible assets. Mixing knowledge and information into new ways of addressing the customer's needs enables the business idea to continually adapt driving productivity.

3.10 Conclusion

Chapter 3 clearly establishes that the employee has: innate qualities that lend to organisational performance; latent qualities that can be activated by introducing the right cues; and qualities that exist but can be enhanced for the improved performance of the organisation.

The literature review has shown that organisational variables required for performance become a part of personal work behaviour in those employees who engage in knowledge acquisition. On the one hand, there must be emphasis placed by organisational normative actions and strategic planning on creating a motivational work environment to drive optimised employee productivity.

On the other hand, there must be an employee who pro-actively makes valuable contributions to work because of organisational frameworks that support their knowledge

creation and sharing activities. The employee requires that personal knowledge used for organisational benefit are noticed and rewarded.

The cues or triggers for knowledge acquisition, sharing and creation are essential in business events both formal and informal and virtual or face-to-face. Creating knowledge-powerful events requires specific event design based in environmental elements of places, attitudes and other people to trigger knowledge spirals of learning and behavioural changes.

The purpose of chapter 3 has been to understand how people who attend business events acquire and leverage knowledge. This leads to the following research questions of relevance to the operational level of the organisation at which the employee works:

RQ2: What variables influence the business event attendee experience at a business event?

Chapter 4 will review methodologies that lend to successful knowledge transfer and the Kirkpatrick-Phillips ROI model. These have applicability in measuring and managing the value created in knowledge transfers between employee and into the organisation resulting from a business event.

CHAPTER 4

ENSURING VALUE FROM BUSINESS TOURISM EVENTS

4.1 Introduction

An overriding aspect of the research reviewed is that socialisation before, during and after a business event is very influential in creating knowledge value that far exceeds that of purely the knowledge content such as lectures and training delivered at the event. The literature review has also provided a deeper understanding of the most commonly used model to assess business event value creation, the Kirkpatrick-Phillips ROI model, specifically with regards to its management of intangible value creation such as knowledge. The model, while having great value in measuring business event ROI, seems to be used with difficulty by organisations.

This chapter reviews other models and the Kirkpatrick-Phillips ROI model in an effort to further understand the process of changing data into useful information that improves organisational performance. The chapter concludes with an overview of variables found in the chapters 2, 3 and 4 from the literature review to be contributing to knowledge creation and that should be acknowledged in every business event design. These variables provides the basis for the research strategy presented in chapter 5 to evaluate whether the theoretical model of how a business event works as a value creator actually works by exploring the perspectives of business event organisers and business event attendees of business events.

4.2 The value of models in defining knowledge variables' behaviours

The need of the organisation to understand and establish control over the knowledge value arising from business events has been proven in previous chapters to be difficult to fulfil. The review has shown that the obligation of producing a business event that creates useful organisational knowledge falls to the business event organiser with some guidance

from the organisation members. Being able to strategically plan the degree of success with which specific variables act to give knowledge value gives the prospect of deliberately influencing future organisational performance. In this way, an influence of continuous quality improvement in the relationship between a business event and an organisation every time a business event is used for knowledge renewal, can be exerted.

Models are examined as to their particular contribution to the management of variables of interest highlighted in chapters 2 and 3. These give insight as to how the variables' behaviour can be managed to deliver a set of predefined outcomes for the business event.

4.2.1 The utility of recognising knowledge value chains in a template

The value of the links in value chains has been shown to be reliant on the behaviour of the variable(s) involved in every link. Research reviewed earlier of two authors, Carter and Tolsby, led both authors to postulate with informal expressions, explanations of a process for knowledge development they observed in an organisation's daily environment. Carter (2008:21) mentioned the need for a phased process that leads to creating tacit to explicit knowledge flowing at informal meetings as "a leading change phase [emotional and social]" and "managing change phase [tactical and technical]". Tolsby (2005:8) spoke of informal employee to employee meetings encompassing tacit to tacit knowledge transfers described as "hands and heart".

Both authors use of descriptors of the knowledge creating event they were observing were conceptual and descriptive of what they saw happening in their research samples. Both felt that what they saw was so important to knowledge management that they should formally recognise these occasions in their research even though they could not fully describe why this was happening. It can be suggested, based on the literature review findings on networks and knowledge transfer processes, that what the authors were observing was informal attempts by employees to pro-actively link up nodes of individual knowledge held by specific people by instigating informal meetings. The question arises from Carter and Tolsby's observations as to how much the organisation and its

employees are explicitly aware of their knowledge processes and whether being more aware of these processes would improve the quality of knowledge transfers. This has direct implications for the methodology of business event design.

Some knowledge in organisations is well known and its behaviour is known to fall within a specific, sought-after, behavioural range when guided by specific, repetitive instructions. For instance financial accounting processes and risk management policies. A formalised, organisational process provides guidelines for standardising specific variables' behaviour and, in doing so, minimising the organisation's risks while maximising its opportunity for benefits. Finance and risk knowledge falls into normative and operational knowledge management and is an example of an organisation embedding important knowledge within their knowledge repository. Such processes are applied in organisations with a high degree of confidence as to the outcomes they are expected to generate. This infers an understanding of the organisation's purpose in the strategies adopted to maintain the quality and integrity of such repositories.

A standard method of ensuring organisational knowledge is to write it down as normative knowledge policies and operational process documents. The principles of creating policies and standardised processes has relevance for building knowledge value chains of quality as acknowledged in the viable systems modelling of chapter 3. The viable systems models are presented as a claim for the importance of recognising knowledge value and generated from the variables of interest found in the literature review and presented in a diagrammatic format (Figures 3.15, 3.16 and 3.17). In these VSM drawings, elements of importance from a knowledge system viability perspective that help in maintaining viable industries, organisations and functional work systems are shown. These illustrations have utility as they are a visual map of how knowledge links up between recursive systems (Figures 3.15, 3.16 and 3.17).

Mapping the systems helps give a clear understanding of the degree of knowledge dependency that exists between and within the recursive layers (Hoebeke, 2000:8; Hoebeke, 2000:27; Walker, 2001:50).

Knowledge system documentation reduces resources such as wasted hours on faulty products, services and processes, wasted manpower and wasted raw input resources arising from repeatedly making new, reactive efforts to control the known variables of a process. Documentation leads to maintaining process performance proactively, within an envelope of acceptable behaviour. The argument is gathering momentum for the suggestion that the process of knowledge evaluation from business events can be formalised thus reducing organisational resource waste.

The formalisation of a methodology that contributes to ensuring the value created by a template of organisational activities driven by a knowledge policy and processes linked to a knowledge strategy becomes a tool that ensures future organisational viability. Further to this, by integrating the tracking of the behaviour of knowledge variables of interest to measure their contribution to ROI, with standardised and existing ROI methodologies ensures that the degree of risk is limited in creating a unique knowledge ROI methodology.

The level of risk represented by wasted resources is limited because the methodologies that follow have been successfully tested in other scenarios. Eisingerich and Bell (2008:496) who are quoted earlier in this literature review, noted a critical gap with key knowledge assets such as service level and customer relationships which are typically intangible, in that the organisation assumes with no material measure of that proof, that strong value contributions to overall organisational performance arise from them. The organisation has been shown to make this assumption based on interpreting key performance indicators (KPI) reflecting growth and financial benefit in terms of tangibles such as sales and profit figures.

With a widely held management creed of using available resources in the most profitable manner, organisations still assume that their organisational performance from the value contributed by organisational knowledge is maximised. Organisations tend to believe without explicit proof that the links in the value chains of intangible asset and tangible asset contribution are strong. Organisations extrapolate good management of all resources

is reflected in performance indicators such as value of sales not generally acknowledging value contributions of more hidden variables but interrelated variables such as the degree of loyalty of the customer. Yet the organisations do not track the variables of intangible assets so cannot attempt to control their value generated and, since the variable behaviour is untracked the organisations cannot really say how well these resources are contributing to overall performance. The risk of underestimating the intangible variables values has been shown in the stock market and in the concern expressed by accounting bodies.

Thus seeking a generic methodology or set of guidelines for managing the value of knowledge from business events is an intuitive, organisational need. The ability to control the level of waste of organisational resources from a business event, in this case the benefit to cost ratio that the organisation bears from attendance and participation in business events, immediately identifies a value proposition for an organisation. Another value proposition arises from influencing human capital behavioural change by moving the traditionally un-formalised behaviour of employees with regards to business events to a more formal and standardised conduct that influences the degree of knowledge 'take home to the organisation' from a business event.

4.2.2 The expectation of a business event in terms of value

Business events are wholly focused on adding organisational value by promising to improve the value adding performance of a multitude of intangible variables. Tziner *et al.* (quoted by Hilbert *et al.,* 1997:127) describe the purpose of a training event [business event] as "the fundamental purpose of training is to help people develop skills which when applied at work will enhance their average job performance.

Hence the ultimate purpose of training evaluation must be to assess the level of on-the-job transfer. So it is important to consider what steps an ROI model should define to enable measurement of the value of any behavioural change arising from a business event.

4.3 The contribution of existing methodologies to create a single 'solution concept' template

It has been argued that an event design template would go a long way to formalising a manner of ensuring that the more elusive intangible variables acting in acquiring organisational knowledge are named and tracked. In terms of project management, a defined template or steps for a management process is succinctly described as "a linear sequence of steps which are carried out to achieve defined objectives" (Burke, 2010:62).

Once the organisation identifies methodologies that can name and influence intangible variables, interventions or steps specifically designed to influence selected variables can be created (Brock & Yaniv, 2007:832). The degree of strengthening of value chain links associated with pairs of intangible variables (assets) such as motivation and behavioural change and set as an outcome of a business event intervention could actually be monitored and controlled. With the definition and documentation of a set of processes to characterise the acceptable parameters of the business event organisation's knowledge relationship as represented in Figure 1.3, the behaviour of the level of knowledge in an organisation over time, business events become part of a organisation-wide strategic plan to improve the organisation's performance.

4.3.1 Modelling for business ideas and competitive advantages

Currently, the business event analysis of objectives to be achieved stage appears to present difficulties for its users in identifying and measuring the role of intangible asset variables at work in a business event. This evidence is argued from the fact that the traditional ROI methods do not explain how to evaluate the effect of intangible variables, and intangible and tangible variable combinations. The argument for a powerful process at the analysis stage is that this stage identifies the gaps between the existing system state and the ideal system state (Leeman, 2002:101). The ideal system state seeks in some way to have improved organisational performance. Once the gaps have been identified, the variables that reduce or remove the gaps can be sought and efforts to incorporate them as

outcomes to business event design can be made (Leeman, 2002:102; Liker & Hoseus, 2008:303). The template is then paying attention to variables within the situation at the recursive level one and variables affecting the situation from recursive level 0 and 2 (Leeman, 2002:102).

For this research situation, which is investigating factors that optimise organisational knowledge creation arising from a business event, the question would be to define a theoretical process that ensures a high degree of successful knowledge transfer into the organisation from an event. The rationale for creating a generic set of steps is to guide business event design and implementation based principally on the need to influence a set of variables to gain a prescribed and desired outcome.

Winter and Szulanksi researched the application of business model templates used in fast food chain outlets where it is necessary to ensure the creation of a level of optimal service or product again and again in different operating environments (Winter & Szulanksi, 2001:732). The purpose of the template is to ensure knowledge transfer quality. Winter and Szulanski (2001:730) importantly note that using a template is not just an exercise in re-creating exactly the same steps for every environmental scenario.

The objective is to affect a template that defines specific generic information about the organisation while guiding the process of acquiring knowledge for a defined desired future but that the template additionally re-organises itself within this organisational vision in response to the changing outside environment (Winter & Szulanski, 2001:733). In other words, the known section of the template reflects distinctive competencies of the organisation's business idea(s) already known.

This business idea(s) defines the organisation's reason for being (its mission) and produces organisational viability and profit but the idea requires constant adaptation to match changing needs (Porter, 1998:75; Van der Heijden, 2001:16; Warren, 2008:612). The distinctive or core competencies of the organisation are captured in the business event template thereby providing an enabling framework by aligning every business

event to management strategies that are planned to ensure future profit maximisation (Figure 4.1). The known template section creates upper and lower boundaries of what is acceptable in expanding the limits of the 'known' processes of the organisation. The known section also represents the 'sunk' costs, which are the already committed costs of the organisation. Van der Heijden's diagram supports the need for both known and unknown in creating organisational distinctive competencies and thus competitive advantages (Figure 4.1).

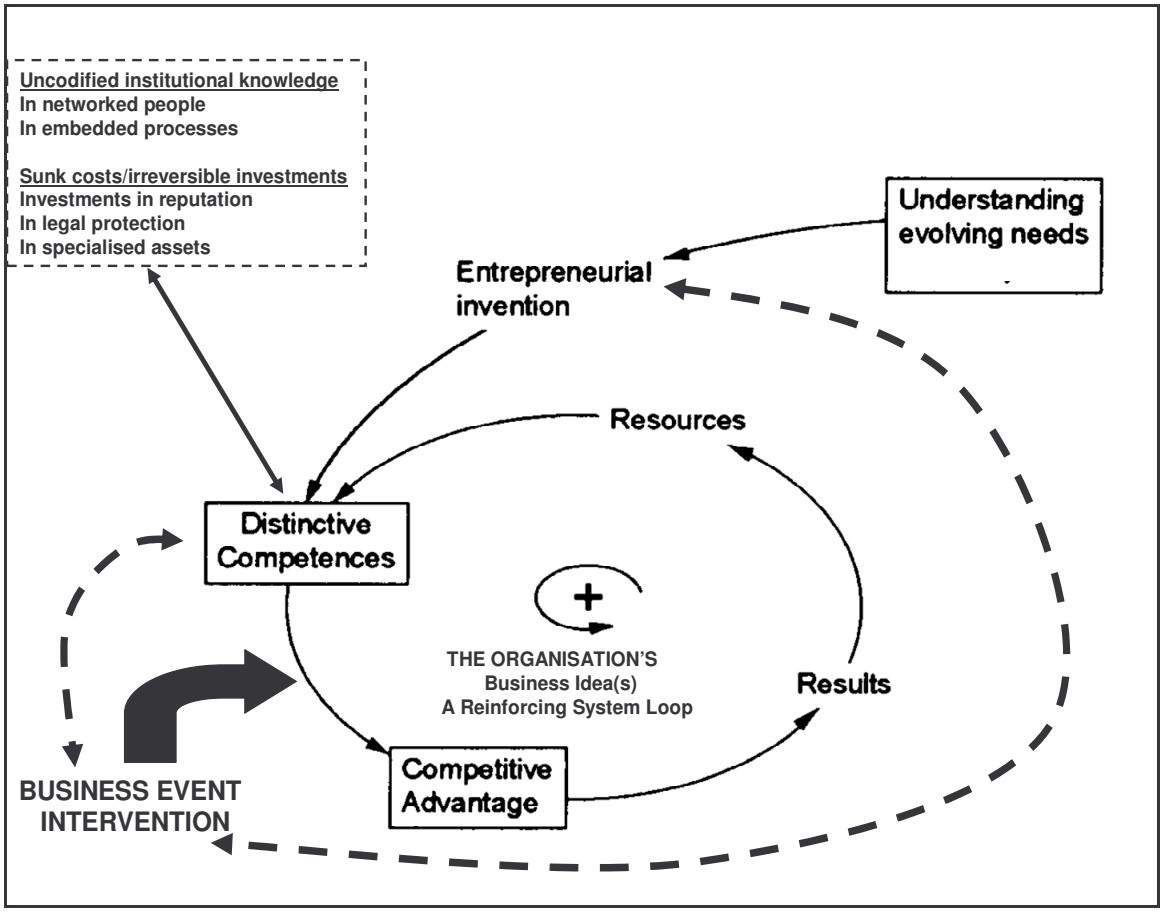


Figure 4.1: The relationship of the organisation's business idea(s) and the business event

Source: Adapted from Van der Heijden (2001:16)

In the ‘unknown’ section of the template are the untapped and uncodified possibilities for innovation and creation arising from strategically designed actions of the catalyst of the designed business meeting (Figure 4.1). The intangible organisational value-added sought from the business meeting is the tacit knowledge of individuals linking their information with new information as discussed earlier in this review. The business event controlled by the business event template is guiding where and how the “thinking and doing” link occurs and driving new ways creating new value in both the ‘known’ and ‘unknown’ template sections (Boynton & Victor, 2000:160). Collaboration led by the business event template in the event environment of peers, contemporaries, customers, competitors and suppliers lends to creating new, more effective, customer-intelligent services and products. The template guides a process of co-configuration for new services and products bounded by the upper and lower limits set by the expected performance envelope of the business event. Improved organisational performance follows (Boynton & Victor, 2000:151).

Consolidating the ideas presented in this section, it can be argued that the performance of variables can be influenced by the event template content. Thus a template would help direct renewal processes for creating new competitive advantage which ensures that the organisational knowledge repository is maintained at an optimal level (Warren, 2008:592).

4.3.2 Planning business events with strategic intent

In support of a template, Porter (2004:xxiv) states that competitive strategy is gained by “a combination of ends (the goals and objectives) for which the organisation strives and, the means (the operating and functional policies) by which it seeks to get there”. Competitive advantage would be improved by having a knowledge work system (Figure 3.16). Porter (2004:xxi) continues that the intent to deliver to a chosen strategy means developing a process and notes that this can only happen when “ the strategy is developed explicitly through a planned process”. This infers that strategic intent with regards to knowledge acquisition and retention becomes part of an organisation’s overall

competitive strategies for improving the performance of an organisation (Porter, 2004:xxii; Kenny, 2006:357). Porter notes that all functional departments create more significant value if their activities are co-ordinated and focused by common objectives (Porter, 2004:xxi). The VSM at R0 level shows that a healthy industry depends on every organisation incorporating knowledge as a function of equal importance to other typical functions such as human resources and finance. Importantly, the VSM at R0 shows how all the functions link in an interrelated system.

These function links can also be described as value chain links as the health of any one of the functions depends on the health or viability of any or all of the others. This is because the outputs of any one function flow into and impinge on other functions to some degree. It follows that when knowledge becomes part of the factor that dictates the strength of knowledge chain linkages, its effect has both vertical and horizontal implications in all levels of recursion from global industry health to operational function viability within an organisation. Strengthening the linkages gives the organisation the attribute of flexibility to respond to new challenges and change (Kenny, 2006:364). It is implicit that a knowledge template of what to do and why would become part an integral part of the knowledge strategy. It is innate that Porter's statements argue to promote the management of as many variables affecting performance as possible not only those that are tangible through traditional KPI measurements. The template can be thought of as an analysis guidance and ROI tool.

The pivotal, central process chosen in this research to theoretically extend is the widely used event evaluation Kirkpatrick-Phillips ROI model. The argument for the use of the ROI model by Phillips derived from the Kirkpatrick ROI model is that it is promoted to more than 20 000 members of the Meeting Professional International Association (MPI) as a useful business events ROI tool (Phillips *et al.,* 2007:xix-xxiii). Further to this, the professional accreditation undertaken by many MPI members is that of the Conventions Industry Council accreditation process to become a Certified Meeting Professional often referred to as becoming a CMP (Convention Industry Council, 2010b). This designation, which is a measure of business event organiser professionalism and business event

experience requires, as part of the professional examination to attain the designation, an understanding to use the Phillips ROI methodology. It can be claimed then, that the Phillips ROI methodology is commonly used as an accepted practice by business event organisers in the global business events industry and as such can provide the kernel model for the prototype template.

4.4 Defining a standard, linear sequence of template steps

As described earlier by Burke (2010:62), following a defined set of linear steps in managing any project has importance in creating an element of control in achieving predefined objectives. In a learning organisation, a controlled project has gravitas because, at each repetition of application of a step, the philosophy of the learning organisation PDCA cycle provides new incremental data on which to base planned change in the template design. The template is thus refined by multiple applications by its users and, through this, becomes a process of knowledge evaluation specific in its nuances of strategy, to the organisation's strategy. Additionally, with each application, the resulting effects for the knowledge system of continuously adding value that ensures a narrowing of the gap between expectations and outcomes, leads to a high degree of confidence in the template.

The template content becomes embedded in the organisation's knowledge repository and has a unique and rare value in the pursuit of the acquisition of knowledge. It can be argued that the template could become an organisational asset.

The template ensures that a standardised form of information about the relationship of the organisation and the variety of business events and various employee types to organisational performance is being gathered and improved continually which is a key component of a learning organisation (Stam, 2007:629).

4.4.1 The arrow core and the unknown aspects of the template

The first methodology of interest is that of Winter and Szulanski (2001:733) who refer to the informational key concepts, the nucleus of a template, as the "arrow core" of that template.

These authors argue that each organisation will find a unique nucleus of facts for their arrow core appropriate to their own business ideas (Figure 4.2). The core knowledge that this represents steers idea renewal (competitive advantage) by encouraging tacit knowledge transfer (Winter & Szulanski, 2001:741).

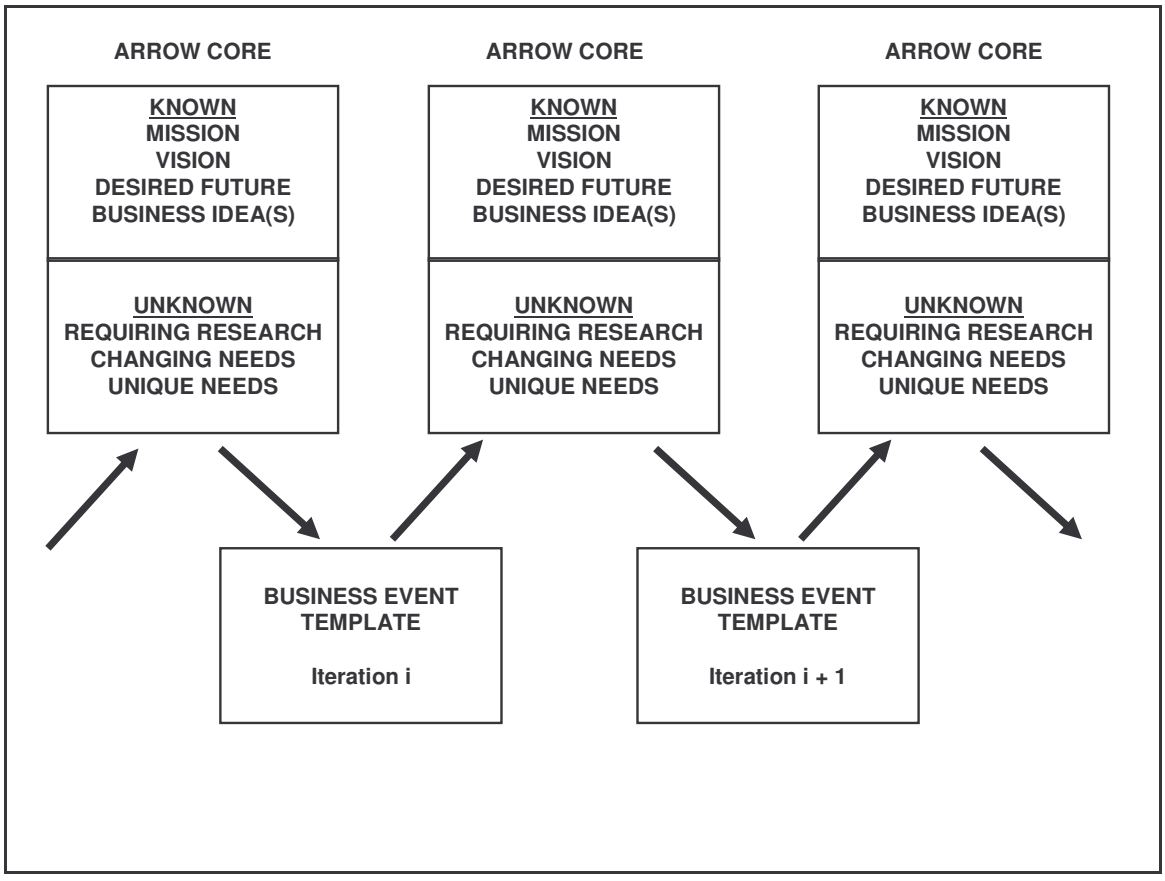


Figure 4.2: The dynamic relationship of the arrow core in the business event template

Source: Adapted from Winter & Szulanksi (2001:735)

While the guiding principles of the arrow core remain intact by embedding in standardised routines, the arrow core will be flexible in applying the routines as arrow core plus unique strategic responses to new needs for innovation and adaptation arising from competitors, customers and staff (Brock & Yaniv, 2007:844).

Conceptually the dynamic nature of an organisation's template shows 'known' and 'unknown' sections in every usage of the template (Figure 4.2). 'Known' remains a constant, its content agreed by the organisation as the purpose for doing business while 'unknown' is developed dynamically. The template content in the 'unknown' segment adapts dynamically to reflect: Internal organisational forces such as primary and secondary activity demands (Porter, 1998:41); forces within the organisation related to the knowledge value chain (Porter, 1998:41; Holsapple & Singh, 2001:80); and forces acting on the organisation from their industry (Porter, 1998:35).

Tseng's definition of the three forces of knowledge can be argued as integral for consideration in defining what is added in defining the forces of changing knowledge acting on the organisation from the industry and from outside of the industry in the macro-environment of the country or global economies (Tseng, 2009:493). However, at all times the 'known' segment remains a constant retaining the guiding organisational arrow core concepts of the purpose of this organisation, its vision, mission and values (Winter & Szulanski, 2001:737).

Use of an arrow core based template ensures that operational template steps of 'known' are consistently applied and the outcomes are within an expected range. The 'unknown' answers the 'why?' of holding a business event and sets unique outcomes that are bounded in their expectations by the known section antecedents. 'Known' ensures aspects such as knowledge decay from the employee point of view of attention capacity limits, is minimised in transfer processes while unknown ensures competitive advantages are ensured (Winter & Szulanski, 2001:741).

Unique strategic responses become part of what is 'unknown'.

By introducing a generic template a supervisor, or peer, or team contemporaries could set elements of the known and unknown sections. Chapter 2 has discussed how 'basho' – the concept of working with others and together embracing knowledge sharing (Ba) - and the pre-event template creation step support the environment for healthy basho. Basho leads to improved overall organisational profitability as described by Bennett in chapter 2. The level of Basho attained from developing an instructional plan (business event intervention) that supports specific goals in the organisation's strategy would be reliant for its success on conducting a needs analysis of the future desired situation for the organisation and an audience capabilities analysis of the new capabilities required to implement this desired future (Bersin, 2004:180; Rothwell *et al.,* 2006:241).

Further to this, the template ensures that there is no wasted time (man-hours) and money arising from unproductive business event attendance as the preferred outcome from attendance is defined within the template. Bartel does make note of the fact that using databases of information that already exist within the organisation can further extend the usefulness of the event (Bartel, 1997:174). Rothwell *et al.* note that "evaluation [of a business event] is a systemic inquiry into the value or usefulness [of the intervention]" (Rothwell *et al.*, 2006:254).

The Rank Xerox experience noted that templates were considered important to organisational performance because they have intrinsic value, having been created by experts inside the organisation (Szulanski *et al*., 2004:608). This would make intuitive sense as by including someone who knows the organisational strategic purpose when applied in an operational context ensuring that the content is conceived for its value-adding contribution to the organisation. Having internal experts involved in event template design would support Winter and Szulanski's work in that there is intangible organisational value associated with "the strategic subtlety of replication" in activities (Winter & Szulanski, 2001:730). By this Winter and Szulanski suggest that a template becomes a regularly used business tool. It is a tool of generic guidelines that ensure that the organisation regularly re-visits how well the organisation is fulfilling the consumer's needs and planning adjustments to meet changing needs (Winter & Szulanski, 2001:731).

Templates help adapt and embed knowledge that consolidates the business reasons for the organisation's existence. "There is only one valid definition of business – to create a customer" (Drucker, 1968:52).

When the template usefulness is reviewed against the criteria of the SECI model as set out earlier, the template can be seen to have provided terms acceptable to the organisation for a truly value-adding process of knowledge, mixing of old and new knowledge. This optimises the opportunities for the 'C' or Combination step to produce results of value to future organisational performance.

4.4.2 Competitive advantages arise from business events template usage

Applying a business event template for every business event helps ensure that specific business event knowledge required by an organisation is replenished so that this knowledge remains a distinctive competency and a competitive advantage. The process of knowledge replenishment is on going over years building an organisational intangible asset and the time invested in this by an organisation is considerable as identified earlier in Table 2.6, the average replacement period of selected intangible assets.

The template becomes part of the knowledge repository of the organisation being the PDCA cycle process. More importantly, the knowledge is not held tacitly by an employee, by HRD or the event organiser, so it will not be lost to the organisation if any of these are no longer part of the organisation. What remains constant and generic to each template is consideration of how each knowledge intervention in its last iteration served the organisation's mission, vision and overall future strategic actions. The lessons learnt at each iteration of the template are included in the next iteration. To this end, the template requires a generic strategy to guide the development of knowledge content that is both temporally and content appropriate to ensuring future organisational performance.

Using a business event/organisational knowledge template postulates improved utility in determining the effect of a business event on the organisation's productivity by extending

the front-end (pre-event), at the event (onsite) and back-end (post-event) processes on either side of the existing Kirkpatrick-Phillips methodology. The template would theoretically set guidelines on the capture of a database of intangible variables of interest, their relationships with other variables both tangible and intangible, and areas their behaviour could be influenced to produce organisational value. The database would act like the miniature Human Resource Information System (HRIS) proposed earlier in section 3.4.3.

The SECI model of Nonaka *et al*. reviewed earlier suggests that a knowledge management system could be applied to measure the value-added at each step of value creation if the SECI model framework is acknowledged as underpinning the process of growing organisational knowledge.

It is important to remember that knowledge is an intangible asset whose value is made up by the behaviour of many variables both tangible and intangible. As such, knowledge is hard to see and recognise within delimitated boundaries as one would see an asset such as machinery, its maintenance and performance. Many interrelationships of variables exist and their contribution to a knowledge repository is elusive to discern. For this reason Jensen and Szulanski state that "without a template the resource may not exist". From this assertion it can be assumed that since intangible asset behaviour in the form of knowledge is hard to define with this is highlighted in chapters 2 and 3, the causal relationships that could be influenced to improve organisational performance are poorly understood thus probably unmanageable (Jensen & Szulanski, 2007:1727).

Creating a business event analysis template potentially helps in qualifying the causal relationships of the variables affecting knowledge creation and retention. It can be argued then that models and methodologies that verify the existence of intangible asset variables are important as they prove that a specific variable exists and it follows that once identified the variable can then be tracked and influenced as to the value it adds. Further, that the knowledge an organisation needs for future performance is pro-actively correctly identified and applied through the design and delivery of the business event intervention.

Jensen and Szulanski studied the use of process templates in Rank Xerox. This multinational introduced templates to promote global organisational efficiency in both use of time and accuracy of knowledge transfer. All employees needed to be made aware of tried and tested processes already existing in the organisation's knowledge repository (Jensen & Szulanski, 2007:1716). Rank Xerox templates were used as a way of ensuring the organisational knowledge transferred from one geographic point to another in a completeness that ensured their brand and reputation values. The authors defined the template as "an organisational routine comprising a connected set of processes that are functioning, observable, recurrent sets of behaviour" (Jensen & Szulanski, 2007:1718). The templates included all the variables and the acceptable envelopes of behaviours that led to Rank Xerox commercial success. The templates used in this case were created in-house by employees who had specialist knowledge in their area so this made their content trustworthy. These templates were made to be easily readable and proved extremely successful as a vessel to pass on knowledge to others although they were geographically distant (Jensen & Szulanski, 2007:1719). An organisation can be viewed as a series of functions although not always geographically distant they are often separate by personalities. A generic template ensures consistency and continuity of individual function actions to the other functions. This has value for overall improved future performance.

4.4.3 The people value stream and the process value stream

An example of a generic business event template is presented in Figure 4.3. This defines a process for the business event of a blend of electronic meetings and training (Bersin, 2004:65).

The five steps are generic in that they define a standardised, repeatable process while the content and people who attend or are involved will vary from meeting to meeting. Jensen and Szulanski state that their findings indicate that "template use enhances the effectiveness of knowledge transfer" so is definitely a desirable characteristic (Jensen & Szulanski, 2007:1727). This implies that a template can enhance organisational

performance. Chen and Hsiang support this and indicate that the creation of a process template begins the cycle of measurement of variable performance because suddenly there is a benchmark of each step of variable's behaviour and its associated impact on organisational performance (Chen and Hsiang, 2007:577).

Once an analysis template becomes part of the organisation's repository of documents it provides a standardised process of business event analysis. Managers now have a yardstick of the impact of knowledge on future performance (Jensen & Szulanski, 2007:1727). Defining the process ensures a standard organisational practice and thus the value generated from standardised meetings can be used to develop baselines for the outcomes that can be expected. Alternatively, the data collected can be used to improve this meeting process.

However, on analysing the process of value generation suggested by Bersin, it can be argued that this model is limited by the 'here and now' focus of the process of how the business event will unfold physically. Although mentioned in the template there is little focus on the entry, pre-event process (how to identify the goals of the intervention) and closing, post-event process (discuss; teach others). The literature review has shown both of these to be critical for multiplying the value generated from a business meeting. Both of these pre-event and post-event processes focus on the people of the event who hold knowledge, who want to participate in gaining new knowledge and want to use this knowledge to create organisational value in new ways. It is clear that a business event template would be more valuable to an organisation if it could include specific reference to the intangible aspects and variables of the event.

As a contrast to this 'process' only template, Liker and Hoseus (2008:39) draw attention to the highly successful, multi-national Toyota whose work methodology has become a global standard for managing organisational performance. The relevance of discussing Toyota methodologies is that this company is a highly successful organisation which has maintained its viability and profitability over many stages of its life cycle. Toyota recognises and manages the active points of connection of two value streams in their

business events, the physical process and the people who participate in it (Liker & Hoseus, 2008:302). Toyota embraces the PDCA cycle technique in its HR policy and related processes for managing people. Toyota calls its people "the people value stream" (Liker & Hoseus, 2008:42). Toyota addresses the intangible variables in their processes such as the way excellent communication and positive work-life provide motivation. An intangible such as motivation is actively managed as part of the human value stream (Liker & Hoseus, 2008:43).

It has been shown how the physical aspects of the organisation's product value stream is diagrammatically represented by Porter's value chain while the people value stream, the intangible value, is more easily understood by the model of the knowledge system in recursive level 1 and recursive level 2 derived earlier by viable systems modelling. Toyota recognises in its business event templates that the organisation is creating the environment for both systems to be able to generate individual as well as combined value for an organisation (Liker & Hoseus, 2008:42).

Bersin's template fails to identify generic, repetitive process to guide the standardisation of the designs of each of the stages. Identifying a typical standardised design in each stage would help in controlling how the variables of the meeting are recognised and influenced. In stage 5 of Bersin's generic process, there is no defined manner that ensures that the new behaviour is captured in the existing processes and documentation of the organisation, tested as to applicability, or the results reflected upon as has been identified as a necessity of optimising value creation with the plan, do, check and act (PDCA) cycle. The literature review has identified that the PDCA cycle then repeats as often as is necessary to continually add degrees of performance improvement. The opportunity for any multiplier value effect introduced by a further process of cascading meetings involving other periphery but affective (in these work systems) stakeholders is not addressed in part because the process is not integrated as part of a big system of generic processes that identify the inter related systems. Change in one has consequence for change in others.

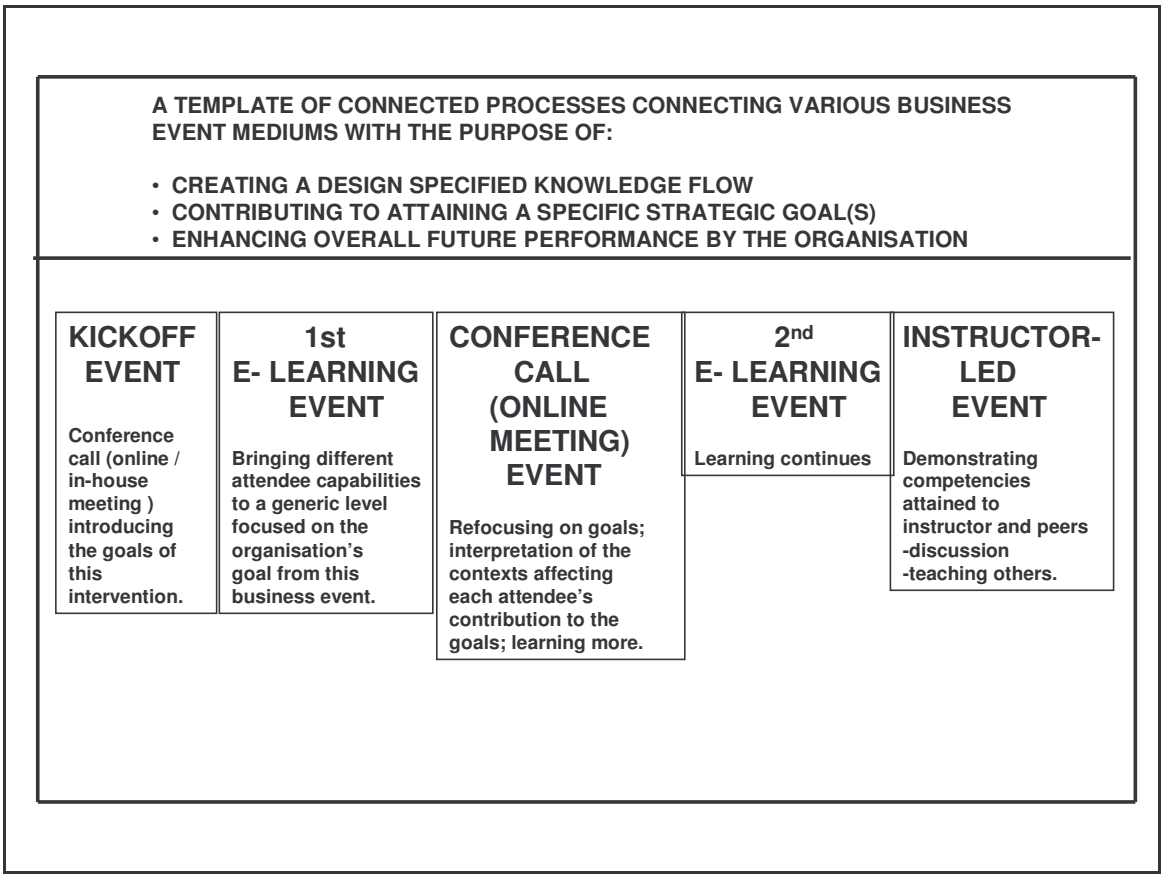


Figure 4.3: An example of a blended learning template

Source: Adapted from Bersin (2004:65)

4.4.4 The argument for a standardised flow in the template process

A business event template serves to define and connect processes that would be repeated on each business event held. Further utility is gained from the template when combinations of mediums and content are contextualised by the organisations' overarching, mission, vision, values and strategic goals. A business event is indeed a set of processes each of which should contain unique conditions designed to influence specific variables and each variable would bring the potential for an associated change in an attendee's behaviour and future work place performance (Bersin, 2004:28; Chen & Hsiang, 2007:577).

Winter and Szulanski note that a template needs review at each application in response to a changing operational environment (Winter & Szulanski, 2001:731). This suggests that the unknown information will both be guided by what is already known and gathered from what is useful in the future to adapt the old. Knowledge discovered at the business event about new variables can be used with existing variables to influence future behaviour. The attendee is primed by the template needs when leveraging people networks in the process of discovery (Boynton & Victor, 2000:163; Deschamps, 2000:138). Person-to-person tacit information interfaces are more focused by prior knowledge of the information contained in the template.

Table 4.1: Upstream and downstream information innovation processes
Source: Deschamps (2000:135)

INFORMATION PATTERN	Upstream Innovation Processes	Downstream Innovation Processes
Focus and Nature	• Very broad scope. • Predominantly qualitative. • Uncertain and exploratory.	• More focused scope. • Qualitative and quantitative. • More precise and reliable.
Purpose	• Building foresight insight. • Identifying options. • Selecting a course of action.	• Reduce risk / build confidence. • Narrow the option funnel. • Make investment decisions.

Deschamps (2000:135) proposes that there is a split in the type of information required for innovation (Table 4.1). Firstly, the organisation must seek innovation through upstream interventions which is a current use of all business events. The purpose defined in upstream innovation clearly reflects the attributes of Ashby's Law of creating the requisite variety for organisational future success. Downstream innovation is almost the opposite of upstream. Deschamps proposes in the model that the broad scope of the new learning is honed and focused in ways that make it useful. The requisite variety of what is useful in the new information is only found after it has been filtered through the lens of the organisation's own strategies and needs (Figure 4.1). It requires a further socialisation

sharing process to take place within the organisation. Brock and Yaniv argue for this latter point noting that the, "accumulation of organisational knowledge is influenced by the interactions between individuals in the organisation" (Brock & Yaniv, 2007:834).

Both processes of Figure 4.3 and Table 4.4 bear similarity to Nonaka *et al*. suggestion in section 3.5 that appropriate Ba (an appropriate environment) has to be created by the organisation for the knowledge to flow and be useful (Nonaka *et al.*, 2000:16).

4.4.5 The pre-event processes of the template

Reviewing Deschamps findings as set out in Table 4.1 that: upstream interventions have the purpose of expanding future possibilities of where organisational change can be made; weighing the strengths and weaknesses of information sourced about the areas of change, their possible benefits and risks arising from the variety of possible paths forward; and finally making the decision of which path will be best for the organisation (Deschamps, 2000:135).

The nature and scope of the information in the upstream intervention phase has general characteristics in that: the information is qualitative and indicates that the information transfer is by reading around and listening to knowledgable sources – the researcher is gathering an understanding of the parameters and implications of the problem being resolved; the information is new or used in innovative manners and may take the researcher to considerations outside of the normal and accepted organisational thoughts; the search for a solution is broad, looking for uniqueness in a new and untried way or limited by having to create a solution within constraints.

Brock and Yaniv discuss the two levels that organisations typically use to recognise when they need to acquire new knowledge. They name this "organisational attention" which is a process of selecting specific information form the surrounding environment. The lower level of organisational attention occurs with the organisation's employees who can focus the organisations on specific areas that they as an individual feel needs input. The second

is the organisation's own "attention pattern" in which the organisation historically tends to focus more on some inputs than others. The authors present an argument that there will be an organisational "attention capacity" which is an upper limit to how much knowledge the organisation can accept at any point and can process and make useful. The authors suggest then that the inputs selected for new knowledge should be chosen not andom because then the incoming information is not overwhelming in such a variety that it may result in it being unused and no value. They name this "attention selection" (Brock & Yaniv, 2007:835).

Brock and Yaniv postulate a theoretical model of how to focus the pursuit of new organisational knowledge that will actually lend to the maximisation of new intangible value created. They suggest that useful new knowledge is attainable and desired for an organisation to pursue and can be proactively managed through paying attention firstly to the outcomes sought from application of new knowledge and secondly to the sources selected for this new knowledge. They name this model the cyclic model of organisational attention (Brock & Yaniv, 2007:838).

The model describes that by increasing the control of what knowledge inputs are sought and how they are subsequently processed the organisation creates an improved ability for absorptive capacity. At each iteration of organisational adaptation pursued the known knowledge is not lost as it is stored in replicator template that protects the known knowledge. New, unknown knowledge is selective gained and then mixed purposefully with the known knowledge. The authors' dispute that known knowledge alone is enough to provide new competitive advantages and note that the organisation has to be prepared to change reviewing the efficiency of the known against a backdrop of new knowledge. If the organisation accepts these premise it is then ready to adapt by openly considering if there are new, innovative ways to attain known goals. The authors argue that actions that intentionally – having a strategy – that seeks to leverage more value from known knowledge with unknown will have a positive reinforcing causal loop effect. This they argue will improve the organisation's overall absorptive capacity thus increasing its

attention capacity and finally improving its ability to create competitive advantages (Brock & Yaniv, 2007:840-842).

The role of business event design to deliver both specific outcomes while incorporating a strategy for a sequential process of firstly upstream and then continuously more focused downstream business event activities (the latter which encourage mixing of known and unknown in more and more specific ways as innovation and creativity expand) can intuitively be seen as relevant to Brock and Yaniv's argument for a cyclical replication process. The known part of the theoretical business event template ensures that the organisation's mission, values and strategic intent are entrenched as the core purpose of event attendance. The business event activities release the unknown knowledge in a managed manner. The outcomes of the event align to delivering the new and unknown but aligned and defined in the organisation's strategic goals (known). The intention is to deliver unique competitive advantages. By moderating existing known processes and by creating new process from mixing old and new knowledge the organisation potentially improves future performance.

Another argument for organisations to introduce a template is that the template ensures the attendee is organisationally focused by pre-event activities on the organisational reasons for their attendance (Boisot & MacMillan, 2004:517). The focus of personal reasons for attendance may fit with organisational outcomes but the value to be created by employee attendance at an event on behalf of the organisation is considered paramount. Here as discussed in chapters 2 and 3, the role of employee motivation and HR's role in aligning personal employee goals with those of the organisation would be of considerable importance to the value that the business event can create.

This supports Ashby's Law discussed earlier, that having an awareness of the requisite information required to make informed decisions under conditions of change makes the organisation aware of the type of new information that is needed to deal with change. The 'known' section of the template has defined the known variables at work – the question arises as to how to best manage these variables' performance when the unknown is

added. This means that the organisation no longer relies on a particular manager's perspective but can deploy the best equipped member of staff to the business event safe in the knowledge that this person has not only the necessary experience and tacit knowledge but is focused by the template on the requirements of the future desired state of the organisation and not their own personal interpretation of this future (Deschamps, 2000:140-142).

Preceding discussion in chapters 2 and 3 as to the type of work-force personalities that excel in this capacity becomes important when deciding who to deploy to a business event - wishing at all times to maximise value creation from the event. These were previously described as the knowledge sharer and boundary spanner personality types.

Later in this chapter, the process of identifying individuals with these traits will be discussed. Apart from the obvious solution of workplace observation these traits can theoretically be identified through existing models and methodologies. These include the application of such instruments as: the Self Directed Learning Readiness Scale (SDLRS) to discover who readily shares knowledge: and the Qualitative Politicised Influence Diagrams (QPID) which helps tag where operational organisational boundaries exist and who controls and spans them. Importantly, the addition of a step such as rating a potential event attendee's suitability for event attendance by a non-subjective methodology such a SDLRS immediately removes bias as to how well that person would encourage knowledge flow and, in doing so, optimises the chance for the quality of new knowledge acquisition (Bartel, 1997:174). This is because, in many cases, an event attendee is picked based on data that is highly subjective such as HR's opinion or the supervisor's opinion of the individual.

SDLRS and QPID have intertwined and co-dependent roles in enhancing the opportunity for ensuring the value attained from business event attendance. While the SDLRS tool and QPID tool may well identify suitable employees, there is still no guarantee of the degree of willingness of that employee to act as a knowledge sharer or boundary spanner. The influence of this variable on organisational success was explored in chapter 3. It was

established that employee attitude to organisational success is often influenced by the value perceived in work-benefits arising from the organisation and employee relationship. The SDLRS-QPID, willingness to work and work-life relationships demonstrate the complexity of real-life systems of an organisation and clearly show the reason that attempts to value the ROI in such systems is so difficult.

Deschamps does not describe how the quantity or quality of information gathered in upstream activities can be focused on existing problems and a desired future. Nor does the author discuss how a tangible organisational benefit value could be assigned to this phase. This argues for the fact that, in the case of interventions for innovation such as the vehicle of business events, the event template is a tool for bounding the upstream innovation process within a reasonable framework. As the framework would be created from existing capabilities, resources and a desired future, the value of a particular route of action will be more easily seen.

4.4.6 The onsite processes of the template

The next step in the upstream innovation process would be the event itself. This does not eliminate the personal attributes of the attendee such as the 'hands and hearts' tacit knowledge seeking discussed earlier and seen to be of importance in seeking innovation and creativity. Deschamps' upstream innovation process has application in the event template. Using the first column characteristics in Table 4.1 (broad scope, exploration, setting a course of action) helps to bring into focus what previously has been considered as relatively unmanageable hands and hearts activities (which are spontaneous).

The business event medium chosen to extrapolate heads and hearts innovating activities which involve a high level of social interactions to gain knowledge would differ for instance from those chosen for a specific skills upgrading. The latter, skills upgrading, is a specific targeted downstream action such as a certification process because the organisation's goal would be different focusing on a very specific outcome - that of gaining specific knowledge required for certification. In one, there is a need for activities

that give the latitude for innovative thoughts to start. In the second, there is a need for industry-focused certification. Different goals suggest a requirement for different interventions and thus different knowledge delivery mediums within the templates (Bersin, 2004:180).

4.4.7 Post-event processes of the template

Deschamps' downstream innovation process requirements suggest that post-event activities (a second set of interventions) to consolidate how the new knowledge can be most productively applied from a range of possible alternatives is equally important to attaining future productivity (Table 4.1). These will be discussed later in this chapter.

Knowledge seeking activities at the event have to be honed to defined purposes because the requisite variety being sought is bounded within acceptable organisational parameters of vision, mission and their resulting business idea(s). Two criteria for the organisation's success resulting from a successful business idea are set out by Van Der Heijden (2001:16) and are adhered to by the preceding arguments for template usage when designing a business event.

The first is that the resulting loop from reinforcing the van der Heijden variable causal loop reflected by the relationship of the organisation's business idea(s) and the business event to grow competitive advantages (Figure 4.1) "ensures continued [organisational] success and growth"; and that, secondly, "there is an ongoing awareness of the evolving scarcities in society leading to inventions that keep the firm's activity set in line with the dynamic needs of the world" (Van Der Heijden, 2001:16).

4.4.8 The template's relationship with liminality and communitas

It can be argued that use of the template is itself an unfreeze cue. The template serves to introduce a new degree of expectation to the zone of expectation. The importance of the level of pre-event expectation to establishing onsite event communitas and liminality as

introduced by Getz earlier in the review suggests that having a template can be described as an antecedent condition that helps to ensure optimal event liminality conditions.

In essence, the template is generating a degree of the expectation of organisational needs that could be fulfilled by event attendance. This does not detract from any personal, professional (CPD) reasons for event attendance because a template core principle would be firstly to establish the unique mission for the business event ensuring that the type of business event required is identified by establishing the unique needs of the target market attendees which can be understood in the next paragraphs by application of the KP-enhancer solution concept (Figure 4.4).

Improving the quality of the pre-event experience improves the degree of successful immersion of the attendee in the zone of liminality created by event onsite attendance which can lead to an improved level of preferred behavioural change.

Lewin and Bandura have already been seen in the previous sections to argue that behavioural change has a very finite event time to occur in so using the event in all its stages to enforce the behavioural change makes instinctive sense.

The template in essence extends the finite onsite event time by adding a new extra time zone of pre-event preparation. It is in this time zone that the unfreezing of an individual's pre-conception begins but in a planned manner because the template defines attendee interactions such as pre-event needs analysis, website design and on line registration experience. The individual is unfreezing.

For the organisation this also a value-adding action as it unleashes tacit knowledge from individuals involved with the template application in possibilities of previously unconsidered innovation and creativity. This extension of effective event time by use of a template to create conditions conducive to behavioural change is of importance and a desired driver for influencing the degree of behavioural change.

The arguments presented lead to the proposition that the success of a business event in organisational performance is dependent on the design and application of an event template. The event template becomes a critical antecedent for achieving the most advantageous knowledge transfer.

Implications for the event organiser are that a successful event analysis can only result if an employee who understands the strategic management of the organisation is involved in the pre-event needs analysis. As discussed previously with regards to the roles of HR and knowledge officers in event creation, understanding the strategic motives for knowledge acquisition is an antecedent for change in organisational performance (Rothwell *et al.,* 2006:262).

The next section discusses how an analysis process could conceivably develop the actual foundation variables of the organisational aspect in focus. This would be done by mapping the elements and attributes of the system that requires a business event intervention.

4.5 Building a pre-event knowledge enhancing productivity solution

Earlier in this literature review, Stam introduced the concept of formalizing a process for enhancing the Knowledge Productivity (KP) of new knowledge that an organisation acquired from a learning intervention.

To this end, Stam created and tested a "solution concept" for a KP-enhancer process, based on the Corporate Curriculum™ methodology (Stam, 2007:629).

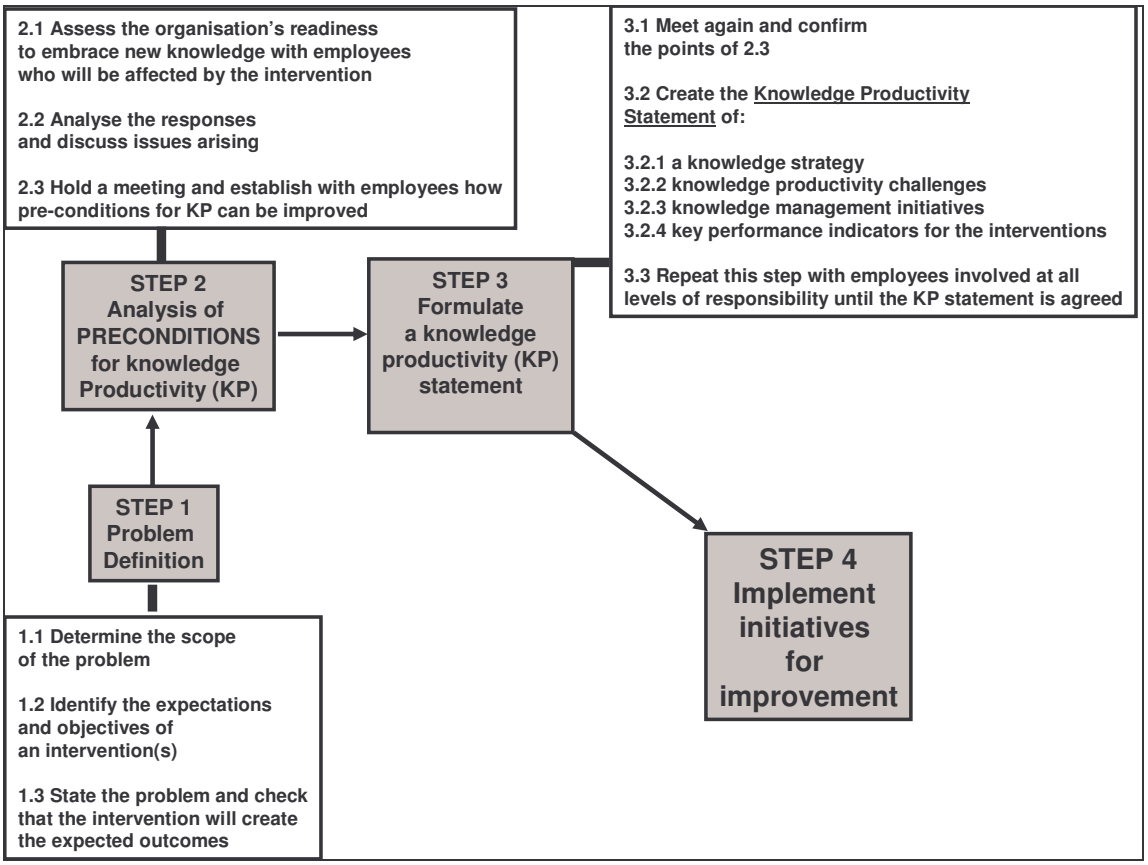


Figure 4.4: The KP-enhancer solution concept

Source: Adapted from Stam (2007:633-635)

The purpose of the KP-enhancer model is to provide a generic template that will be bounded in its content by the unique conditions of each organisation (Figure 4.4).

The KP-enhancer process has the role of ensuring that the opportunity for improving organisational performance attainable by application of new and existing knowledge is optimised (Stam, 2007:629). The KP enhancer is a template for application at recursive level 2 as a strategy for the entire organisation. But, as has been proven, the value created at recursive level two (R2) affects the environment of systems at levels one (R1) and level zero (R0). The KP-enhancer process ensures that the people working at the R2 level within the related systems are sure of what they need to do to deliver their organisation's strategy. This process/solution ensures that they externalise (meet) and cohesively document the knowledge needed to deliver the strategy objectives**.**

Stam's concept is similar to that of Beer's syntergration workshops (White & Lee, 2009:687) in that the series of workshops culminates in expectations that match both the proposed intervention and the needs of the organisation and employee (see Section 2.9). Both models focus and refocus those involved through a series of meetings until the essence of the problem and an agreed solution with a strategy for implementation and measurement are identified. The meetings act to unfreeze individual perspectives and refreeze them aligned to a common vision. Organisational conditions required for strategy and decisions relating to leading changes in productivity have been agreed and documented by all involved. Importantly, Stam's model supports Beer's thinking on creating individual viable systems that support the overall viability of the organisation through their actions (Walker, 2001:5). This viability can now be conferred to the organisation by relevant sub-systems because they are all working in an independent but cohesive manner.

The KP-enhancer and the syntergration methodology help ensure that gaps between expected and actual performance are narrowed as far as possible. The KP enhancer can be argued to be a slightly superior form of the syntegration concept. It lends itself to an initial statement defining the behaviour of variables in the relationship of knowledge, business event and organisation. This is important as this is defining the 'here and now' situation of the organisation and linking what knowledge is available to the 'there and then' situation (Jones, 2007:340).

The importance of the KP enhancer (or similar methodology) is in defining a unique and appropriate knowledge 'fit' for each unique problem to be tackled by the business event design. The fact that the event outcomes are actively defined for every event makes it possible to set performance indicators to measure how well the business intervention served the need. It follows that to optimise the opportunity between a specific relationship sub-process such as this and related systems within the organisation, the KP-enhancer should be guided by and contributing to a larger organisational strategy model.

The ‘known’ section of a template would include a documented, recursive process for defining the organisational scope of knowledge to be acquired. This is suggestive of a cognisance by the event designers of any overarching organisational ‘knowledge’ policy. The literature reviewed so far suggests that this might be given to the event organisers from the HR and the human capital development strategies suggested earlier.

4.5.1 Determining the current and the future states during the pre-event process

Rothwell *et al.* (2006:4) discuss the generic instructions given by the “ADDIE model”. ADDIE is an acronym for, "Analysis, Design, Development, Implementation (delivery) and Evaluation” (Rothwell *et al.*, 2006:4). ADDIE is used as a stepwise template of progressive development to designing instructional programmes and is similar to the PDCA cycle.

In ADDIE, the A-analysis stage lays the framework that defines all the other stages. This suggests a change in the iterative template for a PDCA cycle to be more explicitly, APDCA. Considering ‘A’ from a variable definition perspective the first ‘A’ in the APDCA cycle needs to be that of the post-event ‘A’ variables plus any new variables that enter the mix for the next cycle. The new ‘A-analysis’ would have variables derived from examining the system after the last PDCA cycle plus, environment variables at work in the current situation of the system to ensure that new ones arising since the last ‘A’ analysis cycle are identified.

It follows that the A-analysis would seek firstly to define the current state of a system in focus plus the anticipated ideal future state (Figure 4.5). This process is interactive systems planning because the current and then the ideal state would be defined for each of the systems that the business event intends to affect.

The highest level of recursion in the scope of this research where the current system is that of the organisation’s mission statement, overall function of the organisation is the reason the organisation exists, the overall SIPOC process that delivers the unique value

sought by the customer and, finally, a diagrammatic representation of the current structure of the system. This last could be an organogram of how people within the organisation are placed to help define who will have use for new information or a QPID diagram representing the causal relationships again to help decide where to disseminate information to. The ideal state is the strategic intention of the organisation. These would be in the 'known' section of the arrowcore template.

Current State before business event	**Ideal State after business event**
Mission – what is the current mission of this system?	Mission – what is the ideal future mission of this system?
Function - what is the current function of the system?	Function - what is the future ideal function of the system?
Process - what is the current process of the system?	Process - what is the future ideal process of the system?
Structure - what is the current structure of the system?	Structure - what is the future ideal structure of the system?

Figure 4.5: Comparing the current and ideal system states
Source: Adapted from Leeman (2002:101)

At a lower level of recursion, various functions within the organisation require new knowledge to contribute to meeting the ideal state. The questions of Figure 4.4 are posed as part of the analysis carried out in pre-event design preparation and help in defining the actual purpose of and expected outcomes of the business event. For instance, a widely used model is that of Kaplan and Norton, the balanced scorecard. This model helps the organisation establish strategy maps to reach goals set for future performance. The map for each goal is a distinctive process that describes physical actions to be taken by the organisation.

The next section highlights a step required to formulate a specific overarching strategy that not only leverages existing knowledge but additionally identifies where new knowledge needs to be acquired and how old and new need to be combined. This is the step that ensures that the knowledge becomes productive in terms of improved organisational performance.

4.5.2 The Kaplan and Norton balanced scorecard as an overarching guide

This section argues the value of having an overall strategic methodology that guides overall organisational performance.

Bose and Thomas (2007:653) state that the balanced scorecard "is a strategic performance management framework and methodology based on a series of performance measures. The scorecard has been developed as a response to criticisms of traditional accounting reports [used] for knowledge-based firms".

The balanced scorecard model of Kaplan and Norton argues for the organisation seeking a perspective of its performance by evaluating four areas including that of knowledge. The four areas are: the financial perspective of the organisation vitality and viability by looking back over a historic time period; the internal business-process perspective to identify the success with which the organisation's processes contribute to success; the customer perspective which identifies how well the customer is being served and such how much market share the organisation will hold; and the employee learning and growth perspective which influences the overall design of the organisation's framework (Kaplan & Norton quoted by Yorks, 2005:31; Stam, 2007:656).

Each of the four evaluation areas has key performance indicators (KPI) that are linked to the satisfaction with the organisation shown by three groups of stakeholders. The strategy map begins with defining stakeholder definitions (three groups are defined by the authors as customers, shareholders and employees) of what satisfaction with the organisation looks like to them. This shows the organisation what to balance. The strategy map then defines how to achieve that satisfaction through processes and, in doing so, defines the drivers to deliver satisfaction. The 'how' is important as the scorecard goals can only be achieved by finding a strategy to deliver 'how'. As with systems thinking the map has several levels of value creation focus. The organisational function levels have their own definition of the strategy because they have different drivers and constraints unique to each function. Their individual goals, however, support those of the organisation's

strategy map goals. Thus lower systems contribute value to the overall goals of the organisation (Kaplan & Norton, 2001a:96).

Kaplan and Norton advocate achieving competitive advantage through strategy showing "a motivated and prepared workforce" underpinning all other organisational activities to improve organisational performance and shareholder value (Kaplan & Norton, 2001a:92). In other words, the learning and knowledge perspective of the balanced scorecard influences the outcomes in finance, business, internal organisational process quality and market-share all of which are reflections of how well the stakeholders are being served (Stam, 2007:662).

Kaplan and Norton explain that the learning and knowledge requirements have three focuses to be enabling in achieving competitive advantages: an organisational climate that encourages personal employee growth; employee competency displayed through functional excellence; and tools represented by standardised processes that ensure quality in employee performance. The authors note that as the process of "learning and adapting strategy" evolves, so what begins as hypotheses on the balanced scorecard to deliver the organisation's strategy become managed cause and effect relationships that define the hypotheses (Kaplan & Norton, 2001b:154). They note that the balanced scorecard is, in fact, a highly integrated information flow system (Kaplan & Norton, 2001b:155).

The balanced scorecard used as a strategic tool is referred to by the authors as a strategy map or map of strategy that aligns the entire organisation to delivering on an overarching strategy (Kaplan & Norton, 2001b:150). The strategy map concept proposed by the authors deliberately links intangible or typically non-financial processes (as in processes that generate value not measurable in terms of money) to key performance goals because of the emphasis in recent years of creating intangible assets in addition to traditional tangible assets (Kaplan & Norton, 2001a:88).

Kaplan and Norton advocate that managers are involved in defining employee learning and knowledge requirements because managers look across organisational functions to

deliver overall strategy and so can better define the learning needs required to deliver on this overall strategy. After learning, managers need to allow the learning to be applied in new innovative ways within the strategy map of their function as this creates value (Kaplan & Norton, 2001a:94).

Yorks notes that creating and maintaining a strategy using methodology such as the balanced scorecard requires constant reflection of the changes in the environment of the organisation and what knowledge is required to deal effectively with change (York, 2005:35). This infers that the strategy must evolve as the conditions of the organisation change. The four performance drivers of the balanced scorecard are applied in an integrated approach to deliver an overall strategy and are therefore interlinked by causal relationships.

It is easy to see how a sub-system of a problem dealt with through a KP enhancer methodology and then used to design a business event would be easily integrated into the larger system of the knowledge and learning balanced scorecard. The problems and solutions for strategy identified by the KP enhancer add value to the understanding of the sub-system in which they exist. This lends understanding to application of the balanced scorecard drivers identified for each strategy and that deliver the desired future. For the balanced scorecard and KP enhancer methodologies to influence future organisational performance, their degree of alignment must be high, which means that the degree to which the people in these systems are willing to support the strategies must be high (Stam, 2007:663).

It follows that the organisation's sub-systems should be re-evaluated constantly to ensure they support the overall strategic goals. The relationship of the sub-systems that the interface with the balanced scorecard knowledge and learning strategy will positively influence organisational performance depending on the behaviour of the employees in those systems. It can be argued that the human resources department in both their HRM and HRD activities or the concept of managerial learning interventions as suggested by Kaplan and Norton which, in themselves, are sub-systems of the organisation, should

base business event design strategy around concepts such as the KP enhancer as a strategy together with the balanced scorecard that can deliver to a high degree of alignment and support for the strategic goals of the organisation (Yorks, 2005:200). Both would be defined as 'known' by the organisation so integrated in the 'known' section of the event design template by the event organiser.

The purpose of this research is not to test a balanced scorecard methodology but to explore the roles of business events in organisational performance. The balanced scorecard provides a widely used measure of organisational performance and the balanced scorecard as a strategy map shows the relevance of employee learning and motivation. The business event provides a strategic tool in the delivery of learning. As such the balanced scorecard is used as the model for organisational strategy delivery in the 'known' section of a business event template.

The next models and methodologies reviewed are examples of strategies that could possibly be the 'how' for identifying intangible variables and influencing their behaviour and thus the intangible value created for knowledge and learning from a business event.

4.5.3 Maximising business event ROI by choosing an appropriate attendee

These models are considered as to their applicability in influencing and managing 'unknown' or previously unmanaged variables acting in the business event process.

4.5.3.1 The self-directed learning readiness scale

As has been seen in chapters 2 and 3, some employees have a natural tendency to share and network both in face-to-face situations and in virtual situations (Beitler & Mitlacher 2007:531). As such, this is the ideal type of employee to send to business events more so than any other in the organisation because these people would in all likelihood bring back more and share more knowledge than most (Beitler & Mitlacher 2007:533).

These employees would also potentially be good managers because they have no fear of others knowing more than they do. But how does the organisation identify these individuals who are likely to be an intangible resource asset? A Lickert-scale based test called Self Directed Learning Readiness Scale (SDLRS) has been used to uncover people who have a natural tendency to share information (Beitler & Mitlacher 2007:527). The SDLRS was developed by Lucy Guglielmino in 1977 and tested on high school students with her stated purpose of developing a scale to gauge "a measure of an individual's readiness to engage in self-directed learning" (Hoban *et al.,* 2005:371).

Guglielmino (quoted in Dixon *et al.,* 1997:48) identifies eight characteristics of self-directed learners and what she refers to as their learning style, the latter she defines as follows: "openness to learning opportunities; self-concept as an effective learner; initiative and independence in learning; creativity; future orientation; ability to use basic study and problem-solving skills".

The learning style defines positive characteristics for an employee that every employer would acknowledge as beneficial to the organisation's potential future performance. A positive learning style could be interpreted as the employee to send to a business event or to be encouraged to be involved in a learning network as the likelihood that this individual would return with knowledge of value to the organisation is high.

The SDLRS does not investigate the degree of individual willingness to share this learning with others or to apply it for the benefit of the organisation. The methodology of the model does have implications for those who the organisation might consider investing in for self-directed learning efforts. Obviously those with high SDLRS scores are more likely to benefit the organisation from an alignment of their personal self-learning to the organisation's strategic goals for learning. Finally, the SDLRS would identify the employees who score low and these individuals could receive appropriate development training. Taking the latter points together, as a result of SDLRS ratings this knowledge can be applied to making informed decisions as to how to act in the future as regards

many issues including business events. This knowledge could be integral to the planning of strategy and attainment of a desired degree of organisational knowledge health.

The limits of the SDLRS model in accurately identifying self-directed learners have been explored by Dixon *et al.* (1997:59-60) in comparison to other similar instruments such as the well known Briggs-Meyers model. These authors conclude that each of the instruments has a value to contribute when measuring the ability of an individual, or their learning style, so it would fall to the HRD to decide which is most applicable for their own specific organisation (Dixon *et al.,* 1997:60).

Criticism arises as to the applicability of all of Guglielmino's 58 test items, but various researchers have successfully applied different sub-sets of the original items in the medical field when attempting to identify attributes for self-learning such as a medical practitioners requires (Hendry & Ginns, 2009:920; Hoban *et al.,* 2005:378). The ability to successfully undertake life long learning is a trait that all industries seek in employees because employees hold the key to innovative and creative responses to the rapid changes experienced by the organisation in the political, economic, social and technological environment (Scholtes, 1998:31).

The SDLRS continues to prove itself as a useful tool when seeking to understand what characteristics to influence in an individual's ability to encourage them to take responsibility for optimised use of their available time and abilities. Hendry and Ginns (2009:920) suggest that the SDLRS should incorporate more investigation into how much the learner uses reflection on the quality of their past work when considering how to improve their personal performance. Constant review and reassessment of objectives has been seen to be an essential part of a successful strategic approach to any system. The review and reflection on what worked and what didn't and then adjustment of the overall strategy to reflect this new knowledge about the situation impacts the potential for future performance (Senge *et al.,* 1994:248; Scholtes, 1998:32).

It can be suggested that high scoring SDLRS employees who are encouraged to use their natural learning style could be important in the workplace. These people can act as knowledge facilitators and mentors for low SDLRS employees as the former probably have more knowledge in certain areas than their low scoring SDLRS contemporaries (Beitler & Mitlacher, 2007:534). If low scoring SDLRS employees could be sent on training that teaches them how to improve self directed learning, this may improve their ability to learn, network and share and thus create a greater opportunity for the organisation to leverage their tacit abilities more fully into the organisation's knowledge network.

High SDLRS scorers could be considered to be more likely to leverage new information value from a business event and from personal continued professional development events. So it would follow that sending these individuals to learning events can influence the possibility of the organisation gaining new information that leads to improved performance. It is easy to see the cost-benefit ratios that can be extrapolated from sending the right employee to the right type of event. It is follows that use of an instrument such SDLRS can immediately be seen of value to management.

The SDLRS instrument is popularly accepted as being an appropriate instrument to apply as its assessment for the learner and self-directed learning is especially applicable when considering online and technology-based (DVD) learning courses (Dixon *et al.,* 1997:59). The authors conclude that responsibility for the choice of assessment instrument will lie with the human resources function understanding both the organisation's future need and thus the individual's training requirements (Dixon *et al.,* 1997:60).

For the purposes of this research, the concept of an employee who has a learning style that may leverage superior value above others in deriving new knowledge from business event attendance is beyond the immediate area of focus, but it cannot be ignored as it has implications for future testing of a strategy that should be in a business event design template or an objective of functional areas in a balanced scorecard.

4.5.3.2 System diagnosis techniques to define the systems affected by a business event

Understanding the impact of an employee in a system and identifying how systems interlink and so affect each other (an action of a person in one system may ripple through to other systems) would empower management to have a perception of how variables associated with each employee affect, firstly, the system in which they act and, ultimately, organisational performance (Swart & Powell, 2006:10).

Using system dynamics analysis tools it is possible to quickly map existing systems in an organisation. The mapping could work backwards from the high level strategic goals to operational level event interventions. Alternatively, a low performing operational system can be identified and an analysis undertaken to identify poorly performing variables for which a business event intervention is created to improve the situation.

Chapter 1 has already used a causal loop diagram to explore the causal relationships in an organisation's knowledge system. The concern in this causal diagram was maintaining the level of knowledge in a system within acceptable limits. The causal loop diagram was at a high level, not identify every underlying interrelated system. As the literature review has proved, there is often a high degree of complexity in every system in focus due to several sub-systems of varying importance (dependent on the situation of the organisation at that time) that have an influence on an organisation's knowledge system in its current state and thus how to achieve a future, strategically intended state.

Swart and Powell (2006:11) argue that it is necessary to "capture the dynamic and systemic qualities of knowledge" recognising the four types of knowledge that Nonaka *et al.* describe to influence the degree of success in future organisational performance.

Powell and Swart (2006:49) in earlier research use similar systems diagnosis called, "Qualitative Politicised Influence Diagram (QPID)". QPID is a causal loop diagnosis methodology that gives a weighting to the strength of each link variable and identifies the

stakeholders at every link (Table 4.2). In this way QPID creates an analysis of where an intervention would be best placed to add value. The business event intervention specifically seeks to address an identified gap.

Table 4.2: Creating a qualitative politicised influence diagram (QPID)
Source: Adapted from Powell & Swart (2006:51)

STEP 1	Create a causal loop diagram of the system under investigation. Systems diagnosis tools that could be used to identify the variables of interest in the system and their relationships : Affinity diagram (Brassard & Ritter, 1994:12); Inter-relationship Digraph (Brassard & Ritter, 1994:76).
STEP 2	Add a degree of the strength of to each loop of the diagram based on how slowly or how fast the loop completes its cycle and its importance ranked against other loops. This weighting is at the discretion of the analyst of the system. Information about the importance of the loop can be found by asking employees.
STEP 3	For each link, identify which people are involved and how knowledge comes to them, leaves them and who they pass this knowledge to.
STEP 4	For each person identified in step 3 list their skills and capabilities that make them competent to be a part of that link.

Powell and Swart conclude that the qualitative QPID methodology quickly defines who knew what to do; whose work was linked to other people (both inside the organisation such as other employees and outside such as suppliers and competitors); and who knew why the systems needed to act in a certain way (Powell & Swart, 2005:54). The authors note that the QPID analysis process helps the organisation recognise the knowledge sets of others in the organisation (Powell & Swart, 2005:53).

The QPID process contributes to the event analysis template because it can be argued that if the exercise is a standardised template tool, it ensures that an understanding of the nodes (the people) of the system requiring knowledge; who new knowledge needs to be shared with; and the importance of the knowledge to the system's loop itself in ensuring

its contribution to the organisation's future performance. The QPID process helps to track important elements of the business attendee's socialisation network. This has implications for post-event activities for multiplying the value of new knowledge. It is the prerogative of the analyst to weight the importance of the influences of the people in the systems under investigation (Powell & Coyle, 2005:797). It follows that the analysis requires the co-operation of the organisation to correctly weight the importance of the relationship at the specific time of the proposed business event.

While the event organiser can guide the activity, the important step of identifying the affinities (relationships) and giving a degree of strength to each relationship lies with an organisational member familiar with the organisation's current situation. Additionally, it can be argued that once an understanding of the existing system is established, it will be possible to define, firstly, a set of outcomes with key performance indicators and, secondly, correctly influence a particular relationship.

In this way, the ROI arising from a business event intervention can be better co-ordinated with other knock-on value-added potentials arising from the complex inter-relationships of the system in focus; controlled, in that an expected value can be set as a realistic goal since the current situation is understood and a gap recognised; and form part of the overall organisational general strategy (Swart & Powell, 2006:18).

This satisfies the systems diagnosis model of chapter 3 at recursion level 1 for maintaining a viable work system. The viable systems model for a healthy knowledge system requires that systems 2 (S2), 3 (S3), 4 (S4) and 5 (S5) seek to provide the operational SIPOC level work units at level 1 (S1) with a knowledge environment that is optimised for overall organisational value creation. The strategic intent behind a particular business event becomes transparent to those involved with the business event moving knowledge creation from the domain of tacitly understood value wins to explicitly defined expectations of specifically defined value adds (Powell & Coyle, 2005:790).

This could be argued as a step in redressing the fact that management cannot see the value of knowledge variables in organisational performance, and so fail to understand their value. Recognising the value of business events to organisational performance is the underpinning value proposition of this research.

As a consequence of better controlling the environment for a viable system, the degree of risk in the system in focus would be better controlled because management would be knowledgeable about the current system and its possible future behaviours after being influenced by a business event (Walker, 2001:94). The ability to minimise risk by foreseeing potential gaps is a further organisational valueadded, highlighted by Swart and Powell (2006:17).

A QPID process supports an organisation in making better strategic goals based on realistically attempting to interpret variables at play in a present situation and creating a desired future in line with the overall strategic intent of the organisation. The argument can be made for the inclusion of a QPID step in an event template with influence in the design of a business event (Powell & Coyle, 2005:797). The QPID methodology is easy to apply as managers of all functions are competent to sketch what they believe to be the QPID of their functional areas.

In this research the use of QPID is not tested as it would involve a degree of training to be able to use it but, like SDLRS it is a consideration for inclusion in future business design criteria. The value of QPID is that it is a strategy that shows linkages of an employee to higher and lower systems of value so it shows the flows of knowledge.

The use and value of cause and effect diagrams such as QPID and, as suggested, in creating affinity diagrams and interrelationship diagrams is demonstrated later in this chapter as the methodology to analyse the variables of the system that have arisen during the course of the literature review.

4.5.3.3 The FIVA Model to define knowledge sources, objectives and value drivers

The need to name and define variables that influence the value of the intangible asset knowledge repository has been shown to be essential. The intangible assets have to be proven as instrumental in attaining financial performance - the most common measurement of organisational performance. The Framework of Intangible Valuation Areas model (hereafter referred to as FIVA) is useful here (Green quoted by Andreou *et al.*, 2007:54). The FIVA model reflects the types of intangible value chain links in an organisational knowledge network (Figure 4.6). The model supports Allee who has already been noted as stating that the links in a network are the primary source of economic value generation (Allee, 2008:6).

The links individually act as value drivers. Each link brings the organisation a unique intangible attribute as follows: Customers – the value generated by the degree of associations with customers; competitors - the value generated by the degree of economic value arising from market position over competitors; employee - the value generated from the quality of collective capabilities of each employee; information – the value generated by the degree of ability to collect and disseminate information; partner - the value from external associations; process – the value generated by the ability to run all operational processes to satisfy employees and customers; product/service – the value generated by the degree to which products and services are developed; technology - the value generated by the degree to which investments are made in technology. The FIVA concept can be aligned to the work of Masqood *et al.* (2007:128) and Bontis *et al.* (Bontis *et al*. quoted by Andreou *et al.,* 2007:56) discussed in chapter 3. These authors stated that there is a need to recognise the components of the knowledge chain and encourage strength in the individual knowledge links to enhance the whole chain**.**

Every combination of the eight value drivers in FIVA crafts an opportunity to create more economic value as a result of the multiplier effect from the combination of two or more separate values. Eight value drivers and four value creation goals for the organisation were highlighted in Tables 2.8 and 2.9. (Andreou *et al.,* 2007:54; Andreou & Bontis, 2007:348). These authors identify employees as the only way to gather

knowledge about the value drivers and knowledge about how to create more value from the latter. By identifying the employee's interrelationship with these drivers helps give understanding, transparency and value to the intangible variables and assets being generated. The authors suggest social intelligence critical success factors for value creation. The descriptors illustrate the interventions that could be used to grow each employee's social intelligence (Table 4.3).

Table 4.3: Defining social intelligence

Source: Adapted from Andreou *et al.* (2007:72-73)

SOCIAL INTELLIGENCE CRITICAL SUCCESS FACTOR CATEGORY	CRITICAL SUCCESS FACTOR DESCRIPTOR
1. Building and maintaining relationships	Build trust. Shared experiences.
2. Receiving direction	Advice and guidance. Peer review/informal feedback. Influence and mentoring. Recommendations and ideas.
3. Energising	Excitement and motivation. Strength and reassurance. Validation and drive.
4. Work information	Subject-matter knowledge. Know-how. Lessons learnt. Technical requirements.
5. Staffing information	Experience. Job rotation opportunities. Complementary and mixed skills. Experts and specialists.

The importance of the FIVA model and social intelligence to business event design is in the identification of combinations of value drivers and critical success factors that will encourage the acquisition of new knowledge. The FIVA combinations can potentially become the objectives set for an event by which to influence the knowledge value created. These become the manner in which the strategic intent of the organisation for improved knowledge resources can be delivered in a focused manner.

The FIVA model with goals (Table 2.8) and drivers (Table 2.9) as an interrelated system is shown in Figure 4.6.

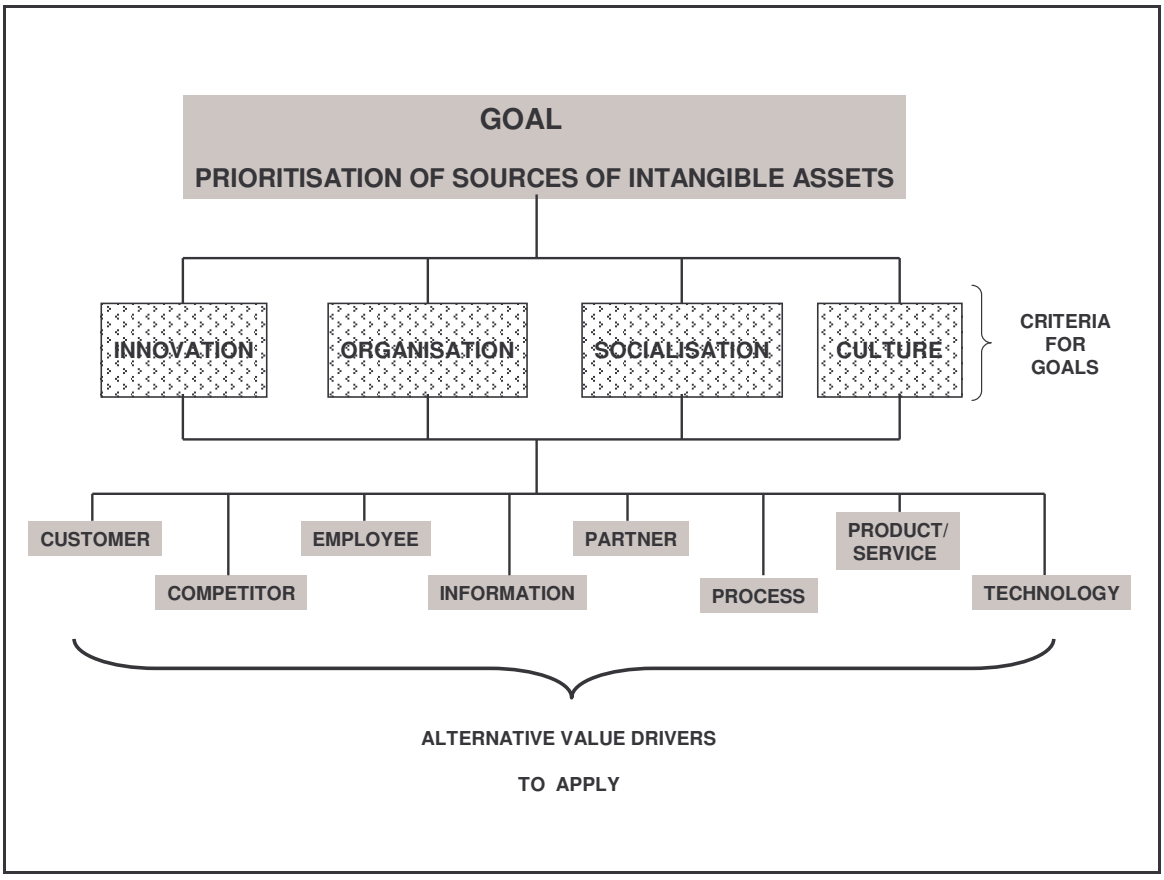


Figure 4.6: The Framework of Intangible Valuation Areas (FIVA)
Source: Adapted from Green quoted by Andreou *et al.* (2007:55)

The four sources of new knowledge of the FIVA framework are: Innovation – encouraging the generation of new ideas; Organisation – planning and organising available resources (both internal and external) to do work better; Socialisation – undertaking activities that result in interactions between resources; and Culture – maintaining an organisational culture that encourages vision and values that grow the organisation (Figure 4.6).

It is intuitive that the value of each of the four sources/objectives can be influenced and grown by carefully selected inflows of knowledge from combinations of the eight value drivers (Andreou *et al*., 2007:53). Logically, as dictated by recursion creation, the greater

the degrees of positive change in any driver, the greater the value that would aggregate to affect organisational performance.

Since the organisation's future performance is dictated by its strategic intentions, it follows that these drivers and sources/objectives should be stated in strategy design. Socialisation is the first step in the SECI model and the beginning of individual behavioural change (see Section 2.7).

Green states in attaining the social intelligence objective that "the establishment of interactions can de designed between resources to influence the efficiency and effectiveness of capturing, transferring and sharing knowledge throughout the organisation for economic gains" (Green quoted by Andreou *et al.*, 2007:55).

It can be argued that this statement speaks directly to optimising socialisation outcomes through creating business event designs appropriate to the four resource renewal goals.

These authors importantly note that the reason to encourage creation of different types of driver links focusing on different value areas is consistent with the findings of Allee (2008:6) in that only in this manner can the health (in terms of ability to create value) of individual value chain links be strengthened to improve the entire value chain creation potential.

The FIVA model makes an important contribution to the evidence that the business event has to be designed taking drivers and outcomes into consideration to be an effective tool for both behavioural change and knowledge creation. Kaplan and Norton have emphasised the importance of identifying what is a driver when creating strategy maps because drivers become the 'how' of delivering value to intangible goals. Employee influence on future organisational performance will rely both on employees gaining new value originating from improved social intelligence but also on having the opportunity to leverage these competencies in the work place.

4.5.3.4 The LOKA Model to define knowledge performance areas and critical success factors

Andreou *et al*. developed the FIVA model to further define a list of operational knowledge assets that could be leveraged by the employee. The authors called this the List of Operational Knowledge Assets (hereafter referred to as LOKA) (Andreou *et al.,* 2007:69).

The LOKA is important because it represents much greater detail of drivers and value links with a "set of seven performance focus areas and thirty-one related critical success factors (CSF) that individual workers can leverage to facilitate organisational performance" (Andreou *et al.*, 2007:56). The LOKA could represent a set of focuses for questions to be posed by event organisers and an organisation's managers to focus their strategic intent for holding a business event, focusing the chosen objectives by judicious selection of appropriate LOKA variables that will help define and track the behaviour of intangible resources (Andreou & Bontis, 2007:363).

The criteria for organisational performance of innovation, organisation, socialisation and culture as described by the FIVA model will be attained to different degrees dependent on the changes in an organisation's market capital required. The development of the market capital is by targeted improvement (representing strategic intent) of organisational performance and has a direct relationship in developing organisational knowledge.

Andreou *et al.,* (2007:52) present a detailed "validated list of knowledge assets". This is detailed in the LOKA research appendix. The degree of accuracy of gaining competitive intelligence or advantage from a business event will depend on the degree to which the employee interactions gain knowledge about the organisation's current and future operating environment (Andreou *et al.,* 2007:72-75).

Employee CSF skills required and potentially in need of ongoing development through business events for knowledge creation are reflected on the legs of the LOKA (Figure 4.6). The LOKA list has potential implications for further action research in business event strategic intent management beyond the scope of this research thesis.

Andreou *et al.* (2007:72-75) provide a diagram of critical success factor categories and their effect on a performance focus area of the LOKA model (Figure 4.7). For instance, on the LOKA model the performance focus area of 'social intelligence' is contributed to through the degree to which the employee influences the critical success factor of 'building and maintaining relationships' of interest to the organisation. Goals for 'building and maintaining relationships' or socialisation are given in the LOKA table as "Build trust; share experiences; help build anchors [places and people where an employee can seek help in interpreting their data]".

This relevance of such a LOKA evaluation set of defined outcomes, critical success factors and variables that can deliver these, is that it has implications for identifying a manner in which to explore the needs of the organisation prior to designing a business event or, for that matter, any intervention that intends to improve an intangible asset. A further use for the LOKA table could be the guideline to the marketing, technology and HR functions or knowledge officer as to where there are gaps between their employee efforts (knowledge creation efforts and strategy) and aligning strategic organisational objectives for a desired future performance (Andreou & Bontis, 2007:362).

Extending the application of the LOKA model to the environment of the business event, it can be argued that this is a template pre-event tool for identifying what knowledge the organisation has; identifying what knowledge an organisation seeks; developing a plan to deliver to the knowledge needs by mixing drivers and assuring critical success factors within the environment of the event; and analysing post-event the suitability of each business event to the degree to which critical success factor improvement and thus performance area improvement aids the organisation's strategic objectives.

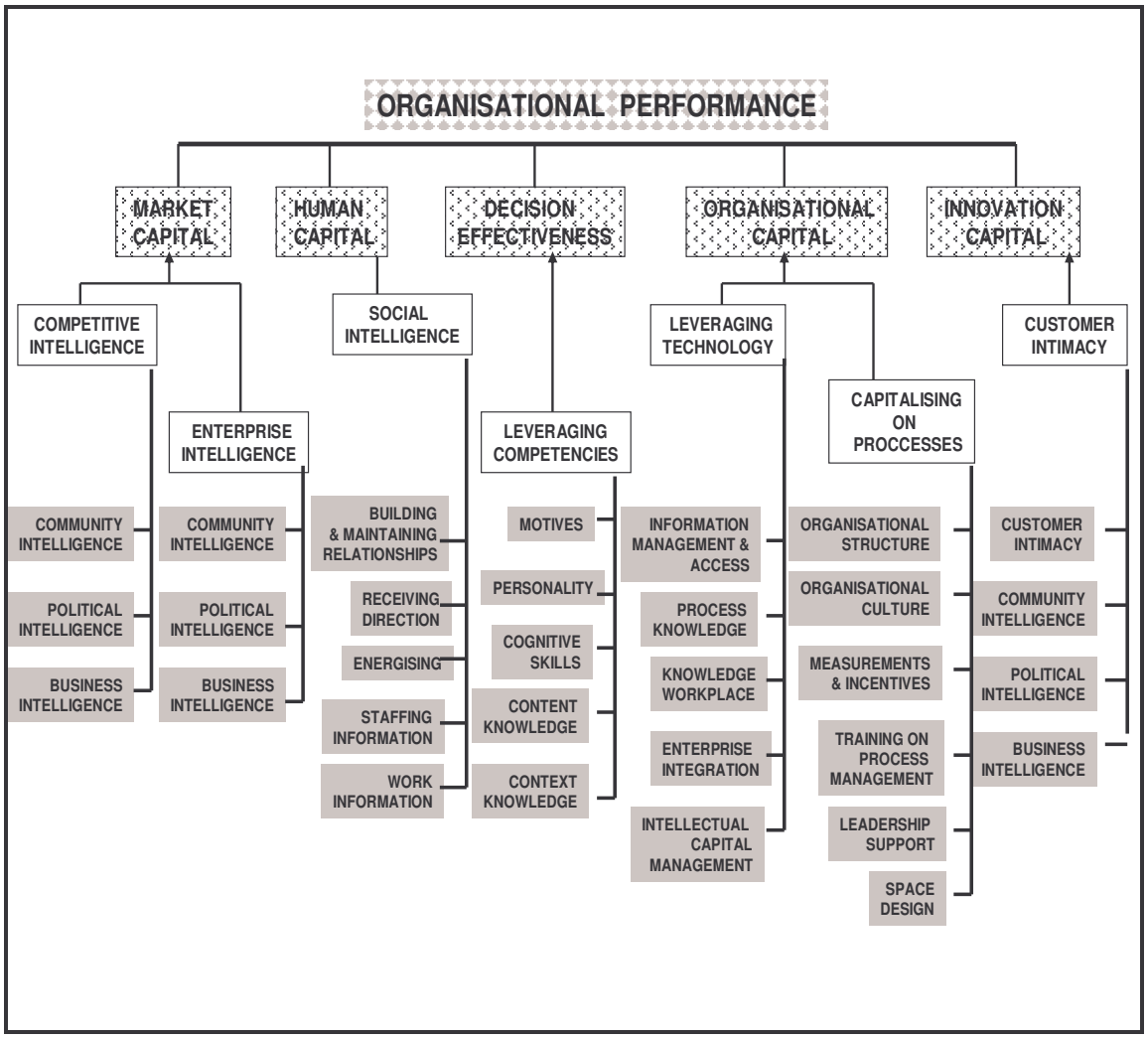


Figure 4.7: The List of Knowledge Operation Assets (LOKA)

Source: Andreou *et al.* (2007:64)

This argument is supported by Hansen *et al.* who conclude that knowledge codification is a relative inexpensive way to encourage the opportunity in the future to maximise value from existing knowledge assets (Hansen *et al.,* 1999:109; Brock & Yaniv, 2007:833). Hansen *et al.* notes that the alternative to codification is to find people who hold pertinent repositories of information but this usually comes at a much higher cost for the organisation. Their recommendation is to use a combination of both people and codification fitting the mix of both to supporting the attainment of the strategic outcomes required. In doing so the organisation creates a unique knowledge management strategy

suited to the way its mission and values shape the overall organisation (Hansen *et al.,* 1999:112).

The question arises as how to identify what drivers in terms of what specific influences could be affected to improve organisational performance, would be useful in such a knowledge strategy. As the LOKA provides the guideline for measuring the degree of alignment of organisational strategic intent to a valuation of the worth of this business meeting, it would be realistic to say that, at different times in the organisation's life-cycle, different weightings could be applied to the key performance areas and their associated critical success factors.

When applying the LOKA it will not matter whether the event is driven by a continued professional development process, an internal meeting or an external business event as it focuses professional skills and by inference their degree of leverage on key organisational performance areas. The LOKA table and FIVA model become the checklist that sets the goals of the business event.

Another application of the LOKA table would be as an instrument to assess individual employees' ability in each of the 31 critical success factors that drive future organisational performance.

The opportunity for future organisational performance would be enhanced by managerial actions that document the strategic plan for the organisation in terms of seven LOKA performance areas, the LOKA thirty-one critical success factors and four knowledge management objectives (The FIVA model). The all-encompassing thread of management control is enabled by the ability to follow the behaviour of specific variables that are being actively influenced to attain specific goals. In terms of value attained from a business event, this has to be carried through the on-site management and the post-event management to fully benefit the organisation in terms of improved performances attributable to the new knowledge attained (Lin & Tseng, 2005:169).

The FIVA and LOKA tools provide excellent methodologies for answering the 'how' of delivering on strategy supporting a balanced scorecard. Again they are beyond the scope of this research.

Focusing specifically on the 'p' in (p, e) of the event design, the value of social intelligence in relation to improving human capital from the list of knowledge operation areas (LOKA) is chosen by the researcher to explore further. The social intelligence variables of interest include the variables of: building and maintaining relationships; receiving direction and energising (Andreou *et al.,* 2007:64). The purpose of researching these three variables is to understand more about which situations created by a business event encourage item 1, innovation and item 3, socialisation as shown in Table 4.4 as these are two of the four key objectives of knowledge acquisition**.** The social intelligence (socialisation) relationship with regards to developing human capital and subsequent improved organisational innovation is shown as significant in the research of Andreou and Bontis (2007:358). In the quantitative survey design (section 5.6.3) the statements used by these researchers to measure socialisation as an intangible organisational resource are used (Andreou & Bontis, 2007:370).

4.6 The Kirkpatrick-Phillips model for measuring return on investment

The Phillips Evaluation and ROI process™ was developed to measure the return on investment learning derived from meetings and events attendance (Phillips & Phillips quoted in Phillips *et al.,* 2007:3). This model's use has been promoted by the Meeting Professionals Association which is the largest body of business event organisers and business event suppliers in the world (Phillips *et al.,* 2007:xv). Consequently, it is currently the pre-emptive model used for business event ROI calculation by business event organisers. As business event organisers are one of the stakeholders of business event design, the model has relevance to defining how business events add to organisational performance.

The Phillips model is an extension of the Kirkpatrick model (quoted in Kline & Harris, 2008:49). The Kirkpatrick-Phillips ROI methodology is already a stand-alone template or solution concept for business events ROI evaluation. It is named a 'solution concept' because its application can be broadly applied across many environments such as varied industries, event types and organisation types (Phillips *et al.,* 2007:1). This supports Stam's concept discussed in section 4.5 of modelling a solution concept to enhance the organisational opportunity for knowledge productivity (Stam, 2007:629).

There are six levels to the process of Phillips ROI evaluation that Phillips applied to evaluating a business event as shown in Table 4.4.

Table 4.4: The six levels of evaluation in an ROI process
Source: Adapted from Myhill and Phillips (2006:693-694)

LEVEL 0	**Statistics, Scope and Volume** – collect data on meeting statistics for instance: web site traffic; budget; attendance; press coverage.
LEVEL 1	**Reaction, Satisfaction and Planned Action -** collect reactions to the event and asks what the attendee intends to do after the meeting.
LEVEL 2	**Learning –** measurement of the degree to which knowledge acquisition has occurred during the meeting. Types of learning include: **Information Learning**: about customers, suppliers, assets **;** **Skills Learning:** new capabilities and skills; **Attitudes Learning:** changing perceptions about brand and products/services; **Relationships Learning:** building new relationships and strengthening old.
LEVEL 3	**Application –** measurement of the degree to which knowledge acquired at the meeting is used by attendee.
LEVEL 4	**Business Impact –** evaluation of improvements in organisational performance.
LEVEL 5	**ROI –** ROI calculation of the net meeting benefits to total meeting costs giving a benefit/cost ratio.

Phillips *et al.* draw attention to the criterion of ensuring that the organisation's strategies are well understood by the event organiser before the event is planned (Phillips *et al.,* 2007:xxv). This statement is a key concept in the argument for the utility of a template

and acknowledgement that the overall organisational strategy has to be considered when business events are used as knowledge creation interventions.

This leads to the setting of business event objectives that are the basis for the ROI evaluations that follow (Myhill & Phillips, 2006:709). Yet, this step which guides all future actions for an event that will create knowledge is not specifically detailed in level 1 of the ROI evaluation framework. It could be said that the hinge of the evaluation success rests with the definition of the objectives and this has basis in Andreou and Bontis' arguments for the need to recognise the value of the individual CSF contributions in relation to their focus areas represented in the LOKA. Only in this way can the contributions be combined to garner an overall ROI (Andreou & Bontis, 2007:349).

Yorks reviews the challenges and contributions of each level of the Kirkpatrick-Phillips framework as set out in Figure 4.8 (Yorks, 2005:202). The level zero data (statistics, scope and volume) has a strong marketing and finance bias and this is not reflective of the quality of the learning experiences. This is more a tangible assessment as required by traditional forms of organisational value creation measurement.

Dixon remarks that the results gathered at level 1 (reaction, satisfaction and planned action) can be misleading in their inferences for the degree of actual learning and individual behavioural change that occurred (Dixon quoted in Yorks, 2005:202). This author warns that if the survey questions tend towards the degree of interest and engagement that the attendee found from event attendance, this did not necessarily correlate to the degree of learning that actually occurred. This can be inferred as indicating that other variables can erode the value of knowledge being created and some of these such as motivation, opportunity to innovate and others have already been discussed in this literature review. Dixon further notes that the implications of this type of survey bias is that only popularly rated learning programmes continued to be offered and these may not actually be the most effective learning programmes (Dixon quoted by Yorks, 2005:203).

Yorks advocates building level 2 assessments (learning) as formative type assessments during the delivery of the event design. In this way, the success of teaching tools in the transfer of knowledge can be assessed as they are applied (Yorks, 2005:203). Yorks notes that developing a formative assessment can be difficult in certain circumstances where the knowledge transfer involves cognitive development which will only be seen later as behavioural change in the workplace (Yorks, 2005:204). Yorks finds that level 3 (application) requires analysis of what is inhibiting or facilitating knowledge transfer firstly from the event to the learner and secondly from the learner back into the organisation. The author warns that this can be an expensive exercise at it will require active tracking of event participants on-the-job over extended periods (Yorks, 2005:204).

This leads to level 4, evaluating business impact, which has proved difficult to assess as discussed in sections 2.4.3 to 2.4.8 where researchers found that organisations failed to deal adequately with managing intangible value creation and measurement. Researchers found that users of the model often experienced high degrees of frustration setting vague objectives for measuring application and the business impact of intangible value. The result is that organisations tend to drop the ROI evaluation process for intangibles after the onsite event concluded.

Yorks notes that the Kirkpatrick-Phillips model assumes that the organisation supports an environment for knowledge transfer. This assumption means that the degree of support for a 'learning organisation environment' is not assessed before the programme is designed as a 'before' baseline. This means that assessing the degree to which new learning is embedded will be problematic (Yorks, 2005:204). At level 4, measurements of how the knowledge has impacted the organisation's performance are hard to isolate from other factors (remembering that intangible factors are at play) (Yorks, 2005:205). Again the results are evaluated over fairly prolonged time periods. As has been seen looking backwards over a historic period of financial performance indicators is often the only criterion used by management to assess the value of a business event to the organisation's performance.

At level 5, Phillips introduces a monetary calculation of the value of the business event to the organisation (Phillips quoted in Yorks, 2005:209). This level relies on its ROI outcome on data arising from level 4. This validation of the learning in an individual's performance has already been shown to be somewhat subjective by authors previously mentioned in this review in that often the attendee is asked to report on their perceived improved performance or a single supervisor is asked to comment on the attendee (Yorks, 2005:213). A further problem with the input data for level 5 is the fact that the impact of the event in the context of the organisation's strategy is not assessed. Yorks (2005:210) warns that this is where "the logic of a balanced scorecard" should be integrated to the Kirkpatrick-Phillips ROI assessment.

The balanced scorecard strategy mapping concept uses financial results as only one of its four measurements of the success of a strategy. It may well be that the business event intervention drove change that enabled other drivers in a strategic plan but, if not evaluated with an ROI calculation, the value of this intangible contribution to the organisation's future performance will be missed (Yorks, 2005:210). Yorks' overall conclusion as to the Kirkpatrick-Phillips model is that it is extremely useful for HRD practitioners but how it is used and to what variables it is applied will define the value of the outcomes it measures that represent the value new knowledge has in creating the future, desired organisational performance (Yorks, 2005:201).

It is now important to revisit the research of Kline and Harris (2008:45-59) previously mentioned in chapter 2 (see section 2.4.4). The authors highlighted the problem of using the Kirkpatrick and Phillips ROI methodology particularly at levels 4 and 5. These ROI level measurements occur within the organisation often at a time of periods of up to the end of the next financial month or year, after the event. The event is historic and the services of the event organiser will probably no longer be influential in attaining measurement. This highlights another antecedent in event design - anticipating who will control each phase in the event's overall evaluation process. The level 4 and 5 measurements are internal to the organisation and are consequently dependent on internal functions such as human resources or a knowledge officer (Hilbert *et al.,* 1997:146; Kline & Harris, 2008:56).

Figure 4.8 shows the linking of individual processes to create a template for ROI over a number of small activities that contribute to the entire business event design as discussed earlier. It is clear from the diagram that there appears to be an undocumented step or process relating to Andreou *et al's.* requirement to identify the CSF (thus identifying the intangible assets to measure) and focus areas of the influence of these CSF variables. Only in this manner can the CSF previously intangible values become clearly identified as benefit or not to the ROI generated from a business event. This argument links to that of Kaplan and Norton in that the strategy maps have to have goals, key performance indicators and strategies that show 'how' to get to those goals.

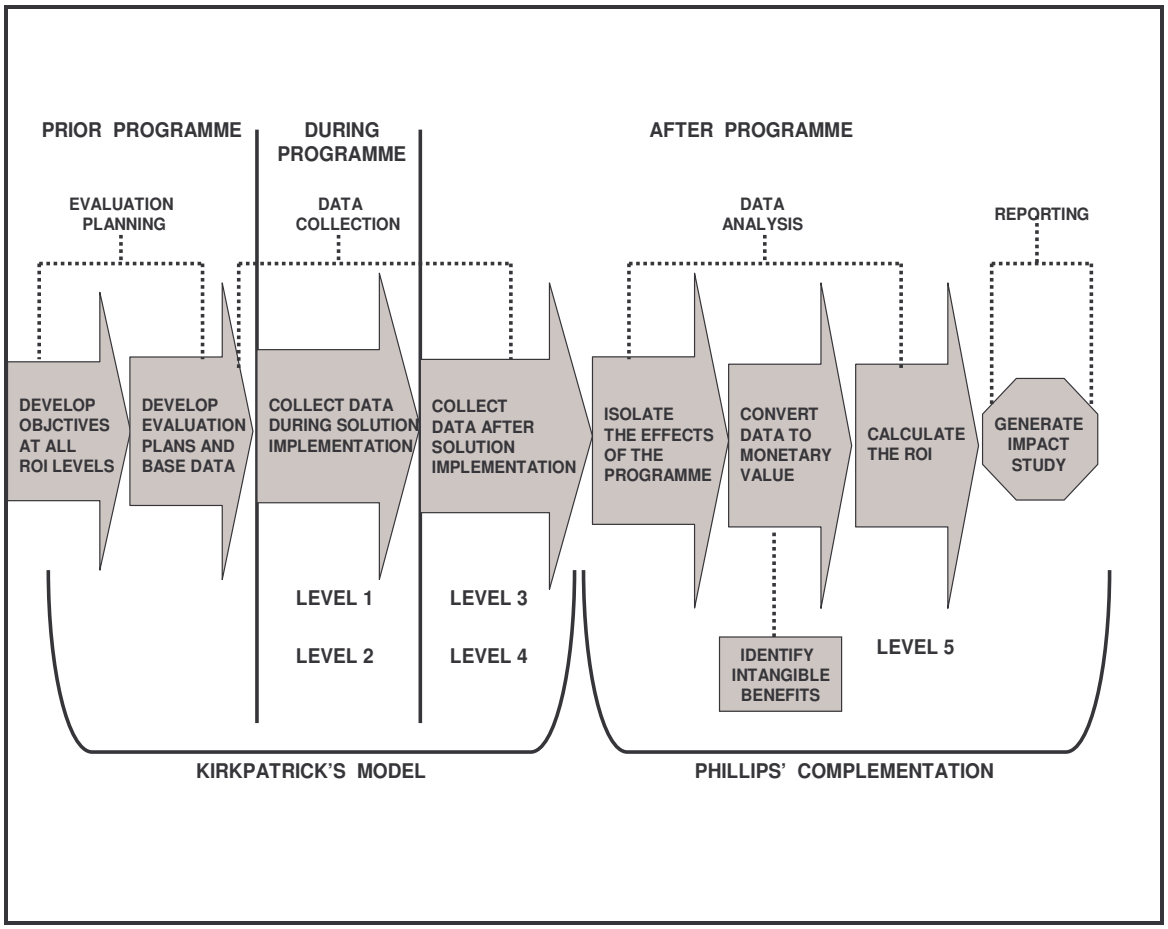


Figure 4.8: The ROI process

Source: Torres and Kline quoted by Kline & Harris (2008:48)

The authors are clear that the majority of the hotels in their sample were uncommitted to developing an ROI system for training as were the human resource functions and trainers (Kline & Harris, 2008:56). Yet the authors point out that the training budget is considered of such importance that the expenditure of budget allocated to training was monitored by the hotels' top executives (Kline & Harris, 2008:54). In spite of the fact that these top executives time comes at a premium cost when involved in designing and managing a training budget, the authors found that only one of the hotels used a complete feedback system such as the Kirkpatrick and Phillips methodology to assess the training beyond level 3 (Table 4.4). The others used an employee-generated qualitative feedback at level 3 on which their managerial judgment of the degree of success of the training was pinned (Kline & Harris, 2008:55). This argues for the fact that managers are not actually hands-on in managing optimal value creation because, like the ROI methodology, they rely on level 1 feedback from employees as to whether the business event intervention was successful for the organisation.

The entire value created as shown in the six-level value assessment of table 4.4 is dependent on its ROI measurements for primarily summative evaluation techniques (Rothwell *et al.,* 2006:254).

The Kirkpatrick-Phillips model has a lack of guidance on a pre-event definition of intangible variables at work in every business event intervention, and which will affect the ROI outcomes of such interventions. The effect of intangible variables is inferred in the Kirkpatrick and Phillips model ROI calculations by the degree of success of the event attendee in the workplace over time. The concern arising from the exclusion from consideration of the influence of these intangible variables by the Kirkpatrick and Phillips ROI model has been raised in chapter 2 by the Holton model (Holton quoted by Yorks, 2005:214).

The inclusion of the Kirkpatrick-Phillips methodology in a larger guiding methodology such as the Kaplan and Norton balanced scorecard encompassed by a template that looks

for additional methods of 'how' to deliver has relevance to understanding the value of business events in organisational performance.

4.7 Building a post-event knowledge- enhancing productivity process

Strategies to deliver 'how' have so far been discussed with application firstly to pre-event strategies. Using the diagrams of section 3.7 of viable system modelling, functional area strategies such as SLDRS, QPID, LOKA and FIVA are relevant in systems terms at level R1 in that they help define the 'how' to deliver value to the R1 and R2 recursive levels of knowledge strategy within the organisation.

At R1 the business event strategies act to bring change to the operational environment by introducing new knowledge. To maximise the business event value generation the Kirkpatrick-Phillips methodology should have influence on the post-event design in terms of setting management criteria such as KPI values delivered against anticipated outcomes. The ROI methodology is situated at the systems level R2 in the VSD diagram of figure 3.17. The business event has been seen as composed of several elements each composed of variables that need an individualised strategic map to manage their own value outcomes. Lewin's function operates at R2 in Figure 3.17 on the actual event. Figure 3.17 highlights choosing the appropriate event types, leveraging networks, embedding information, leveraging ICT support to share information and employee behavioural change to work together to produce intangible value. The Kaplan and Norton balanced scorecard is at level R0 acting on knowledge strategy at R1 (Figure 3.15 and 3.16). These systems influence the R2 level with policies and procedures (normative management) required to reach the organisational strategic goals.

Strategies are now required to ensure that business event knowledge is transferred back into the organisation.

Powell and Yalcin (2010:236) draw attention to the fact that the effectiveness of any training intervention can only assessed if "attention is paid to exactly what is being measured and what the actual desired outcome is". Powell and Yalcin (2010:236)

illustrate the point with an example of post-learning event measurement of success that indicated that the training was indeed successful. However, the post-event measurements related to a specific learning outcome achieved, usually measured at the event end (a test) and not to a change in on-the-job behaviour of the event attendee. Thus any interventions contribution to future organisational performance is not proven. The causality of learning to improved job performance in the system of the organisation in which the individual works is an assumption. The model used to assess outcomes may be introducing a biased result if the system of variables at work in a particular situation is not fully understood (Powell & Yalcin, 2010:236).

The omission suggests two important factors that can help maximise the ROI of a business event have been overlooked. Both the design of the environmental context of the business event intervention and the pre-event expectation of the attendee are not considered as important in their influence in contributing to maximised ROI event outcomes. It is clear that having an understanding of the influence of intangible variables at play when assessing a current state in the organisation is pivotal to designing or attending a business event that is hoped to facilitate a future desired change in the organisation's performance. The pre-event needs analysis has to be aware of these intangible variables to inform the subsequent event design. The result of not acknowledging the influence of these unseen variables is that the event is not optimised to deliver its content in the 'best' way possible to maximise the possible improvement in the individual's performance.

This obviously has implications for the organisation's future performance not being optimised by a business event intervention if the effect of the intangible variables at work in knowledge acquisition is not acknowledged. The introduction of a needs analysis for the intangible variables acting in the relationship of knowledge and event attendee, which the business event intervention is designed to alter, together with a more formative assessment criteria than currently exists as to how change in these variables is clearly a component of the organisation's knowledge ROI management process (Figure 4.8). It has already been shown that added value is attainable when these variables are identified and

managed to act in tandem with tangible resource behavioural change. The existing model leads ROI indicators to be assessed post-event (Figure 4.9)

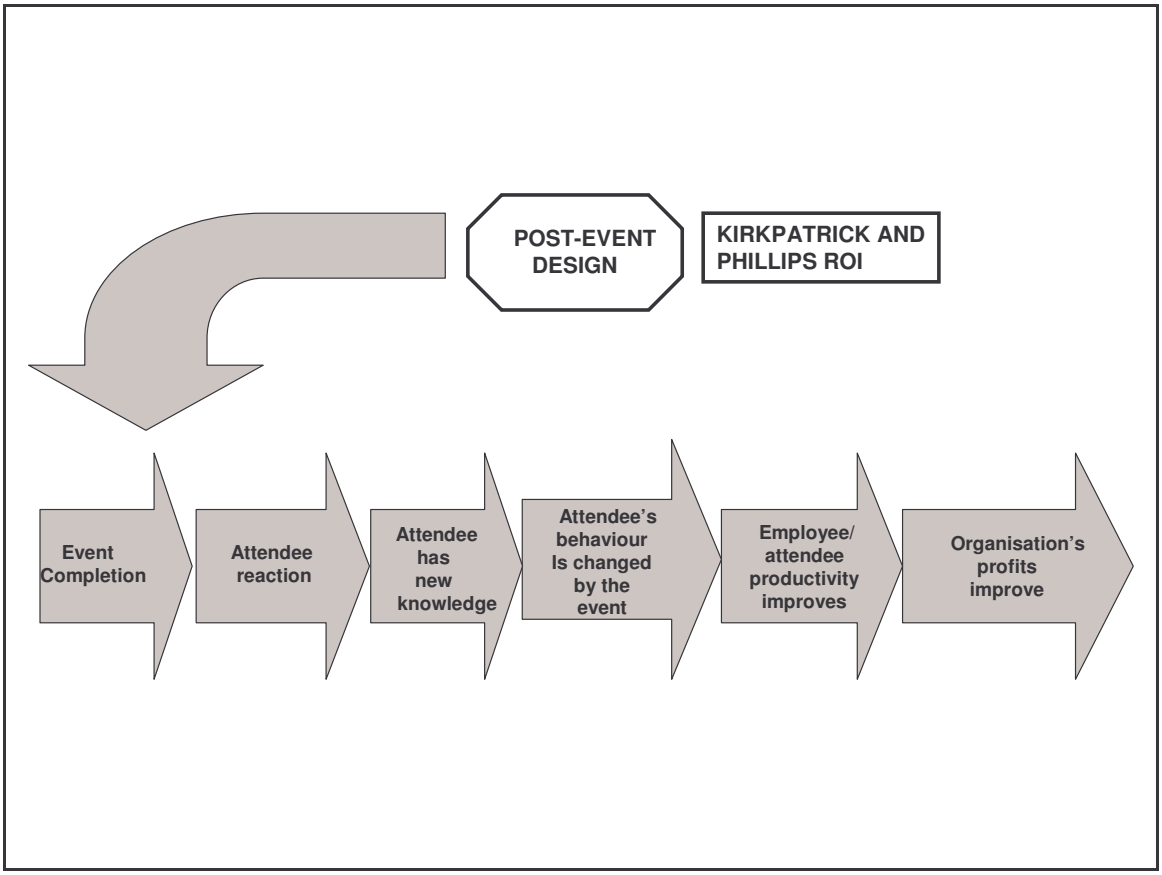


Figure 4.9: The evaluation outcomes path of the Kirkpatrick & Phillips model
Source: Adapted from Rothwell *et al.* (2006:250)

However it could be argued that, based on the previously reported shortfalls in applying the Kirkpatrick-Phillips model in the workplace, actions that prove the worth of the business event intervention in terms that can be easily seen by management as having influence on the future performance of their organisation, would prove useful. The period in which the managers would receive information about how the event is acting in affecting the future desired future would become tangible. Currently, the influence of new knowledge arising from a business event has been shown in the literature review to be intangible and assumed to a large extent.

Placing more emphasis on the design pre-event phase of identifying the intangible variables acting as antecedents and constraints on attaining any improved level in the organisation's future success introduces an opportunity to exert influence on optimising new knowledge from these variables in designing a post-event phase. Post-event actions should enable the embedding and saving of new, important knowledge. Planning post-event actions can be argued to give the organisation improved ROI capabilities. This may be a competitive advantage.

The use of post-event activities to measure the narrowing of gaps in organisations is well established. The PDCA model (Plan, Do, Check and Act) cycle is methodology well established when seeking continuous system improvement (Scholtes, 1998:33; Liker & Hoseus, 2008:131; Aikens, 2011:192). The viable systems modelling and the literature review has shown a knowledge system to be no different from any other system in an organisation in that it requires specific attributes to maintain its viability. The step that post-event activities need to address is the 'Check'. A post-event check is needed that reviews the gap between pre-event expectation and post-event reality. In doing so, the value of the business event activity becomes part of the organisation's tangible value domain because the variables are known and are being measured for behavioural change. No new actions are taken (Act) until what has been learnt that is useful to the organisation is integrated to the existing systems (Scholtes, 1998:34; Liker & Hoseus, 2008:155; Aikens, 2011:194). Only then can the next improvement cycle (Plan and Do) begin. It is obvious that the Plan step within the framework of business events brings the organisation back to the design required of the next business event (Liker & Hoseus, 2008:158).

After attendance at a business event, the attendee holds varying degrees of raw data and new information. Its value to the organisation is only realised when contextualised. The DIKW model (Figure 4.10) states that an "evolutionary process" is required for useful application of new learning (Aikens, 2011:47).

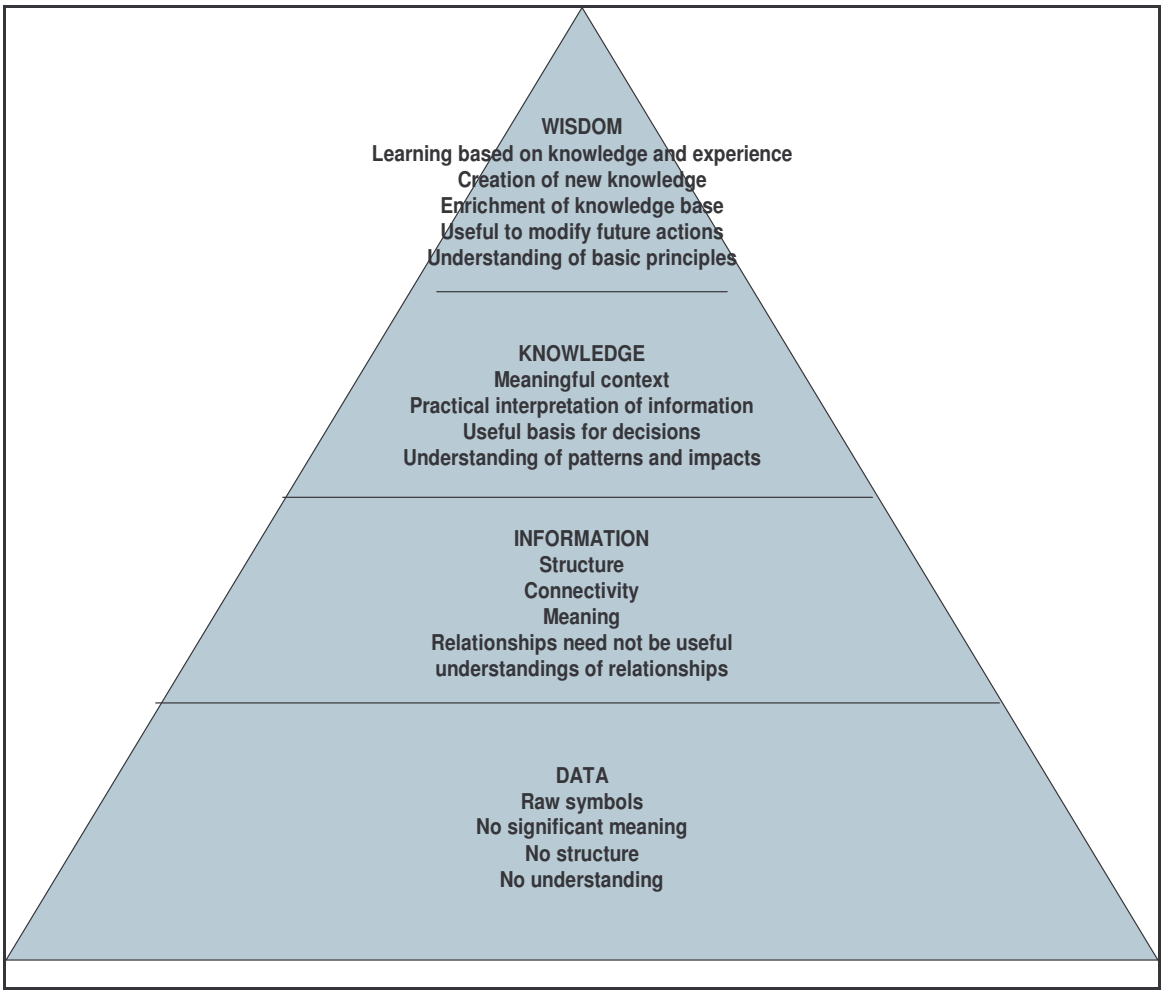


Figure 4.10: The DIKW model or knowledge pyramid

Source: Aikens (2011:46)

At the lowest level, the data level, there is limited value to be derived for the organisation as the data is not contextualised. A key element of the DIKW model is that the layers of data, information and knowledge are integrated by establishing feedback loops (Aikens, 2011:47).

The strength of these loops affects the value to the organisation from new learning flows such as those introduced by business events. The feedback loops can be argued to be the activities of the post-event phase that ensure value derivation from intangible variables.

The feedback loops provide the period for reflective consideration of new data and information.

Ensuring that the learning flows from the business event attendee allows the new data to be contextualised in many different ways by the people to whom it flows. It is people who affect value of the outputs of the operational systems that they work in. This enhances the level of information and then the level of knowledge available within the organisation. This, in turn, has the effect of adding to the potential quality of decisions made at all nodes (people) along the flow (Aikens, 2011:47).

Chapter 3 has already noted that Metcalfe's law governing the value derived from networked nodes infers that the quality and level of knowledge in a system is affected by the nodes that interlink to that system. In the internal environment of the organisation, it can be argued that involuntary limitations on the number of nodal links may lead to limited application of new knowledge thus limiting the organisation's potential for performance.

This argues for the reason that new learning about competitors, suppliers and customers plus new abilities arising from improved personal capabilities and skills must be consciously placed into the organisation's knowledge flow if new value potentials can begin to become a reality (Aiken, 2011:49).

This argument can conclude that innovation and creativity, the attributes of an organisation that creates competitive advantages, need an actively managed linking process. Ensuring that new knowledge flows through the system answers Ashby's law that there a requisite variety of information for decision making if informed responses to environmental changes are to be made by the organisation (Figure 4.11).

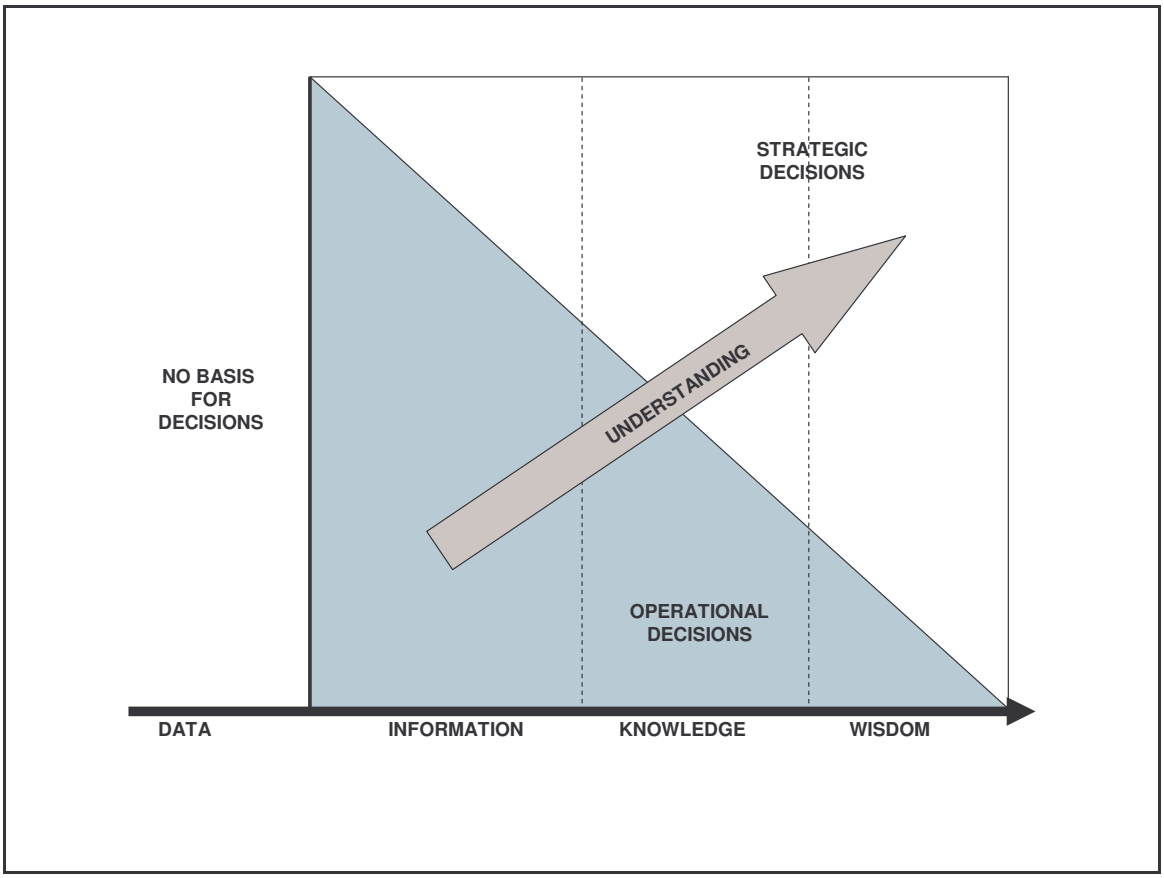


Figure 4.11: The DIKW model and its support for decision making
Source: Aikens (2011:47)

This suggests consciously extending the summative evaluation actions of the Kirkpatrick and Phillips model. The extension would encourage additional formative type activities along the entire process that can influence and help accrue value for the organisation from new knowledge (Hilbert *et al.,* 1997:139). Characteristics of formative evaluation could be introduced by activities in the ROI process as a distinct post-event phase and defined in the unknown of the arrow core template (Figure 4.2).

The actual manner of capturing an individual's personal new knowledge derived from a business event into the organisation's knowledge repository in this post-event phase would be dictated by the goals and objectives set in the pre-event analysis.

Table 4.5: Comparison of evaluation characteristics: formative versus summative
Source: Adapted from Rothwell *et al.* (2006:255)

FORMATIVE	SUMMATIVE
Primarily prospective.	Primarily retrospective.
Improvement and change focused.	Results focused.
Ongoing.	Short lived.
Feedback and reflection oriented.	Evidence oriented.
Shapes the direction of the [business event] project.	Concludes the quality of the [business event] project.
A series of integrated analyses in the [business intervention] project life cycle – before, during and after [continuous].	A final analysis in the [business event] life cycle – at the end of the project or in planned pauses throughout the project.
Informal reports.	Formal reports.

The value for the learning chain can be attained by following generic process steps: a needs analysis; a programme designed to produce a desired learning outcome; individual learning that has the opportunity to be applied in the workplace; assessment of the new learning in terms of its impact towards improving individual performance; assessment of individual performance impacts on organisational performance (Yorks, 2005:197). Proving a change in the output of individual and organisational performance is the basis of the outcomes measurements taken throughout a business event by the Kirkpatrick-Phillips model.

Formative assessments ideally occur during the event lifetime and lead to changes to the original design during the course of the event. Formative assessment measurements are integrated as key performance indicators in the design phase of the event. For instance delegates can be asked after a learning session what their perception of the quality of the content, the content delivery and lecturer. Adjustments can be made as the event progresses and certainly future events can review the feedback and make change. In this way, the best route to a desired outcome is assured through continuous evaluation and adjustment (Table 4.5).

Summative assessment would take place at a point or points determined by a strategic milestone(s) that is linked to the overall strategy map designed for that knowledge intervention (Figure 4.12). These evaluations are measurements of the changes in individual and the organisation's performance wrought by the business event. They provide information about how well the learning embedded in the organisation and the benefit of the new knowledge for the organisation helping to recognise the knowledge value and qualify the cost of having pursued the business event. (Yorks, 2005:197).

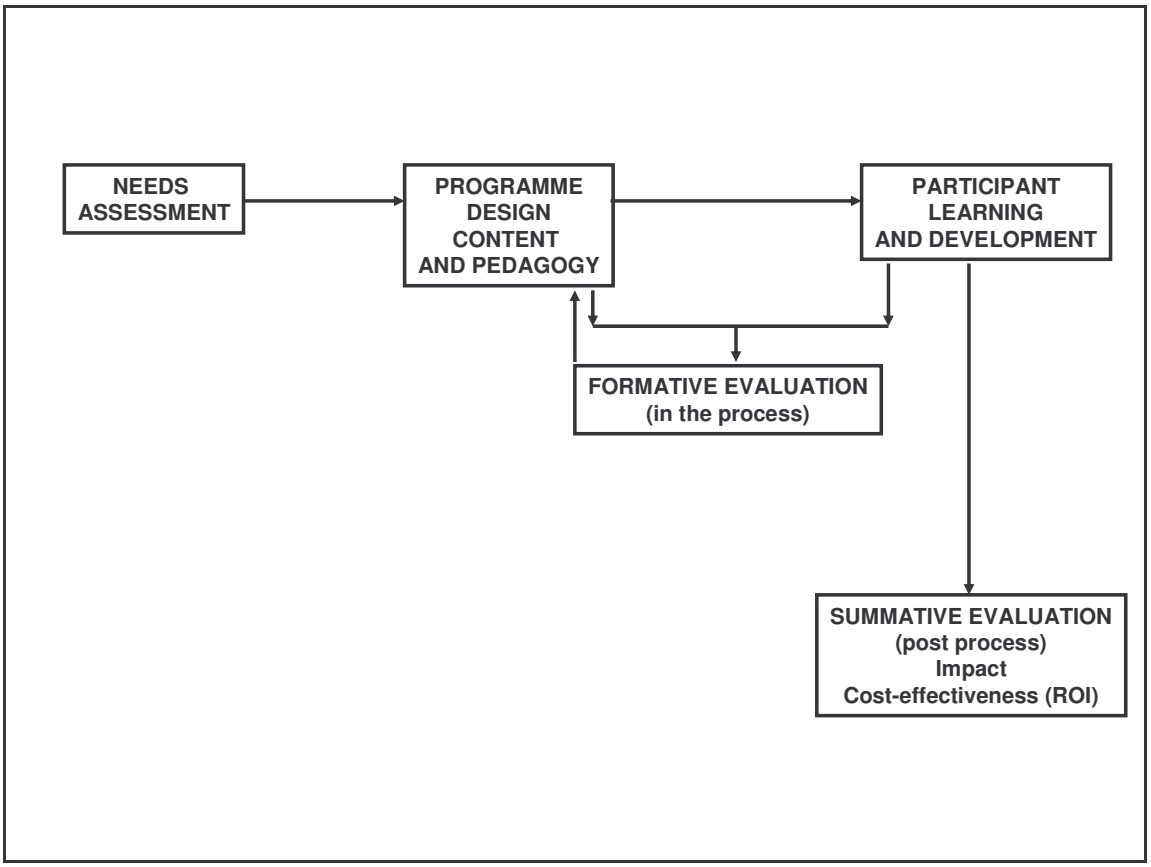


Figure 4.12: Formative and summative assessment application
Source: Yorks (2005:198)

Substantiating intangible variable performance in terms of historically accepted managerial statements used to describe tangible value such as: "improving efficiency means achieving the same results with lower costs; improving effectiveness means

achieving better results with the same costs; it is possible to get better results with the same costs" may be required to prove the value of the new knowledge to help managers champion recognition of intangible value creation. The proposed strategy map represented by an extended Kirkpatrick-Phillips will define the process for intangible value creation highlighting how finance and learning, two of the four points of the balanced scorecard, interrelate. These actions can help managers to see intangible value being created (Stone & Watson cited by Rothwell *et al.,* 2006:254).

The argument for the Kaplan and Norton strategic mapping to be standardised as an organisational process is again suggested as valid for application in the post-event phase. Deschamps highlights the differences between upstream (appropriate for pre-event and during event) and downstream (post event) information innovation processes (Table 4.1). Upstream business event strategy would be very different from downstream. Upstream strategy is to prepare the employee and the organisation for the business event and to ensure that during the event the attendee has been adequately motivated to accept knowledge inflows of use to the organisation (Deschamps, 2000:135).

The downstream processes focuses on delivering new knowledge post-event into the organisation to aid in reaching a specific pre-defined organisational strategic goal. The latter will be part of stated balanced score card goals for learning and future organisational performance. The downstream process should provide the requisite variety of information to the right people of the organisation so that future decisions can be made by them in a manner that minimises risk. In doing so it empowers these people to: create multiple informed options about future performance potential and narrow them to a selection of the single action; assess the risk attached to each possible action and weigh it against the benefit; and to have the confidence to choose a particular course of action over others and confirm it as the most feasible based on the information used (Deschamps, 2000:135; Von Krogh *et al*., 2001:430).

It is at this post-event stage that specific courses of action (embedding, sharing and communicating) can lead to final value transformations that help multiply the value

derived from the business event raw data value. Raw data moves to data forms of more value such as information, knowledge and finally wisdom as depicted in the DIKW knowledge pyramid (Figure 4.10).

Von Krogh *et al.* state that these processes of knowledge creation and transfer are keys to maintaining "sustainable competitive advantage and superior profitability" for an organisation (Von Krogh *et al.,* 2001:421). Von Krogh *et al.* suggest two strategies for leveraging and expanding the application of knowledge in an organisation (Table 4.6). The first is to leverage new knowledge within the context of existing processes and systems. This mixes known knowledge with previously unknown creating an enhanced value. The second is to use the knowledge in a totally new, creative innovation adding a completely new value stream. These are both strategies that when defined in a post-event process can change the form of raw data multiplying it four fold (data, information, knowledge and wisdom) as value from the business event. The two strategies resonate with the strategy mapping required for the Kaplan and Norton balanced scorecard and give more understanding to the description of 'how' to manage the process. When combined with Deschamps upstream and downstream focus, these strategies and focuses become ROI process guidelines.

Table 4.6: Knowledge creation strategy post-event
Source: Adapted from Von Krogh *et al.* (2001:430) and Von Krogh *et al.* (2001:432)

	Leveraging strategy impacts on strategic goals Source: Von Krogh *et al.* (2001:430)	**Expanding strategy impacts on strategic goals** Source: Von Krogh *et al.* (2001:432)
Efficiency	Share knowledge in the organisation.	Expand on knowledge related to existing processes.
Innovation	Share knowledge between domains to improve innovation processes.	Create new process and product innovations from existing knowledge domain.
Managing risk	Share knowledge to reduce the risk of overtaxing resources. Share knowledge on competitors and regulatory environment.	Develop knowledge domains to reduce risk of overtaxing resources. Develop knowledge domains to reduce the risk of deterioration. Develop knowledge domains on the regulatory and competitive environment.

It has been argued in this section that there is a need for two major downstream steps firstly to ensure embedding of the knowledge and secondly to ensure multiplication of data value by flowing it through the organisation. The next section looks at how organisational culture can support a knowledge strategy.

4.7.1 When to apply stimuli for post-event knowledge productivity

Morrison (2008:1184) draws attention to a constraint of knowledge transfer. The author suggests a learning curve model where 'forgetting' is demonstrated as an impediment to new learning application in the work place.

Since improved organisational performance has been linked to improved individual employee productivity in the literature review it follows that steps taken to minimise the variable 'forgetting' become a critical post-event action.

Morrison (2008:1185) argues that because it is easier to create daily work output by using old methodologies, there is a natural resistance to applying new learning. This is because new learning will initially take longer to create the same output until the new skills are honed in their working environment.

Gradually the newness involved in the knowledge application decreases and daily work output increases and should - if the learning intervention was correct - surpass old output values. This is the transitioning to a higher degree of productivity which Morrison notes will only be maintained if the individual can be encouraged to use the new capabilities long enough within their organisational function to be comfortable with replacing the old (Morrison, 2008:1185).

Sirmon *et al.* agrees with Morrison noting the importance of new individual learning but adds that this, in itself, will not necessarily deliver improved organisational performance. A second value proposition to encourage new learning application is simultaneously required. There is a relationship between the employee applying new skills in the work

place and the processes that their managers implement to allow them to do so. The authors state, "co-ordinating and deploying processes are necessary to implement a [knowledge] leveraging strategy, and their effectiveness in the implementation is at least partly dependent on the managers' skills in using these processes" (Sirmon *et al.,* 2007:286). This suggests that every work place knowledge system has to follow a template of actions set out in a process – a strategy map- supported and co-ordinated by managers.

Actions taken to influence and minimise the degree of forgetting can be argued to have a relationship with the unfreezing of an individual's behaviour, transitioning him/her to a newer, higher level of competence (thus productivity) and refreezing them at this point - concepts introduced by Lewin (1951:228) and Buchanan *et al.* (2005:202) in chapter 2.

Logically, the organisation's opportunity cost in creating an improved individual performance (the loss in productive time and output to the organisation during that individual's attendance at a business event and subsequent transition to a higher productive level) requires that effort is made to ensure the strategic intent behind the action is met.

The theoretical cause and effect of these variables is shown in the causal loop of learning and forgetting (Figure 4.13). The reinforcing loop shows how both the organisation's working environment and employee 'forgetting' new learning can act in either a positive or negative reinforcing manner for the value of new knowledge to the organisation.

The balancing loop shows how the new value from the reinforcing loop, if positive, can improve overall organisational knowledge and so rationalise the level of benefits as compared to cost of business event attendance.

The questions this poses is: what planned actions such as ICT technologies can be used post-event to ensure that the knowledge flows into the organisation's knowledge repository; what actions will ensure the new knowledge is shared to ensure opportunity

for multiplied value (downstream focuses and communication across networks); and what actions ensure that the employee is encouraged to transition successfully to a new, higher level of productivity (actively managing the possibility of forgetfulness and encouraging new skills practice in the work place).

Ravn in acknowledging the need for managing the knowledge transfer process suggests specific processes to ensure value multiplication (Ravn, 2004:164).

Ravn's research study focused on how to reduce barriers to knowledge flow between academia and the practitioners who used their work.

The research also dealt with knowledge flows across different industry disciplines but has relevance to application across different functional areas of an organisation. The relevance of his work is that he indicates that a pro-active process has to be undertaken to create knowledge flows (Ravn, 2004:168). He concludes that creating the best value from a knowledge chain takes "careful arena setting and process facilitation" (Ravn, 2004:175).

This bears out Deschamps argument for a focused downstream knowledge process and Kaplan and Norton's argument for a single methodology that maps and drives the entire knowledge strategy gaining specific end goals.

Downstream post-event knowledge strategy mapping seems definitely part of extending the 'p' of people created value found in the Lewin function (p, e).

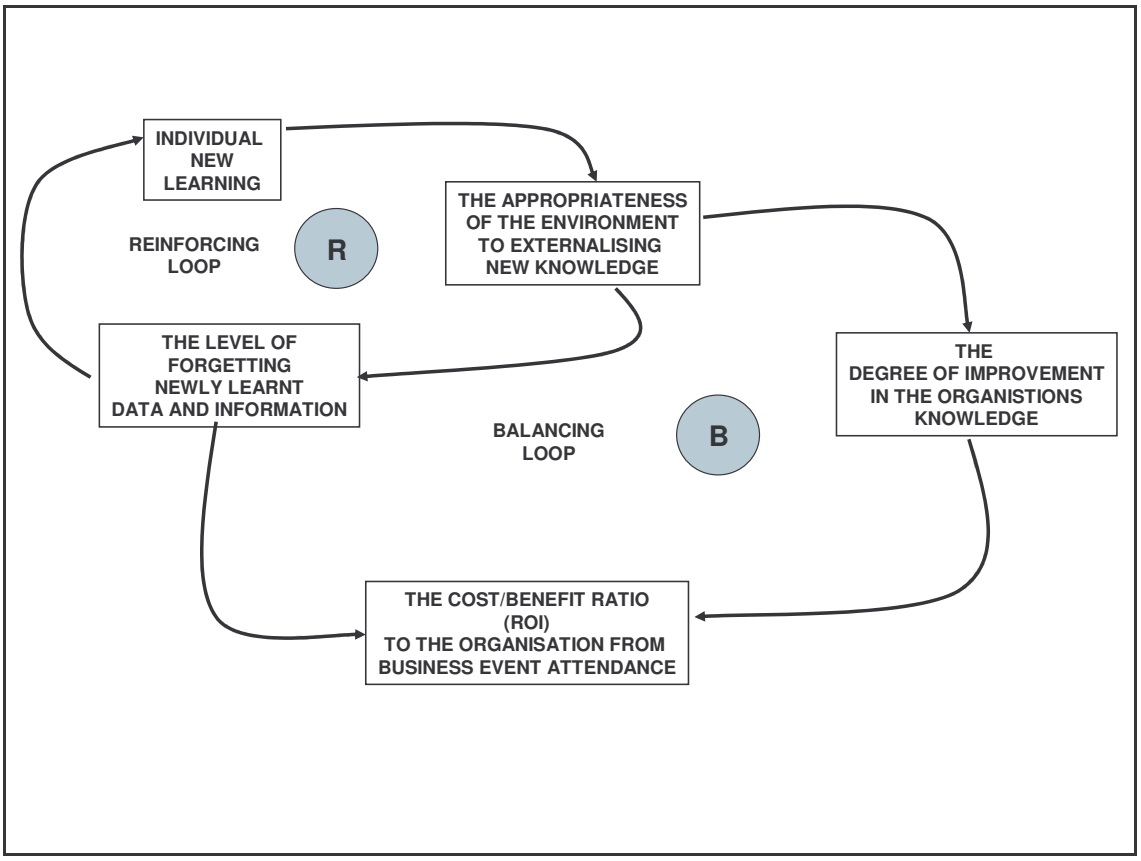


Figure 4.13: The effects of learning and forgetting on the organisation

Source: Author's own compilation (2011)

4.7.2 Knowledge strategy maps need to be dynamic in nature

The design of a knowledge management plan seems fundamental to optimising the benefit of a business event. Intuitively, it follows from Lin and Tseng's research that the knowledge system as set out in the viable system's model at R1, has to be dynamic in its nature and not constrained by unsupportive management actions. The knowledge management has to be responsible for 'feeling' change in its organisational environment originating from both within and without and adapt strategy to manage each environmental. However, a gap of consequence noted by these authors is when managers and employees have perspectives that differ as to what learning is needed because knowledge about the entire organisational system is not made freely available to all. Lin

and Tseng note that the gaps can be partially closed with appropriate technology tools such as making new knowledge widely available in electronic databases, on websites and in emails but further note that it is the combining of several employees' knowledge together with technology that leads to innovation (Lin & Tseng, 2005:171).

The requirement for further strategies that become the 'how' of managing knowledge has been explored. In the next sections, the many variables identified in an organisation's knowledge strategy from chapters 2, 3 and 4 are distilled to a set of 12 major variables.

4.8 Analysis of the variables in the extended ROI model

A number of variables of interest have been identified as affecting organisational performance as derived from a business event. Using the reviewed literature data as a framework a variable affinity table and a variable interrelationship diagram are created in the next sections to: address the issue of trying to understand the variables behaviour with each other and therefore the value they create; and postulate the what the external influences of variables at play (latent variables) in the relationship of a business event and organisational performance look like.

4.8.1 Evolving the relationships of the research area variables

Variables of interest are collated in Appendix 1 under major themes and sub-themes within themes. These variables have been derived from the secondary data collected in the literature review. Their typical behaviour has been established by the information presented in chapters 2, 3 and 4.

These variables are linked to the four concepts (themes) established in chapter 1 as guiding the research to be undertaken. The four concepts and their sub-themes are propositions about the focus of the research scope (Sections 1.6.1, 1.6.2, 1.6.3 and 1.6.4). The purpose of collating the variables under these key concepts is to show and understand the complexity of the variables acting in the systems in focus.

These variables act in some manner on the relationship of the research concern's dependent variable, the value of organisational performance, and the independent variable, the degree to which a business event adds value to organisational performance (see Figures 1.3 and 1.4). The collating of all the variables identified to key concepts is used in a second derivative to create an affinity diagram categorising 12 key issues.

4.8.2 The affinity diagram of key issues

The regrouping of the similar issues as represented by variables creates an affinity diagram which produces "natural groupings that help to understand the essence of the research problem" (Brassard & Ritter, 1994:12). The affinity diagram is shown with all the variables of interest sorted into 12 groups that have commonality within each group between variables (Appendix 2).

The use of an affinity diagram methodology has another advantage in that it helps the researcher think beyond what is accepted as the typical variable behaviour and relationships and to seek out new relationships from "non traditional connections between ideas" (Brassard & Ritter, 1994:12).

There are relationships between both intangible and intangible variables, and intangible and tangible variables and it has been shown that these are difficult to recognise and interpret. Seeking new ways of explaining variable behaviour may be highlighted in this variable sort.

The abbreviated affinity diagram comprises 12 major categories of issues named as 12 variables (Table 4.7).

Each category is accompanied by an overarching variable descriptor. A second shorter descriptor is linked to each and this label is reflected in the interrelationship diagram.

Table 4.7: Abbreviated affinity diagram

Source: Adapted from Brassard & Ritter (1994:13)

Category of Variable: Variable 1 – The intensity of support from an organisation for business events as a strategic tool in an organisation's knowledge replenishment strategy. **Known as Variable 1** = Business events in knowledge strategy.
Category of Variable: Variable 2 – The degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities. **Known as Variable 2** = Business event strategy alignment to organisational competitive advantage.
Category of Variable: Variable 3 – The level of support for an organisational policy on human capital management (HCM as an intangible asset) that directs the embedding of knowledge into an organisation. **Known as Variable 3** = HCM knowledge as an intangible asset.
Category of Variable: Variable 4 – The degree to which the business event is uniquely designed and ther monitored over long time periods to deliver both specific tangible and intangible outcomes. **Known as Variable 4** = Business event tangible and intangible value over time.
Category of Variable: Variable 5 – The degree to which the organisation has a policy (informal and formal internal meetings etc) for social interaction giving an opportunity for creativity leading to innovation from employees. **Known as Variable 5** = Social interaction, creativity and innovation.
Category of Variable: Variable 6 – The degree to which an employee can be motivated to undergo change for improved work performance. **Known as Variable 6** = Employee motivation.
Category of Variable: Variable 7 – The degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy. **Known as Variable 7** = HR aligning CPD to organisational performance.
Category of Variable: Variable 8 – The degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries. **Known as Variable 8** = Business event extended value creation.
Category of Variable: Variable 9 – The degree to which the event design optimises the chance for behavioural change based on (p, e). **Known as Variable 9** = Business design f (p, e).
Category of Variable: Variable 10 – The degree to which the organisation applies a standardised template for co-ordination and control for all business events to ensure delivery of the organisation's known (mission) and unknown (strategic intent). **Known as Variable 10** = A learning organisation through iterative, measurable cycles.
Category of Variable: Variable 11 - The level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events. **Known as Variable 11** = Business event value creation for economies.
Category of Variable: Variable 12 – The degree to which the organisation sees a business event as a work process that adds value in an intangible manner that drives improved tangible outputs in the organisational value chain. **Known as Variable 12** = A work process where intangible outcomes drive tangible outcomes.

4.8.3 Creation of the interrelationship digraph

Using an interrelationship diagram creation methodology (hereafter referred to as the ID), the influence of the relationships between the categories can be postulated (Brassard & Ritter, 1994:76). The ID helps gain an understanding of the possible behaviour and therefore the value each variable can contribute in the relationship between a business event, knowledge and improved organisational performance (Figure 4.14).

The utility of this exercise is that by establishing the possible strength and outcomes of the variable relationships, it may offer insight into actively managing their influence in the business event and organisational performance relationship (Brassard & Ritter, 1994:76).

The variables are not known exactly as to their behaviour but what is represented in the ID is an interpretation based on the literature review findings. This interpretation can be modified by PDCA cycles in the field as further data is gathered on how planned interventions (business event strategy processes) and their outcomes (knowledge value creation) relate to or reflect theoretically interpreted relationships. This is the basis for action research methodology suggested to follow on from this theoretical research and discussed briefly in chapter 5.

The ID diagram suggests 12 variables influencing the value in the following levels of recursion: R2, the business event work process (Figure 3.17); within the higher recursive level R1, the knowledge work system (Figure 3.16); within the higher recursive level R0, the organisation seeking competitive advantage (Figure 3.15).

The organisational knowledge value chain that the 12 variables affect is theoretically represented in Figure 3.19.

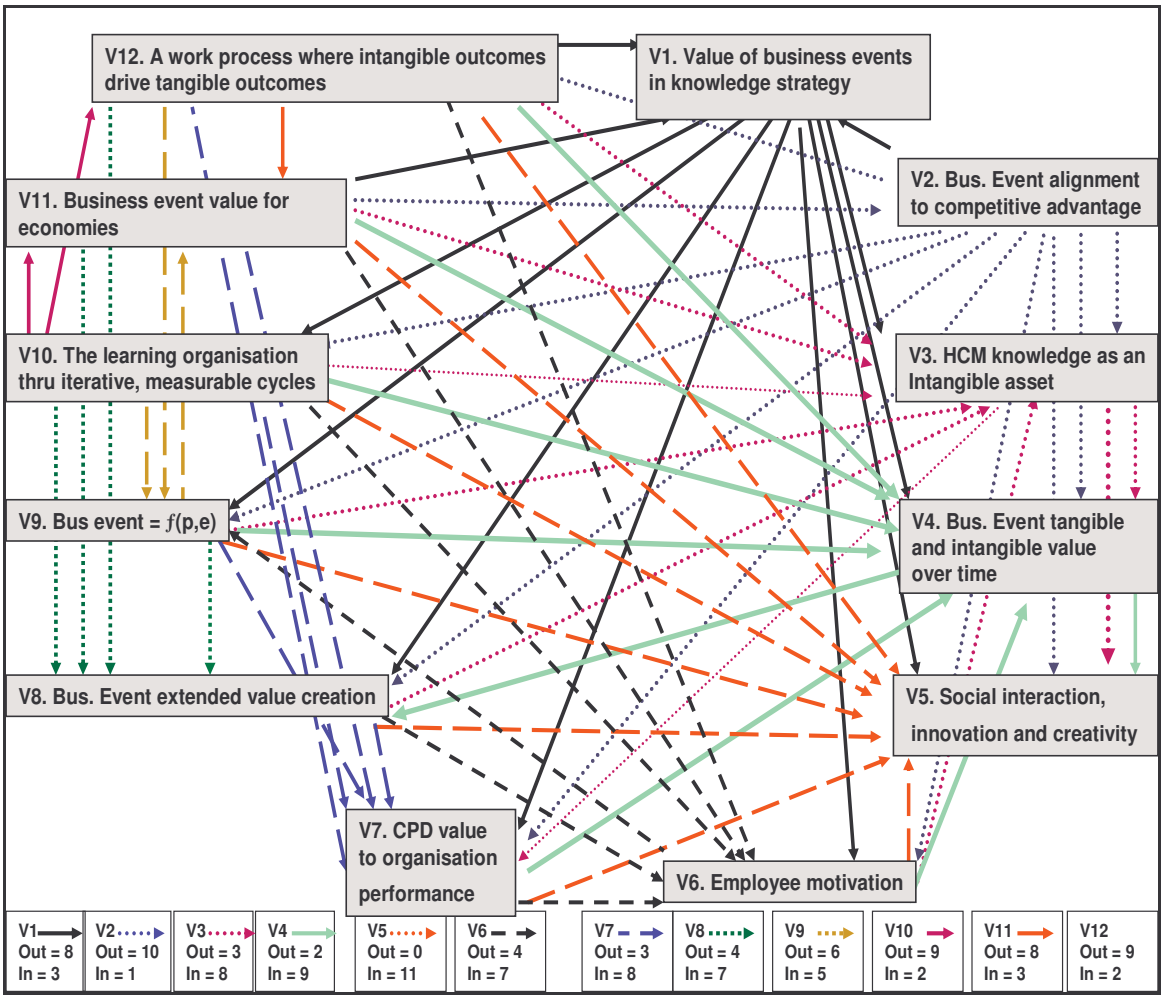


Figure 4.14: Interrelationship diagram derived from the affinity diagram categories
Source: Adapted from Brassard and Ritter (1994:83)

The ID methodology requires that an outgoing arrow is drawn from an issue/variable to another issue/variable if that first issue is an influencer on the second. Conversely, an incoming arrow is used if an issue is affected by another issue. For example, the issue/variable 1 (V1) states, "[The value of] business events in [organisational] knowledge strategy" and has eight arrows leaving the issue [out] and three arrows pointing at the issue [in]. This can be interpreted as this issue influencing or being a "driver" of the behaviour of eight other issues while it is only affected in its own behaviour (an "outcome") by three issues (Brassard & Ritter, 1994:80). As the outgoing arrows (8) outnumber the incoming arrows (3) this issue/variable can be considered

overall as a driver of behaviour influencing the behaviour of eight others. Conversely an outcome is strongly an issue/variable influenced by the behaviour of the several other variables and its value is dependent on the effect of these influences on it. Variable 5 (V5) which describes "social interaction, creativity and innovation" has 11 arrows pointing to it so is influenced or dependent for its value as an outcome on these 11 inputs.

It can be argued that the strength of the three variables (incoming arrows) as opposed to that of the outgoing arrows (8) may balance, but there is a strong argument to be extrapolated from these arrows for considering the relevance and value of business events when creating an organisational knowledge strategy that influences (drives) organisational performance.

The ID issues are now categorised in terms of whether they are a driver, an outcome or a variable that can is predominantly neither and perhaps may be influenced easily influenced into being more of a driver or more of an outcome (Table 4.8).

For the purposes of the compilation of the variables into groups of drivers, outcomes and variables that can be influenced, assumptions are made that:

- A strong driver is considered as any variable with outgoing arrow number => 8;
- A strong outcome is considered as any variable with incoming arrows => 8;
- A variable that can be influenced has nearly equal incoming and outgoing arrows =< 7.

It is important to note that the literature review suggests that the strength of each of the 12 variables can be influenced during the business event process of knowledge transfer.

To optimise the business event-organisational performance system of these 12 variables, all the driver variables (V1, V2, V10, V11, and V12) would always have almost entirely out arrows.

Table 4.8: Driver and outcome variables derived from the ID

Source: Adapted from Brassard & Ritter (1994:84)

A. DRIVER 'Out' arrows	B. OUTCOME 'In' arrows	C. CAN BE INFLUENCED
Variable 1 – The intensity of support from an organisation for business events as a strategic tool in an organisation's knowledge replenishment strategy. **Out = 8**	**Variable 3** – The level of support for an organisational policy on human capital management (HCM as an intangible asset) that directs the embedding of knowledge into an organisation. **In = 8**	**Variable 6** – The degree to which an employee can be motivated to undergo change for improved work performance. **Out = 4 In = 7**
Variable 2 – The degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities. **Out = 10**	**Variable 4** – The degree to which the business event is uniquely designed and then monitored over long time periods to deliver both specific tangible and intangible outcomes. **In = 9**	**Variable 8** – The degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries. **Out = 4 In = 7**
Variable 10 - the degree to which the organisation applies a standardised template for co-ordination and control for all business events to ensure the delivery of the organisation's mission (known) and strategic intent (known) through appropriate strategy maps (unknown). **Out = 8**	**Variable 5** – The degree to which the organisation has a policy (informal and formal internal meetings etc) for social interaction giving an opportunity for creativity leading to innovation from employees. **In = 11**	**Variable 9** – The degree to which the event design optimises the chance for behavioural change based on (p, e). **Out = 6 In = 5**
V11. Variable 11 - The level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events. **Out = 8**	**V7. Variable 7** – The degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy. **In = 8**	
Variable 12 – The degree to which the organisation sees a business event as a work process that adds value in an intangible manner that drives improved tangible outputs in the organisational value chain. **Out = 9**		

These variables represent the external and internal environments of the organisation and are often found in policies and processes that both ensure and drive the quality of the outcomes of the causal loops. The need to understand variables acting from the external environment on the organisation and acting within the organisation's environment has been confirmed earlier in chapter 4 in the Kaplan and Norton strategic mapping process that applies a balanced scorecard strategy in driving organisational performance.

The outcome variables (V3, V4, V5, and V7) are directly affected by the driver variables as to the quality of their outputs. Associations in the secondary data reviewed have been found to substantiate the relationships shown in the ID diagram (Figure 4.14).

4.8.4 Analysis of the driver variables in the ID

Drivers in the problem statement are shown in column A (Table 4.8).

A 'driver' in the relationship of the business events and organisational performance is important in that the strength of its behaviour can influence the value derived in the problem relationship. Interpreting this with systems thinking means that the strength of these variables can flow via interconnected systems to affect and improve the value of other variables.

In terms of VSM this means that if the systems of the driver variables are healthy and connected to the problem system by communication channels of high quality then the value that flows from them to other systems will reflect or drive up the terminal value. Obviously it is intuitive that if the drivers weaken tending towards 8 out arrows in strength then their value contribution diminishes in certain issues or stated in another way, their influence diminishes on some variables behaviour.

The ID methodology has identified five driver variables (Table 4.9).

Table 4.9: Driver variables

Source: Adapted from the interrelationship digraph (Brassard & Ritter, 1994:80)

Variable 1 – The intensity of support from an organisation for business events as a strategic tool in an organisation's knowledge replenishment strategy.
Variable 2 – The degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities.
Variable 10 - the degree to which the organisation applies a standardised template for co-ordination and control for all business events to ensure the delivery of the organisation's mission (known) and strategic intent (known) through appropriate strategy maps (unknown).
Variable 11 - The level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events.
Variable 12 – The degree to which the organisation sees a business event as a work process that adds value in an intangible manner that drives improved tangible outputs in the organisational value chain.

The driver variable V2 is the degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities. V2 strength affects all other variables except V11.

V11 is the level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events. By referring to the VSM of recursive systems it is easy to claim that this is because the organisation exists as part of a larger system – that of its industry and its country. Improving the strength and value creating ability of an individual organisation can affect the value of all other organisations it relates to and their industries positively. As such, it can be claimed that the strength of variable V11 will affect the strength of V2. The warrant for this claim has been established by the literature review that value flows between interrelated systems, in this case recursive level 0 creates the conditions for recursive levels 1 and 2 to create value.

4.8.5 Analysis of the outcome variables in the ID

Theoretically outcomes of the research problem situation are shown in column B (Table 4.8).

An ‘outcome’ is as a result of the behaviour of other variables at work. These preferred outcomes have been established from the secondary data of the literature review. This means that if the viability of the system, in this case the ability of the organisation to perform in a manner that makes it financial viable (ROI) and healthy (ROO), depends on these outcomes being attained then it is logical to state that any action that optimises the value of these outcomes is preferred. The four ‘outcome’ variables are all variables that the literature review has shown as preferred outcomes for the environment of a business event and organisational performance relationship (Table 4.10). The outcome variable value will flow from those variables that affect them.

The primary data research seeks to establish exactly how these theoretical variables are actually acting and if there are gaps between their anticipated behaviour and outcomes in terms of creating value for the organisation and as established by the literature review and, their actual value generation abilities.

Table 4.10: Outcome variables

Source: Adapted from the interrelationship digraph (Brassard & Ritter, 1994:80)

Variable 3 – The level of support for an organisational policy on human capital management (HCM as an intangible asset) that directs the embedding of knowledge into an organisation.
Variable 4 – The degree to which the business event is uniquely designed and then monitored over long time periods to deliver both specific tangible and intangible outcomes.
Variable 5 – The degree to which the organisation has a policy (informal and formal internal meetings etc) for social interaction giving an opportunity for creativity leading to innovation from employees.
Variable 7 – The degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy.

The value of outcome V5, the degree to which the organisation has a knowledge policy for social interaction, is affected by all eleven other variables. This outcome under VSM modelling can be claimed as pivotal in its implication for its effect on the organisation’s continued existence because the ability of the organisation to create an environment for innovation and creativity is what ensures its survival over competitors. The warrant for this is that it has been shown in the literature review that competitive advantage and thus viability and profitability result from a continuous cycle of innovation and creativity and

the resource that builds this is knowledge which lies with each employee. Social interaction encourages innovation and creativity.

The quality or degree of innovation and creativity is an outcome of Lewin's formula for behavioural change, f (p, e) at the recursive level R2, the business event.

4.8.6 Analysis of all other variables in the ID

In column C are variables that are currently neither strong drivers nor a strong outcome in the theoretical ID system (Table 4.8).

These variables have been established from the literature review as being important in the business event and an organisation's future performance, relationship (Table 4.11). These variables include: V6 - the degree to which someone who attains knowledge value from a business event will be motivated to use it to improve the organisation's performance; V8 – the degree to which the suggested modifications to the Kirkpatrick-Phillips ROI methodology can improve the value generated from events; and V9 - the degree to which the event design is successful in creating a zone of liminality and communitas and thus behavioural change of benefit to the organisation.

These are variables where it may be possible to strengthen or weaken their effect to sway towards a preferred effect. It is claimed that influencing these variables can help in narrowing the gap between anticipated value creation from business events and actual value created.

The warrant for this claim is that these variables can influence a driver and/or an outcome, so altering their behaviour can improve the strength of drivers or improve the opportunity for optimised outcomes.

Table 4.11: Variables that can be influenced for value creation

Source: Adapted from the interrelationship digraph (Brassard & Ritter, 1994:80)

Variable 6 – The degree to which an employee can be motivated to undergo change for improved work performance.
Variable 8 – The degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries.
Variable 9 – The degree to which the event design optimises the chance for behavioural change based on (p, e).

Variable V9 has 6 'out' arrows and 5 'in' arrows. This variable can be claimed to act uniquely as both a driver and an outcome in that business design can change an individual's future behaviour thus acting as a driver in knowledge creation, and business design can influence the outcome for improved organisational performance. It can be conversely claimed that a poor business design will fail to influence a change in employee behaviour as greatly as it could, and organisational performance will not increase optimally.

V9 is the degree to which the business event design creates the possibility for a high level of communitas and liminality as part of a defined set of outcome objectives to change individual attendee future behaviour based of the attendee (customer, supplier, competitor or employee) creating value opportunities for future organisational performance. The design is speculated from chapters 2, 3 and 4 as having an influence pre-, during and post-event. The design effect is not limited to the actual day of the event.

V 9, business event design, can act as a value driver by positively affecting the final value of the following variables as follows:

- **Variable 3** – The level of support for an organisational policy on human capital management (HCM as an intangible asset) that directs the embedding of knowledge into an organisation;
- **Variable 4** – The degree to which the business event is uniquely designed and then monitored over long time periods to deliver both specific tangible and intangible outcomes;

- **Variable 5** – The degree to which the organisation has a policy (informal and formal internal meetings etc) for social interaction giving an opportunity for creativity leading to innovation from employees;
- **Variable 7** – The degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy;
- **Variable 8** – The degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries;
- **Variable 11** - The level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events.

V9, business event design, will be influenced thus dependent for its final value on its relationship by:

- Variable 1 -The intensity of support from an organisation for business events as a strategic tool in an organisation's knowledge replenishment strategy;
- Variable 2 – The degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities;
- **Variable 6** – The degree to which an employee can be motivated to undergo change for improved work performance;
- **Variable 10 -** the degree to which the organisation applies a standardised template for co-ordination and control for all business events to ensure the delivery of the organisation's mission (known) and strategic intent (known) through appropriate strategy maps (unknown);
- **Variable 12** – The degree to which the organisation sees a business event as a work process that adds value in an intangible manner that drives improved tangible outputs in the organisational value chain.

4.8.7 The people (p) and the environment (e)

The ID diagram has presented a theoretical interpretation of the situation being researched. The research strategy is to gather information to understand influences in the situation so improving the opportunity for both tangible and intangible organisational value creation.

It follows that exploring possible extensions to the Kirkpatrick-Phillips ROI model is exploring ways of improving the process of business design. The models explored in this chapter (chapter 4) have relevance to managing variables identified in chapters 2 and 3 found to be acting in the research situation. It can be claimed that there is utility in considering extending the Kirkpatrick-Phillips ROI model with elements of these chapter 4 models. The warrant for this claim is that affecting the variables influencing behavioural change in a specific and positive way for an employee attending a business event by using event design (Variable 9 – the degree to which the event design optimises the chance for behavioural change based on (p, e)) contributes to optimising the opportunity for the organisation to improve future performance.

It is claimed that modifications to the Kirkpatrick-Phillips model in terms of managing design elements can improve both outcome values and the strength of drivers. It is important to understand how to influence each variable's behaviour.

While all 12 variables are of interest as to their behaviour in the business event-organisational performance value chain, the intermediate variables (V6, V8, and V9) which are neither drivers nor outcomes are variables of particular interest. These variables, V6 employee motivation, V8 business event extended value creation and V9 business design can change positively in ways that effect future behaviour and future organisational performance value creation. Each has the potential to help deliver improved value to the organisational value chain. Understanding more about both the business event organiser and the business event attendee's perceptions of the behaviour

of all 12 variables, and especially these three variables, is argued as relevant when designing the research surveys.

4.9 Summary of literature reviewed with regards to the business event work process

After reviewing in the literature how organisations ensure their survival, the sections 4.9.1 to 4.9.5 use this information and VSM to propose what S1 to S5 systems of a viable set of systems would look like (Figures 3.15, 3.16 and 3.17). The S1 to S5 represent a theoretical organisational knowledge system that seeks to create opportunities for organisational performance (viability and health).

4.9.1 System S1: influence, monitor and control

The business event work unit at S1 is influenced, monitored and controlled within set parameters of behaviour set by the organisation in line with the strategic outcomes it wishes to achieve. There is little evidence of this in past research with regards to a business event although the principle is supported by the secondary research reviewed.

The literature shows the following with relevance to processes and policies for the business event that will influence, monitor and control value creation:

- The literature suggests that the inputs to any work process including a business event as encapsulated by f (p, e) have to be managed against a specific set of outcomes;
- Managers do not like using the Kirkpatrick-Phillips ROI methodology for managing and influencing the value generated from attending a business event;
- The theoretical concept of an organisation having an overarching knowledge strategy exists and is well supported as to the value it has for organisations but is not supported by hard evidence with regards to managing and controlling an intervention such a business event;
- Managers of organisational internal functions are not shown in the literature review as knowing the 'how' of building a business event strategy map to actively manage learning to attain organisational adaptation requirements. The literature suggests that a knowledge

strategy map is possible and should be pursued with methodologies such as the Kaplan and Norton balanced scorecard;

- The literature suggests that HRD and HR activities are influential in managing how employees undertake knowledge development aligning both private and business learning to organisational goals. There is no evidence of a strategy map for a business event and HRD activities;
- The literature suggests that the process of creating knowledge has to begin with some sort of pre-event unfreezing of normal work cognitive behaviour to gain most benefit from a business event in terms of new knowledge. No evidence is shown in the work place with regards to using a business event process to attain this although the principles of unfreeze-change-refreeze for a new behaviour are well known;
- The literature suggests that the process of creating knowledge is greatly amplified in value by post-event knowledge activities caused by social interaction. The literature shows that this is generally done in ad-hoc post-event meetings with no evidence presented of specific processes defined for how the knowledge could be multiplied and embedded.

4.9.2 System S2: stability/conflict resolution

At S2 the actions of the organisation seek to promote stability and set down rules for conflict resolution. Operational units in tangible work processes need to be co-ordinated in their efforts and resource usage to support the organisational strategy. It seems that there is little standardised methodology for the allocation of knowledge resources. Efforts that bring about sharing, storage and access to new knowledge lend to creating stable and conflict free environments.

A strategy that creates access to knowledge needs to use it to maintain stability as productivity is higher when there is stability.

4.9.3 System S3: optimisation between operational units

Figure 3.17 identifies other knowledge value creating opportunities from operational units at the system level as the business event. The S3 management role assumes that the organisation helps guarantee value optimisation by:

- Ensuring the correct event type is chosen as the knowledge intervention vehicle. For instance an exhibition will not provide specific training needs, and a conference is generally an upstream broad knowledge process. Knowledge need has to be tied to an appropriate business event type. This would be part of an overarching knowledge strategy but no evidence is found of the role of business events in an organisation's efforts to ensure future performance strategy;
- Leveraging the opportunity to build business networks between work units. No evidence is shown of how this is planned as a strategy and as input for business events although the literature review shows that networking is seen as a purpose of business events;
- Embedding of information. As previously stated the literature review does not indicate that there are specific processes and policies in place to encourage this after a business event;
- ICT support. The literature indicates that communication tools are essential as are database repositories for knowledge storage and policies and processes that reflect organisational knowledge. It is not clear how these will be applied post business event;
- Behavioural change. Change in tangible systems is advocated by the literature review as being monitored and managed. As previously stated behavioural change is the purpose of a business event but managing the behavioural change so that it occurs in a preferred and expected manner, the 'how' of this strategy, is not indicated in the literature reviewed.

4.9.4 System S4: future plans and strategies

The literature advocates that work systems ensure the future of the organisation through strategies. No evidence has been seen of S4 management with regards to planned strategy

and business events. Such a strategy would recognise a business event as a work process capable of creating the requisite variety of knowledge to create opportunity and diminish risk.

4.9.5 System S5: policy

There is no evidence of organisations typically having an overarching policy on business events processes applicable for knowledge creation. This is advocated in the Kaplan and Norton balanced scorecard methodology, but these authors acknowledge the difficulty most organisations have in attaining this because the 'how' of physically managing an intangible is hard to establish.

Due to the lack of secondary data available specifically related to the business event-organisational performance work process, the research surveys try and establish what attendees and business event organisers actually believe about the business event-organisational performance work process and compare this to existing secondary data and the theoretically established variables of the ID diagram. Action research is discussed in detail in chapter 5 in its application to a future testing of an arrowcore type template in the role of a strategy map for business events.

4.10 Conclusion

Creating a set of linked processes is a practical means of influencing selected intangible variables. It is important that the organisation sees business events and the knowledge management systems that underpin them as a way of doing their business better (Burkett, 2005:104).

These propositions when bounded by the reviewed models of chapter 4 raise the final research question:

RQ3: What actions in business event design methodology help in creating event designs as a strategy map for knowledge that support the overall strategic goals of an organisation?

The question is extremely broad and this research does not test for instance the LOKA list in relation to an extended Kirkpatrick-Phillips model application in the field. The field research focuses rather on gaining a better understanding of the elemental work process of the business event, f (p, e) specifically in the context of understanding the socialisation that drives knowledge creation.

CHAPTER 5

THE RESEARCH STRATEGY AND FINDINGS

5.1 Introduction

Chapters 2, 3 and 4 have helped in gaining an understanding of the behaviour of the many intervening variables at work in the complex system of a business event and its relationship with the organisation and its future performance. The preceding chapters have shown that the variables act within the work process provided by a business event to change the behaviour of event attendees. All the variables highlighted in the literature review have been categorised into 12 overarching variables that have been named in chapter 4.

To create propositions about the relationships of these variables and their influence on the value they create or diminish in the organisational asset of knowledge gained from a business event requires analysis of how these variables are actually behaving in the physical environment. This chapter deals with the qualitative and quantitative research strategy adopted to explore the behaviour of the 12 variables. The research strategy is designed to answer the three research questions while meeting the objectives of this research.

5.2 The research variables

With regards to understanding knowledge flow between a business event and an organisation from the secondary data reviewed there is limited, direct research evidence of variables and their behaviour. The literature review has then been trans-disciplinary using the domains of learning, business, technology and sociology to gain an understanding of knowledge acquisition and flow from these other contexts. The secondary findings give an indication of the behaviour that is expected from the chosen variables. It been acknowledged by various authors in the literature reviewed that there

are gaps in the current understanding of how knowledge can add value from a business event to an organisational value chain and, what influences the amount of value that can be added in a knowledge renewal intervention such as a business event.

A number of recurring themes within the four research concepts are identified during the literature review with regards to organisational knowledge. The variables at work in each set of themes have been discussed as to their influence on the organisation although it is acknowledged in chapter 4 that, due to the complexity of systems and their inter-relatedness both on vertical and horizontal axes through and across systems to other systems, such as from a business event to gross domestic product, or an employee to other employees, that the variables chosen to be examined more closely only provide a theory as to what may actually be happening. That said, the more thorough the understanding of the behaviour of these identified variables the easier it is to recognise gaps between expected behaviour and actual behaviour in the relationship between a business event and its impact on future organisational performance.

The research has been designed to gather the opinions of the people with experience of the business event organisational performance relationship. From this, certain theoretical suggestions can be made as to how to manage the behaviour of these variables to optimise future organisational performance. Additionally, the results of the research are used to recommend methodology to create specific influences on the 12 variables behaviour by extensions to the Kirkpatrick-Phillips ROI model to improve the knowledge value generated from business events.

5.2.1 Triangulation methodology

To accommodate investigation of the relationship of the business event and organisation based on the fact that there is not much supporting literature, the research design uses both method triangulation and theory triangulation to create the survey questions to gather primary data.

The research applies firstly a qualitative survey of 18 senior employees representing 5 functions - marketing, information technology, human resources, academics and event organisers. This allows an initial exploration of the believed situation of variables behaviour as raised from the conceptual literature review framework.

This is the first triangulation of theory against qualitative results. These results are used to agree or highlight disagreements with the theoretical assumptions of the behaviour of the variables.

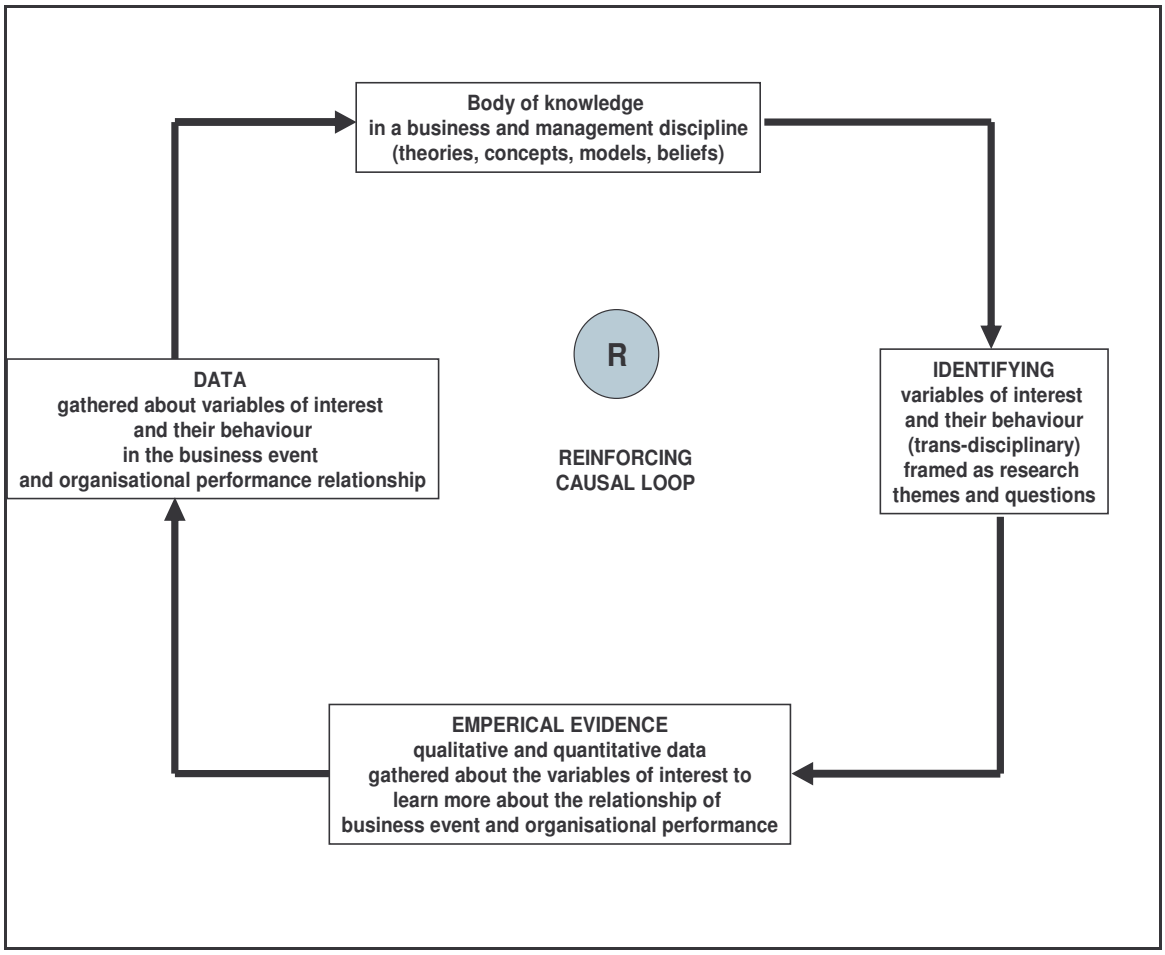


Figure 5.1: A model of the research of business and business event variables
Source: Adapted from Myers (2009:12)

It is on this survey that the questions of the quantitative survey are based. The quantitative data then gathers more specific detail about the variables and their relationships with each other by again comparing the conceptually stated behaviour of the variables of the situation against that reported by people in the situation (Hair *et al,* 2007:298). This provides a second triangulation and a more statistically significant result because the sample size is much larger.

The research process to collect data to extend the body of knowledge about business events and organisational performance is shown in Figure 5.1. This is a reinforcing causal loop because the quality of performance at each step reinforces the strength of the quality of the data in the next step. Each step will help in defining the utility of these variables behaviour while creating a body of knowledge about business events and their relationship with organisational performance.

5.2.2 The rationale for action science in the research design

Myers argues that action research is directly linked to the research of Lewin (1951:25) equation B = *f* (p, e) where B is the degree of behavioural change of a person affected by attending an event (Myers, 2009:59).

The event outcome in terms of knowledge value created through behavioural change is influenced by the people at the event (p) and the environment of the event (e). This equation has been used to underpin much of the scope of the literature review in chapters 2, 3 and 4 and is accepted in this research as succinctly summing up what is happening at a business event. The way of measuring the change in behaviour of people at an event requires an ROI measurement tool. The ROI measurement tool needs to be part of a bigger control and monitor system as shown in the theoretical viable systems model for a knowledge strategy represented in Figure 3.16. The VSM models all rely on the co-ordination and control mechanisms (systems S1 to S5) between work processes for health. If information about the external and internal environments in which the

organisation exists is not flowing through the systems and triggering adaptive change, the organisation will no longer be competitive and healthy.

Figure 3.16 of the organisational knowledge work system has an R1 system with S1 which is a collective of operational value creating work units that includes business events, employee human capital as an asset, knowledge productivity and knowledge strategy. System S1 is influenced, monitored and controlled within set acceptable parameters of behaviour by: System S2, a system responsible for stability/conflict resolution; System S3, a system for optimisation between operational units; System S4, a system for future plans and strategies; and System S5, policy. This argues that a business event at R2 needs an ROI methodology as an iterative process to get sets of outcomes that can help establish the typical behaviour of variables in the systems and that this process is itself a value contributor to a bigger value system. To understand the systems, action science has been chosen as a possible field testing methodology.

Using action science methodology provides a way of testing peoples perceptions of what is happening - “Action science emphasises understanding the difference [gap] between the behaviour of the practitioners [in their day to day work] (theories-in-use) and their beliefs [about what they think they are doing] (espoused theories) and making recommendations for single and double loop learning” (Argyis & Schön cited by Myers, 2009:61). Myers states, “A fundamental assumption of action science is that there is a difference between what people say and what they do” (Myers, 2009:61).

The utility of this is that the organisation expects and assumes improved performance after business event attendance. They want to see a return on their investment of time, money and people just as they would want a benefit from the usage of any tangible resource.

The literature review has shown that although the Kirkpatrick-Phillips ROI model is one of the most popular event-organisational measurement tools, it is often used only in a

limited manner by organisations both to set the outcomes for and measure ROI, although organisations actively seek to measure ROI.

The process of ROI measurement has been shown to be problematic and it logically follows that action research which seeks to solve a problem by changing the way a process currently works while adding new verifiable knowledge about the process to the existing body of knowledge is a research methodology suitable for this research (Pellissier, 2007:27).

The research both qualitative and quantitative adopts an action research focus as explained in steps 1 to 5 of Figure 5.2. The steps are as follows:

a. Step 1 – Diagnosis of the concern.
b. Step 2 – Planning an action that seeks to change the behaviour of variables in the current situation in a predefined manner.
c. Step 3 – Taking this specific planned action.
d. Step 4 - Evaluating the results of the action.
e. Step 5 – Reflecting on what was learnt and what is still not understood and beginning the cycle again.

Step 5 is an input and is where this research begins by assessing what is known about the situation of the organisation and a business event in the literature review. In this research, only step 1 is completed producing step 2 as a theoretical model and outcome to be tested at a later stage.

The research is exploratory and the complete cycle, steps 1 through 5, is being built as the variable systems are identified and tested. The ID created in chapter 4 is a theoretical model of the behaviour of the 12 variables established from the literature review. Through action research as a strategy, the actual behaviour of these variables can be measured and this used from the results of this research to modify the theoretical ID presented here.

Hallebone and Priest note that the final result of each complete iteration of the cycle is "bounded by time and space but not exclusively based on the research participants' meanings" - inferring that the survey participants who answer questions that lead to understanding and more knowledge about the behaviour of the cycle do so in their own constructivist manner adding to the existing body of knowledge of business events and organisational performance and also influencing the way the data generated in the cycle is interpreted through the lens of their real-life personal perceptions and experiences of the business event-organisational performance-knowledge management situation (Hallebone & Priest, 2009:185).

When the complete cycle becomes typical of a system that is well documented or 'known' as to its typical behaviour, it becomes a standard for the expected behaviour of the variables in its system.

An example of a known process is often found in an organisational process, procedure or policy these being examples of normative management actions where established processes can be documented. These are processes where it is reasonable to expect the inputs to deliver outputs from their work process that are known and considered normal. When the cycle is 'known' then the use of the cycle is to keep the output of the cycle within an acceptable envelope of behaviour.

The cycle serves as a quality control mechanism that draws attention to unexpected deviations that need investigation by repeating further cycles of the action theory scenario.

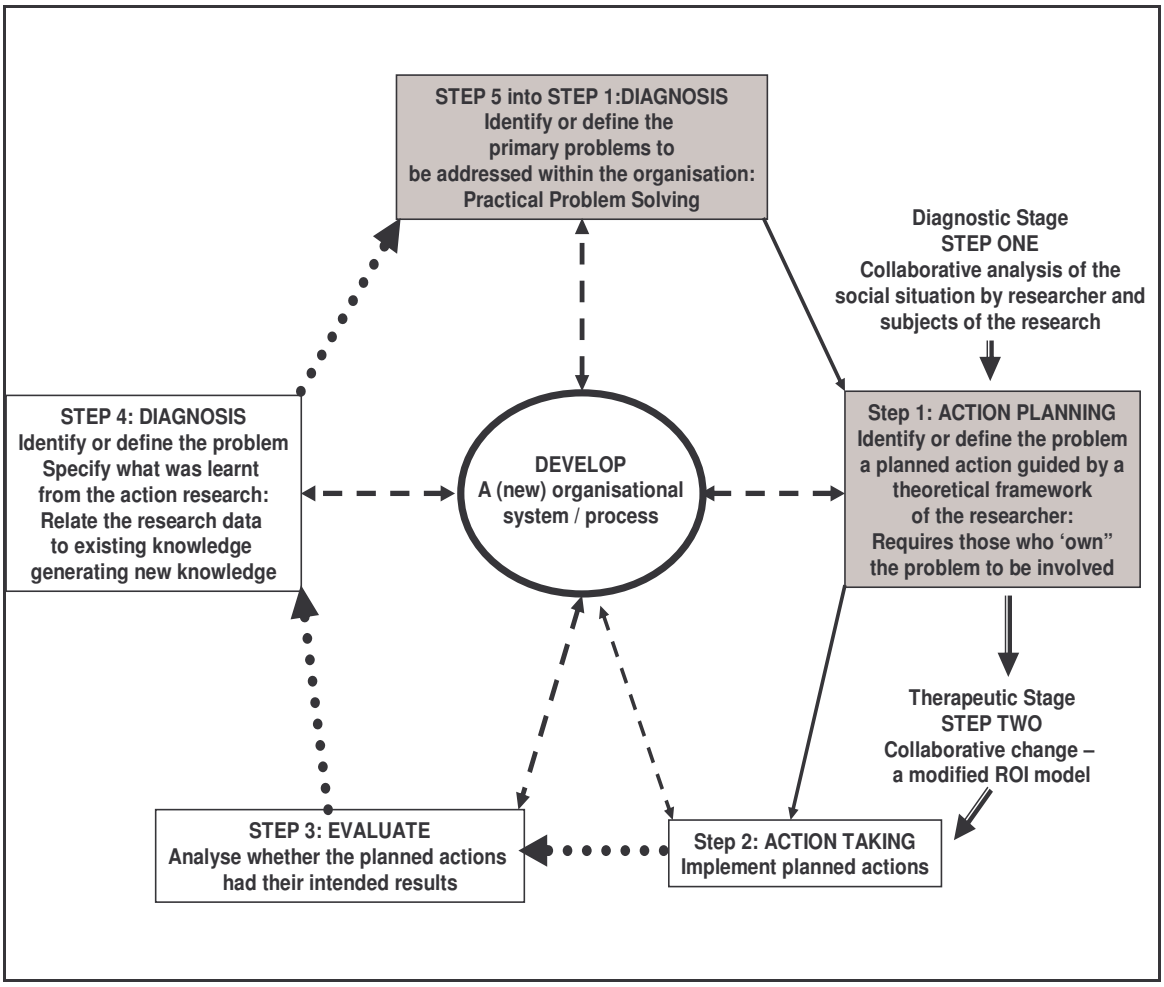


Figure 5.2: The action research process

Source: Adapted from Myers (2009:57-59)

This part of the literature review helps establish what methodologies could be placed in a 'known' value creation process. Since the Kirkpatrick-Phillips methodology is a principle used by the business events organisers, its place in the business event needs to be acknowledged. Reviewing how the methodology works in a theoretical 'action' based manner helps to establish this.

The literature review is led by the research statement, 'the value of business tourism in organisational performance'. This is the input from step 5 as the underlying concern of this research is to establish how the business tourism event works, how it can be part of

the organisational value chain with regards to useful knowledge and show how this knowledge value chain is part of a larger system of value influencing the quality of the business tourism industry and its GDP contributions to a country.

Step 1 uses the literature to document the business event work process as it currently seems to act as a work process that adds value to the organisation. This is the current theory of the business event mechanism in organisational knowledge systems.

The literature review of this research together with the findings of this research provide an input to the step 1 action research cycle – finding the gaps in the value creating ability of the business event and organisation relationship helps to decide how the Kirkpatrick-Phillips model could be altered for easier use in the field. The proposition is that by understanding more about the way these variables act through this research in the business event situation allows the research to propose an extension to the Kirkpatrick-Phillips methodology as a means to attain improved organisational strategic ROI management. This is a theoretically proposed solution to address gaps that appear to diminish the current ability of the business event as a work process to produce an optimised quality of knowledge as an outcome. This model would then be tested in an action theory cycle after completion of this research.

An important argument for action theory use is that, because the process is iterative, it allows for comparison of results from each cycle. In each cycle, the methodology is modified and then tested. Each cycle has an expected outcome and an actual outcome and the degree of variation in these two outcomes (gap) indicates how well the variables in the process are being understood. This is useful in determining whether the observed and monitored variables are being affected by intermediate and unseen variables. In this iterative manner the process is better and better understood.

This research uses two surveys to review the behaviour of this system of the 12 variables from the perceptions of people in the work system of a business event. These are compared to the secondary research findings documented from the literature review. This

is intended to provide an insight to what is actually happening in the gaps where little is known about the variables and their behaviour. The primary data of the two surveys provides recommendations as to modifications to be applied in the theoretical model to ensure the usefulness of the proposed Kaplan and Norton plus Kirkpatrick-Phillips methodology. Step 2 concludes with proposed modifications to the existing Kirkpatrick-Phillips model

Steps 3 and 4 of Figure 5.2 would test the new ROI methodology and integrate the results of the test back into the body of knowledge about business events and organisational performance. The feedback from these steps modifies the model at step 5, the next iterative application process which again tests the value of the modified model and so on.

Step 5 extends the body of knowledge about the relationship process of business events and organisational performance, with the ROI research findings. As action research is an iterative process aiming for an ever higher degree of quality (as a result) it follows that, with each iteration of the step 1 to 5 cycle, that the body of knowledge will continually change as new information about the situation in focus is discovered, tested and validated (Pellissier, 2007:28). Step 5 becomes the body of knowledge supporting the process at step 1 of the next iteration. Myers states that "all action research studies must demonstrate a potential contribution to practice [the 'action']" and that "all action research must demonstrate a clear contribution to research [the 'theory']" (Myers, 2009:64).

5.2.3 Action theory applied to an arrowcore template

In chapter 4 Winter and Szulanski highlighted that every process template (in this case an ROI process template) needs review at each application (Winter & Szulanski, 2001:731). The iterative process of action science corroborates the need for an ROI template process continuously evolving as action theory activities add new knowledge to the existing of what is known about the process. The evolution of each action cycle would be unique in responding to unique change in the organisation's operating environment but elements of

the cycle that reflect the organisation's mission and current strategy remain constant. The degree of change is the unknown part of the template together with what strategies the organisation devises to deal with the change while still maintaining the 'known', its mission. The template is the work process repeated continuously in the action cycle. It can be claimed that the arrowcore template has an important role to play in maintaining this balance of unknown to known in the process.

This would ensure that the ROI process recommended for a business event would always be responding and evolving with the correct degree of knowledge variety to ensure that organisational performance improvement is assured. The degree of variety of knowledge required for informed organisational strategic decision making has a direct relationship with the appropriateness of the ROI methodology at seeking and measuring outcomes that affect future performance. Simply stated, the cycle seeks to provide the diversity of knowledge required to optimise the quality of the outcomes of the process.

An addendum to the iterative modification of the ROI methodology is that ROI expected from business events by individuals, organisations and national economies predominantly focuses on measurement of tangible variables of value such as improved productivity, profit and sales. The literature review has shown intangible variables to be the unseen value levers in improving tangible resource usage over and above what would normally be expected while driving additional value derivation from such unique aspects of competitive advantage as quality, innovation and creation. It can be argued that applying action research steps 1 and 2 provides information about the business event-organisation performance relationship as a proposed basis for better managing all the variables, tangible and intangible, that affect organisational performance.

5.2.4 Variables outside of the system in focus

The sub-system variables of V10, V11 and V12 are not included in the surveys as statements to test perceptions as they are considered outside the stated scope of the

business event system (which is at R2 level in the VSM) although their influence is acknowledged.

V10 is a variable that is a driver (out = 9, in = 2) that acts to improve the quality of the business event work process in creating value. The variable descriptor is 'the degree to which the organisation applies a standardised template for co-ordination and control for all business events to ensure the delivery of the organisation's mission (known) and strategic intent (known) through appropriate strategy maps (unknown)'. This variable is considered as representative of a learning organisation because it encompasses iterative, measurable cycles using each cycle's outcomes and KPI to improve on the quality of the next. However it is an outcome of the effects from the rest of the system so it relies on other variables for the strength of its outcome.

V11 is a variable that has most impact in a higher system than the R2 level, at the business tourism industry of the R0 level. The variable descriptor is 'the level of effect of value creation from business events for a national economy not only for spinoff hospitality value but from improved organisational performance in industries using business events'.

The quality of the business events produced by a nation affects the quality of the business tourism industry. It is a driver (out = 8, in = 3) in that the stronger it is the more it acts to improve the value created for the national industry of business tourism, its aligned industry of leisure tourism and other national industries. The subsystem variables that compose V11 are outside of the focus of this research.

V12 is the variable that describes the way intangible asset development can improve tangible asset gains. This is outside the scope of this research although the theory has clearly linked the value of knowledge to improved financial performance measured in terms of tangible gains.

5.3 The utility of several philosophical influences in the research approach

The literature review established key concepts, themes and ideas for possible incorporation in the process of business event design. These concepts and themes are interpreted in terms of variables.

5.3.1 The utility of a predominantly positivist approach

Gaining new or confirming existing knowledge about the relationship of business events and organisational performance is tied to recognising and tracking the behaviour of a system of variables and, for ROI purposes, being able to associate actions taken to modify their behaviour with naming organisational key performance indicators.

It can then be argued that a positivist paradigm in the qualitative research design best suits the overall research focus because Myers notes that "positivist researchers typically formulate propositions that portray the subject matter in terms of independent variables, dependent variables and the relationships between them" (Figure 5.3). The research questions and objectives in this research address this.

Authors Myers, Hallebone and Priest argue that typically the conclusion to research based on positivist principles is that there can be a "drawing of inferences about a phenomenon from the sample to the stated population" (Myers, 2009:37; Hallebone & Priest, 2009:93).

A positivist approach suits the exploratory nature of this research study as inferences are draw from existing information to suggest explanations for the situation of the business event and its relationship to organisational performance. In turn this information is used to extend the ROI model testing it further in the action cycle as to its validity in the field.

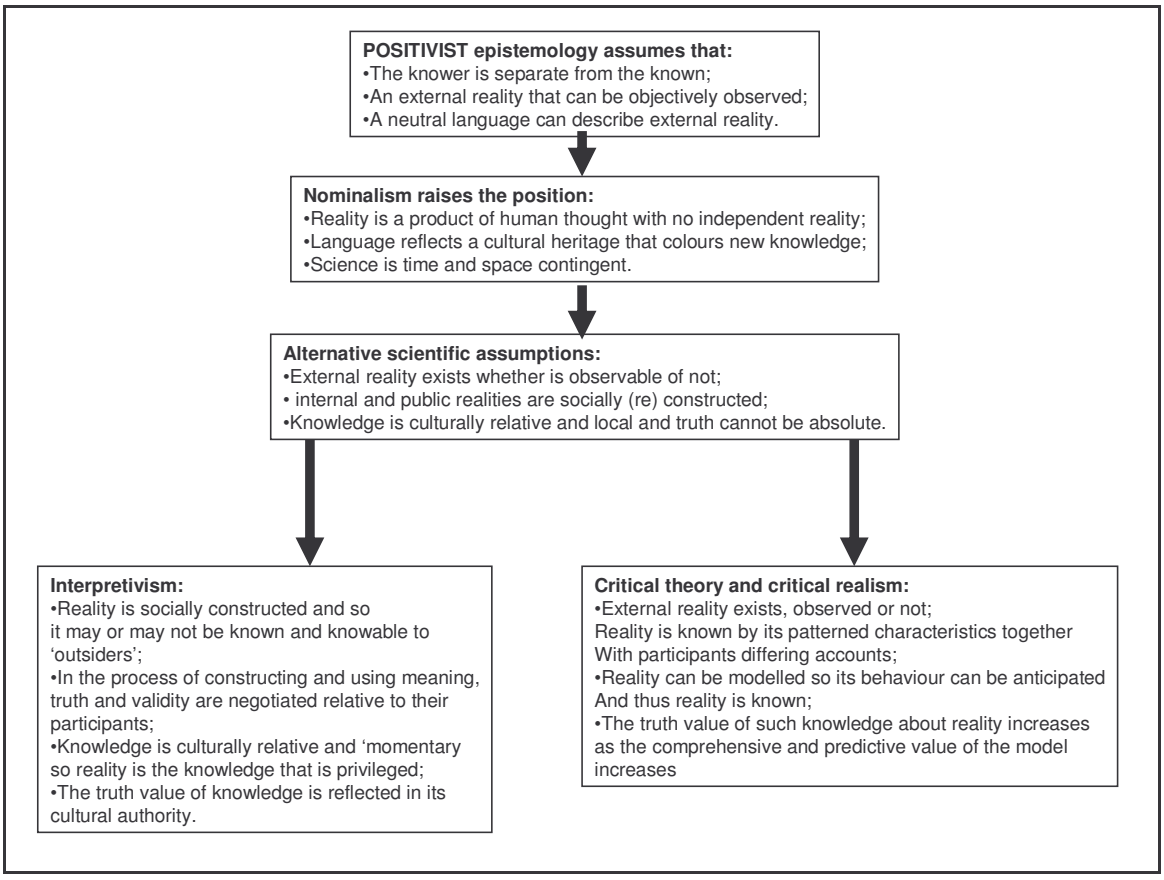


Figure 5.3: Positivism modified by critical realism

Source: Adapted from Hallebone and Priest (2009:172)

In Figure 5.3, the first element of the flowchart shows the argument for positivist approach is that the process is objectively observed. Although the process is subjectively interrogated by asking for users' perceptions of the process value, the business event process outputs are objectively measured in terms of KPI and outputs observed.

That said, the second element of the flowchart, nominalism, confirms that the perception by the users becomes the reality once integrated to the work process. The process is governed then by its behaviour over time including the parameters set by the organisation for its future design and ongoing co-ordination and monitoring in regards to the quality of expected outputs it creates.

The third element of the flowchart confirms that the reality may not be all that is happening as 'observable' in the system. The influence of hidden factors cannot be ignored. At the fourth step, a division comes in the research philosophy adopted. Here, this research follows the path of critical research and realism. This philosophy underpins the importance of recognising the people affected by the work process and is designed to serve in terms of real, repeatable measurables.

5.3.2 The relevance of a critical research approach in moderating positivism

This research seeks to gain an understanding of the "social reality as it is historically constituted and produced and reproduced by people" with regards to the situation of business events and the organisation (Myers, 2009:42; Hallebone & Priest, 2009:171). This is because Lewin's (p, e) relationship model for behavioural change indicates the people (e) affect the process (p) so understanding the typical social interactions that add value in the business event work process is fundamental to understanding how to create value for organisational performance. In the case of business events, the people of the event are active participants and thus what happens at each event is interpreted with individualistic meaning by each (Hallebone & Priest, 2009:171).

The relevance of recognising organisational and business event historical elements that affect the social reality of business event stakeholders leads to better understanding how stakeholder personal realities and perspectives have a role worthy of consideration when planning their concept of value generation from a business event (Myers, 2009:42). This was first referred to in chapter 1 with the CATWOE model application.

An improved understanding of the perspectives of business event stakeholders could be argued to have utility in creating better business events optimised by modifying the unseen influence of the organisation and/or an individual's attitude on the potential organisational value to be generated by an event.

5.3.3 Application of positivist and critical philosophy as a research strategy

The philosophy of the research strategy is summarised in Table 5.1

Table 5.1: The philosophy underpinning the research strategy adopted

Source: Adapted from Hallebone & Priest (2009:92-113)

Positivist with a subtheme of critical theory and realism	**The value of business tourism events in organisational performance**
Research questions scope	The relationship between a business event, the people who attend the event and thus the value arising from the event for future organisational performance.
Philosophy of science	
Ontology How reality is viewed (what is the current reality and what can be understood by it)	Reality is **positivist** being objectively definable in terms of a modifying an ROI model that guides event design thus event quality and extending the existing body of knowledge**.** This reality is influenced by the perspective of the humans in the situation. However, the research inquiry is underpinned by action theory which seeks to establish and prove causal relationships to underpin recommendations (**criticalist**).
Epistemology How knowledge is generated (what is the relationship between the knower and what can be learnt from the process)	Knowledge is **independent** and **objectively** generated producing a set of research questions highlighting gaps in the understanding of the value of, the business event in changing future organisational performance. The research questions are based on specific assumptions/stances taken in existing literature concepts and information. Predominantly, a logical linear process is followed to generate confirmation or refutation of extensions to these stances as proposed by the research questions derived from this theoretical positioning.
Argument structure for logic in the research	**Linear -** the logic provides a linear line of argument with information gathered around the subject used both: **Deductively -** to verify theoretical concepts/themes and extend by deductive reasoning the themes, concepts while addressing gaps (exemplified by the research questions); **Inductively** reason and suggest new creatively found themes and theoretical concepts that are grounded in data about peoples experiences. This reasoning tends to be tentative generalisations (exploratory in nature).

5.3.4 The relevance of the stakeholder stances to the research

The qualitative study leads to the first substantiation and opportunity for extending the framework of knowledge about the business tourism event and organisational

performance relationship. The concept that antecedents are required for effective business event design to influence future organisational performance has been established in the literature review and several antecedents related to themes and concepts of interest are investigated in the quantitative survey. The antecedents provide the first broad interpretation of the behaviour of the variables by preliminary exploration with the open ended questions posed of the interviewees.

Table 5.2: The investigative methodology of the research
Source: Adapted from Hallebone & Priest (2009:92-113)

Investigative Methodology	
Purpose	**Nomothetic:** strategy to explain particular phenomena
Tactic	To use empirical data supported by theoretical data and concepts to answer research questions arising from the concern of this research, "The value of business tourism events to organisational performance". The data will answer the research questions posed and led to the construction of new propositions to add to the body of knowledge and a strategy to change return-on-investment methodology (a process).
Main research methods	Qualitative and quantitative.
Approach and Outcomes	A topology of practice principles that results in a ROI model based on causal links (cause and effects)
Researcher's stance	**Emic:** The researcher explicitly operates as a (quasi) insider with the research sample. From this perspective, the validity of the findings is interpreted by the researcher linking what the participant responses with the academic acknowledge (the literature review). The researcher identifies conceptual variables of interest of the research by considering the respondent's descriptions which are stated in their own specific and idiosyncratic descriptions, explanations and operational insights the **objectively** associating them with academic knowledge that exits.
Interviewee's ontological stance	**Constructivist:** the interviewee's stance is individual and unique based on their own perspective of the reality of the business tourism and organisational performance relationship.

The researcher's own knowledge of business event management or emic stance with regards to business events further affects the flow of the open-ended interview nature of the qualitative survey (Hallebone & Priest, 2009:112). The researcher has her own world knowledge or view of the business event and organisational performance situation (Hallebone & Priest, 2009:198). The researcher's stance is important to recognise because, although the researcher uses secondary and primary data to explain both the current situation of business events and the future desired model for business event evaluation, her experiences will influence her interpretation of the answers of the survey

participants and in making sense of these responses measured against the existing body of knowledge (Table 5.2).

This emic stance is particularly manifested when interpreting the qualitative data where the interviewee responses rest on the skill sets and interpretations of the researcher in identifying themes and sub-themes from the interviews relating to the 12 identified variables of interest within these responses (Hallebone & Priest, 2009:108; Churchill *et al.*, 2010:405).

The results of the qualitative analysis are interpreted from the perspective of the researcher in a manner that "imaginatively and systematically develops an increasingly compact yet comprehensive theoretical understanding of the reported and observed phenomena" (Hallebone & Priest, 2009:119). The researcher is aware of the emic position and tries to maintain objectivity as established from the literature review at all times.

The survey participants have their own stance in that they, too, have personal interpretations of the value of a business event and the value that it lends to their performance in their professional lives and in their organisations (Table 5.2). In their own minds they will have given the purpose of the knowledge presented at an event a value weighted in a constructivist stance by the "cognitive meaning-giving activities of their individual human mind" (Hallebone & Priest, 2009:178). Their stance is important to remember when analysing the survey questions because the literature review has established that the value of knowledge lies, to a great extent, on the influence of the Nonaka SECI model of knowledge reinforced by theories from Lewin, Bandura. These authors highlight that the human cognitive state needs to unfreeze if it is to learn and have the potential for new value, and then refreeze in this new state so that its future value is not lost.

The ways that individuals can be encouraged to unfreeze and reach a new state is integral to improving event design techniques. The research is seeking to understand what

business event stakeholders actually do to obtain value and use value from a business event as opposed to what they say they do and in this manner advance ideas of how the behaviour of specific variables in a business event can be modified to improve organisational performance (Pellissier, 2007:22).

5.4 The utility of multiple perspectives in the primary data capture

The literature review established that business events are about knowledge transfer. The existing literature about how business add value for their attendees, the organisation and the economy in which the latter two exist have been generally concerned with measuring tangible benefits that arise from the business event process. It follows that it is relevant to establish how tangible variables can be influenced in their behaviour in a business event to optimise the value they create. The existing literature on how value from business events is attained by the organisation is limited.

The investigative theory that guides this part of the research is set out in Figure 5.3. as critical theory and critical realism that: “external reality exists, observed or not; reality is known by its patterned characteristics together with participants differing accounts; reality can be modelled so its behaviour can be anticipated and thus reality is known; the truth value of such knowledge about reality increases as the comprehensive and predictive value of the model increases” (Hallebone & Priest, 2009:172).

Thus, for the qualitative survey the ontology of the interviewees of this situation under review (business events) is going to be viewed from their reality which is that is of constructionist philosophy. This means that the survey gathers information “relative to the participant’s explicit and enacted experience and consequently as socially constructed by, and relative to different humans” (Hallebone & Priest, 2009:113). This is an important statement as this primary data provides a way forward to interpret, review and extend what is already known about the business event situation from the more positivist approach of the themes, concepts and variables originating from the literature review before designing the quantitative survey.

As shown in Figure 5.2, the purpose of 'the action research process' model is the value generated by repeatedly gathering the participants' perspectives in establishing the actual situation of a business event and organisational performance - the true value of "such knowledge about reality increases as the comprehensive and predictive value of the model increases".

The process of knowledge transfer via a business event is shown in the literature review to be a complexity of many sub-systems in which each is responsible for generating value for the organisation. It follows that it is important to gain the perspectives of different types of people involved in the business event process if the current situation of knowledge transfer is to be better understood (Myers, 2009:10). Seeking these multiple perspectives on the relationship of business events and organisational performance reduces the bias introduced if only the perspective of one type of stakeholder is used.

The variety of perspectives gathered in the qualitative interviews and quantitative survey is shown in Figure 5.4 and includes people who have attended a business event: HR practitioners, IT practitioners, marketing practitioners, business event organisers, academics and others who attend business events. The organisational areas of interest with regards the organisation and business events are: the influences of an organisation's leadership and management: the function of human resources; the use of technology as a knowledge flow-on aid; the relationship between the image of a business event and organisational intangible value; employees who attend business events to gain knowledge; and the business event organisers. The literature review identified the variables of interest in each and this research seeks to understand the behaviour of these variables in the situation of a business event from the perspective of these organisational areas.

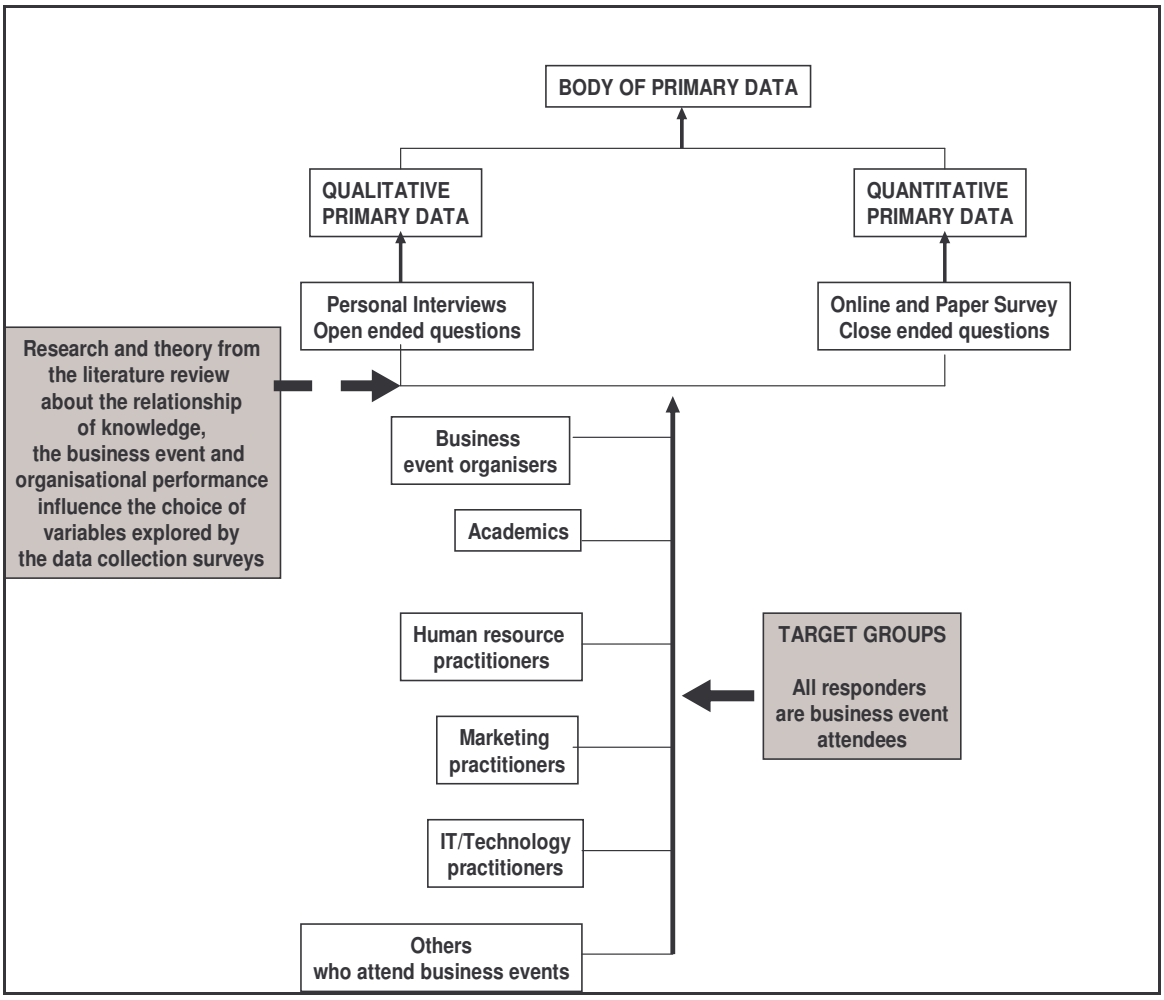


Figure 5.4: The data collection methodology

Source: Author's own compliation (2011)

5.5 The qualitative survey instrument

The primary objective of this thesis is to explore the role that a business event plays in organisational performance by examining the work process that the business event represents.

This situation is now viewed against a background and exploratory understanding established from the secondary data reviewed. Consequently, the purpose of the qualitative research is to gain a deeper understanding of this fit of the 'actual' situation

against that of the 'reviewed or anticipated' situation from the perspectives of key stakeholders. These qualitative interviews represent the perceptions of people who are involved in the process of the business event and organisational knowledge acquisition and knowledge embedding.

The qualitative study provides an initial examination of the relationships of both the organisation and its knowledge processes and the organisation and its view of the usefulness of business events. The survey sought to gain an understanding of how and why business events are used by organisations and the value placed on new knowledge by individuals attending and their organisations.

5.5.1 Interpreting the value of knowledge in organisationally complex systems

The system of the value created by business events for organisational performance has been clearly shown as complex with many variables acting in the relationship. To interpret the complexity, both a qualitative and quantitative survey were undertaken to generate data to be interpreted to influence a change in the methodlogy of the implementation of the Kirkpatrick-Phillips ROI model to follow a template more in line with supporting overall organisational knowledge strategic intent as respresented by the Kaplan and Norton balanced scorecard model. The theoretical changes would then have a field test using the action research process (Figure 5.2). The overall purpose of this exercise is to guide conceptual development of an improved organisational ROI management process that helps in use of the business event in a predefined manner to help maximise the opportunity to create improved organisational performance.

Step 1 of the model is the "diagnostic stage - a collaborative analysis of the social situation by researcher and subjects of the research" based on having identified the problem through the literature review and now involving those who 'own' the problem to be involved. The outcome is, firstly, a therapeutic stage (Figure 5.2, step 2) which is actual evidence qualifying the need for a change to the existing process and, secondly, a changed process - in this case, a hypothetical ROI template.

The qualitative data collection research stage relies on gaining an exploratory understanding of the degree of involvement and influence of the 12 major variables identified from chapters 2, 3 and 4 that have been linked to the overarching four critical concepts of this research (Appendix 1). This phase of the research relies on inductive logic because the output of the interviews helps gain an insight to the variables actual behaviour compared to what is expected from the literature review. The emic stance of the data reviewer comes into play here as the sampling process is purposeful in that this researcher used her knowledge of business and of event organisers together with the readings from the literature review to select a sample of eight of each of these two categories.

The argument for selecting two types of event organisers is that one type is qualified in terms of event organisation (stakeholders 1, 2, 4, 6, 8) while the other is not (stakeholders 3, 5, 7).

The argument for selecting four HR practitioners is their influence on knowledge suggested by the literature review which appears pivotal in knowledge generation.

The argument for selecting two IT practitioners is this function builds many of the connections through which information flows in a modern organisation and many types of virtual business events are supported by IT.

The argument for two marketing practitioners is that the event always has a brand value whether to internal organisational customers (employees) or external customers.

The argument for including two academics is that their business produces solely the product of knowledge so they make have a unique perspective of the business event.

The stakeholders are described in Tables 5.3 a, b, c, d, and e.

Table 5.3a: The event organiser stakeholder profiles

Source: Author's own compilation (2011)

STAKEHOLDER	ROLE IN INDUSTRY
EVENT ORGANISERS	
STAKEHOLDER 1 Business events professional organiser	Holder of a business tourism designation - **postgraduate diploma in management practice, events**. The diploma is attainable by course work. Additionally the stakeholder is an experienced exhibition organiser.
STAKEHOLDER 2 Business events professional organiser	Holder of a business tourism designation – **Certified Meeting Professional** (CMP) www.conventionindustry.org/CMP/CMPcandidates.aspx. The CMP is attainable by recognition of prior learning and experience and examination. Additionally the stakeholder is an experienced meetings planner.
STAKEHOLDER 3 Business events non-professional organiser Representative on the board of a business association	**Association manager** for the **Johannesburg Chamber of Commerce and Industry** www.jcci.co.za .Additionally the events manager of several smaller: direct marketing and engineering associations. This manager has no professional events organisation designations but co-ordinates business events considered of value to their association members.
STAKEHOLDER 4 CEO of the largest global business event professional association	**President of Meeting Professionals International** www.mpiweb.org . An international association of 24000 members who are both providers of business tourism events and business tourism event suppliers. The association is not legally bound to maintain continued professional development although it offers many CPD activities and a number of globally recognised designations. Additionally the stakeholder is a chartered accountant. The stakeholder is not an events organiser but a business expert who was on the Vancouver 2006 winter Olympic event management team.
STAKEHOLDER 5 Business events non professional organiser Informal business network	The **Alumni Relationship Manager for the University of Cape Town (UCT) Graduate School of Business**. An informal network/community of practice of UCT graduates of the Masters of Business Administration (MBA) alumni. The stakeholder is not a professional events organiser.
STAKEHOLDER 6 A professional trainer but a non-professional event organiser who holds training events	The stakeholder is **a director of a professional training organisation** for information technology software and hardware courses www.xpert.co.za . In particular this organisation supplies project managers to industries.
STAKEHOLDER 7 The event manager of an association for business directors and others with no formal CPD basis.	The stakeholder is the **member relationship manager for South African The Institute of Directors.** This stakeholder organises events but is not qualified as a professional event manager. The association members do not attain CPD points by being a member of this association.
STAKEHOLDER 8 The CEO of a professional association with a CPD database	The CEO of the **Association of South African Travel Agents** (ASATA). A professional association www.asata.co.za . This CEO does not organise events but is responsible for the CPD programme integrity. The association holds many events and a large proportion of the events are designed to support the continued professional development of their members. Some of these events are to fulfil legislative requirements to practice their profession. In addition this association maintains a database of professional continued development attained for each member.

The qualitative results are used to guide the survey design in the next quantitative phase of the research (Hallebone & Priest, 2009:185). The quantitative data is analysed and contribute together with the qualitative findings to a modified ROI methodology for the next action stage of the iterative action research process (Figure 5.2).

The qualitative type interviews sought information primarily gathered "directly and purposefully" to answer specific research questions (Hair *et al.,* 2007:118; Myers, 2009:122). The qualitative process was designed to interview 18 key stakeholders who have a relationship with business events.

The role of each stakeholder in their industry and their organisational title or position is shown in Tables 5.3 a, b, c, d, and e.

The stakeholders interviewed represent the following elements of organisational work-systems: The human resource function; the business event organiser function; the marketing function; the role of networks and associations in a continued professional development function; and the information technology function that acts to enhance knowledge flow.

The researcher assumed that interviewees have reasons for attendance at a business event typified by two needs. Firstly, using a business event to gain knowledge for their organisation at a higher recursive level of the value chain as the knowledge need is organisationally driven. In this scenario, their objective is to gain new knowledge and ultimately to share it within the organisation to improve their own work performance and organisational performance. Secondly, by using a business event in a personal capacity to advance personal continued professional development or personal knowledge. The latter has been shown in chapter 3 as occurring at a lower level of recursion in the organisational value generating system i.e. the CPD value is aligned to the individual employee and may or may not contribute value to the next, higher system level, that of the organisation. In this scenario, the value of the new knowledge may or may not be shared to improve organisational performance.

Table 5.3b: The marketing practitioner stakeholder profiles

Source: Author's own compilation (2011)

STAKEHOLDER	ROLE IN INDUSTRY
MARKETERS	
STAKEHOLDER 9 A CEO of a marketing association which is currently setting up professional marketer accreditation processes	An executive director of the **Marketing Association of South Africa** www.marketingsa.co.za . The association members are marketers aspiring to follow best practice and fulfil all legal onus placed upon them Additionally the stakeholder is a chartered secretary. The stakeholder is a non professional event organiser. The stakeholder is not a marketer.
STAKEHOLDER 10 A marketing professional and a director of a face-to-face and a virtual marketing association	A marketing professional with international designation accreditation. A director of the **Institute of Interactive and Direct Marketing South Africa**, a branch of the Direct Marketing Association of South Africa.

Table 5.3c: The human resource practitioner stakeholder profiles

Source: Author's own compilation (2011)

STAKEHOLDER	ROLE IN INDUSTRY
HUMAN RESOURCES	
STAKEHOLDER 11 A human resource practitioner	The **sales line manager** of **Paracon** recruitment services, South Africa. The organisation interprets organisation's staffing needs in information technology and provides contract and full time staff. The organisation has a training division for contractors.
STAKEHOLDER 12 A human resources practitioner	The **sales director** of **Paracon** recruitment services, South Africa. The organisation interprets organisation's staffing needs in information technology and provides contract and full time staff. The organisation has a training division for contractors.
STAKEHOLDER 13 A human resources Practitioner and a Director of a virtual human resources network	An **executive director and founder of a Human Capital** website, www.humancapital.org.za .Additionally the stakeholder is both an Organisational & Industrial Psychologist with the Health Professions Council of South Africa (HPCSA) and as a Chartered Human Resource (CHR) Practitioner with the South African Board for Personnel Practice (SABPP).
STAKEHOLDER 14 The Canadian national tourism human resource strategic planning manager	The **senior vice-president** of the **Canadian Tourism and Hospitality Research Council (CTHRC)**. Additional: A 2009, 2010 and 2011 funder of a global initiative led by Canada to create a globally recognised event manager designation. The designation is attainable by recognition of prior learning, experience and an examination. This stakeholder is in charge of programmes to create and maintain Canadian tourism qualifications and designations that require CPD. This designation has subsequently been adapted in 2011 by MPI specifically as a business event professional global designation.

Table 5.3d: The information technology practitioner stakeholder profiles

Source: Author's own compilation (2011)

STAKEHOLDER	ROLE IN INDUSTRY
TECHNOLOGY	
STAKEHOLDER 15 An IT practitioner	**The manager of Distributed Computing, Information systems and Technology,** of the **city of Cape Town municipality**.
STAKEHOLDER 16 IT practitioner	The **Business Relationship Development and Business Applications manager** of the **city of Cape Town municipality**.

Table 5.3e: The academic practitioner stakeholder profiles

Source: Author's own compilation (2011)

STAKEHOLDER	ROLE IN INDUSTRY
ACADEMIA	
STAKEHOLDER 17 Academic	**The academic manager of a not-for-profit community and government training organisation, Tanzania.**
STAKEHOLDER 18 Academic	**A researcher for a leading tobacco company at the University of Kentucky, U.S.A.**

The relevance of the investigating the two conditions for attendance is that the relationship of the two situations seems often dynamically related in the literature review and this has suggested that low levels of knowledge sharing activities at business events and in organisations leads to low levels of knowledge flow so even if the knowledge exists it is not as useful as it could be with designed business event interventions to share. The literature review has indicated that high levels of knowledge sharing and receiving activities are the optimal conditions for knowledge flow.

5.5.2 The value of an open-ended question survey

As there is little existing research specifically addressing the value of the process of business events in organisational performance, using closed-ended questions with a limited number of responses might have limited the richness and insight of the answers given and so was not used (Hair *et al.,* 2007:266). Instead, semi-structured questions were selected to prompt the interviewee but also give them rein to give unrestricted answers

that used their own words to describe what they felt and saw. These questions support the exploratory nature of the research where not much is known about the business event-organisational relationship so the question format should not restrict answer content in any way (Hair *et al.,* 2007:265; Churchill *et al.,* 2010:405). Use of semi-structured questions also leads to a richer and more spontaneous interviewee interpretation of what they feel is being discussed thus the cause and effect of dependent and independent variable relationships in the context of the discussion begins to surface from the interviewee's subconscious mind (Rubin, 2010:23). This can bring forth some interesting and unexpected detail.

Although the discussion was free-form in nature, the researcher sought to introduce distinctive characteristics of the relationship of knowledge transfer, business events and organisational value during the discussion. These were being sought throughout the interview process and needed to be integrated where possible and appropriate to the interview by the researcher's questioning technique and the pre-existing knowledge of the context known by the researcher (from the literature review) to draw out the interviewee's opinions of these characteristics (Rubin, 2010:114). This methodology gives the researcher a better understanding of the concern situation from different types of business event stakeholder perspectives than would be obtained by using closed-ended questions which allow only a limited number of answers (Hair *et al.,* 2007:154; Churchill *et al.,* 2010:403).

5.5.2.1 The qualitative interview process

These interviews took place over a period of three months from late November 2010 to early March 2011 and so apply to a specific time and place in the current situation of business events and organisational performance (Hair *et al.,* 2007:156).

The stakeholder job specification has a possible influence in the business event design and return-on-investment process, so is stated to provide the researcher with a situational awareness of the type of person being interviewed. Each stakeholder has their own

constructivist expectation of the range of benefits accruing from a business event, or how they personally interface with a business event. The stakeholders were chosen by the researcher to be representative of groups of individuals of interest who would be examples of the same target groups included in the quantitative analysis. The 18 interviewees of the qualitative survey are all senior staff with considerable work experience and who regularly attend both informal and formal business events. Senior staff was selected to give a perspective based on several years of experience of aspects such as online meetings, face-to-face meetings, CPD, and the value of business events. The number of 18 was initially arbitrarily chosen by the researcher to be sufficient but during the interviews it became apparent that many generic themes within each of the two groups came up again and again suggesting that 18 was, in fact, enough to argue as, although exploratory, to represent consistently held views about this situation.

The initial contact was made by a brief telephone call to establish willingness to participate in the survey followed, after agreement to participate, by an email which introduced each interviewee to three to six concepts of interest developed by the researcher from the conceptual framework of the literature review (Hair *et al.*, 2007:153; Hallebone & Priest 2009:107). An example of the type of introductory email sent to each of the qualitative survey participants is shown in Appendix 4.

The email responses were followed up by a further live interview one-on-one (interviewee and researcher) wherever possible. Each interview was taped, transcribed to a Microsoft Word™ document by the researcher and sent back to the interviewee to be signed off as a correct representation of their perspective. The emic stance of the data reviewer comes into play here as the literature reviewed in chapter 2 (Section 2.10, experiential learning) had suggested that the unfreeze behaviour which is linked to a degree of motivation to do something (in this case to participate in the survey) could be enhanced by interventions that gradually engage the cognitive processes of the interviewee to the task at hand (the survey). The gaps between first phone call, first email, one-on-one interview and finally transcription and sign-off gave time for the interviewee to explore their own tacit thoughts about business events and organisational

performance. Interviewees were encouraged by the researcher to add thoughts and the survey process steps hoped to drive the articulation of tacit to explicit sharing of thoughts (Figure 2.13, SECI model).

The researcher used the literature review background to interpret the phenomenology of the "lived experience" of the business event and its implications for each interviewee's own workplace performance and for their contributions to future organisational performance (Laverty, 2003:4). While the overall epistemological stance of this research is positivist in that business events and organisational performance can be described in a normative process, it was clearly understood from the paucity of secondary data about business events and organisational performance that it was likely that interviewees would be more or less informed on this situation, thus the survey methodology hoped to prompt the surfacing of tacit experiences and perceptions (Laverty, 2003:13).

The introductory email asked the interviewee to consider three variable relationships at play in a business event such as those described below. The business event environment was described in the email to be virtual or face-to-face or both so as not to limit an interviewee as to the business event experiences they describe to the researcher. The relationships introduced for consideration by email were:

1) The relationship between organisations wanting employees to be up to date with latest trends and skills and improving the organisation's chances of gaining competitive advantage over similar others?

The relevance of asking this question is that chapters 2 and 3 have shown that the human resource or human capital component of an organisation is the intangible resource from which firstly creative and then innovation arises. These lead to competitive advantage and this affects the ability of the organisation to outperform competitors. It is the only way such an asset can be created for the organisation. The argument for asking this question follows in that there is a relationship between being up to date with skills and trends and improved organisational performance (Section 2.4.2 - creating competitive advantage and

Section 4.3.1 - modelling for a healthy, viable performance). Variable 2, the degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities and Variable 7, the degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy have relevance here and the interviewee answers will help better understand the behaviour of these variables. The information held by individuals is uncodified but could be transferred, and thus its value realised, into organisational processes and procedures (codified) (cf. Figure 4.1 – competitive advantage).

This question also serves to begin to gather information on what, in the opinion of the interviewee, creates a good business event at which new information for requisite decision making variety can be gathered contributing to RQ2: What variables influence the business event attendee experience at a business event?

2) The demand by employees for access to continued professional development (CPD) and the value of CPD business events run by a community of practice /association?

The second question is based on chapter 3, which investigates what is known about the organisation's employee in terms of motivation and willingness to share personal knowledge with the organisation. Causal loops of this relationship have been theoretically proposed in Figure 3.4, the causal loop for knowledge from an event and the event attendee, Figure 3.10, the relationship between employee knowledge and the organisation and Figure 3.2, Vroom's statement of an individual's [job] performance value. Additionally, chapter 3 explores functions such as Figure 3.2 stating Vroom's function of an individual's [job] performance value based on both their degree of motivation and the ability to perform in the job.

A number of factors such as silo mentality and fearful managers have been shown to inhibit the creation of a learning organisation (cf. Section 2.9.2 - the scenario planning

workshop) and, in turn, affect the level of an individual's motivation in the workplace while HR is thought to be highly influential in creating the learning organisation (cf. Section 1.3.2 employee knowledge over time; cf. Section 3.4.3, human resource contributions to a learning organisation). This question opens discussion to gather information to answer RQ1: How do an organisation's staff members affect the design of a business event?

3) The role for a human resources (HR) or a knowledge officer (manager) to play in developing employees through business events in order that they have the requisite variety of knowledge to help in improving the possibility of gaining competitive advantage for an organisation?

The relevance of question (3) is to establish who and how the strategy for business event design aligns to that of organisational strategic intent. The literature review has noted that meeting formats, for example the syntergration meetings in section 2.9.1, and the tiger meetings in sections 2.8.1.3 and 3.2.1, can drive the positive value derived from such business events but it is not clear to what extent most business events use the organisation's overall goals to guide each event's content and design when seeking to create a requisite variety of information on which to base future decisions (cf. Figure 2.8, causal loops of variables of the relationship between an organisation's mission, strategic intent and a business event design). This question also served to begin to gather information on RQ3: What actions in business event design methodology help in creating event designs as a strategy map for knowledge that support the overall strategic goals of an organisation?

The interviewee was not required to give a response to these three relationship aspects of organisations and business tourism events although most interviewees did. The relationships defined in any of the questions set to the interviewees served only to stimulate personal thought around continued professional development, business events, communities of practice, and the role that human resources or a knowledge officer/management play in organisational knowledge generation. As the interviews were

open-ended, each unique respondent was at liberty to add any detail related to their personal business event-organisational performance experience.

The email questions and any responses received formed the basis of the unstructured discussion in the follow-up telephonic interview. The telephonic interviews lasted twenty-five to forty minutes and were taped with the interviewee's agreement. The tapes were transcribed verbatim by the researcher. Both email response and telephone discussion created a single document that was sent to each interviewee to amend and sign-off as a fair representation of their email and telephone responses. The final transcripts are available in Appendix 4.

The written transcriptions allowed the researcher the opportunity to conduct a thorough post-survey review of the primary data created by each interview. This is an important part of the survey process as the literature review has already revealed that there is a particular difficulty in understanding which intangible variables are at play in the context of the business event so the influence of the survey respondents on defining the causal relationships in helping to uncover more about the variables of interest came into play. The literature review findings were also the basis for the researcher to understand the different perspectives of the interviewee groupings to the same concept and variables introduced to the discussions by the researcher.

Some of the responses returned by the recipients both from the email and the interview were unexpected as is typical in open-ended questioning (Pellissier, 2007:24; Churchill *et al.,* 2010:405). This may be due not only to the spontaneous discourse manner of the interview process thus introducing concepts that were not part of the qualitative scope of research but also because research in the field of business events is currently limited so there is little past research on which to base an expected range of responses. Thus the researcher's concepts themselves may have been limited in scope. Each interviewee would have broadened the researcher's scope with a set of personal constructs about the business event – organisational performance situation.

5.5.2.2 Analysing the qualitative survey responses

Open-ended questions need more time spent after the survey to analyse, as the answers follow no specific set of responses. Additionally, the interviewee's responses may introduce a new variety of themes over and above those expected (Hair *et al.,* 2007:266; Myers, 2009:110; Churchill *et al.,* 2010:405). The interviews varied from very long to relatively short. To analyse the open-ended questions, the transcribed interviews were initially divided into direct quotes that typified specific themes and sub-themes within the 12 variables (Churchill *et al.,* 2010:405).

In this way, the primary data was distilled to a more manageable quantity by reflecting on characteristics, qualities through the 12 variables deemed specific to the four research concepts and supportive of answering the three research questions (Hallebone & Priest, 2009:109; Myers, 2009:110). To do this, the Atlas.ti version 6.2 software (2011) was used. Atlas.ti v6.2 is a qualitative analysis tool that helps with management of primary data such as interview transcripts. The quotations of interviewees were reviewed to see where their comments lent support for each of the 12 variables, or showed where the variable strength was diminished by actions of individuals or the organisation. The results of the distillation are presented in Appendix 5.

In carrying out this distillation, it was possible to confirm that specific themes from the existing body of knowledge had validity and, in addition, to identify new themes introduced by interviewees that were not previously considered by the secondary sources. With regards to interpreting the collected data, as discussed earlier, the process of inductive (inducing from existing knowledge) and abductive reasoning (proposing new concepts based on valid information arising from inter-disciplinary information) is used by the researcher to suggest theoretical explanations as to what gives rise to a particular interviewee's concept of the situation.

Each of the 18 transcripts has quotes selected by the researcher as apparently representing support for or against the 12 variables. In many cases, an individual quote supported more than one reference to one of the 12 variables in Appendix 5a is shown below:

Stakeholder 2 - Business events professional organiser - 13:3 [A further philosophy of CMP is...] (31:31)
Codes: [V1] [V2] [V5] [V9]
A further philosophy of CMP is that a gathering of people is not an end in itself. In every instance - within the CMP process, a gathering - no matter what capacity or type has the conceptual ingredients, at the very outset, for the next step in the message retention process.

Variables V1, V2, V5 and V9 all have relevance in this quote. This is not unexpected due to the assumption that the variables are acting in a complex system of many inter-relationships as shown in the Figure 4.12.

The ID diagram has shown all 12 variables acting in the manner that would be preferred to optimise outcomes of the business evnt – organisational perfroamnce situation. In the hyportheical systemof the ID diagram that interprets the literature findings, the drivers are preferred (best case scenario) drivers, the outcomes are preferred outcomes. To gain a feeling for the strength of these variables from the interviews each variable was seen as either reinforcing (exhibiting the preferred behaviour) and thus positive or being inhibited in exhibiting the preferred behaviour, thus negative. Each variable that follows has positive and negative strengths and this helps with the analysis of what is happening.

A précis of quotes and perceptions from the 18 interviewiees aligned to the 12 variables is given in the next section.

5.5.2.3 Interpretations of the qualitative findings

a. Appendix 5.1a: V1 positive - the intensity of support from an organisation for business events as a strategic tool in an organisation‘s knowledge replenishment strategy.

Atlas.ti v6.2 collation of this variable for all transcripts states: 43 quotation(s) for V1 theme**.**

All respondents for this variable showed support for the concept of a business event as a tool for overall organisational knowledge replenishment. Two, however, in appendix 5.1b, having shown support for the concept specifically stated reservations about whether this relationship is actually acknowledged by organisations.

b. Appendix 5.2a: V2 positive - the degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities.

Atlas.ti v6.2 collation of this variable for all transcripts states: 74 quotation(s) for V2 theme.

All respondents felt strongly that the purpose of attending a business event to improve the organisation's future was important, but only the City of Cape Town had a policy or standard process that ensured this. The other respondents created personal initiatives to try and share information they received from a business event but this was not standardised by an organisational policy.

There was a wide range of opinions of the value created from a business event (all positive) that varied from brand exposure to networking, the value of supplier, competitor, customer relationships, and innovation and creativity opportunities. These views are corroborated by the secondary data findings. All the respondents began in this distillation to state the importance of social interactions, and for face-to-face meetings, for delivering value from business events for organisational strategic intent. Many carried out informal post-business event knowledge sharing after the event, when back at the office. Again there was no formal structure as to with whom this sharing occurred and appears to have been mainly with the most intimate immediate work colleagues in their department and sometimes the managers above themselves.

The link between human capital development through business events and knowledge that helps the organisation perform better was very apparent to them but none were

particularly clear on how this happened and none mentioned a formalised knowledge strategy except for City of Cape Town. In appendix 5.2b several quotes alluded specifically to the fact that HR had nothing to do with the business events so the secondary data suggestion that HR activities are critical in guiding the alignment of the development of employees through business events to attaining overall strategic objectives is not seen.

c. Appendix 5.3a: V3 positive - the level of support for an organisational policy on human capital management (HCM as an intangible asset) that directs the embedding of knowledge into an organisation

Atlas.ti v6.2 collation of this variable for all transcripts states: 27 quotation(s) for 1 theme.

The stakeholders, particularly the City of Cape Town stakeholders 15 and 16, and the Xpert trainer (stakeholder 6) who specialises in project management training, espoused the use of documentation of new information into organisational processes, and for sharing through informal meetings post-business event to gain more value from the actual business event. The Tanzanian academic (stakeholder 17) noted that the workshops were the only place that people had time for dialogue and were essential in any pro-active organisational strategy planning process. Stakeholder 18, the USA based academic, noted that, in her research field, presentations and papers presented at conferences add to the existing body of knowledge of all participants. The papers and presentations are retained in the research repository.

In appendix 5.3b responses referred to the risk involved when organisations do not take steps to ensure the new knowledge is captured post-event (HR Paracon line manager stakeholder 11). This was the first and only time that a stakeholder mentioned how risk to an organisation's future performance becomes escalated when a knowledge embedding strategy is not followed.

This stakeholder also drew attention to the silo effect of attendees not wanting to share knowledge to make themselves more unique. Xpert trainer (stakeholder 6) noted correspondingly that an inhibitor to the post-event value of new knowledge is the degree to which the individual business attendee is motivated to take new knowledge onboard and then share or use it for the organisation. Stakeholders 13 (HCI HR practitioner) and stakeholder 17 (Tanzanian academic) noted there is often a gap from top management and leaders in understanding there was a need for post-event embedding. This lack of policy from managers and leaders seems to indicate post-event embedding is not a general policy.

d. Appendix 5.4a: V4 positive - the degree to which the business event is uniquely designed and then monitored over long periods to deliver specific tangible and intangible outcomes.

Atlas.ti v6.2 collation of this variable for all transcripts states: 39 quotation(s) for 1 theme.

Pre-event objectives for business event attendance seem not to be set as a rule with only the City of Cape Town and Paracon sales director (stakeholder 12) mentioning a purpose and outcome for attendance defined to the attendee, pre-event. The value of social interaction at the event was shown as important and relevant to the amount of new knowledge that would be gained so social interaction opportunity at a business event is important (Stakeholder 4, MPI CEO; Paracon HR sales line manager).

Stakeholders 1 and 2 (both professional events organisers) noted that meetings, trade shows and exhibitions allow the organisation direct contact with potential and present customers, suppliers and competitors and great value is gained from social interaction. Stakeholder 2 also stated that being face-to-face is seen as invaluable by organisations. These perceptions suggest that social interaction at business events is a driver for the amount of knowledge gained so elements that encourage social interaction should be considered by event organisers in the event design process.

The degree to which the event design begins before the day of the business event to motivate attendees or make them aware of the objectives of attendance would ensure the motivation for behavioural unfreezing begins by consciously thinking about the business event before attendance.

Stakeholders 10 and 12 responses in Appendix 5.4b indicate that CFOs (chief financial officers) keep a tight control on expenditure for business events. The potential for creating intangible outcomes that are drivers linked to improved, future tangible outcomes as seen in chapters 2 and 3 seems not to be considered by the CFOs. HR practitioners 13 and 14 note that HR has little influence in ensuring intangible outcomes (skills, learning, human capital development). CTHRC HR practitioner notes that in his experience with Canadian business very little of the social interaction happening at business events is actively linked back to management of opportunity for changed behaviour and improved organisational performance in the workplace. Stakeholder 6 (Xpert trainer) notes that HR input has been absent for some time in the outcomes of business events and further notes that the ROI value of an event has to be measured if it is to qualify the cost.

e. Appendix 5.5a: V5 positive - the degree to which the organisation has a policy (informal and formal internal meetings etc) for social interaction giving an opportunity for creativity leading to innovation from employees.

Atlas.ti v6.2 collation of this variable for all transcripts states: 33 quotation(s) for V5 theme.

Overall, the stakeholders felt that social interactions at business events are essential to future organisational performance and are definitely linked to future creativity and innovation. Again, the City of Cape Town (stakeholders 15 and 16) is seen to actively encourage social interaction in the workplace (informal) and at business events (formal) specifically to extend the value gained from the event. These stakeholders indicate they

are well aware that doing this during the event and post-event extends the value attained from any business event.

In appendix 5b, several stakeholders draw attention to the fact that the knowledge value to be gained is highly dependent on who is at the business event. They note that experts have to be respected specialists in their field to offer real knowledge benefits. They also note that the people who attend must be competent to effect networking opportunities. Stakeholder (15) noted the presence of senior staff can sometimes inhibit the free flow of ideas between more junior staff.

Only the City of Cape Town has distinctively recognised the value of social interactions.

f. Appendix 5.6a: V6 positive - the degree to which an employee can be motivated to undergo change for improved work performance.

Atlas.ti v6.2 collation of this variable for all transcripts states: 24 quotation(s) for V6 theme.

Stakeholders 15 and 16 (City of Cape Town) have noticed that some employees are definitely better than others at sharing new knowledge and actively use these individuals to spread new information. These individuals were self-motivated to share and this confirms findings of the literature. Several stakeholders thought that attending business events could lead to staff loyalty and, as such, events could be a motivator for improved staff loyalty. Stakeholders noted that motivation was tied to the value employees themselves saw in attending – for instance was the speaker or event content exciting or interesting to them?

In appendix 5.6b it is seen that three stakeholders feel that, generally, little effort is made by the organisation with business event attendees to highlight or harness the employee knowledge by supporting and encouraging networking both inside and outside the organisation for value creation.

g. Appendix 5.7a: V7 positive - the degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy.

Atlas.ti v6.2 collation of this variable for all transcripts states: 60 quotation(s) for V7 theme.

Various aspects of the responses for this variable alluded to actions that HR should take based on the literature review, but in most cases was not involved.

Stakeholder 16 (City of Cape Town) mentioned that the work skills development plan driven by their HR is essential in the organisation's strategic planning. Stakeholders 10 and 16 noted again that some people are better at business event knowledge transfer than others and picking the right person to attend was always a challenge. Stakeholder 9 (MA(SA)) noted most people in his experience were keen to undertake continued professional development but did not mention HR in this context. Several stakeholders noted employees are keen to undertake their own CPD (with no HR intervention) to retain a competitive edge in getting jobs outside of what the organisation provides in the way of training. Paracon sales director (stakeholder 12) noted, however, that training was often not a personal choice of the employee but rather done to fulfil an organisational need and often defined by a manager, not HR.

In appendix 5.7b, several stakeholders noted that HR does not have a role in influencing or aligning CPD to an organisational knowledge strategy. In the 26 negative comments received on this variable in appendix 5.7b, the feeling was generally that while HR interventions into managing CPD through business events and HR's role in choosing the best people to attend business events and aligning all their actions to organisational overall strategy was a nice idea - it was not happening. This is a surprising response considering the literature review felt HR participation in knowledge development for human capital - an intangible asset - was an essential element in ensuring the future performance of an organisation.

h. Appendix 5.8a: V8 positive - the degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries.

Atlas.ti v6.2 collation of this variable for all transcripts states: 29 quotation(s) for V8 theme.

While design templates for business event value creation were not specifically mentioned by stakeholders in the interviews, several stakeholders were already comfortable with extensions to knowledge flow from a main business meeting in the form of sub-meetings (Stakeholder 4 MPI CEO referred to these as "pods"), virtual conferencing and tele-conferencing. They shared their personal experiences showing how they use concepts of business event design that extend the main business event value but do not formalise a template/policy for when these actions are appropriate.

Stakeholder 16 (city of Cape Town) noted that their organisation actively planned "to keep the information flowing" after an event. This stakeholder liked small, focused meetings for the purpose of information spreading because there was opportunity in these small meetings for drilling down further on issues. This stakeholder also noted that specialists would be brought into these small meetings by teleconference as needed. Stakeholder 12 (Paracon HR sales director) noted that he would be comfortable with teleconferencing. Stakeholder 4 (MPI CEO) noted that the organisation SAP held their conference in the USA but used pods with Brazilian and Japanese SAP teams to have side meetings aligned to the USA conference.

Stakeholder 1 (a professional event organiser) felt that 30% of business event budget should go to post-event activities as this post-event phase was so valuable to organisations. Stakeholder 1 also noted that, instead of one annual conference a year, an organisation should have several – one per region annually. It could be reasoned that only a few employees can attend a national conference because of cost but regional conferences make the events more accessible. The stakeholder did not elaborate on how

this would extend organisational value. Stakeholder 6 (Xpert professional trainer) stated that training is a "learning journey" and is ongoing and not a one off intervention. This infers that value chain creation is a continuous process. Stakeholder 17 (Tanzanian academic) had used e-learning to create CPD value and found it very useful for creating new organisational knowledge value. This stakeholder noted that, with donors who pay for business events, there is an understanding that the value of the actual meeting will be reaped for a long period after the actual event because of the work done at the business event. This stakeholder noted that this is part of donor cost/benefit calculations in that the time line of donor events has a very definite post-event phase for measurement of benefits.

Several stakeholders wanted a policy for business event design and indicated why, by highlighting gaps, they saw in the business event current processes. Appendix 5.8b saw stakeholder 11 (Paracon line manager) "wishing" for an organisational post-event policy that made sharing compulsory. Stakeholder 1 (the professional event organiser) felt many organisations wasted their money at exhibitions and trade shows because there was no formal post-event activities. The stakeholder said as much as "80% of leads" were never followed up. Stakeholder 17 (the Tanzanian academic) saw leaders of employees not at all interested in behavioural change from business events or in post-event activities. This latter observation is obviously in contradiction to the donors of business events seen earlier in this section in that the organisations that attend the donor events are not availed of post-event opportunities because of leadership attitudes although the donors themselves believe meetings to have long-term, measureable benefits.

i. Appendix 5.9a: V9 positive - the degree to which the event design optimises the chance for behavioural change based on (p, e).

Atlas.ti v6.2 collation of this variable for all transcripts states: 77 quotation(s) for V9 theme.

Stakeholder 16 (City of Cape Town) felt face-to-face meetings of benefit but the time they took had to be managed so as not to be detrimental to delivering workload requirements. Stakeholder 15 noted that face-to-face meetings allowed for observation of body language and facial expressions, especially where English was a second language. Non-first language English speakers conveyed meanings better through hand movements, facial expressions and drawing. City of Cape Town used meetings to agree policies and processes thus behavioural change happening at meetings created organisational value that became assured through policy and process.

Stakeholder 10 (a marketing professional) felt business events had to be branded to send messages to attendees about the organisation and its value. Branding helped create the picture of the identity of the organisation and thus behavioural change. This marketer felt marketers had to be involved in event design because of this and had to be involved in creating the organisation's overall strategic intent so that they created the right branding messages. This marketer noted that branding acts as a trigger (for the good of the organisation) encouraging many business event participants to acknowledge or use the organisation's products and services.

Stakeholder 13 (HCI HR practitioner) noted that business event content should be chosen to make "light bulbs go off". This indicates content provides opportunity for behavioural change. This same stakeholder saw content causing behavioural change and releasing the potential for creativity and innovation.

Stakeholder 11 (Paracon sales line manager) noted trust was built with people about the Paracon product by discussing things outside of the work environment such as families and leisure pursuits. Trust leads to behavioural change in that the customer relationship was strengthened and the customer more likely to use Paracon services.

Stakeholder 4 (MPI CEO) noted that due to the fast changing external environment in which organisations operate, the need for employee change to keep up with this is paramount. This stakeholder advocated face-to-face meetings as contributing greatly to

behavioural change. Stakeholder 1 (the professional events organiser) saw exhibitions and trade shows as the platform for behavioural change as these events were opportunities to find out more about products and services and make the buy/no-buy decision based on personal experience. Hands on experience with a product changed future behaviour. Stakeholder 3 (non-professional events organiser) noted that people do not put as much emphasis on food at the event as they used to - wanting quick meals - the emphasis suggests the value is from networking and learning.

Stakeholder 6 (Xpert trainer) noted that training had to have a hands-on element for the students to make the lesson stick. This stakeholder noted that venue and food were critical to creating a completely enjoyable learning and memorable (and thus behaviour changing) experience. Stakeholder 17 (Tanzanian academic) noted that venue was critical to success and for focused meetings that created real value participants had to be removed from the workplace demands. Stakeholder 18 (USA academic) noted that small meetings where everyone knew each other were very useful for information sharing which obviously can lead to behavioural changes.

Event design is normally seen as the job of an event organiser, an individual supposedly trained in designing an event that creates opportunity for behavioural change. Stakeholder 10 (marketing practitioner) noted that working with an event organiser can be easy or difficult depending on “chemistry” and from this one assumes the relationship can have an effect on the design. Stakeholder 1 (a professional event organiser) felt most organisations let her guide the event design. Stakeholder 18 (USA academic) worked very successfully with an event organiser but used them predominantly for event-specific tasks such as AV, hotel bookings etc. Stakeholder 4 (MPI CEO) said that event operational logistics had for years been the event organiser’s job but now the organiser needed to be involved in the strategic intent of the meeting.

Appendix 5.9b introduces some interesting understanding (or not) of what behavioural change looks like. Stakeholder 18 (USA academic) did not feel behavioural change arose from sharing information, yet had previously agreed that the meetings were invaluable for

learning. Thus the stakeholder seems to show that there is a lack of understanding of behavioural change from learning leading to workplace change. Stakeholder 15 (City of Cape Town) felt the design of the meeting triggered change in this case specifying event environment – if the meeting was too generalised in content and the employee learning need was specific, the event was a waste of time and nothing would be learnt. Thus there is a relationship between the objective of the meeting and the meeting design if behavioural change is to be a result. Stakeholder 16 (City of Cape Town) noted the presenters' abilities to present as critical to learning attained. Stakeholder 17 (Tanzanian academic) agreed that the presenter skills were critical to behavioural change. This stakeholder said that, generally, there is little pre-event preparation for change as attendees have little access to information related to the event and work before the event.

j. Appendix 5.10a: V10 positive - the degree to which the human resources applies a standardised template for co-ordination and control for all business events to ensure delivery of the organisation's known (mission) and unknown (strategic intent).

Atlas.ti v6.2 collation of this variable for all transcripts states: 33 quotation(s) for V10 theme.

From the evidence to be presented it appears that HR has very little input to organisational strategic intent and certainly does not have a template for business event value management. Both City of Cape Town stakeholders (15 and 16) and Paracon (11 and 12) saw managers taking on what the literature felt were HR tasks such as checking what was needed in the way of training and what was learnt in training. Managers helped solve daily work problems and training related to work, not HR practitioners. Stakeholder 9 (MA(SA)) saw marketers as fairly self regulated as regards to their learning choosing to do their own CPD, again seemingly with no HR intervention. Stakeholder 3 (a non-professional events organiser) also saw many business people choosing their own CPD with no input from their organisation.

Stakeholder 4 (MPI CEO) saw strategic intent as vital to event design but by the use of qualified event organisers not HR practitioners. Stakeholder 17 thought it would be extremely useful if HR did co-ordinate business events with organisational strategic intent but it was not happening at the current time.

Appendix 5.10b shows that managers and personal interventions drive CPD but no mention is made of HR.

k. Appendix 5.11a: V11 - the level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events.

Atlas.ti v6.2 collation of this variable for all transcripts states: 24 quotation(s) for V11 theme.

Stakeholder 13 (HCI HR practitioner) felt strongly that business event quality makes South Africa stand out in global competition for business. Stakeholder 14 (CTHRC) noted the purpose of all CTHRC business events was to make a "competitive and sustainable tourism workforce in Canada". Stakeholder 4 (MPI CEO) noted Brazil and Asia wanted to train to hold better business events to differentiate themselves from competitors. Stakeholder 8 (ASATA CEO) noted that ASATA competes against other associations and their business meetings differentiate them from competitors. Stakeholder 3 (a non-professional events organiser) notes that meetings help spread the word on South African products to other countries. Stakeholder 17 (Tanzanian academic) said the spin-off from meetings for hotels and other leisure support industries was very important to the Tanzanian economy.

Appendix 11b shows that one stakeholder (13 – HCI HR practitioner) felt South Africa should be trying harder for business events that made them more competitive against countries like Singapore and India. Stakeholder 1 (a professional business event

organiser) felt the South African government was not fully aware of the value of business events for the economy because little research had been done in this field.

l. Appendix 5.12a: V12 positive - the degree to which the organisation sees a business event as a work process that adds value in an intangible manner that drives improved tangible outputs in the organisational value chain

Atlas.ti v6.2 collation of this variable for all transcripts states: 41 quotation(s) for V12 theme.

City of Cape Town (stakeholders 15 and 16) very clearly see their business events as part of a bigger value chain for organisational performance. Stakeholder 10 (a marketing practitioner) feels marketing is not included enough in creating the strategic work process path. Stakeholder 9 (MA(SA)) believes HR should be playing a "core" role in delivering strategic intent. Stakeholder 12 (Paracon sales director) felt the CIO (Chief Information Officer) has a critical role to play in delivering strategic intent but did not indicate if CIO input was required for business events or as a tool that ensures organisational communication – the latter being essential for information sharing (email, web-based communication, data in databases for decision making).

Stakeholder 4 (MPI CEO) saw meetings as a platform to deliver training for such functions as HR, marketing and communication and thus delivering strategic intent by creating value from business events with this value adding to overall organisational performance. Stakeholder 4 felt that someone like a "chief connections officer" should be officially responsible in an organisation for overall knowledge strategy co-ordination. Stakeholder 1 (the professional event organiser) repeatedly mentioned the value of business events for future organisational performance but did not mention the requirement for events aligned to the organisation's strategic intent. Stakeholder 6 (XPert trainer) felt project managers should be responsible for delivering aspects of overall strategic intent and this would include conceptualising the need for business events.

In appendix 5.12b several stakeholders feel that individual employees and organisational functions can become uncoupled from organisational strategic intent. Communication seems to have a strong role in maintaining common goals and this is obviously delivered through well designed formal and informal business events.

5.5.2.4 The results of researcher observations

The researcher herself noted several important influences of the variable behaviour as noted by respondents and gaps between respondent experiences and expectation of variable behaviour as expected from the literature review while conducting these interviews.

The first gap was that none of the 18 interviewees indicated that they had experience with a formal organisational policy for knowledge creation and embedding. Business event professional organisers 1, 2 and 6 and particularly 4, the MPI CEO, advocated a knowledge policy implemented via business events but all stated that organisations were not typical in having one. Several stakeholders thought the business event was the physical representation of gathering knowledge not seeing the business event as only one part integrated to a larger system that involved databases, communication tools and communication forums if maximisation of its value was to be obtained. The business event is the tool that adds value to the system in the form of the knowledge but the knowledge still needs more processing after the event and this was not consciously understood by most although implicitly it is understood that business events are important.

The second gap was that all interviewees acknowledged that they undertook business event activities to gain new knowledge (whether at the organisation's behest or for their own CPD) but the concept of embedding knowledge after the initial learning at the business event was not alluded to until introduced to the conversation by the researcher. Knowledge flow actions such as further mini meetings and the opportunity to practice and share extending the event attendee experience into the organisation or extending the

learning arising from CPD was only being influenced as post-event activities by informal interventions of some senior managers. It was not a conscious effort. The City of Cape Town IT section actively pursued embedding informally. Other interviewees such as the Paracon line manager lamented the lack of it and stakeholder 1, a professional business event organiser, thought 30% of event budget should go on post-event activities.

The researcher felt that this was because the interviewees saw a business event as a process for learning but did not typically think of it in an extended, broader form as a work process of the organisation. Work processes need upper and lower limits to be set as an envelope of acceptable behaviour if outputs are to be optimal in value. Actively seeking to control the business event work process through manipulation of actions of the event attendee was not consciously pursued.

As there was general confusion shown by respondents about how organisations managed human capital improvements through organisational policies and strategy related to creating unique business event designs - probably due to the fact that business event ROI is not applied as a guiding principle so is relatively unknown as a process, the researcher decided to treat the following variables as one in creating the quantitative survey questions as follows:

Variable 3 (outcome) – The level of support for an organisational policy on human capital management (HCM as an intangible asset) that directs the embedding of knowledge into an organisation;
Variable 4 (outcome) – The degree to which the business event is uniquely designed and then monitored over long periods to deliver both specific tangible and intangible outcomes;
Variable 8 (outcome) – The degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries.

This variable describes the value chain of human capital development.

The third and most surprising gap that was agreed by both the HR practitioners and all other interviewees is that HR has very little to do with business events and that HR is not consulted when business events are planned, although HR are adamant they should be.

The interviews suggest that line managers and other functional managers influence the development of human capital through business event attendance in that they chose who goes to the event. By abductive reasoning this infers that organisational strategic actions for competitive advantage are acted out through others than HR in the context of seeking the requisite of variety of knowledge to be obtained from business event activities. This also infers that managers are fully aware of individual employee skill needs and gaps and address these gaps to achieve improved organisational performance through choosing appropriate business events. While Kaplan and Norton mention that managers should have the responsibility to run each organisational functional area strategy map included in a balanced scorecard, the literature review had indicated that HR had a considerable role to play in employee development.

In quantitative survey design, a section to ascertain how HR influenced a business event had been included. This section is kept as only this small qualitative sample refuted the role of HR but a new section was added to establish tentatively who was influencing the event if not HR. This was asked both of the event organisers (one group) and all others (second group) as to who they thought was influencing the business event design and who chose those who attended the business event. Establishing whether other organisational functions than HR has a role in employee development through business events was exploratory. While no relationship between business events and HR specifically had been established from the literature review, literature references to general HR activities to maintain the skills capacity of an organisation through training (human capital development) were frequent. The qualitative survey findings suggest otherwise. An objective of the research is to suggest ways to better control a business event process through recommending extensions to the Kirkpatrick-Phillips model and answering the question of whom influences a business event design and who chooses

those that attend a business event could be important extensions (cf. Section 1.4, research objectives).

The fourth important observation by the researcher was that event organisers see business events as a process that they deliver primarily as their work, or reason to be. The work provided income and while the organisers attempted to lesser or greater extents to apply best practice as represented by event organiser professional training, they still delivered what the client wanted. This might, in many cases, have not been what was best for the client in terms of organisational knowledge value creation theory as reviewed. However, this is set against a background where the theory and current research reviewed shows that ROI for intangible asset creation is difficult and does not use tools such as LOKA, QPID and other instruments to help unravel the strategic intent of a business event.

The other interviewees (8), representing functions within organisations who might typically attend a business event, saw the business event as an activity they undertook for the purpose of learning and gaining new knowledge. The strategic intent of their attendance is definitely knowledge creation. The professional event organisers (stakeholders 1, 2, 4 and 6) could all see the argument for an organisational policy and strategy influencing the event design but the feeling was that if the client was not linking the two there wasn't much the event organiser could do.

This observation resulted in two abductive reasoning processes by the researcher. The first was that event organisers want only to deliver a business event that satisfies a client because this is how they earn money – giving the customer what they want. The second was that event organisers and business attendees would view the event in different ways. The only way to narrow the gap between what the event organiser delivered and what the business attendee wanted would be to design the event leading the organisation in its input to the design with questions that made quantitative respondents actively address and assess the link between the event and purposefully planned competitive advantage (organisational strategic intent). The quantitative analysis instrument had to investigate this if recommendations to better manage the Kirkpatrick-Phillips model are to be made

(cf. Section 5.6). As previously stated, the focus of the quantitative research remains in understanding the business event work process, *f* (p, e) specifically in regards to creating opportunity for socialisation.

5.5.2.5 Limitations of the qualitative survey

While the qualitative survey records these stakeholder opinions verbatim and then use of Atlas.ti v6 (2011) distils the raw data to the theoretical framework of variables established in the literature review, the researcher still interprets the meaning of the responses from her own unique point of reference which can create a bias in the manner of raw data interpretation (Myers, 2009:127). However, this researcher's knowledge of the operational business event and the content of the literature review can also positively guide the scope of the primary data collection process as shown by inclusion of a new section to try and establish who is influencing the business event in the quantitative survey and also in acknowledging the difference in perspectives offered of the business event as a work process by event organisers and then all others (Rubin, 2010:11; Churchill *et al.,* 2010:390).

Other limitations of this email and telephone survey technique are: Interviewee body language and facial expressions could not be seen or interpreted as cues to the interviewer to dig deeper in certain topic areas; telephonic time with interviewees was limited or negated by the interviewee workplace demands (the IOD event organiser and the ASATA event organiser were not available even though both they and the researcher tried several times to find a common date); more in-depth conversation may have been curtailed by the fact that this was the first time that a contact had been made between the interviewee and researcher on this subject and there may have been a reticence in disclosing what may have been by inference, controversial opinions about their organisation when offering a personal opinion of the value of business events in organisational performance (Myers, 2009:127; Churchill *et al.,* 2010:381).

5.6 The quantitative survey

5.6.1 The use of two survey formats

These sections present a brief rationale for the design of the quantitative survey to qualify the survey design interms of the analsyis of the raw data planned by using both a review of descriptive statistics and exploratory factor analysis to interpret the findings (Fabriger *et al.,* 1999:295).

The quantitative survey explores firstly the transformation/work process of knowledge creation in terms of who defines and designs various elements of the event design to help define the scope of influence of (e) of Lewin's formula (p, e). Secondly the survey reviews the relationship of HR and business events. Finally the survey reviews (for business event attendees) the role of social interaction at business events to help define the scope of influence of the (p) of Lewin's formula (p, e).

Both surveys shared online features as follows: the unique identification (ID) code of each computer used to complete the survey online was set in SurveyMonkey™ recording criteria to be stored and to be used to block a second entry from this computer ID. This ensures that the number of unique responses collected is verifiable; an example of the individualised email request for survey participation is shown in Appendix 7a; the email request for business attendees to complete the paper survey at an Xpert business meeting is shown in Appendix 7b; the email request to ask respondents to complete the paper survey at Meetings Africa 2012 (a business tourism event) is shown in Appendix 7c; screen shots are shown in Appendix 8 of the Linked-in groups approached and the IT website www.carbonite.co.za; completed paper version were loaded from one computer into the SurveyMonkey™ online form to consolidate all the results.

As the findings are the result of two surveys, there are two sets of questions that share some aspects and are unique to their set in other aspects. There is a set of questions relevant to assessing the role of event organisers in creating a business event experience and a second set of questions posed to business event attendees who are the people who

experience the business event process. There is a final set of questions that both surveyed groups answer. The shared questions were questions about the role of HR in business events and the relationship between organisations and event organisers with regards to how the elements of event design are chosen.

5.6.2 The event organiser quantitative survey design

The format of the survey for event organisers is shown in Appendix 6a and 6b. This survey focused on the event organisers' role as deliverers of a service to the organisation complying with the organisation's requirements as the client. This research stance was taken so as not to pose statements that constituted theoretical best practice as represented by the Kirkpatrick-Phillips methodology that could have led to respondents answering what they thought should be best practice and, as such, reflecting their professionalism as event organisers but not what was actually happening in the field. To this end, the research focused on how the business event work process was implemented. The sample size anticipated is greater than 100 and considered as adequate (Fabriger *et al.*, 1999:283). Costello and Osborne note the following: Current research practice suggests that high subject to research statement/item ratio (>100 respondents: 1 item) helps set a criterion for the required sample size; and an exploratory factor analysis will reflect whether the sample size is adequate with the nature of the data reflecting whether the sample size is strong if there are high communalities with several variables loading on a factor (Costello & Osborne, 2005:4).

The event organiser quantitative survey instrument asked that each respondent agree that they had designed a business event defined as a conference, meeting, seminar, trade show, and exhibition or training session. If they disagreed with this statement the survey was complete as the respondent did not represent a respondent of interest in this survey.

When the event organiser agreed with the statement the survey then asks their age; professional association membership; professional event qualifications; and whether they typically worked for service or manufacturing organisations.

The demographics are followed by a section on who typically chooses the design elements in business event creation. This section is nine statements with an option to select themselves as the event organiser and contributors from inside the organisation in the form of internal organisational functions such as HR, managers other than HR, marketing (this section was also answered by business event attendees); a 5-point Lickert scale section of six statements rating the importance of HR involvement in business event design (this section was also answered by business event attendees); a 5-point Lickert scale section of five statements rating the importance of post-event reporting on objectives and post-event strategy procedures; a Lickert scale section of four statements rating the importance of a tool that helps to define intangible variables in the business event design to an event organiser.

The opportunity for brief open-ended responses is given on two multiple-choice type questions by providing an area for input on selection of the option 'other'. The first 'other' is applied if the respondent wanted to indicate an alternative demographic for their main job function in which they work as their job they felt was not in one of the six given options. The second 'other' is an opportunity to add extra information in a brief manner (120 characters) adding insight to what happens when planning a business event from the perspective of someone inside the organisation.

5.6.3 The business event attendee quantitative survey design

The event attendee survey instrument asked that each respondent agree that they had attended a business event defined as a conference, meeting, seminar, trade show, and exhibition or training session. If the respondent disagreed with this statement the survey was complete as this individual did not represent a respondent of interest in this survey.

When the business attendee agreed with the statement the survey then asks their age; whether they typically worked for service or manufacturing organisations; their function in the organisation (a selection of six functions, five offering functions of human resource, operational management, strategic management, information technology,

academic while the sixth allowed an input as 'other'); who defines the objectives of attending the business event to them. The qualitative survey had indicated that, while business event organisers are responsible for most operational aspects of the event such as AV etc., the managers within the organisation had influence in deciding design elements. This last set of questions sought to investigate this with the larger sample group.

This is followed by a section on who typically chooses the design in business event creation. This section consists of 10 statements with an option to select an internal organisation function such as HR, managers other than HR, marketing, marketing.

Lickert scales are used in this research that intends to understand the reason or perspective of respondents for observed or reflective variables uncovered in the literature review (Diamantopoulos & Winklhofer, 2001:274).

The next section is a 5-point Lickert scale section of six statements rating the importance of HR involvement in business event design. This is to evaluate the value of HR in organisational HCM value creation. This is considered in the work process as an input to the work process as the HR/HRD influence is thought to drive the transformation step of the work process. Feedback from qualitative interviews has suggested that HR influence in adding value through business events to organisational performance, is negligible. This scale has not been used before in the research reviewed but is built with consideration of having an instrument that has content validity and considers the following factors for constructing a research instrument: The six statements represent unique indicators of a proposed latent factor that represents the relationship of HR and HR activities on knowledge creation from a business event. Every statement represents a distinct factor reflective of an unseen but present HR influence as seen in the literature review (Bollen & Lennox, 1991:308); the Lickert scale usage assumes that attitudes or perspectives can be measured in a linear manner (Rattray & Jones, 2005:236).

As an exploratory factor analysis methodology is to be used to analyse the respondent data Fabriger *et al*. recommend inclusion of a minimum of four and maximum of six variables to account for each common latent factor expected. In addition, a sample size of greater than 200 is preferable (Fabriger *et al.,* 1999:282-283).

The next section had a 5-point Lickert section rating agreement or not, on 12 statements relating to an attendees' personal experience of business events. The centre point of the Lickert scale is set as a neutral point (neither agree nor disagree). The rationale for this is argued because the concepts may be new to some respondents and the researcher did not want to force an answer or irritate respondents by forcing an answer (Rattray & Jones, 2007:236). It is clear to the researcher from the qualitative interviews that the concept of a knowledge strategy supported by standardised processes, policies, measurements and management that deliver to an overall strategic organisational intent is limited.

Some of the items in this section are considered to be reflective of influences in V9 (the degree to which the event design optimises the chance for behavioural change based on *f* (p, e) including items 16.1, 16.5, 16.6, 16.7, 16.9 and 16.12. The remainder of these items are considered to be reflective of influences in V2 (the degree to which there is alignment between the business event and strategic intent (proposed outcomes) to gain knowledge through human capital activities and includes items, 16.2, 16.3, 16.4, 16.8, 16.10, and 16.11. The items of this section are all independent variables thought to act (theoretically) in higher systems as described in chapters 2, 3 and 4 and include aspects such as managers fearing employee knowledge, understanding why event attendance is necessary from the organisation's perspective, and other factors that influence an attendee's ability to maximise their knowledge learning curve at an event. However, as each item has not been tested specifically in regards to knowledge creation the research is exploratory.

This was followed by five statements (agree/ disagree/ don't know) on the relationship of CPD and organisational strategy. CPD is not a prime focus of this research as it is a knowledge domain beyond the scope of general socialisation that occurs at a business

event focused on organisational benefit. While socialisation has certainly been shown in the literature review to improve personal professional development, the motivation behind personal CPD may not be the same as it is for employees sent as organisational representatives. The literature review has indicated that CPD may be for entirely different motivations than the organisation requires. This research has chosen not to focus on the reasons that personal CPD motivation may differ from organisational knowledge seeking motivation. The statements sought only at a high level to review if there is any link between personal CPD activities and organisational value creation.

Then a Lickert scale section rated the importance business attendees attributed to 11 statements relating to social interaction at a business event. This section represents what may be happening – the transformation in the system of knowledge acquisition at a business event. Seven of these statements (items 18.1 to 18.7) were adapted from questions used in Andreou and Bontis research' on social interactions and their relationship to adding human capital value (Andreou & Bontis, 2007:370). The remaining four items are drawn from the findings of the literature review. This section has relevance to confirming the strong support indicated in the qualitative survey sample respondents for the benefit adding ability of social interactions when pursuing organisational knowledge value creation.

The remaining six statements of this section reflect secondary findings from the literature review investigating: other perceptions of social interactions/behavioural change value; a 5-statement section using a Lickert scale rating on the importance of post-event strategies by their organisation to apply attendee business event generated knowledge; a section of four statements relating to the requirement for a tool that helps to define intangible variables in organisational strategic planning. This has relevance to the FIVA and LOKA models where research presents a possible answer to specifically defining objectives and using these to guide the business event design. These items include being able to define the intangible objectives (21.1), defining the drivers of intangible objectives (21.2), being able to use SECI as a process to guide business event design (21.3) and being able to

describe intangible variables of knowledge (21.4). These are outcomes of a business event work-process but the qualitative survey responses have already indicated a very incomplete understanding of what a knowledge strategy would include so the answers given by respondents in this section will likely reflect what an ideal outcome looks like.

5.6.4 How the quantitative survey samples were obtained

The online survey captured a total of 413 responses over a period of three months ending early February 2012. The survey, as previously described, was actively promoted by the researcher by sending individual emails requesting survey participation and by exposure on Linked-in websites and an IT forum, Carbonite website. The response rate could be monitored daily on SurveyMonkey™ and the researcher noted that survey responses were received online on the day of sending out emails (the research never sent less than 50 in a daily batch). The email addresses were collected from MPI and other websites of which the researcher had membership. Table 1.5 in chapter 1 shows the possible populations of each group targeted and shows how members of the group were contacted. MPI has membership composed of 50% business event organisers and 50% business organisations (not event organiser organisations) so both types of respondents may have come from MPI. The offer of a Kindle seemed not to inspire people to participate as only 35 entered their email addresses. Alternatively the respondents may have had issues with privacy in not giving their email addresses.

The online survey instrument captured 413 responses shown in Table 5.4, but of these, 33 were incomplete and removed from the sample. A further two respondents indicated they had not attended a business event and the survey automatically took them to the end of the survey so these were also not included in the final number used for statistical analysis (Appendix 6, survey page 2). Of the remainder, 296 were business attendee respondents and 82 were business event organisers. The survey was kept open during the collection of surveys completed on paper but no new entries were gained.

Table 5.4: Response capture process with the quantitative survey instruments

Source: Author's own compilation (2012)

	Online Survey instrument	Paper survey Xpert	From Meetings Africa	Total (n) usable
Event organisers	**82**	**------**	**22**	**104**
Business event attendees	**296**	**35**	**23**	**354**
Not complete	33	5	155	
No business event experience	2	------	-----	
Total	413	40	200	
		From 40 handed out	From 200 handed out (100 x 2)	

The researcher had exhausted her web networks and business networks so decided to use the survey in its printed format to gather more respondents.

Meetings Africa, a specifically business event forum, was underway in Johannesburg in February 2012 and permission was received to spend a day at the event promoting the paper format of the survey (Appendix 7c). The online survey was printed composed of 100 survey forms specific to event organisers and 100 specific to business event attendees. Each person met at Meetings Africa was asked which form they would complete if willing. The exercise took two people, including recollecting the completed forms, over 7 hours on the last day of the Meetings Africa event. It was hoped that by promoting the surveys on the last day, most participants would have finished the bulk of their business and would have time to complete the survey forms. Of the 200 forms handed out, a total of 45 were completed. As the CEO of Meetings Africa in her letter (Appendix 7c) had pointed out, the trade show was to drive business and while potential respondents to whom forms were distributed were very supportive they did not have much time onsite at Meetings Africa to fill in the forms which led to a low completion rate (45 completed out of 200 distributed).

The Xpert training organisation then allowed the researcher to conduct business attendee surveys at a breakfast morning held in Cape Town in April 2012. The researcher's letter requesting Xpert support in this is to be found in Appendix 7b. The event organiser version of the form was not distributed as all attendees were from business thus were not event organisers. This group represented a wide variety of industries that all used Xpert project management as a tool. The group was small and approachable and, of the 40 business-type survey forms handed out, 35 were fully completed and handed back at the Xpert meeting.

The researcher unlocked the unique computer ID facility of the SurveyMonkey™ 2012 software and all completed paper survey forms of both types from both Meetings Africa and Xpert were loaded by the researcher to the online survey. These results all have the same unique computer code of the computer they were loaded from. The computer unique ID is seen in the raw data as 41.84.89.86 for all these entires. Every result was then downloaded from the survey software as a single Excel spreadsheet (Microsoft Office Excel v2003™) and the online survey format in SurveyMonkey™ (2012) was closed.

The date was now the end of April 2012 and the researcher felt that the sample of 104 event organisers and 354 business event attendees was sufficient to begin statistical analysis.

The descriptive statistics are described in detail as they influence the 'picture' being told by the research findings.

The next section looks at the survey findings and begins with those related to the demographics and attributes of the surveyed event organisers. Then the role of event organisers in business event design is considered in conjunction with how event organisers view support from the organisation in elements of design. The section concludes with where event organisers consider their role lies in aligning the business event to attain organisational objectives.

5.6.5 Findings for the surveyed business event organisers

5.6.5.1 Demographics and characteristics of the surveyed event organisers

The following sections discuss the results of the survey answered from the perspective of 104 (n) event organisers.

The event organiser is responsible for designing and delivering the business event. The event is a process of work and typically transforms selected inputs to required outputs.

The inputs to this work process are: people at the event or who bring knowledge/networking (speakers, peers, international perspectives from international attendees, people from other industries aligned to the main event purpose); the event design includes attributes of design of the event (venue, new knowledge, events to network etc) to enhance the opportunity for cognitive change by attendees.

The business event work process follows Lewin's formula (p,e) that cognitive change in an individual is a function of both the people attending and the event environment. The design of the event strives for an event that maximises the opportunity for cognitive change in its participants. The changes should be aligned to objectives set before the event was designed. Cognitive change precedes behavioural change. Behavioural change can improve organisational performance.

Outputs from process include changes in attendees brought out by the acquisition of new knowledge leading to enhanced creativity and innovation in individual workplace performances, improved business networks, improved ability by individuals to contribute to organisational performance.

The results of the survey indicate that 103 of the event organiser respondents created business events for organisations that create services. Only one worked for a manufacturing organisation. It can be suggested that the sample reflects the experiences of event organisers of service organisations.

Section 2.3.1 has reviewed literature that suggests that service industries rely heavily on improvements in organisational performance from employee behavioural change triggered by learning. The learning goes straight from the business event into the way the employee behaves in the future within the organisation. Manufacturing industries take new knowledge and only see the results after the knowledge has changed a tangible process or policy so the value-add passes through a further transformation step. The fact that the organisers work predominantly for service industries indicates an area for further research as to whether service industries recognise business events as being responsible for immediate behavioural change and improved performance more so than manufacturing organisations.

Table 5.5 shows an almost equal distribution of event organisers in the age ranges 30-59 years.

Table 5.5 Age ranges of the surveyed event organisers

Age range in years	Event organisers age grouping
18-29	16%
30-39	26%
40-49	24%
50-59	24%
60-69	8%

Table 5.6 shows that 59% of those surveyed belonged to a business events association while 41% did not. Forty-three percent of all surveyed belonged to an association but not a business events association. Business events associations are suggested in the literature review to be responsible for providing continued professional development knowledge.

All event organisers surveyed said that they held a business events specific qualification or designation (100%). CMP qualified event organisers are required to renew their designation every five years and they need to prove continued professional development

(CPD). CMP designation training is offered by MPI. It is not clear how event organisers who do not belong to an association continue to stay abreast of changes and trends of the business event industry.

Thirty-four percent of all event organisers surveyed said that they held a CMP qualification. This infers that they have been trained in use of the Kirkpatrick-Phillips ROI methodology if they have attained this qualification. Holding this qualification has relevance to understanding how the ROI methodology is being used currently (cf. Section 4.3.2).

Table 5.6 Characteristics of the surveyed event organisers

Characteristic of the event organiser	**Percentage of organisers with the characteristic**
Belongs to a business event focused association. Comprising: Saaci (South Africa) MPI (international) Events association - not Saaci/MPI	59% 30% 27% 2%
Other industries associations (not events)	43%
Does not belong to any association	41%
Tertiary events related education (certificate, diploma, degree)	76%
Certified Meetings professional (CMP) (designation)	34%
Only experience – no qualification	0%

5.6.5.2 The event organisers' influence in business event design

The event organisers were asked how often they were involved in various elements of the business event and who typically helped them from the organisation. A review of the responses is collated in Table 5.7. The table is amalgamated from a set of multiple choice statement responses. The respondent was asked to indicate whether they were involved in

each element of design and who else from within the organisation might be involved in this element.

Each respondent was allowed to show more than one response per statement so the totals do not add to 100%.

With the exception of choosing the length of an event, organisers indicated that they are influential in making the choices about the event design components for their client organisation. These aspects include: speaker selection (50% felt they were responsible), venue choice (85%), attendees as a target market (45%), geographic location of the event (57%), breakaway events (67%) and the event website design (56%). This suggests that event organisers have an important role to play in event design.

In Table 5.7 the columns 3, 4 and 5 to the right of event organiser reflect who is involved in these decisions from the organisation based on the past experiences of the event organiser.

These 3 columns do not add horizontally to 100% indicating that sometimes no-one is involved from the organisation and the decision on an item is made only by the event organiser.

When an organisational function is involved for instance in Row 1, the event organiser has indicated that 50% of the time they select speakers on their own and in the other 50% of events they may get 60% input (1%+41%+18%) from other managers.

The survey did not establish who gave recommendations if not the organisation but it may have been specialist event suppliers such as venues, or speaker hire specialists which the survey did not investigate.

Table 5.7: The event organiser's role in business event design

Event design components	Event Organiser	HR	Other managers	Marketing
1. Event speakers chosen by whom?	50%	1%	41%	18%
2. The event venue is chosen by whom?	85%	0%	46%	10%
3. Who chooses who attends the event?	45%	2%	66%	23%
4. Who chooses the event length?	36%	1%	54%	9%
5. Who chooses the geographic location?	57%	1%	53%	12%
6. Who chooses what breakaway /social events/sub meetings occur?	67%	0%	42%	15%
7. Who designs the event website?	56%	0%	46%	27%

Event organisers are helped in the design process mostly by managers other than HR: 60% of the time these managers help in choosing event speakers; 46% of the time in choosing the venue; 66% of the time in choosing attendees; 53% of the time in choosing the geographic location of the event.

However the 67% of event organisers who felt they were responsible for breakaway and sub events are only helped 42% of the time by these managers other than HR in the design of breakaway /social events. This suggests that these subsidiary events may not be considered as significant at the main event by the managers.

Event organisers who felt they had responsibility for event web design (56%) are helped 46% of the time by managers other than HR and 27% by marketing.

Marketing is involved with the event manager's design decisions: 18% of the time in choosing event speakers; 10% of the time in choosing venue; 23% of the time in choosing attendees; 9% of the time in choosing the length of the event; 12% of the time in choosing the location of the event; 15% of the time in designing the breakaways/social events; 27% of the time in designing the event website.

Marketing has been established as an important contributor to an organisation's intangible value in terms of creating an expectation with customers of what the organisation represents. This has particular relevance when the organisation is a service organisation. These do not have tangible products to display.

The event organisers in the survey, with one exception, worked for service creating organisations. Yet event organisers are helped to a significantly lesser extent by the organisation's marketing function in all components of the event design than 'other managers'.

Event organiser design decisions may have favourable and unfavourable implications for the intangible equity value of a service organisation.

5.6.5.3 Business events as part of larger organisational strategy

The event organisers were asked to weigh the importance to their organisations of aligning the business event outputs to overall organisational objectives. The questions were rated with a 5-point Lickert scale from not at all important (1) to extremely important (5).

The responses are shown in Table 5.8.

Table 5.8: The alignment between business event objectives and organisational objectives

Survey question	Event organiser responses
1. How important is a post-event budget to expenditure report to the organisation?	9% not at all to slightly important 17% important 74% very to extremely important
2. How important is a return on objectives report to the organisation?	17% not at all to slightly important 32% important 51% very to extremely important
3. How important is a post-event review meeting to the organisation?	8% slightly important 31% important 61% very to extremely important
4. How important is a post-event strategy to the organisation to absorb the new knowledge?	78% not at all to slightly important 23% important 9 % very to extremely important
5. How important is adding event objectives delivered to organisational performance criteria (as ascertained by an instrument such as a balanced scorecard) to the organisation?	44% not at all to slightly important 28% important 28 % very to extremely important

The results in Table 5.8 indicate that, from the event organisers' perceptions:

Item 1 - Organisations realise that the event must qualify the money spent. Ninety-one percent (17% + 74%) of event organisers report on the cost of the event and event attendance qualified in financial terms.

Item 2 - Organisations realise that events must have objectives. Eighty-three percent (32% + 51%) of event organisers indicate that they report on meeting objectives set for the event.

Item 3 - Organisations realise that events should review post-event how things went at the event. Ninety-two percent (31% + 61%) of event organisers hold a post-event review meeting with the organisation.

Item 4 - Organisations do not realise that a post-event strategy for the knowledge arising from an event is important for maximising the value attained from that event - 78% of event organisers said that their client organisations thought it unimportant.

Item 5 - Just over half (56%) of the organisations that the event organisers work with realise that it is important to link the business event outcomes to an overall strategic performance plan such as the balanced scorecard but 44% of event organisers did not have organisations that require this of their business event.

5.6.5.4 Discussion and implications of the event organiser responses

The results of section 5.2.3 suggest that organisations encourage their event organisers to report on costs, objectives met and to hold a post-event review meeting to work out what went well and what didn't.

The findings of the previous sections imply that organisations ensure that their money invested in business events is correctly spent and they measure this by looking at tangible indicators (costs against budget); that they set objectives for attending / holding a business event and check to see whether they are met at the end of the event thus further qualifying the value of the event to them (the objectives may be both tangible and intangible); that they check to see how well the event went based on a post-event meeting thus learning how to get better value from the next event. This is the limit of post event activity – no plan is made to measure value creation over long time periods after the event.

The respondents indicated that 78% of event organisers' work for organisations (Table 5.8, result 4) who do not see the requirement for these actions that ensure new knowledge is bedded down in the organisation with a post-event knowledge strategy.

Actions to protect the knowledge such as sharing it with others or storing it in a database or changing policy / process as a result of the new knowledge are not planned. Any multiplier effect that may have been gained by distributing the new knowledge is lost.

The findings also showed that 44% of event organisers work for organisations (Table 5.8, result 5) who do not see these actions (Table 5.8, results 1, 2, 3) as outcomes that can contribute to an overall organisational strategy which has been developed to deliver along a timeline of value creation - for instance planned through application of a balanced scorecard tool that includes a knowledge component (intangible asset development). Fifty-six percent of the event organisers said that the organisations link the business event to an overall strategic plan, yet item 4 indicates that they fail to recognise that they immediately stand the risk of losing the new knowledge by not having knowledge embedding processes in place.

5.7 The survey findings from business event attendees

The format of the survey for business event attendees is shown in Appendices 6a and 6c. The following sections discuss the results of the survey from the perspective of people who attend business events (n = 354). All 354 participants of the survey confirmed that they had attended a conference, training, exhibition or trade show business event.

5.7.1 Demographics of business event attendees

The 354 respondents were asked to indicate their main function in their organisation (Table 5.9).

Table 5.9 Business event attendee's function in an organisation

n = 354	Number	% of total (n)
1. Human resource function	47	13%
2. Operations management function	68	20%
3. Strategic management function	45	12%
4. Information technology function	42	11%
5. Academic function	60	18%
6. None of the above	92	26%

Table 5.9 reflects a range of organisational functions aligned to qualitative interviews that focused on the opinions of groups 1 to 5 about business events.

Item 6 are individuals who felt they did not fit into any of the categories 1 to 5 and these described themselves as predominantly finance, legal, administration and one-person organisations.

Table 5.10 shows the ages of the respondents which are fairly equally distributed across the age ranges.

Table 5.10 Age ranges of business event attendees surveyed

Age	**Percentage of 354 (100%)**
18-29	22%
30-39	28%
40-49	20%
50-59	14%
60-69	16%

The number of respondents is 334 (94%) who work in service-orientated organisations and 20 (6%) worked in manufacturing organisations. This suggests that 334 of the respondents have work environments (service) that produce intangible value though service creation based on employee knowledge. Section 5.6.5.1 has shown how 103 of the 104 event organisers work for clients who run service based organisations.

These findings may suggest that service organistions recognise the need to keep replenishing knowledge. However this would need futher research.

Further to this, whether manufacturing or service orientated, Kaplan and Norton (2001a) advocate that intangible value (recognised as organisational performance improvements) in their strategy maps can only be activated through motivated, prepared workforces (cf.

Section 4.5.2). This would infer that specific strategy for defined knowledge replenishment through business events would be valuable. It can be argued that using tools such as SDLRS (cf. Section 4.5.3.1) to select attendees ready to absorb new knowledge, QPID (cf. Section 4.5.3.2) to identify the network that this chosen individual works with, FIVA and LOKA (cf. Section 4.5.3.3; cf. Section 4.5.3.4) to drive the knowledge to some extent solves the problem of strategically managing knowledge to deliver specific outcomes. This construct would require further research in the field through application of these concepts.

5.7.2 Survey questions: defining the objectives of event attendance

A survey question sought to establish who of event attendees had typically been given objectives of event attendance before they went to the event. In response, 15% of respondents said no-one gave them objectives for attendance, 15% said that the event organiser gave them the objectives of attendance, 5% said HR gave them the objectives, 64% said a manager other than HR gave them objectives.

It seems that most (54%) of attendees generally do have objectives for attendance before they go to a business event. No conclusion can be drawn as to whether the objectives relate to an internal strategy.

5.7.3 Survey questions: to test several influences acting in learning

The following questions were drawn from the literature review. These variables are suggested as influential in the outcomes of the business event as a learning process. Each statement was rated by respondents using a Lickert scale of strongly disagree (1) to strongly agree (5). Option (3) allowed ‘neither’ indicating no experience thus perception from the respondent on the test item. The responses are shown in Table 5.11.

Table 5.11 Testing concepts relevant to event design found in the literature

Statement	Responses
1. Event organisers should use an events evaluation model	3% strongly to moderately disagreed 19% had no feeling on the statement 78% moderately to strongly agreed
2.My manager briefs me on event objectives before I attend	25% strongly to moderately disagreed 13% had no feeling on the statement 62% moderately to strongly agreed
3. Some managers fear employees will know than them if they send them to an event	36% strongly to moderately disagreed 15% had no feeling on the statement 49% moderately to strongly agreed
4. Some people in my organisation are better at explaining than others	8% strongly to moderately disagreed 4% had no feeling on the statement 88% moderately to strongly agreed
5. The event content is more important than the venue for me to learn	8% strongly to moderately disagreed 8% had no feeling on the statement 84% moderately to strongly agreed
6. The event venue is equally as important as the event content for me to learn	31% strongly to moderately disagreed 16% had no feeling on the statement 54% moderately to strongly agreed
7. Informal meetings within the event are important for me to learn	5% strongly to moderately disagreed 8% had no feeling on the statement 87% moderately to strongly agreed
8. The HR department has designed my professional development path with me	58% strongly to moderately disagreed 11% had no feeling on the statement 31% moderately to strongly agreed
9. My professional development path has relevance to the business events I attend	9% strongly to moderately disagreed 6% had no feeling on the statement 85% moderately to strongly agreed
10. I quickly forget what I learn if I don't use it at work	29% strongly to moderately disagreed 12% had no feeling on the statement 59% moderately to strongly agreed
11. My organisation encourages me to share my learning	28% strongly to moderately disagreed 12% had no feeling on the statement 60% moderately to strongly agreed
12. I am as comfortable holding online meetings as I am holding face-to-face meetings	23% strongly to moderately disagreed 14% had no feeling on the statement 63% moderately to strongly agreed

The items numbered 1 to 12 are reviewed individually as follows:

Item 1- 78% of event attendees felt that the onus lay with the event organiser to evaluate the event. Only 3% disagreed that this was a responsibility of the event organiser.

Item 2 – while 62% of event attendees are briefed by their managers on event attendance objectives 25% said they were not.

Item 3 – 49% agreed with the suggestion that their managers fear employees may know more than them if they send employees to an event. 36% disagreed with this statement.

Item 4 – 88% agreed that some people in the organisation explain new knowledge better than others. Only 8% disagreed with this statement.

Item 5 – 84% agreed that they felt the event content to be more important than the venue. Only 8% disagreed with this statement.

Item 6 – 54% agreed that the venue choice affected the quality of their learning experience and was as important as the event content. 31% disagreed that the venue was equally as important as the event content.

Item 7 – 87% felt informal meetings, social and breakaway events to be very important in their learning process. Only 5% disagreed with this statement.

Item 8 – 58% felt strongly that HR did not design their professional development. Only 31% agreed that HR was an important influence in their career development.

Item 9 – 85% felt that business events were important to their professional careers with only 9% disagreeing with this statement.

Item 10 – 59% agreed that they forget new learning if they do not get a chance to apply it at work. 29% felt they do not forget if they didn't apply new learning in the workplace.

Item 11 – 60% of event attendees agreed that their organisation encouraged them to share the new information that they learnt at an event, but 28% disagreed that their organisation supports this.

Item 12 – 63% agreed that they were as comfortable with online meetings as they were with face-to-face but 23% felt they were not as comfortable with online meetings as face-to-face.

5.8 The perceptions of who influences the design of the business event

This set of statements about who has input to the design of eight elements of the business event were asked of both quantitative survey groups.

The business event attendees were similarly asked to identify who they thought was responsible for elements of event design. Event organisers were asked to rank the same statement from reflecting on their own experiences in responding to their own survey. The results are presented just for the event organiser perceptions in section 5.6.5.2. This section of the survey attempts to give an internal organisational perception of how the event design process is currently working. Eight statements were asked of the event attendees. The responses of business attendees are compared to event organisers' perceptions and summarised in Table 5.12. The focus of this comparison in Table 5.12 is to see who the event attendees thought was responsible for elements of the design compared to the perception of the event organisers.

The table is an amalgamation of several descriptive statistical results. The total internal organisational influence is stated in column 4 as the sum of columns HR (1), managers other than HR (2) and marketing (3) to give a total percentage of internal organisational influence. The event attendee responses give an indication of how well a strategy for event design is known in the organisation. The literature suggests that the knowledge strategy should be widely known. As event organisers are specialists in delivering the event process it has to be assumed that event organisers' perceptions reflect what is actually happening during business event design. Thus, if the event organisers' number of responses is high, this indicates that most event organisers have been involved in defining elements of design. For example in item 2 (Table 5.12) 85% of all event organisers surveyed felt they had been given responsibility for this element of choosing the event

venue on past events. The results in Table 5.12 give an indication of who actually plays key roles in current event design practice and to what degree the event organiser collaborates with the organisation during the design process.

Table 5.12: The attendee perceptions of who influences event design

Event design components	Event Organiser	1.HR	2.Other managers than HR	3. Marketing	4. (1+2+3) = internal influence	Don't know
1. Event speakers are chosen by whom?						
Business attendee perspective	28%	1% +	45%+	15%+	=61%	5%
Event organiser perception	50%	1%+	60%+	18%+	=79%	N/A
2. The event venue is chosen by whom?	43%	1%+	31%+	15%+	=47%	4%
Event organiser perception	85%	0%+	46%+	10%+	=56%	N/A
3. Who chooses the target market that attends the event?	14%	3%	64%	20%	=87%	4%
Event organiser perception	45%	2%	66%	23%	=71%	N/A
4. Who chooses the event length?	27%	2%	49%	12%	=63%	4%
Event organiser perception	36%	1%	54%	9%	=64%	N/A
5. Who chooses the geographic location?	32%	2%	44%	12%	=58%	4%
Event organiser perception	57%	1%	53%	12%	=66%	N/A
6. Who chooses what breakaway /social events/sub meetings occur?	31%	1%	40%	16%	=57%	7%
Event organiser perception	67%	0%	42%	15%	=57%	N/A
7. Who designs the event website?	24%	1%	31%	34%	=66%	6%
Event organiser perception	56%	0%	46%	27%	=73%	N/A
8. Who chooses who attends from your department?	7%	6%	81%	5%	n/a	5%
Event organiser NOT asked this question	n/a	n/a	n/a	n/a	n/a	n/a

The findings are reviewed as follows:

Item 1 -50% of the surveyed event organisers said they were responsible for the event speakers but 79% of the time they felt that the choice of speakers was also influenced by internal members of the organisation.

In contrast, 28% of event attendees thought event organisers alone were responsible for choosing the speakers while 61% of attendees stated internal organisational sources as influencing speaker choice.

It seems that organisers get considerable help (61%-79% of the time) from the organisation in selecting speakers.

Item 2 – 85% of event organisers felt that the responsibility for choosing a venue fell to them but that 79% of the time this decision was also influenced by members of the organisation.

In contrast, 43% of business event attendees thought venue choice fell solely to the event organiser while 61% thought it was an internal organisation decision.

It seems that event organisers are highly involved in venue choice. Attendees and event organisers agree that the organisation often has an influence (61%) in the final choice of venue.

Item 3 – 45% of event organisers felt they were responsible for choosing the target market attendees. 91% of the time this decision was also influenced by internal members of the organisation.

In contrast, 14% of business event attendees thought the event organiser influenced target market choice and 87% saw this choice as falling only to internal members of their organisation.

This suggests that target market choice is generally influenced by internal organisation members rather than the event organisers alone. This may be because the organisation has to qualify time and money spent on a business event so are very involved at a managerial level in ensuring the organisational funds are well spent.

Item 4 – 36% of event organisers felt they were responsible for the length of the event but this decision was also influenced 64% of the time by internal members of the organisation.

In contrast, only 27% of event attendees thought the length of the event was chosen by the event organiser while 63% thought the choice fell to their organisation.

It seems that the organisation influences the length of the event. The survey shows that event organisers do not consider themselves highly involved in this decision. A predefined budget from the organisation will, in practice, affect the choice of event length more so than the event organiser or the organisation and this may be an overriding influence – the budget available dictates the length of the event.

Item 5 – 57% of event organisers felt they were responsible for choosing the location of the event, but this decision was also influenced 58% of the time by internal members of the organisation.

In contrast, 32% of event attendees thought the location of the event was chosen by the event organiser but 68% thought the choice fell to their organisation.

It seems that the organisation moderately (58-68%) influences the choice of location but over half of the event organisers surveyed (57%) felt they typically had a role to play in this decision.

Item 6 – 67% of event organisers felt they were responsible for choosing the breakaway and social events that occur but this decision was also influenced 57% of the time by internal members of the organisation.

In contrast, 31% of event attendees thought the event breakaway and social events were chosen by the event organiser while 57% thought the choice fell to their organisation.

It seems that the organisation moderately (57%) influences the choice of breakaway and social events but over half of the event organisers surveyed (67%) felt they typically had a role to play in this decision.

Item 7 – 56% of event organisers felt they were influential in the event website design but this was also influenced 73% of the time by internal members of the organisation.

In contrast, 24% of event attendees thought the event website design was chosen by the event organiser but 66% thought the choice fell to their organisation. Both the event organisers and the event attendees indicated that marketing had a larger role to play in the website design (27-34%) than marketing had played in items 1 to 6. This makes intuitive sense.

It seems that the organisation (66-73%) influences website design but over half of the event organisers surveyed (56%) felt they typically had a role to play in this decision.

Item 8 – this question was only posed to event attendees and not to event organisers. This question asks, "Who chooses who attends the event at the department level?" The attendees felt overwhelmingly (82%) that managers other than HR (6%) chose who attends the event. 5% didn't know who made this choice and another 7% thought the event organiser may have influence in this decision.

It is clear that the perception of who is responsible for choosing elements of event design varies greatly. The statements have shown that there is most often a design relationship

between organisation and event organiser for the physical event elements. Further research is required to establish whether aspects such as the size of the event budget means more intervention from managers or whether a manager's or event organiser's personality type perhaps influences the degree to which they have control over choosing the elements to name just two possible influences.

5.9 The perceptions of HR's role in business events

From the literature review, HR typically has an organisational skills development plan that seeks to recruit the best employees and maintain this human capital value through training and other business events. The value contained in an organisation's human capital is integral to achieving organisational goals.

HR's role has been shown in the literature review as having a unique role in knowledge development within the organisation. Several aspects including the following have been suggested as the HR role:

i) To know what knowledge the organisation needs to attain strategic goals:

ii) To identify which employees need upgraded or new skills, including developing varied knowledge concepts from business networks to ideas for innovation and creativity:

iii) To recommend how new, useful knowledge can be gained.

The literature review suggests that HR should be involved in business events because:

i) A business event adds value to pre-defined objectives of the organisation. It can be argued that the purpose of a business event is to change employees and, in doing so, change the overall value of human capital;

ii) A business event, like any organisational process, must exhibit characteristics of quality to ensure that the input resources are optimally converted to required output. The quality is defined in this case by how well the business event acts to change the behaviour

of an attendee (the output) and this is subsequently reflected in improved productivity. HR manages this human capital function so it follows that HR can influence the value of outputs.

5.9.1 Comparison of HR responses with event organisers and business event attendees

The next tables (Table 5.13a through Table 5.13f) compare the responses of event organisers, HR business event attendees and finally the business event attendees excluding the HR event attendee function. Each of the three groups was posed the same six questions.

The respondents were asked to rank their response on a Lickert scale of (1) not at all important to (5) extremely important. The question asked the respondent to indicate how important they felt an HR function input was.

Although there are only 47 respondents responsible for HR functions in this survey, it can be seen for every one of the six questions that their responses are markedly different from those of the event organisers and the other business attendees.

The sample size of 47 is not big enough to be statistically significant for the entire population of HR, but it gives an interesting suggestion as to what may be currently happening with business design.

A gap seems to exist between the way that a business event that improves the knowledge of employees is actually used by HR to monitor and coordinate organisational human capital development.

Table 5.13a: HR involvement in knowledge acquisition strategy

Q1. HR involvement in the organisation's knowledge acquisition strategies from business events	
1a. Event organisers n = 104	76% not at all to slightly important 19% as important 5% as very to extremely important
1b. HR attendees perception **n = 47**	**14% not at all to slightly important** **32% as important** **54% as very to extremely important**
1c. All other attendees (excluding HR) perception n = (354-47) = 307	48% not at all to slightly important 34% as important 18% as very to extremely important

In Table 5.13a, question 1 evaluates HR's involvement in knowledge acquisition strategy **-** 76% of event organisers thought HR was not at all or slightly important in knowledge acquisition arising from a business event.

Fifty-two percent (34% + 18%) of all business event attendees (except HR) thought it important to extremely important that HR be involved in knowledge acquisition from business event strategies. Eighty-six percent (32% + 54%) of the HR function respondents thought the inclusion of HR important to extremely important.

In this question, the event organisers felt strongly that HR was not important in this role while the event attendees did see HR involved in this knowledge strategy through business events as did HR themselves. It can be seen that there is a considerable gap in the perceptions of the role HR should play in a business event with regards to knowledge strategy.

Table 5.13b: HR involvement in event content design

Q2. HR involvement in event content design	
2. a. Event organisers n = 104	73% not at all to slightly important 22% as important 5% as very to extremely important
2b. HR attendees perception **n = 47**	**21% not at all to slightly important** **45% as important** **34% as very to extremely important**
2c. All other attendees (excluding HR) perception n = (354-47) = 307	60% not at all to slightly important 24% as important 16% as very to extremely important

In Table 5.13b, question 2 considers HR involvement in event content design **-** 73% of event organisers thought HR was not at all or slightly important in event content design.

Sixty percent of all business event attendees (except HR) thought it not at all important to slightly important that HR be involved in event content design. In this question, both the event organisers and the event attendees do not see HR involved in event content design.

Seventy-nine percent (45% + 34%) of the HR function respondents thought the inclusion of HR to be important to extremely important in assessing event content.

It can be seen that there is a considerable gap in the perceptions of the role HR should play in helping create knowledge aligned to HRD goals.

Table 5.13c: HR recommending who attends a business event

Q3. HR recommending who attends a business event	
3a. Event organisers n = 104	56% not at all to slightly important 34% as important 10% as very to extremely important
3b. HR attendees perception **n = 47**	**14% not at all to slightly important** **45% as important** **41% as very to extremely important**
3c. All other attendees (excluding HR) perception n = (354-47) = 307	60% not at all to slightly important 24% as important 16% as very to extremely important

In Table 5.13c, question 3 asks if HR recommends who attends a business event **-** 56% of event organisers thought HR was not at all or slightly important in recommending who attends a business event.

Sixty percent of all business event attendees (except HR) thought it not at all important to slightly important that HR recommended who attended a business event.

Eighty-six percent (45% + 41%) of the HR function respondents thought the inclusion of HR important to extremely important. It can be seen that there is a considerable gap in the perceptions of the role HR plays in selecting who needs to be at a business event.

This result suggests that business events do not necessarily align to employee skills development which, in turn, delivers the organisation's overall strategic goals.

Table 5.13d: HR management of a post-event knowledge embedding strategy

Q4. HR management of a post-event strategy to ensure new knowledge from a business event becomes available to the organisation	
4a. Event organisers n = 104	64% not at all to slightly important 19% as important 17% as very to extremely important
4b. HR attendees perception **n = 47**	**21% not at all to slightly important** **24% as important** **55% as very to extremely important**
4c. All other attendees (excluding HR) perception n = (354-47) = 307	38% not at all to slightly important 31% as important 31% as very to extremely important

In Table 5.13d, question 4 asks if there is HR management of a post-event knowledge embedding strategy **-** 64% of event organisers thought HR was not at all or slightly important in managing a post-event strategy that ensures the new knowledge becomes available to the entire organisation.

Yet 62% (31% + 31%) of all business event attendees (except HR) thought it important to extremely important.

Seventy-nine percent (24% + 55%) of the HR function respondents thought the inclusion of HR important to extremely important. It can be seen that there is a considerable gap in the perceptions of the role HR plays in selecting who needs to be at a business event.

This result suggests that business events do not necessarily align to employee skills development which, in turn, delivers the organisation's overall strategic goals.

Table 5.13e: HR matching employee knowledge needs to business event strategic intent

Q5. HR matching employee knowledge needs to the strategic intentions of the event	
5a. Event organisers n = 104	60% not at all to slightly important 24% as important 15% as very to extremely important
5b. HR attendees perception **n = 47**	**2% not at all to slightly important** **43% as important** **55% as very to extremely important**
5c. All other attendees (excluding HR) perception n = (354-47) = 307	32% not at all to slightly important 28% as important 40% as very to extremely important

In Table 5.13e, question 5 considers whether HR is influential in matching employee knowledge needs to business event strategic intent **-** 60% of event organisers thought HR was not at all or slightly important in matching employee knowledge needs to the event strategic objectives.

Yet 68% (28% + 40%) of all business event attendees (except HR) thought it important to extremely important. Ninety-eight percent (43% + 55%) of the HR function respondents thought the inclusion of HR important to extremely important.

This is an interesting and contradictory result in the light of the event attendee responses to questions 2 and 3. In question 2, the event attendees did not see HR involved in business event content design. In question 3, they indicated that HR did not have a role in deciding who goes to a business event. Yet they see a requirement for HR matching their employee knowledge needs to the event knowledge objectives.

In Table 5.11 for item 8, "The HR department has designed my professional path for me" 66% of event attendees disagreed. This supports the responses above in questions 2 and 3 in that the attendees have no expectation based on their past experiences of HR being involved in business content design or in who goes to an event. Employee knowledge requirements can only be met if the employee is identified and sent to an event that has the right content to meet their knowledge needs. HR is apparently not fulfilling this role. But the response to matching their knowledge needs to the event may be indicating that they would like HR to have a role in this. Especially as Table 5.11 for item 9, "My professional development path has relevance to the business events I attend" indicates that employees seek knowledge from their business events and consider this important for their workplace success.

The causal relationship of employee knowledge growth being dependent on the appropriateness of the event content to the employee and that the employee is picked to attend this event is not apparent to event attendees or event organisers.

Table 5.13f: Business event feedback to include HR

Q6. Business event feedback to include HR at the end of the event	
6a. Event organisers n = 104	68% not at all to slightly important 15% important 16% as very to extremely important
6b. HR attendees perception **n = 47**	**20% not at all to slightly important** **30% important** **55% as very to extremely important**
6c. All other attendees (excluding HR) perception n = (354-47) = 307	44% not at all to slightly important 25% important 31% as very to extremely important

In Table 5.13f, question 6 queries whether business post-event feedback includes HR - 68% of event organisers thought HR was not at all or slightly important to be included in their event feedback reporting.

Yet 56% of all business event attendees (except HR) thought it important to extremely important. Eighty-five percent of the HR function respondents thought the inclusion of HR important to extremely important. This result suggests that event organisers do not currently include HR in event feedback but HR and attendees would like this to happen.

5.9.2 HR relationship with the business event

There are six observed variables presented in statements concerning event organisers and business event attendee perceptions of the HR influence in business events (cf. Section 5.9, Tables 5.12 a-f). As there are six variables, a multivariate analysis technique was used - the Exploratory Factor Analysis (hereafter referred to as EFA) - to try and interpret the underlying HR and knowledge relationship in business events, knowledge creation and organisational performance. The EFA is exploratory in the sense that the literature has not suggested a specific interpretation of business events and organisational performance with relevance to HR activities so the behaviour of variables in this situation is being explored using these six variables (items).

5.9.2.1 The rationale for understanding HR and business event interfaces

The literature review has suggested that HR activity is to support organisational performance by implementing a human capital development strategy that aligns to an overall strategic organisational knowledge strategy (cf. Section 3.4.3). The actions of this function in this regard are important in facilitating the development of competitive advantages over market-share challengers. As stated, relatively little information exists on the feasibility of this concept applied in the context of HR influence in creating a business event when such events are used as a strategic tool to deliver strategically appropriate, improved human capital capabilities.

The result of the literature review has been to suggest 12 variables of interest (Table 4.8) that represent the complex system of a business event and organisational performance. The ID graph does reflect the importance of the relationship of HR and business events on organisational performance in several of the identified variables. This ID graph is a theoretical representation of the specific situation of business events and organisational behaviour (cf. Figure 4.14).

The qualitative survey has revealed what appears to be a gap in the role that HR could play with regards to using business events as a work process to deliver the HR function of improving organisational human capital. The qualitative survey responses (cf. Section 5.9) suggest that HR has little influence in a business event both from the perspective of the sample of event organisers and from the perspectives the sample of business event attendees.

Six statements (Appendix 6b, page 10 and Appendix 6c, page 16) are posed in the quantitative survey. The questions review the opinion of the event organisers and business event attendees of their experiences with any activities that HR generally undertakes or implies during the creation and management of business events. The respondents give a perspective of the current situation by rating 5-point Likert type statements of not at all important to extremely important for six different activities that would help indicate the extent to which the HR function of developing human capital in support of an overall knowledge enhancement organisational strategy uses the business event in a strategic role.

The event organiser responses give an indication of the perception of the role of HR in business event design from the perspective of the event organiser. As such, the theoretical behaviour postulated from the literature review and diagrammatically represented in Figure 4.14 by the variable digraph is reviewed against how it actually appears to those involved in a business event.

It is an assumption of the following EFAs that the results do not reflect a specific cause and effect relationship as defined by the effect of individual variables of the digraph on each other but rather each EFA provides an overview of the entire system and sub-systems of the 12 variables as to possible interpretations of the outcomes of their interactions.

Variable V9 - the degree to which the event design optimises the chance for behavioural change based on (p, e) – is defined by their responses in that if the event organisers do not have specific outcomes relating HR activities to developing human capital as a result of the business event the literature interpretation of the contributions to organisational knowledge value creation from HR when considered in the context of business events is in question.

In turn, this can be argued to affect the overall organisational knowledge value chain as represented by the 12 variables of the digraph. Any positive (strengthening) change in the behaviour of V9 (the influence of business event design) improves the opportunity of the value created by the behaviour of V8 - the degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries (cf. Figure 4.14). Thus it can be argued that, because of the recursive nature of the complex system in focus, the viability and value created by business events for all the systems, R0, R1 and R2 may be affected if the role of HR with regards to business events and their design is not explored, understood and recommendations made to optimise their combined influence.

This situation deserves investigation because of legislation such as Sarbanes-Oxley that requires that organisational risk to value creation be managed and, as business events are proposed in this research as organisational value creators of the intangible asset of knowledge, managing a business event optimally can be argued as having relevance and utility. Ramos in Table 1.3 suggests five components for organisational internal control when meeting legislation and steps 3 and 4 of this internal control strategy support the argument for exploring HR activities and business events (Ramos, 2004:33). Step 3 states organisational risk management best practice needs to develop “control policies and

processes that help ensure that management actions continuously address risk control while striving to meet the organisational objectives" and step 4 requires development of a system that ensures reliable information flow and communication enabling personnel to "capture and exchange the information needed to conduct, manage and control its [the organisation's] operations". The relevance to HR activities and a business event are now linked clearly to V8 and V9 and can be argued to validly introduce the necessity of understanding more about the variable V6 - the degree to which an employee can be motivated to undergo change for improved work performance (cf. Section 2.3).

The next two sections review exploratory factor analyses to confirm the relationship of variables related to strategic HR functions for human capital and a knowledge strategy. Exploratory factor analysis does not test hypotheses about causal relationships but seeks to understand and explain more about the situation in which several variables are found at once and all have influence as can be seen in the 12-variable digraph (cf. Figure 4.14) (Costello & Osborne, 2005:8).

The role of a business event in a value chain of knowledge as the intervention of choice for employee behavioural change as an input-output value transformation has not been well explored as shown in the literature review but, as in all other work processes, the input use organisational resources and transforms them into a more valuable output.

Strategy is required to bring about these changes in levels of value formation and is planned, monitored and controlled to optimise value creation processes. Tangible organisational work processes are well documented in business literature. Section 2.3 discusses research that specifically links knowledge about customers as attained through employees at business events, as linked to improved organisational ability to retain customers strongly linking this to improved profits.

5.9.2.2 The event organiser and HR, work process input: exploratory factor analysis

This variable relationship is examined firstly from the perspective of the event organisers. This EFA attempts to understand more about the relationship of variables the secondary data discusses as related to HR activities specifically in the situation of the business event from the perspective of the surveyed event organisers (n=104). The literature review has suggested that the role of HR is to develop human capital in a manner that supports future improved organisational performance aligned to attaining specific organisational strategic goals.

The event organisers' experience with HR when designing a business event should reflect this. Section 3.6 specifically defines the role of the event organiser and this includes using the business event to support the organisation's mission, vision and goals and expediting attendee learning. This suggests an HR function. However it has already been seen in the descriptive statistics that event organisers do not see HR activities as influencing their job of business event design (cf. Section 5.9).

A Principal Axis Factoring extraction method (hereafter referred to PAF) is used to find common variance and identify the latent constructs or meanings of the items being observed.

Table 5.14 represents a measure of sampling adequacy derived from the PAF. This gives the Kaiser-Meyer-Olkin as 0.851 showing that a portion of the variance in this sample is caused by underlying variables which supports the use of a factor analysis in trying to identify these latent variables.

The Barlett's test of sphericity at 0.00 is < 0.05 which indicates that this correlation matrix is significantly different from an identity matrix and the variables relate to one another sufficiently to carry out an exploratory factor analysis.

Table 5.14: KMO and Bartlett test – event organiser

Source: SPSS Statistics v20 (2011)

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.851
Bartlett's Test of Sphericity	Approx. Chi-Square	493.883
	Df	15
	Sig.	.000

The determinant at 0.0007 is > 0.00001 indicating the variables are fairly independent in their behaviours from each other. In Table 5.15, which explains the total variance, item 1 has an eigenvalue of 4.251 which is =>1 so acceptable and this factor explains 70% of the total variance.

Table 5.15: Total variance explained – event organisers perspective of HR

Source: SPSS Statistics v20 (2011)

	Initial Eigenvalues			Extraction Sums of Squared Loadings	
Factor	Total	% of Variance	Cumulative %	Total	% of Variance
1	**4.251**	**70.849**	**70.849**	**3.929**	**65.487**
2	.682	11.366	82.215		
3	.567	9.455	91.670		
4	.210	3.496	95.166		
5	.155	2.580	97.746		
6	.135	2.254	100.000		

Review of Table 5.16: shows all 6 variables have loaded on unrotated Factor 1 and no other factor. The unrotated Factor 1 is a latent factor and is named by the researcher as Knowledge Development Strategy. The six variables are believed to be unique descriptors or reflective indicators of the behaviour of this latent factor (Dillon, 2001:64).

Table 5.16: Factor matrix for Factor 1 – event organisers

Source: SPSS Statistics v20 (2011)

	Knowledge Development Strategy
	FACTOR 1
11.6 Feedback (from the event organiser) to include HR at the end of the business event	.914
11.4 HR's management of a post-event strategy to ensure new knowledge from a business event becomes available to the organisation	.852
11.5 HR matching employee knowledge needs to the strategic intentions of the business event	.849
11.1 HR involvement in defining the organisation's knowledge acquisition strategies from business events	.813
11.2 HR's involvement in defining the content of the organisation's business events	.760
11.3 HR's recommendations as to which employee(s) attend a business event	.640

Analysis of the Lickert scale results shows that event organisers saw the relationship of HR in event design to ensure implementation of a knowledge development strategy as only slightly important described by a mean = 2.1058 and standard deviation of 0.93131 (Table 5.17).

Table 5.17: Standard deviation of the variables representing knowledge strategy: event organiser

Source: SPSS Statistics v20 (2011)

	N	Minimum	Maximum	Mean	Std. Deviation
F11_HR	104	1.00	4.33	2.1058	.93131
Valid N (listwise)	104				

This implies that the relationship between the six variables (items), representing the underlying variable knowledge development strategy, is considered only slightly important by event organisers in designing business events.

Table 5.18: Cronbach's Alpha for HR from the perspective of the event organiser
Source: SPSS Statistics v20 (2011)

Cronbach's Alpha	Cronbach's Alpha Based on Standardised Items	No. of Items
.916	.916	6

The internal consistency represented by Cronbach's Alpha > 0.90 indicates a high degree of reliability about the interrelatedness with which this set of six variables (items) represents the effect of the latent factor (Table 5.18).

Table 5.19: Inter-item correlations of knowledge strategy variables: event organiser
Source: SPSS Statistics v20 (2011)

	Mean	Minimum	Maximum	Range	Maximum / Minimum	Variance
Inter-Item Correlations	.646	.505	.850	.345	1.683	.015

Table 5.19 shows that the items have an inter-item correlation of between 0.5 and 0.85. Surprisingly, the variable that deals with post-event strategy planning by HR (item 11.4) correlates highly with that of matching employee knowledge needs to pre-event strategic intentions (item 11.5) at 0.85. While this may suggest that one of these two variables could be made redundant, it may also suggest that the event organiser respondents were not clear on the difference between a pre- and post- event business design strategy. This may mean the wording of the statements appeared as an overredundancy in wording about strategy to the event organisers although the literature review shows that the variables are reflecting two different outcomes (Netemeyer, 2001:56). Alternatively, the

respondents are not clear on the variables involved in a strategy and the responses are an indication of a misunderstanding of the meaning of items 11.4 and 11.5 (Straub & Curtis, 1989:151). These items could be extended for quantitative response with greater associated explanations or made open-ended to allow respondents more opportunity for in-depth responses (Rattray & Jones, 2005:237). This suggests that more research is needed of variables that act within the unique systems of these two variables to write more specific statements to test respondents in this situation to be able to evaluate the event organisers' understanding of these items for business event design.

5.9.2.3 The business event attendees and HR, work process input: exploratory factor analysis

As with the previous section, the argument for this EFA is an attempt to understand the relationship of variables related to HR strategic activities with their application to business event design from the perspective of the surveyed business event attendees. The literature review has suggested that the role of HR is to develop human capital in a manner that supports future improved organisational performance aligned to attaining specific organisational strategic goals and, as such, it can be argued that the business event attendees and their possible behavioural changes resulting from a business event should be reflecting this HR strategy.

In this way, it could be seen that employees have their personal abilities to perform changed in a way that benefits the overall strategic actions of an organisation as encapsulated in system variable V10 (cf. Section 4.8.2). V10 is a driver variable that links HR activities to using standard processes in designing a template to drive the value attained from a business event to align with the organisation's mission and strategic goals (cf. Section 2.4.1).

This relationship is now examined from the perspective of the business event attendees, who are themselves employees, and thus the human capital responsible for knowledge (skills, capabilities, information) contributions to future improved organisational

performance. The literature review indicates that HR influences the knowledge that employees require and this knowledge in turn influences the ability of the organisation to improve future performance.

Table 5.20 represents a measure of sampling adequacy from the survey results of business event attendee perspectives of the relationship of HRD activities and business events.

This gives the Kaiser-Meyer-Olkin as 0.906 showing that a portion of the variance in this sample is caused by underlying variables.

The Barlett's test of sphericity at 0.00 is < 0.05 with the Chi-square statistic at 1520.109 at 15 degrees of freedom is not significant which indicates that this correlation matrix is significantly different from an identity matrix and the variables relate to one another sufficiently to carry out an exploratory factor analysis.

Table 5.20: KMO and Bartlett's Test – business event attendees
Source: SPSS Statistics v20 (2011)

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.906
Bartlett's Test of Sphericity	Approx. Chi-Square	1520.109
	Df	15
	Sig.	0.000

The determinant at 0.013 is > 0.00001 indicating the variables are fairly independent in their behaviours from each other. In Table 5.20, factor 1 has an eigenvalue of 4.343 which is =>1 so acceptable and this factor explains 72% of the total variance.

This result is unrotated because only latent factor 1 is found as an acceptable common factor for all six variables (Table 5.21). None of the other factors have an eigenvalue = > 1 so their loadings are not considered as strong.

Table 5.21: Total variance explained – business event attendees perspective of HR
Source: SPSS Statistics v20 (2011)

Factor	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	**4.343**	**72.380**	**72.380**	**4.023**	**67.043**	**67.043**
2	.489	8.152	80.533			
3	.445	7.414	87.947			
4	.284	4.736	92.683			
5	.237	3.942	96.626			
6	.202	3.374	100.000			

The factor is named the same as the factor for the event organisers' knowledge development strategy (Table 5.22).

Table 5.22: Factor matrix for Factor 1 – business event attendees
Source: SPSS Statistics v20 (2011)

	Knowledge Development Strategy
	1
11.4 (15.4) HR management of a post-event strategy	.881
11.5 (15.5) HR matching employee knowledge needs to the strategic intentions of the business event	.861
11.6 (15.6) Feedback (from the event organiser) to include HR at the end of the business event	.821
11.1 (15.1) HR involvement in defining the organisation's knowledge acquisition strategies	.821
11.2 (15.2) HR involvement in defining the content	.810
11.3 (15.3) HR recommendations as to which employee(s) attend a business event	.708

The internal consistency represented by Cronbach's Alpha > 0.90 indicates a high degree of reliability about the interrelatedness with which this set of six variables (items) represents the effect of the latent factor (Table 5.23).

Table 5.23: Cronbach's Alpha for HR from the perspective of the business event attendee

Source: SPSS Statistics v20 (2011)

Cronbach's Alpha	Cronbach's Alpha Based on Standardised Items	N of Items
.923	.923	6

Table 5.24 shows that the items have an inter-item correlation of between 0.566 and 0.793.

Table 5.24: Inter-item correlations of knowledge strategy variables: business event attendees

Source: SPSS Statistics v20 (2011)

	Mean	Minimum	Maximum	Range	Maximum / Minimum	Variance	N of Items
Inter-Item Correlations	.667	.566	.793	.226	1.400	.005	6

Overall business event attendees tend towards considering the role of HR in development of a business design strategy as important (Table 5.25). However, the descriptive statistics showed that respondents felt that HR intervention in event design and HR recommending who attends the event was not as important as HR being involved in knowledge strategy (matching the event to organisational strategy, post-event knowledge embedding processes, matching employee knowledge needs to the event and HR receiving feedback post-event from the event organiser).

Table 5.25: Standard deviation of the variables representing knowledge strategy: business event attendee

Source: SPSS Statistics v20 (2011)

	N	Minimum	Maximum	Mean	Std. Deviation
F15_HR	353	1.00	5.00	2.7533	1.1936
Valid N (listwise)	353				

5.9.2.4 Conclusions on HR and HRD influences on inputs to a business event work process

This seems to indicate that event organisers do not realise that the business event represents a work process of the larger work process of knowledge strategy. This finding has been confirmed in the qualitative interviews. Business event respondents seem to indicate that they realise that a business event is part of improving organisational work but fail to consciously link the reason that human resources and human resource activities should be an influence on deciding who attends the event or what the event content should include. The qualitative interviews note that business respondents, particularly HR, believed that HR had a very important role to play in organisational knowledge strategic intentions but the application of this seems lacking for the process of a business event.

5.10 Single item measures

An exploratory factor analysis of items in section 16 of statements given to business event attendees failed to find valid latent factors as the communalities of these items were all < 0.4. This suggests the items contribute little to the understanding of the two latent constructs V2 and V9 of which the items were considered to be reflective. Cause and effect relationships are not expected from EFA but highlighting any latent factor that is explainable from the secondary data as to its influence on the business event work process would have been useful in this exploratory research.

Variable 2 (V2) is a strong driver for value creation (out arrows number 10) in business events and describes the role of a business event's strategic intent in creating competitive advantage (cf. Section 4.8.3; cf. Figure 4.14). Items thought to reflect these influences in the value chain link are statements 16.2, 16.3, 16.4, 16.8, 16.10 and 16.11 (Table 5.11) as effects of the latent factor for competitive advantage creation.

Variable 9 (V9) is a variable that can act either as a driver (out arrows number 6) or an outcome (in arrows number 5). This variable system relates to how business event design f (p, e) influences behavioural change. Items believed to reflect this influence in the knowledge value chain withregards to effects from event design on the value chain as highlighted from the literature review are 16.1, 16.5, 16.6, 16.7 and 16.9.

Costello (2005:3) notes that if the factor structure is still uninterpretable after several EFA attempts, as occurred here, with at each run removing selected items then a problem exists either with item construction, scale design, or the theoretical explanation of the expected latent construct itself. These items seem to reflect the latter condition and are independent dimensions outside of the two theoretical constructs abot V2 and V9.

The items of this section are then considered as presenting single item measures of interest in this exploratory research. Gliem and Gliem note that a single item type is "less valid, less accurate and less reliable than multi-item equivalents" as these items present limited data (Gliem & Gliem, 2003:83).

However, the results open opportunity to consider various inferences arising from the secondary data against the sample of the respondent perceptions. This perspective is taken by the researcher for the statements set to business event attendees as to their personal perceptions of variables affecting their experiences of business events. These variables are suggested by the literature review to affect the business event work process.

5.10.1 The age of business event attendees and usage of virtual meetings

The Pearson chi-square goodness-of-fit test is used to compare the business event attendee perceptions (n =351) of using virtual meetings to the theoretical one of the literature review (Item 16.12). Using virtual as opposed to face-to-face meetings is suggested by Gibson & Cohen (2003) and Gorelick *et al*. (2004) in the literature reviewed to be an ability more common in younger people. They suggest younger people use the activity with more ease to work with others thus expanding their ability to gain and give organisational value from networking beyond physical face-to-face meetings (cf. Section 1.1.7). The literature review suggested younger people use virtual meetings easily because they have been brought up with the Internet. The survey questioned stated, "I am as comfortable holding online meetings as I am holding face-to-face meetings". Respondents responded on a 5-point Lickert scale from strongly disagreeing to strongly agreeing.

Table 5.26: Online meetings as a knowledge sharing tool – business event attendees Source: SPSS Statistics v20 (2011)

	Value	Df	Asymp. Sig. (2-sided)
Pearson Chi-Square	16.655[a]	16	.408
Likelihood Ratio	17.056	16	.382
Linear-by-Linear Association	1.604	1	.205
N of Valid Cases	351		

The Chi-squared value of 16.655 with 16 degrees of freedom gives an asymptotic significance of 0.408 which is far larger than $p > 0.05$ so this relationship appears not to be validated by this sample's responses (Table. 5.26). This suggests that a knowledge strategy can effectively use virtual business events with all age groups of business employees to share information.

This infers for this sample that all age groups of employees are comfortable with holding virtual meetings. Milost (2007) in section 2.4.6 noted that older employees hold repositories of experience very useful to future organisational development. The literature review has shown that this has positive implications for the power of networks as proposed by Metcalfe's Law (cf. Section 3.2.6) and supports the opportunity for crowd accelerated innovations especially since young and old can create together through the virtual platform (cf. Section 3.5).

Innovation has been shown to be a critical driver in creating value for organisational performance seen as creating competitive advantages over competitors. The opportunity to connect virtually then leads to the new group thinking of new realities and the creation of distinctive organisational competencies (cf. Section 4.3.1). The literature review has suggested that technology improves flow and sharing of information between employees (cf. Section 3.5; cf. Table 4.6) using the virtual medium from where ideas originated (originating Ba) to exercising the ideas in many environments (exercising Ba) as show in Table 3.4. In section 2.10.2 the use of story-telling for historic experience sharing has been shown as a co-constructing creative process.

The ability of all ages of respondents to feel comfortable with online meetings means that the knowledge value chain (cf. Section 3.7) could multiply individual knowledge value with an element of the knowledge strategy suggested in Table 3.3 and 3.4 as developing a net strategy to leverage as much as possible from Internet business communication. Section 4.7 reviews existing theory in which researchers such as Von Krogh *et al.* (2001) recognise and argue for defined strategies to extend the value of knowledge. Applying concepts of table 4.5 it can be proposed that the onsite phase of a business event is a summative exercise where a certain amount of knowledge replenishment is certainly achieved. Summative is recognised by attributes such as retrospective, short lived, formal reports and a final analysis. On leaving the event, the summative knowledge could become formative if a strategy drives attributes of formative knowledge such as prospective, improvement and change focused, feedback and reflection orientated and informal reporting (such as Internet communication).

Finally, Gibson and Cohen (2003) have suggested that virtual meetings will make a meaningful contribution because they have a reduced monetary cost when compared to arranging face-to-face meetings which, in globally dispersed organisations, becomes an expense (cf. Section 1.1.7). As both researchers published in 2003 and 2004, which is nearly a decade ago, it suggests that there may no longer be a gap between the way young or older employes use the Internet and its associated work and communication tools. Thus the opportunity for organisations to save money by communicating virtually exists. This also argues for the ease of use of online databases to store policies, processes and other organisational information.

5.10.2 Business attendee perceptions of the relationship between organisational strategic planning and event ROI models

Business event attendees were asked if they agreed (1), disagreed (2) or did not know whether their organisation used a tool such as the Kaplan and Norton balanced scorecard (Item 19.1).

As has been discussed in the literature review, use of such a tool would indicate that intangible and tangible asset development is planned and measured as an overarching organisational strategy to reach clearly defined objectives.

The balanced scorecard would set the goals to be achieved and the business event would be part of the 'how' that Kaplan and Norton state as needing to be defined in the strategy map (cf. Section 4.5.2). The results of the business event attendees ranking on a Lickert scale of strongly disagree (12) to strongly agree (5) are shown in Table 5.27 for n = 351. The literature infers that that an intervention for 'how' should have objectives and these should be measurable in their value contribution to the whole strategic plan.

Table 5.27: Overall strategy map and ROI relationship: business event attendees

Source: SPSS Statistics v20 (2011)

			16.1 Event organisers should use an events evaluation model for every event (e.g. Phillips ROI model (return-on-investment))					Total
			1	2	3	4	5	
19.1 My organisation uses a performance management tool (like the Balanced Scorecard)	1	Count	0	2	20	62	52	136
		% within 19.1 My organisation uses a performance management tool (like the Balanced ScoreCard)	0.0%	1.5%	14.7%	45.6%	38.2%	100.0%
	2	Count	4	4	31	71	36	146
		% within 19.1 My organisation uses a performance management tool (like the Balanced ScoreCard)	2.7%	2.7%	21.2%	48.6%	24.7%	100.0%
	3	Count	0	1	17	36	15	69
		% within 19.1 My organisation uses a performance management tool (like the Balanced ScoreCard)	0.0%	1.4%	24.6%	52.2%	21.7%	100.0%

The Chi squared result in Table 5.28 indicates a result of 0.048 which is significant at probability $p > 0.05$. Respondents whose organisations used a balanced scorecard methodology to guide future organisational performance agreed with the literature

reviewed that the ROI of a business event should be evaluated. Even respondents who disagreed that their organisation used a balanced scorecard or didn't know whether their organisation used a balanced scorecard thought it important that there should be an ROI evaluation of a business event.

This supports the literature in that any aspect of the 'how' of creating strategy as proposed by Kaplan and Norton should be individually valued in its contributon to the overall organisational strategy.

Table 5.28: Overall strategy map and ROI relationship: Chi squared result
Source: SPSS Statistics v20 (2011)

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	15.631	8	.048
Likelihood Ratio	16.946	8	.031
Linear-by-Linear Association	7.112	1	.008
N of Valid Cases	351		

5.10.3 Business attendee perceptions of the relationship between organisational strategic planning and knowing the objectives of event attendance

The previous section indicated that the business event attendees thought the ROI evaluation of a business event was important. To attain specific outcomes from a business event that would contribute to the overall value anticipated by a strategy map, it is reasonable to argue that the event attendees should be aware of the purpose of their event attendance.

It has already been discussed that HR activities are not considered by business event attendees as important in defining knowledge strategy specific objectives from business event attendance.

It became clear in the qualitative interviews that the managers play a role in an organisational knowledge strategy.

Management influence has also been seen in the designing of an event in ergonomic aspects such as where the event is to be held, how it is to be marketed, how many days the event lasts. The statement posed was whether managers brief attendees on the objectives of the attendance (Item 16.2) in so doing inferring that an attendee who understands the purpose of attendance objectives realises their actions at the event and post-event have a focus on outcomes to create value for the bigger system of the organisation.

Item 19.1, a statement that evaluated whether the respondent knew if their organisation used a performance management tool such as a balanced scorecard, could be inferred as having a significant relationship with Item 16.2, a statement about management briefing of event objectives.

Lewin (1951) has been shown in the literature review to advocate actions that unfreeze an individual from their current level of knowledge and what is required of their individual performance if behavioural change to a higher level of knowledge is to be realised.

Managerial briefing can be a trigger for change.

Table 5.29: Overall strategy map and event attendance objectives: business event attendees

Source: SPSS Statistics v20 (2011)

			16.2 My manager briefs me on the event objectives before I attend					Total
			1	2	3	4	5	
19.1 My organisation uses a performance management tool (like the Balanced Scorecard)	1	Count	7	19	15	56	39	136
		% within 19.1 My organisation uses a performance management tool (like the Balanced Scorecard)	5.1%	14.0%	11.0%	41.2%	28.7%	100.0%
	2	Count	8	32	25	53	28	146
		% within 19.1 My organisation uses a performance management tool (like the Balanced Scorecard)	5.5%	21.9%	17.1%	36.3%	19.2%	100.0%
	3	Count	5	16	8	24	17	70
		% within 19.1 My organisation uses a performance management tool (like the Balanced Scorecard)	7.1%	22.9%	11.4%	34.3%	24.3%	100.0%

Table 5.30 indicates that the Chi-squared results are not significant at probability $p > 0.05$. So, although in Table 5.29 all respondents agreed that it was important that their managers briefed them on event objectives before attendance, there is no significance to

this in relation to the organisation using a balanced scorecard. In the literature review, several authors including Sveiby (2007), Carter (2008), Gibson and Cohen (2003), Gorelick *et al*. (2004) and Van Winkelen (2010) have drawn attention (cf. Section 3.3.2) to fact that some managers perceive no point in sharing financial results, vision, mission and strategy as they feel it has little to do with an employee's daily job of work.

Table 5.30: Overall strategy map and event attendance objectives: Chi-squared result

Source: SPSS Statistics v20 (2011)

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	8.973	8	.345
Likelihood Ratio	9.059	8	.337
Linear-by-Linear Association	3.790	1	.052
N of Valid Cases	352		

This could be argued as indicating an uncoupling or lack of clarity by business event attendee perceptions of the links in the knowledge value chain between a balanced scorecard and their objectives for event attendance. Further, when considering the result of the previous section where measuring the ROI value from an event and the use of a balanced scorecard was significant as expected, it raises an area for further research as to whether it is clear to the respondents that they, as individuals, are responsible for gathering the value required to fulfil their managers' objectives for their event attendance. Myhill and Phillips (2006) show in the literature review that business objectives have to underpin event ROI measurement (cf. Section 4.6). In terms of knowledge generated as an intangible of the event work process, it would be beholden on the attendee to understand that fulfilling their manager's objectives had a link to improve future organisational performance.

As this research is exploratory, the understanding of what may be happening between managers and attendees may further be enhanced by considering the response of

attendees to the statement posed as to whether employees have found their manager fears sending them to an event as it may mean they will then know more than the manager (cf. 5.7.3). The result was that 49% of respondents agreed with this statement while 15% neither agree nor disagree with the statement. This may be an influence that negatively affects the strength of this link in the value chain. The City of Cape Town stakeholder interview mentioned several times that a bond of trust has to be built between the employees and their managers before information flows and performance can be improved. White and Lee (2009) and Burt and Van der Heijden (2003) supported the concept of trust if goals are to be reached without wasting man hours through deviations from strategy maps to outcomes. Figure 2.19 highlights further the gaps that adversely affect the knowledge management system value creation process (Lin & Tseng, 2005) and these gaps all involve the effect of managers on the value chain.

The relevance of these findings is in the concept of interrelated organisational systems where value flows and the issue of trust is the link to an individual employee's degree of motivation to help the organisation succeed as has been discussed in the literature review (Leistner, 2010; Jones & Hill, 2010). This relates to the culture of the organisation as described in the Table 4.3 that suggests trust has to be part of the culture.

5.11 The transformation aspect of business events, socialisation: exploratory factor analysis

The items posed to business event attendees in section 18 of the survey instrument seek to establish whether the items reflect latent variables describing socialisation. Socialisation has been shown in chapters 2 and 3 to be critical in the process of creating new knowledge in an individual. New knowledge drives innovation and creativity thus organisational performance. Further to this, chapter 4 has identified various drivers and models that increase the opportunity for socialisation to occur. All of these items are underpinned with theory and research presented in the literature review.

Table 5.31 represents a measure of the sampling adequacy from the business event attendee perspectives of the importance of various aspects of business event design in encouraging socialisation. This gives a Kasier-Meyer-Olkin measure of sampling adequacy of 0.899 and acceptable as close to 1 and > 0.6. The Bartlett's test of sphericity at 0.00 is < 0.05 with a Chi-squared statistic at 2113.387 at 55 degrees of freedom is not significant at p > 0.05 which indicates that this correlation matrix is significantly different from an identity matrix and that some of the variables relate to one another sufficiently to carry out an EFA.

Table 5.31: KMO and Bartlett's test – socialisation
Source: SPSS Statistics v20 (2011)

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.899
Bartlett's Test of Sphericity	Approx. Chi-Square	2113.387
	Df	55
	Sig.	0.000

The determinant at 0.002 is > 0.00001 indicating the variables are fairly independent in their behaviour from each other.

In Table 5.32 Factors 1 and 2 have eigenvalues > 1.0 so are acceptable and together explain 62% of the total variance.

The rotated pattern matrix is examined in Table 5.33. The rotation was achieved by an Oblimin rotation with Kaiser normalisation. This is an oblique rotation method that allows the factors to be correlated. Two factors were obtained after nine iterations

Table 5.32: Total variance explained – socialisation

Source: SPSS Statistics v20 (2011)

Factor	Initial Eigenvalues			Extraction Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	**5.698**	**51.804**	**51.804**	**5.280**	**48.000**	**48.000**
2	**1.175**	**10.685**	**62.489**	**.867**	**7.877**	**55.878**
3	.894	8.125	70.615			
4	.700	6.366	76.980			
5	.521	4.735	81.715			
6	.507	4.610	86.325			
7	.402	3.656	89.981			
8	.389	3.533	93.514			
9	.288	2.615	96.129			
10	.228	2.075	98.204			
11	.198	1.796	100.000			

Items with no cross loadings between the two factors show that this item is highly correlated with a single factor (1 or 2). As the sample size is > 350 any item => 0.30 or => -0.30 (for instance -0.30 to -1.0 indicating the strength of the correlation between +1.0 to -1.0) is acceptable as a loading of 0.32, "equates to approximately 10% overlapping variance with the other items in that factor" (Costello & Osborne, 2005:4).

The item loading values are read from left to right for each horizontal row, the following items loaded with positive correlations on Factor 1: 18.10, 18.9, 18.1, 18.11, and 18.3.

Table 5.33: Pattern matrix – socialisation

Source: SPSS Statistics v20 (2011)

ITEM	Factor	
	1	2
18.10 Social interactions through face-to-face meetings build trust within a business relationship	.936	
18.9 Informal social interactions with colleagues,customers, competitors as side-events to the main face-to-face event to build relationships (side-event meetings/discussions,social evenings/events)	.899	
18.1 Strengthening relationships i.e. trust, shared experiences, networking opportunities, shared interests	.608	
18.11 Social interactions through online meetings technology build trust in a business relationship	.576	
18.3 Receiving stimulation to work better i.e. excitement, motivation, re-assurance, validation	.550	
18.2 Receiving guidance from others i.e. advise, mentoring, informal feedback, ideas, recommendations	.534	**-.207**
18.8 Feeling part of the event community at the business event helps me learn (feeling happy and excited when at the event -a sense of loss when you leave)	.442	**-.213**
18.6 Developing new ideas from personal contact with experts from industries related to yours		-.926
18.5 Developing new ideas from personal contact with your industry experts		-.858
18.7Developing new ideas from personal contact with experts from other countries		-.712
18.4 Receiving work pertinent information i.e. subject matter knowledge, know-how, lessons learned	.367	-.382

The researcher has opted to place the cross loading items of 18.2 and 18.8 shown in bold on Table 5.33 in Factor 1 as the loadings on Factor 2 are negatively correlated and are

between -0.30 and 0.1 they are dropped from Factor 2. Items 18.2 and 18.8 are considered reflections of the latent Factor 1. The Factor 1 items all deal with social interactions where trust and strengthening the feeling of being part of a group is increased by receiving and sharing knowledge from others. None of them refer specifically to personal goals expected of the business event.

Factor 2 has the items 18.5, 18.6 and 18.7 loading solely on this factor. Item 18.4 has a positive and a negative correlation with the Factors 1 and 2 respectively and both loadings are of almost the same loading value. On inspection, this item is not situated for respondent context in either a social group interaction or a personal need when compared to all other items in the section. It is more like an organisational goal, stated but with no indication of how this is to be achieved. Andreou and Bontis include this item under their statements used to assess social interactions and in their research the context of the socialisation is not specified (Andreou & Bontis, 2007:345). The need to specify context of the socialisation has arisen from the literature review findings that indicate personal socialisation for knowledge may be different from group socialisation for knowledge. As Factor 1 has seven items representing its effect, the researcher chose to place 18.4 in Factor 2 and drop it from Factor 1. This item, as stated, may not be a strong statement to assess this outcome as it may have ambiguity in interpretation for respondents.

In Table 5.34, Factor 2 is negatively correlated at -0.648 with Factor 1. The correlations should not exceed > 0.7 which would indicate a shared variance at 0.7 of 49% which is not acceptable. The two factors are distinct and unrelated.

Table 5.34: Factor correlation matrix
Source: SPSS Statistics v20 (2011)

Factor	1	2
1	1.000	-.648
2	-.648	1.000

5.11.1 Factor 1 reliability and discussion of implications

Cronbach's Aplha for Factor 1 is 0.860 as shown in Table 5.35 which indicates an acceptable degree of reliability about the interrelatedness of the seven items that are theorised to represent the effect of the latent factor.

Table 5.35: Cronbach's alpha for Factor 1
Source: SPSS Statistics v20 (2011)

Cronbach's Alpha	Cronbach's Alpha Based on Standardised Items	N of Items
.860	.864	7

The table 5.36 shows that the items have inter-related correlations between 0.334 and 0.738 which infers that each item represents a different aspect of the latent factor. There is no redundancy of any of these items.

Table 5.36: Summary of the inter-item correlations for Factor 1 items
Source: SPSS Statistics v20 (2011)

	Mean	Minimum	Maximum	Range	Maximum / Minimum	Variance	N of Items
Inter-Item Correlations	.476	.334	.738	.405	2.213	.010	7

Factor 1 is named tacit to tacit socialisation.

The argument for this name for this latent factor is based on the theory presented from the literature review for the SECI model (Nonaka, 1996). This is the 'S' phase of the SECI model which in section 2.8 suggests involves two steps, an individual and then a group creation of knowledge in a tacit manner. This process is a tacit to tacit knowledge transfer. Neilsen (2009) has suggested that the learner acquires new tacit knowledge (a

knowledge transfer) as an individual development (cf. Section 2.8). Then Floyd *et al.* (2005) explains that the embedded individual tacit learning is extended by interfacing in a group manner with other people interfacing through informal discussion. Steps 1 and 2 do not need to occur simultaneously. The learner's knowledge and that of the group is joined. The joining action often results in multiplications of the initial value as innovation and creativity from others minds act as a trigger for new innovation.

The items of Factor 1 involve the business event attendee learning more about the changing environment in which the organisation exists from competitors, peers and associates. The employee is excited and motivated by these interactions. The resulting new knowledge potentially provides the variety of knowledge required in Ashby's Law of Requisite Variety as described by McKelvey (2010) in section 2.5.2 to deal with environmental change. This endows the ability to ensure the future viability of the organisation. Drucker (1970) uses the term "knowledge worker" for the employee who embodies the principal that every individual's knowledge contributes to future organisational success. Appel-Meulenbroek (2010) has identified "co-presence" as employees share meeting space and hold informal discussions to trigger each other to formulate new ideas blending together their personal ranges of new and old knowledge and Erden *et al.* (2008) noted that this is the group working as a "collective mind and body" (cf. Section 2.5 and Section 2.6).

The relevance of the factor is that it reflects that employees are developing their human capital worth to the organisation from their presence at a business event in terms of attributes such as networking, sharing and innovating. This raises the thought that if the HRD activities or other managerial activities focused the pre-event purpose of the meeting in the minds of the attendees by pre-event QPID, LOKA and FIVA exercises which are tied into delivering an overall knowledge performance defined by the balanced scorecard, the value created from the business event could be greatly increased and the organisational performance even more greatly improved.

The question remains as to the extent to which this new knowledge creation is actually encouraged and applied in the workplace. The finding presented in section 5.10.3 has shown that there is no significant relationship between briefing attendees on the objectives of attendance before an event and a tie to a balanced scorecard strategy map guiding the type of improved knowledge required. Section 5.10.2 has shown that business event attendees think the ROI of an event should be measured and this was seen as significant in a relationship with an overall strategy map for a balanced scorecard objective for knowledge. It is these employees' activities in the workplace after a business event that have the potential to change overall organisational performance. HRD influence in this human capital development is low and yet HR practitioners have been shown as important in the literature reviewed for tracking, evaluating and ensuring future HR requirements of the organisation are met. This is summarised in an argument for their value to the input resources (human capital and event content) of the business event work process presented in section 5.9.

Event organisers also influence the event design (Table 5.7). Section 5.6.5.4 summarises the descriptive statistic responses of the event organisers and they are clearly aware that the business event should serve a higher system of knowledge development such as that related to a balanced scorecard strategic objective. Often event organisers feel that they have a high degree of autonomous input to event design (Table 5.7). Yet a variety of managerial functions other than HR work with the event organisers in designing the business event but there is apparently no process to how this occurs. Managers other than HR are influencing the attendance at, and content and design of, business events (Table 5.7). The process of tacit to tacit socialisation is occurring at business events but considering the findings it cannot be said that this is optimised. Gaps exist in the flow or the processes and policies that deliver the overall knowledge strategy work process. The influence of 'other managers' in the delivery of the balanced scorecard strategy map of the knowledge to be gained from a business event needs evaluating to understand the implications of the strategy application gap on knowledge development.

5.11.2 Factor 2 reliability and discussion of implications

Factor 2 is named as personal tacit socialisation. The attendee would be looking for new information based on their personal tacit understanding of the organisation or perhaps their own personal needs.

Cronbach's Aplha for Factor 2 is 0.869 as shown in Table 5.37 which indicates an acceptable degree of reliability about the interrelatedness of the four items that are theorised to represent the effect of the latent factor.

Table 5.37: Cronbach's alpha for Factor 2
Source: SPSS Statistics v20 (2011)

Cronbach's Alpha	Cronbach's Alpha Based on Standardised Items	N of Items
.869	.870	4

The table 5.38 shows that the items have inter-related correlations between 0.447 and 0.790 which infers each item represents a different aspect of the latent factor. There is no redundancy of any of these items.

Table 5.38: Summary of the inter-item correlations for Factor 2 items
Source: SPSS Statistics v20 (2011)

	Mean	Minimum	Maximum	Range	Maximum / Minimum	Variance	N of Items
Inter-Item Correlations	.626	.447	.790	.342	1.765	.014	4

This factor has a negative correlation with each of its associated items. The items all represent a type of socialisation but the emphasis is on personal socialisation as opposed

to group socialisation. A number of explanations based on the theory reviewed are considered.

The negative correlation may be suggesting that the more the employee has placed their own understanding of what is required from the event attendance, the less the knowledge gained will reflect the organisational strategy map for knowledge. The more the employee places a personal perspective on the point of event attendance, the less the knowledge gained has relevance to the organisational goals and the more the knowledge gained has relevance to personal knowledge needs. The literature review has shown in section 2.5.2 that Pickering (2004) supported Beer (who creates the viable system methodology) in advocating that management clearly define the channels of information flow required by an organisation to employees. When this becomes a normative management activity such as a policy on knowledge, any actions taken by individuals in knowledge acquisition at a business event are, in fact, an antecedent for a learning, adaptive organisation (Gorelick *et al*., 2004; Von Krogh, 1997; Bahra, 2001). Gilbert (2000) notes that the success of an organisational learning system in bringing added value to all other systems in the organisation is dependent on the commitment of every employee to adopting a willingness-to-learn perspective.

An alternative explanation to be considered is suggested in Section 3.4 which discusses the need for alignment between personal employee goals and organisational goals because personal tacit knowledge encompasses a type of knowledge entirely unique to each person and can influence, rightly or wrongly, their perception of how the organisational goals are to be met (Nonaka *et al.,* 1996). An individual's tacit intelligence, skills and expertise are an attribute of 'feeling' required for the organisation's survival (Dalkir, 2005; Baron & Armstrong, 2008).

Thus the more the individual has a low level of understanding of their job goal aligned to an organisational goal, the less they are able to 'feel' what is needed for organisational improvement.

Another factor that may be influencing this negative correlation finding is the employee's individual motivation to use personal contact for the good of the organisation. Section 3.2 introduces Vroom's interpretation (2005) of an individual's capacity to perform for the organisation, their personal performance. 'M' in Vroom's equation is the degree of motivation the individual applies to their job of using their ability in the workplace.

The literature review in section 3.2 indicates that low levels of motivation will probably lead to a low level of the individual seeking knowledge of use to the organisation and possibly a high level of behaviour that seeks knowledge for personal CPD use or in other terms personal tacit knowledge as represented by Factor 2. The link of low motivation to decreased organisational performance is obvious.

Concerning the proposition of the preceding paragraph, the descriptive statistics (Tables 5.39 a, b and c) exploring the feelings of employees (business event attendees) to CPD in general are reviewed. These indicate that the respondents felt that their CPD activities are encouraged by the organisation and their industry associations. In these tables, high levels of agreeing with the statements (agree = 1) are shown.

This suggests that another dimension to this factor may be manifesting in defining the delineation of where the pursuit of individual knowledge from a business event ends from that of pursuit of knowledge for organisational goals.

Here is a supporting argument for further research in that the clarity or importance with which the business event attendee understands the purpose of event attendance is a prerequisite in future organisational performance. An attendee with low motivation for organisational goals and high motivation for CPD goals could still be useful in event attendance if the knowledge need is focused pre-event and harvested post-event.

Table 5.39a: CPD undertaking

Source: SPSS Statistics v20 (2011)

19.3 I undertake my own continued professional development (CPD)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	**1**	**330**	**93.2**	**93.2**	**93.2**
	2	18	5.1	5.1	98.3
	3	6	1.7	1.7	100.0
	Total	354	100.0	100.0	

Table 5.39b: Organisational encouragement to undertake CPD

Source: SPSS Statistics v20 (2011)

19.4 My organisation encourages me to undertake continued professional development (CPD)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	**1**	**264**	**74.6**	**74.6**	**74.6**
	2	82	23.2	23.2	97.7
	3	8	2.3	2.3	100.0
	Total	354	100.0	100.0	

Table 5.39c: Availability of CPD opportunities from industry sources

Source: SPSS Statistics v20 (2011)

19.5 My industry association gives me access to continued professional development (CPD)

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	**1**	**215**	**60.7**	**60.7**	**60.7**
	2	93	26.3	26.3	87.0
	3	46	13.0	13.0	100.0
	Total	354	100.0	100.0	

This factor analysis is based on existing theory and the recommendation is for more research to be done to explore the negative correlations of the aspect of a personal influence on knowledge acquisition at a business event.

5.12 Post-event actions to embed knowledge: exploratory factor analysis

The statements set in section 20 of the business attendee survey attempts to gain an understanding of how the organisation encourages a business event attendee to embed the new knowledge for organisational use post-event.

Embedding has been seen in the ID graph (Figure 4.14) to ensure maximisation of value attained from business event attendance. Desired outcomes of business event attendance, V10 the organisation's ability to be a learning organisation because there is a standardised process for business event knowledge acquisition (a template) that aligns to organisational knowledge needs (balanced scorecard), V11 the value that the business event will add to organisational future performance and thus a national economy and V12 the degree to which the organisation recognises the business event as an organisational work process – all encourage outcomes where new knowledge improves the organisation's ability to perform better in the future. Although not specifically addressed with perception statements in this research as explained earlier, they will still be outcomes of a system of variables that supports organisational improved performance from new knowledge acquisition. This is supported by the theory of the literature review.

Table 5.40 represents a measure of sampling adequacy from the survey results of business event attendee perspectives of the relationship of post-event knowledge embedding activities undertaken by the organisation. This gives the Kaiser-Meyer-Olkin as 0.876 showing that a portion of the variance in this sample is caused by underlying variables. The Barlett's test of sphericity at 0.00 is < 0.05 with the Chi-square statistic at 1150.102 at 10 degrees of freedom is not significant which indicates that this correlation matrix is significantly different from an identity matrix and the variables relate to one another sufficiently to carry out an exploratory factor analysis.

Table 5.40: KMO and Bartlett's test – knowledge embedding

Source: SPSS Statistics v20 (2011)

Kaiser-Meyer-Olkin Measure of Sampling Adequacy.		.876
Bartlett's Test of Sphericity	Approx. Chi-Square	1150.102
	df	10
	Sig.	.000

The determinant at 0.038 is > 0.00001 indicating the variables are fairly independent in their behaviour from each other.

In Table 5.41 Factor 1 has an eigenvalue > 1.0 so is acceptable and Factor 1 (unrotated) explain 73% of the total variance.

Table 5.41: Total variance explained – knowledge embedding

Source: SPSS Statistics v20 (2011)

	Initial Eigenvalues			Extraction Sums of Squared Loadings		
Factor	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	**3.671**	**73.419**	**73.419**	**3.349**	**66.979**	**66.979**
2	.440	8.806	82.225			
3	.395	7.892	90.117			
4	.293	5.864	95.981			
5	.201	4.019	100.000			

The Factor 1 is named knowledge embedding (Table 5.42).

Table 5.42: Factor matrix for Factor 1 knowledge embedding – business event attendees

Source: SPSS Statistics v20 (2011)

	Factor
	1
20.3 Encouraging me to 'flow' the new knowledge myself through the organisation (e.g. collaboration, communication, updating others if I am an expert)	.865
20.4 Integrating my new knowledge into existing information normative management systems (e.g. databases, policies, processes)	.855
20.2 Using my new knowledge to improve organisational functions (e.g. analysis, decision making, planning)	.853
20.5 Aligning my business event attendance to improving my workplace performance	.776
20.1 Having a formal knowledge management system (e.g. this standardises the capture of my new knowledge making it available to others)	.735

The internal consistency represented by Cronbach's Alpha in Table 5.43 is > 0.90 at 0.909 and this indicates a high degree of reliability about the interrelatedness with which this set of five variables (items) represents the effect of the latent factor.

Table 5.43: Cronbach's Alpha for knowledge embedding from the perspective of the business event attendee

Source: SPSS Statistics v20 (2011)

Cronbach's Alpha	Cronbach's Alpha Based on Standardised Items	N of Items
.909	.909	5

Table 5.44 shows that the items have an inter-item correlation of between 0.584 and 0.785 which indicates no redundancy of any of the five items.

Table 5.44: Inter-item correlations of knowledge embedding variables: business event attendees

Source: SPSS Statistics v20 (2011)

	Mean	Minimum	Maximum	Range	Maximum / Minimum	Variance	N of Items
Inter-Item Correlations	.666	.584	.785	.201	1.344	.004	5

The SECI model of Nonaka *et al.* (1996) completes its four-stage process for knowledge with two final steps 'C' for combination (Section 2.8.1.3) and 'I' for internalisation (Section 2.8.1.4). Table 2.7 (Nonaka *et al.*, 2000) shows how new knowledge can be stored as either routine knowledge where tacit business attendee knowledge is placed in routine policies and processes and this can lead to changes in organisational culture or, as systemic knowledge assets where the explicit knowledge is captured, as manuals, databases, patents and licences. In the literature review, Van Winkelen (2010) and Clarke (2010) advocate that organisations have as a critical focus the need for an understanding of knowledge flow as represented in the SECI model if employee behavioural changes derived from business event attendance are to influence organisational performance. At the final step of SECI, reflection on new knowledge is critical if it is to aid in organisational performance. Buchanan *et al* (2005) have drawn attention to make knowledge 'stick' and refer to Lewin's research (1951) that there is a need to refreeze the changed behaviour of individuals or the knowledge will be lost.

The problem lies in that the findings have indicated that while both business event attendees and event organisers recognise the need for ROI measurements the Kirkpatrick-Phillips model has been found by Kline & Harris (2008) and Bersin (2004) in section 2.8 to be difficult to apply in practice for intangible asset management and measurement. The authors note that this is partly because most of the companies reviewed had no high level managerial directive (policy) on how a knowledge strategy should be implemented. Yet, as can be seen from this EFA, the concept of embedding new knowledge is thought to be important.

Phillips *et al.* (2007) have drawn attention to the criterion of ensuring that the organisation's strategies are well understood before the event is planned as these are the bases for all ROI evaluations that follow (Section 4.6). Intuitively, these also define the expected outcomes that will need to be embedded to be able to deliver the balanced scorecard anticipated performance improvements. Yorks (2005) notes that the Kirkpatrick Phillips model assumes that the organisation supports an environment for knowledge transfer.

A final note on the importance placed upon understanding how to manage intangible assets is reviewed by the perceptions of the event organisers (section 13.1, 13.2, 13.3 and 13.4 of the survey) and of the business event attendees (section 21.1, 21.2, 21.3 and 21.4). This section is not statistically analysed as it is clear from prior results that all respondents believe that a knowledge strategy is a good way to manage a business event intervention. There is, however, confusion and gaps in understanding about how organisations are managing the business event work process in relation to measuring and influencing improved organisational performance. This section sought only to gain an indication as to whether all respondents would like to have more control of the management of intangibles. Both sets of survey respondents indicated that the need for an intangible management process is important to very important.

5.13 A conceptual model as a basis for f (p, e)

A business event has been described as f (p, e). The inputs to the work process of people (p) and event environment (e) have been reviewed and, aligned to this, the role that HR plays in business events has been reviewed both from the findings and to the literature review theories.

Structural Equation Modelling (hereafter referred to as SEM) is used to assess the relationships proposed by the theory for the work process of inputs and output transformed by the construct f (p, e). This conceptual model contains four components that theoretically describe the SECI model for behavioural change as seen in the literature

review to explain what happens for knowledge creation at the business event (Nonaka *et al.*, 2000). The four components are joined as the work process of the business event. This is a measurement structural model and shows how observed variables relate to the unobserved (latent) variables uncovered by the exploratory factor analyses against the work model derived from theory presented in the literature review. A theoretical path-process diagram is created of the variables representing the business event work process f (p, e). The model indicates how well the theoretical model fits the data obtained from the surveys (Hooper *et al.,* 2008:53).

The first component of the construct considered is the HR influence in ensuring employees and the business event align to the organisation's strategy for future improved performance through human capital development and it has six items. The second component, the tacit to tacit knowledge, is the transformation where the learner's knowledge and that of the group is joined through socialisation at the event (cf. Section 2.7 and 2.8). Aligned to this component is the second factor variable system – another transformation component which recognises the potential of the individual to undergo personal tacit change (Floyd *et al.,* 2005). The final component (4) of the construct represents the outcome of the work process and is the relationship between components 1, 2 and 3 in creating a desirable organisational outcome in terms of the potential for strategic intent and improved future performance from the event.

The EFA for HR influence on human capital (this factor is named knowledge development strategy) and business event (an input) with the EFA for transformation (these two factors represent socialisation at the business event) and the EFA for strategic outcomes (this factor represents new knowledge worthy of embedding) are in the SEM of Figure 5.5. The EFA analyses have already indicated that there is no correlation between HR activities and human capital development, so these activities have no influence on either personal tacit or tacit to tacit behaviour at the business event (dotted lines). This seems to be in contradiction to the theory that HR has a role to play in human capital development but it is important to note here that the theory did not deal with research

about HR influence for the situation of a business event. What the theory indicated is that HRD should be involved wherever human capital is the resource being improved.

The strength of the relationships is represented in Table 5.45, the standardised regression weightings.

The model suggests a weak relationship exists between HR activities and organisational strategic outcomes (narrow line).

There also exists a weak relationship between personal tacit socialisation and strategic organisational outcomes (narrow line).

There is a strong relationship between tacit to tacit socialisation and strategic outcomes (bold line).

There is no relationship between HR activities and socialisation of either kind.

Table 5.45: Standardised regression weights
Source: SPSS Statistics v20 (2011)

LATENT FACTOR	DIRECTION OF RELATIONSHIP	LATENT FACTOR	ESTIMATE
Tacit to tacit socialisation	**<---**	HR impact on *f* (p, e)	0.062
Personal tacit socialisation	**<---**	HR impact on *f* (p, e)	0.088
Strategic outcomes	**<---**	HR impact on *f* (p, e)	0.106
Strategic outcomes	**<---**	Personal tacit socialisation	0.182
Strategic outcomes	**<---**	Tacit to tacit socialisation	-0.007

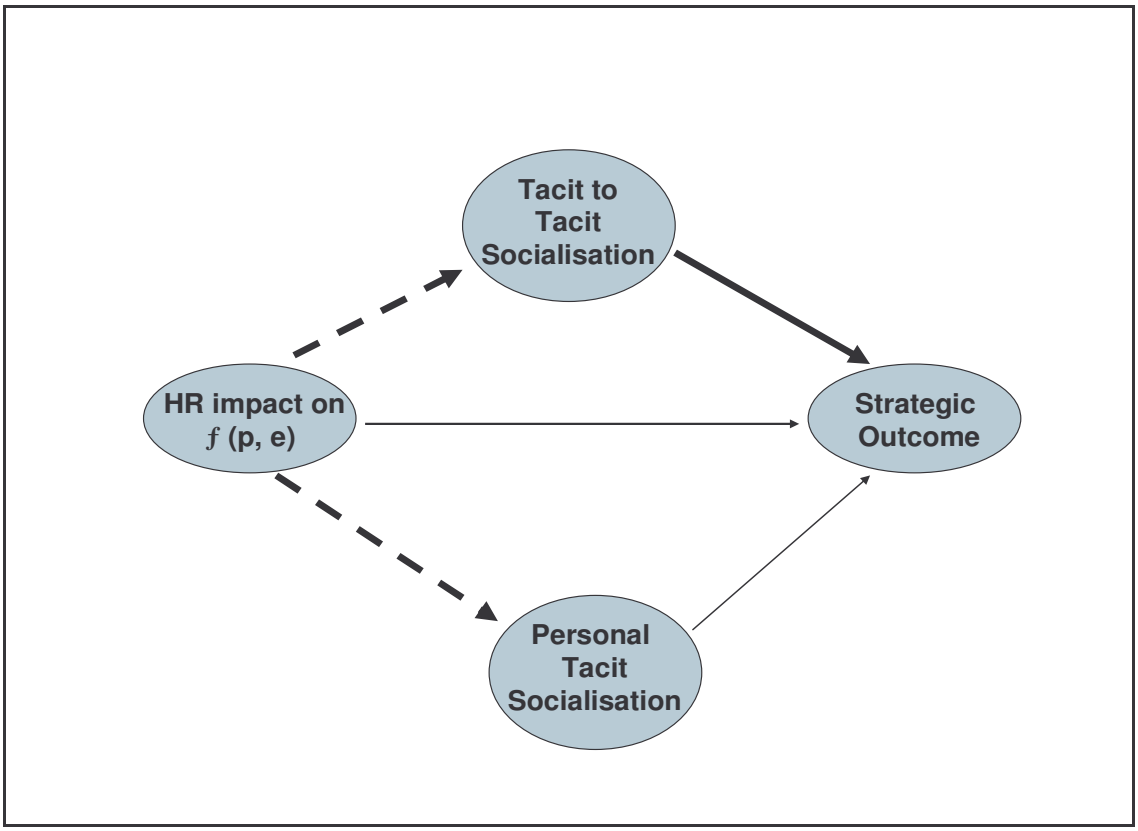


Figure 5.5: Structural equation model of the business event work process
Source: SPSS Statistics v20 (2011)

The table 5.46 of indicators confirm the goodness-of-fit of this model as acceptable using the RMSEA chi-squared test; the Expected Cross Validation Index (ECVI); the Normed Fit Index (NFI); and the Tucker-Lewis Index (TLI) (Barrett, 2007:820; Hooper *et al.,* 2008:56).

Table 5.46: Indicators of goodness-of-fit

Source: SPSS Statistics v20 (2011)

MEASUREMENTS	INDEX	ACCEPTABLE LEVEL
RMSEA	**0.082**	**acceptable** at 90%
	0.075 – 0.089	
ECVI	**2.358**	**acceptable** at 90%
90% confidence interval for ECVI	2.142 - 2.595	
NFI	**0.863**	GFI measure **acceptable**
TLI	**0.874**	GFI measure Value close to 0.95 represents **a good model fit**
χ^2 / df	**3.384**	Less than 1.0 is a poor model fit, more than 5.0 reflects a need for improvement

5.14 Conclusion

Chapter 5 has presented the findings of this research. As can be seen in the findings, the area of research is wide covering several domains that are interrelated in explaining knowledge creation. The role of the people as an input to the work process of a business event has been shown as unchallengeable in altering future organisational performance.

Chapter six follows with the conclusions from this research and recommendations for future research.

CHAPTER 6

CONCLUSIONS

6.1 Introduction

This study is the first of its kind to investigate the value of business tourism from the perspective of the value of its tourism product, business events, in improving the performance of an organisation. This can lead to an improvement in the performance of industries with an effect on GDP. The research thematic concepts of organisational learning and improvement used to build performance into the future through communicating and collaborating are strategic actions undertaken through business tourism activities.

The research shows that business event attendees and event organisers alike recognise the role of the business event as being important in terms of an opportunity to create new knowledge and new opportunities for organisational performance. However, the findings have shown several gaps in the ways that the business event knowledge value potential for improving organisational performance is managed.

6.2 The findings with regards to answering the three research questions

The study is exploratory so the research has made contributions and suggestions to extend the understanding of several aspects of business tourism concerning business events and their relationship with improving organisational performance.

The implications of the findings with regards to the first research question (RQ1): How do an organisation's staff members affect the design of a business event are:

i) Actions of event organisers are influential in successfully designing a business event and its outputs (cf. Sections 5.6.5.2; Section 5.6.5.4; Section 5.8). Thus the organisation could take normative action and set minimum criteria in a policy as to what constitutes a competent event organiser and the organisation's expectation of this individual;

ii) HR seems not to influence future organisational performance through the environment of the business event (cf. Section 5.9.2; Section 5.13). This implies that if the organisation wants the organisational human capital needs aligned to business event outputs, event design should acknowledge the role of the HR function. This would require the organisation setting HR involvement as a standard for the business event design process;

iii) Managers of organisational functions other than HR are often influential in who attends a business event and how the event is designed (cf. Section 5.8). This is important as managers have to deliver organisational outcomes but the assumption follows that the managers are competent to assess what knowledge is needed, what business event will best deliver this knowledge and who (which employee) will be the repository of this knowledge and generate most value from it.

The second research question addressed by the research is (RQ2): What variables influence the business event attendee experience at a business event? The research findings indicate the following:

i) Currently, the act of socialisation, which is the opportunity for behavioural transformation of an employee and altered future behaviour, seems to occur spontaneously through the efforts of each attendee while at the event (cf. Section 5.11; Section 5.13). The design of the event with regards to such physical aspects as content, meeting type and people attending has been shown by the attendee responses as important in attaining knowledge, but the lack of specific ROI methodology for tracking intangible value atevents makes the value of these subjective in terms of knowledge creation.

ii) The findings show that the event organiser does influence design (cf. Section 5.6.5.2). As the event organiser is the professional service provider, this suggests that organisational policy could dictate that the event organiser always meets with any internal functions of the organisation that have a stake in creating organisational change from the said event. However, the event organisers infrequently apply a detailed ROI process for managing knowledge outcomes. This seems to be a self-perpetuating problem in that if the client (the organisation) does not understand how to use the event effectively to deliver strategic intentions, then the event organiser, even if trained to do so, will not insist on it.

The manner in which knowledge content and other design features such as virtual and physical meeting types and other sensory tools can be used to encourage information flow is not alluded to with any specificity in either the qualitative or quantitative survey responses. This seems to arise from a lack of understanding of how to define intangible objectives for an event from which could follow real attempts to manage the value created in delivering these objectives through a combination of content, meeting types and sensory tools. If the objectives could be specifically defined, it would then be possible to apply elements of design to deliver the objectives. Tools such as FIVA, LOKA and QPID could potentially help in setting objectives and delivering them. In fact, on the latter issue, all respondents have indicated that measuring the value of the business event and tailoring it to improve future organisational performance is important, so a set of tools to uniquely define intangible outcomes would be valuable.

iii) The findings show that attendees and event organisers are cognisant of the need to have strategic objectives for the event that align to an overall balanced scorecard of organisational strategic intent (cf. Section 5.6.5.3; Section 5.6.5.4; Section 5.10.2). However the 'how' of doing this, or the methodology for identifying specific intangible organisational aspects of knowledge and setting an overarching development objective for knowledge performance in a balanced scorecard as with measuring event outcomes in (ii) is not clearly understood by either group.

The third research question is (RQ3): What actions in business event design methodology help in creating event designs as a strategy map for knowledge that supports the overall strategic goals of an organisation?

i) The findings imply that any ROI model used for an event evaluation such as the Kirkpatrick-Phillips ROI methodology has to be part of and contribute to a bigger system of overall organisational objectives (cf. Section 5.9.2.3; Section 5.10.2; Section 5.12). As such, the event ROI methodology becomes part of the organisation's overall evaluation tool such as the balanced scorecard. Otherwise, the benefits arising from the event cannot be recognised as adding value to the overall objectives set for improved organisational performance.

6.3 An argument for an extended Kirkpatrick-Phillips evaluation tool

Every organisation is unique in defining a set of specific goals to be attained in a specific period to improve aspects of its performance. These goals, in turn, contribute to delivering on an overall strategy for competitive advantage creation. This strategy can intuitively be understood to also be reflected in the goals set for a beneficial relationship of a business event and an attending organisation. The new value created in this relationship can be measured by the Kirkpatrick-Phillips model that compares the event outcomes against the pre-event organisational objectives. This event valuation tool has the potential to be linked and aligned to a balanced scorecard measurement tool that itself sets the criteria for, and then tracks, the attainment of the overall strategy delivery (cf. Section 2.4.2; Section 2.8; Section 4.6).

The study has indicated that there is very little attempt to manage the value outputs of events and to further align these to higher-order strategic organisational goals, but that it is a concept for managing intangible value creation that many business people in the survey supported. Based on the gaps shown in the exploratory research in trying to maintain a viable interrelated set of systems from lower systems such as the value-creating business events, linking to intermediary systems linking the event to organisational key functions (marketing goals, HR goals, employee goals and others) it

can be considered relevant to use action theory to theorise and suggest the testing of an extended Kirkpatrick-Phillips process modified as an arrowcore type template (chapter 4). This could address the problem identified in the study of not being able to recognise the steps required to manage a value-creating process.

Using a template to link tools that can measure intangible value changes in an organisation, such as the Kirkpatrick-Phillips model, is proposed. This is theorised from the secondary literature as accomplished by extending the steps of its process to strategies defined in a balanced scorecard tool ensures iterative and repeatable standardised actions are taken in intangible value creation. The tools measure the value attained from every business event while guaranteeing that the overall goals of the organisation are considered for every business event. The arrowcore template of a modified Kirkpatrick-Phillips model would theoretically fit into the larger management system of the Kaplan and Norton balanced scorecard which itself ensures policies and standardised processes to support the Kirkpatrick-Phillips objectives from business events. The Kirkpatrick-Phillips model would be modified with aspects of other models especially QPID, LOKA and FIVA (cf. Section 4.5).

This section has proposed an answer to the problem identified by business survey respondents in their limited understanding of a process that better manages intangible value creation. It is argued that the solution has relevance as the Kirkpatrick-Phillips model is already the preferred model for managing business event outcomes with many event organisers trained in its application as a tangible outcome measurement tool.

6.4 Contributions of the study

This research has made several empirical, practical and methodological contributions to the body of knowledge concerning the value of business tourism in the performance of organisations.

The empirical contributions of this research are considered first. They are supported by existing secondary data and this research contributes to extending the understanding and

possible implications of existing research with regards to its application in business tourism activities.

6.4.1 Empirical contributions

- The Lewin formula (1951) f (p, e) has been shown to have a role to play in managing the outcome of business events when its variables (p/people) and (e/environment) are considered as elements of organisational interventions specifically designed to create new knowledge (cf. Section 4.5.3.3).

  The business event is argued here as a work process contributing to delivering to an organisation's mission and thus forming part of an organisation's overall strategy for survival and profit (cf. Section 2.4). The research findings indicate, however, that while the business event participants surveyed agree that business events are important for their organisation, there is confusion as to exactly how new knowledge is established as an outcome, then embedded and used by the organisation (cf. Section 6.2).

  The research suggests that there is a need for a focus on business event components. These include who comes to the event, how new information is delivered (equipment), what secondary information sources or tools used at the event and any other elements to support knowledge acquisition and retention. This is the first time that the Lewin formula has been suggested as linked to strategic goal attainment from the perspective of business event value creation for an organisation (cf. Section 5.13).

- Based on secondary research findings, the application of the Lewin formula in business event design is seen as linked to delivering Getz' concept of a liminal zone at an event. The liminal zone is the business event environment (Ba) created by the event organiser and the organisation that encourages behavioural change (cf. Figure 2.6).

The research results indicate that while design is addressed by the event organiser and representatives of the organisation working with the event organiser, there is little consistency with regards to attainment of pre-event defined outcomes in who contributes what to the design from the perspectives of both the organisation and the event organiser.

Further, the research indicates that human resources have little or no role to play in business event design although the literature suggests that human resource development and management is a critical function by human resource practitioners in support of future organisational performance.

These seemingly unmanaged variations with regards to who contributes to the design of the inputs to a business event may well reduce the utility or final value of the event outcomes.

This research's contribution to the body of knowledge on business event management is that consideration is given to improving the business design input link - the link between organisational needs and projected outcomes set for every event. This, in turn, would improve the potential for new value in the entire value chain (cf. Section 1.1.3; Section 1.1.5; Table 3.1; Table 3.2; Section 3.2.8).

- Exploration of the Lewin formula in the situation of a business event in this research contributes to the understanding that a business event is a link in a larger value chain that represents organisational intangible value creation (cf. Figure 2.7).

  The research explored who attends business events and why they attend, surveying different functions of an organisation. The research findings reflect that business event attendees are employees and that the business event affects the value of their individual knowledge (cf. Section 2.4.7; Section 3.2).

This contribution corroborates the literature review findings to highlight employees and their behavioural change from event attendance as the drivers of organisational new value creation which, in turn, suggests there must be a post-event plan to ensure this value is captured and utilised (cf. Section 3.3).

- A system thinking approach has been applied using the secondary data presented to theoretically model the derivation of value arising from business events (cf. Section 3.7). The business event is considered in this research as a viable work unit. This approach assumes that every viable work unit in an organisation creates some value that flows upwards and outwards to other functions of the organisation. Understanding the theoretical value flow paths from the business event upwards and horizontally through employees and functions of the organisation is a contribution made by this research. Modelling the viable systems links and paths suggests ways of managing the contribution of business events in the creation of organisational competitive advantages across managerial functions such as HR and finance, and across support systems such as ICT and IT (cf. Section 3.5; Figure 3.19).

  This value flow is diagrammatically interpreted using both theoretical causal loop diagrams and viable systems diagnosis to postulate three theoretical inter-linked systems-in-focus described as R0, R1 and R2. They represent an organisational knowledge system (cf. Section 3.7). While the research could not review the entire knowledge system at three recursive levels, it has contributed to a greater understanding of the potential of business events as a work unit within the theoretical system R1. This is supported by the research findings that indicate the importance attached to gaining new work-focused knowledge from business events by the surveyed business event attendees.

- The management of value chain outcomes for business events has been argued in this research from a systems thinking perspective to postulate reliance on specific models and methodologies to be able to create iterative standardised processes for business event design. The contribution of the research is that it proposes that

intangible value creation is managed by: the Lewin formula at recursion level R2, this being the lower level of creating value through the business event work unit for the organisation; the Kirkpatrick-Phillips methodology at R1, this being a higher level of managing and measuring the intangible value creation of a business event for the knowledge work system; and an overall organisational strategic tool such as the Kaplan and Norton balanced scorecard at R0, the highest level that ensures that the purpose of the business event's intangible value creation is aligned to the defined knowledge system that creates expected intangible outcomes. Business event respondents of this research agreed that there is a need to manage intangible business event outcomes. They also agreed that many organisations use a balanced scorecard to create a map for attaining strategic objectives (cf. Section 4.4; Section 4.5).

The contribution made by this research is to recognise the interrelatedness and interdependency of the three models for intangible value creation. While the model applied may vary, it is the recognition of higher and lower systems of value that the models need to bridge as an interlinked mechanism to bring continuity of purpose that is important. This suggests that managing the relationship of all three simultaneously in attaining desired outcomes is important to consider, as ignoring one diminishes the value creation potential of any other. This relationship has not been suggested before in the body of knowledge about business events and organisational performance.

- The secondary research and contributions of this research presented thus far suggest that the Lewin model has a relationship in value creation with the intangible value chain model proposed by Holsapple and Singh (2001) which is adapted from the tangible value creation model of Porter (1998) (cf. Section 3.7). The secondary research has shown that value created over any value chain, whether tangible or intangible, is dependent on the cumulative strength of each of its links. This research has indicated that standards set for event outcomes can

vary greatly because of variations in inputs and very little attempt to set goals for intangible outcomes (cf. Section 5.6.5; Section 5.8; Section 5.9).

The contribution of the research is that the Lewin formula is a critical vertical and horizontal linking method between all areas of the theoretical intangible value chain and, further, that business events must logically be a link that strengthens the chain rather than diminishing it (cf. Section 3.8). This relationship between the Lewin model physically represented by a business event and an intangible value chain has not been suggested before for business events.

- The role of socialisation at business events for knowledge augmentation and replenishment has been suggested by these research findings as extremely valuable to organisations seeking competitive advantages through knowledge. This supports the importance of considering business event design in the context of the SECI process proposed by Nonaka (2000). The secondary research has shown that knowledge flows from optimised opportunities for socialisation (cf. Section 2.7). The research business respondents have indicated that opportunities for socialisation at business events are integral to the satisfaction with the event.

  The contribution of this research is to recognise the importance of event activities that maximise opportunity for socialisation and the entire process of SECI. The role of SECI as mandatory in business events has not been suggested before for the methodology of business event design related to systems as value creators.

- The secondary research data has indicated a link between organisational knowledge and organisational risk management. This is with regards to an organisation being sufficiently equipped with pertinent knowledge to take informed business decisions that ensure future organisational viability. Ashby's Law, that an organisation can only respond appropriately to stimuli if it has the requisite variety of responses available to it in its knowledge repositories, is argued as being substantiated by these research findings that indicate that business

attendees use business events to gather knowledge about their industry and other industries (cf. Section 2.4.6; Section 2.6; Section 2.8.1; Section 3.2.7: Section 4.4.4; Section 5.9.2.1).

This contribution of the research suggests that business events have a definite role to play for an organisation seeking to minimise risk (cf. Figure 2.10). This in turn can be argued as a business event contributing to good corporate governance actions by helping an organisation meet the requirements of the Sarbanes-Oxley and other corporate governance regulations as it can ensure the requisite variety of information.

- The role of personal goals (CPD) and motivation from attendance at a business event has been discussed in the literature review. The SEM model latent factor for personal tacit socialisation to strategic outcome shows a weak relationship (cf. Section 5.13).

  The contribution of this is that it corroborates findings of the literature review that an employee's goals for business event attendance may not be those of the organisation (cf. Section 3.2.4). The literature indicated that, to attain full value from employee attendance, the two sets of goals need to be aligned.

6.4.2 Practical contributions

The findings of this thesis have suggested a number of practical points of application with regards to conducting business tourism activities. These would be to affect the future performance of an organisation through business tourism events and business tourism management policies with regards to both their roles in influencing the future of their nation's economy.

- Business tourism success has traditionally been described in terms of tangible measurements such as bed nights, car hire and other spin-offs from business events (cf. Section 2.3). However, both secondary and primary research indicates

that business events create the opportunity for a secondary, if not more important, outcome. This is their role in ensuring the future success of organisations that attend them through creating the intangible resource of knowledge (cf. Section 2.3.1).

This research makes an argument for the utility of widely recognising and promoting this intangible contribution of business tourism. The proposition suggested from this research is that tourism management needs to more actively consider a focus on the importance of supporting the optimisation of business tourism event activities through their design and value significance because they are intangible value creators. The relevance of this action can be seen as a financial contribution by business tourism to a country's future economic growth strategies, highlighting the link between intangible and tangible economic outcomes (cf. Section 2.4.2; Section 4.3.1).

- This research shows that business tourism activities are implicit in enhancing future organisational performance unequivocally linked together by cause and effect variable relationships. The research has only been exploratory, suggesting descriptors of these variables and conceiving management of them theoretically. However, the research, both secondary and primary, has suggested the value of designing business events with the purpose of influencing the strength of a specific variable relationship or reducing the effect of undesirable variables acting within the knowledge chain so the exploratory elucidation of certain variables that may be acting in these systems is a contribution to possible management of them (cf. Figure 4.12; Section 5.13).

- The research findings have indicated that the manner in which organisations use business events with regards to such aspects as aligning business event outcomes to overall strategic intentions, to human resource management and to recognising employees as knowledge repositories has been shown by this research as not standardised (cf. Section 4.7). Lack of standardisation of knowledge acquisition is in contradiction to secondary research reviewed that requires policies and

processes about how to make new knowledge useful. The findings have indicated that there is a general lack of organisational processes and policies as to how to capture event attendees' (employees) new knowledge in an organisational knowledge repository. The processes and policies ensure an opportunity for the new knowledge value to be multiplied (cf. Section 2.3.3; Section 2.3.4).

This research indicates that the secondary data highlights methodologies that could possibly ensure standardisation, but currently there is still a gap in most organisational efforts to incorporate new knowledge into the organisation in a standardised manner (cf. Chapter 4). Standardisation ensures that results are repeatable and that the quality of value created can be pro-actively managed to attain specific outcomes. This research suggests that employees exacerbate this situation by sometimes not having their professional development needs aligned to those of the organisation. This all becomes a constraint to the value that can be created by attendance at a business event.

The practical contribution of the research is drawing attention to the need to assess existing organisation and business event relationships by both event organisers and organisations as this will lend to recognising when these processes and policies are absent.

- Secondary research showed a resistance to application of the Kirkpatrick-Phillips methodology for application in ROI measurement by organisations (cf. Section 2.8.1). The methodology met with resistance from organisations complaining that it was time-consuming to apply with further difficulties in identifying performance measurement indicators because the measurables are often intangible. The research findings corroborated that event organisers infrequently use a ROI methodology to measure objectives against outcomes for intangibles such as knowledge because their client organisations do not ask for it (cf. Section 5.5.2.4; Section 5.10.2).

This research found that business event attendees corroborate that they are often unaware of efforts to manage business event outcomes. However most supported the concept of ROI measurement from business events as an important contribution in terms of managing future organisational performance and qualifying time and financial expenditure on business event creation (cf. Section 5.10.3). This contributes to highlighting a current need in that a more practical version of an ROI tool is required by both the organisation and event organiser if business event value creation is to be measured.

- A contribution of this research has been to recommend that the Kirkpatrick-Phillips methodology is retained to manage the acquisition and embedding of knowledge with theoretical amendments to the methodology that would simplify its application in terms of tracking intangible value creation. Many event organisers are trained as CMPs in the methodology with regards to tangible outcomes, so to change to another model would lose this existing knowledge. As stated, there are over 10 000 qualified CMPs. Changes to the methodology could include additional pre-event and post-event steps that clarify the path of knowledge flows, thus making the tracking and embedding of intangible value more explicit (cf. Section 2.4.2).

  This research contributes further by identifying from the secondary research that the Kirkpatrick-Phillips methodology could become the strategy map or the 'how' as postulated by Kaplan and Norton that is required to manage improvement of intangible value creation and complete an organisational intangible value chain (cf. Section 4.5).

- The research has contributed to an understanding of the use of virtual business events as knowledge creation tools. Such concepts as online meetings, and online learning were suggested in the literature to be easier for younger employees who have used online activities regularly since a young age (cf. Section 2.4).

The contribution that this research has made is that there seems to be no difference in how older and younger people view online business events with all age groups of business event attendees indicating an ease of usage with them (cf. 5.10.1). This opens the way for the acceptance and management of blended learning techniques and business activities for all ages of employees when ensuring requisite varieties of both knowledge and knowledge repositories. Blended events have more global reach at a low cost of implementation extending the potential of the absorptive capacity of an organisation by interfacing employees from all parts of the world (cf. Section 3.2; Section 3.5).

6.4.3 Methodology contributions

- The qualitative interviews of the research were found important in understanding the situation between an organisation and business events (cf. Section 5.5.2). It is clear from the interviews that the process of organisational knowledge accumulation is more tacit for many business people than explicit. All interviewees had a strong 'gut' instinct as to why the business events were important but had no real understanding of what would represent a defined process for what they were doing intuitively. This makes the situation of business tourism and associated improvements in organisational performance from intangible value creation hard to describe in terms that refer to specific attributes and characteristics.

  The contribution that this research has made to the methodology for investigating the value of business tourism in business events is that as Nonaka *et al.* have already highlighted, the process of person-to-person interview is a type of socialisation process that allows tacit information to become written down and become explicit (cf. Section 2.7). Qualitative interviews are important in establishing a written version of tacit thoughts especially where the situation under review is exploratory with little known of it. Once written down, more focused research can begin through larger surveys focusing on specific suspected latent variables.

- Latent factors are made up of sub-systems of variables. It is the effect of these sub-system variables that this exploratory research tries to identify through gathering the perceptions of people involved in the situation. The literature review suggests what the effect of each variable might look like. This research does not claim to be cause and effect investigation because the exact interactions of the variables in the systems are unknown (coining the term exploratory). In the methodology of analysing the secondary data, it was found that using an affinity diagram to group possible similar variable behaviour theoretically and then an interrelationship digraph to further name and group higher systems of variables created from these sub-system variables helped to build an understanding of the expected theoretically proposed situation (appendix 1). The highest grouping of variables (12) of the digraph influenced the creation of the statements about outcomes seen in the situation and are used to record the perceptions of the respondents about the real situation (cf. Section 4.8). The statements reflect variables considered influential by prior researchers in this situation.

  The contribution made by the use of these tools is that the researcher can form a theoretical picture of a not well researched situation from the tool application. This provides a starting point to corroborate or suggest alternatives for proposed variable behaviour. Application of the tools helps in postulating the variables that may be acting in the situation.

- The research considered the four underlying thematic concepts to underpin the situation of the importance and value of business tourism in the performance of an organisation (cf. Section 1.6). The affinity diagram drew the variables from the literature review into groups (Appendix 1). The groups had relationships with 12 major theoretical variables representing them in a higher system. The four thematic concepts threaded strongly through all 12 variables as would be expected of interlinked systems (cf. Figure 1.7; Figure 1.8).

Using the fact that the variables represent sub-themes of the main themes, it seemed reasonable to use a qualitative tool, Atlas.ti v6.2 to analyse the qualitative interviews. This resulted in grouping the feelings and perceptions of the interviewees in a thematic way (Appendix 5). The more detailed secondary findings of the affinity diagram helped in linking the statements of each interviewee to one of the 12 main variables. In this way, the interviewees could be given quantifiable value and thematic reference.

The use of a qualitative tool such as Atlas.ti v6.2 linked to a system of thinking tools that helped to define thematic concepts is a contribution this research has made to methodology.

- When developing a set of statements to use ultimately as a standardised instrument for iterative usage, it is important to see what research survey items past researchers have found of reliable. Andreou and Bontis created a set of statements to gather information about the perceptions of their research group on the value of socialisation (cf. Section 4.5.3.3). These statements were used in the quantitative survey of this research and found to be useful in this respect (cf. Section 5.6.3). The contribution of this research is to have used the statements and found that they do indeed contribute to identifying outward results of the intangible latent variable, socialisation.

6.5 Limitations of the study

The theory has shown clearly that while much is known about value chains in tangible asset creation, little is understood about intangible asset creation management in terms of value chains, especially in the situation of a business event. Two important limitations exist for evaluating the business event in terms of intangible organisational asset contribution.

The first limitation of the study is the fact that the best known and promoted model for measuring return on investment from a business event is not popular in practice. Very little is known about the role of the model in measuring intangible asset creation. A body of research knowledge about the efficiency and effectiveness of the model in actual application would help in understanding how business events contribute to organisational performance.

The second limitation is that business events, while actively pursued both informally and formally by organisations, are not generally proactively leveraged or recognised as intangible value creators. The awareness of the potential of the business event to create competitive advantage through active management of the business event work-process is not highlighted as a management practice or organisational normative actions in any of the theory reviewed. The management of business events happens informally, but proactively, with some of the best performing global companies indicating an understanding of the value of business events, but still using them in an unformulated manner. The literature clearly shows a link between reducing organisational risk profiles and using business events as the work process to ensure a sufficient diversity of knowledge with which to make informed decisions when managing risk, but the business event process still appears to be on an ad hoc basis. It is not recognised as a work process for intangible value creation.

6.6 Recommendations for future research

There is a requirement highlighted in the findings for research to identify the role of the organisation's managers in business events. Then the interface of the event organiser with the organisation could be better understood. This could also highlight the role of organisational strategic intent as applied by managers to business events.

The value of HR in a business event needs to be explored, possibly with action research. Human resource practitioners clearly indicate that they feel they should be involved in the

business event and the implications, both negative and positive, of such an action need to be understood in terms of benefit for the organisation.

Many aspects of intangible organisational value creation have been covered in the literature review but are not researched specifically by other researchers in the situation of the business event. For instance, examples of this are the value inferred on an organisational brand in a business event; the value of personal continued professional development in attaining organisational goals; and the effect of organisational culture on knowledge development to name just three.

The work process model of the business event f (p, e) as derived from the literature and evaluated with exploratory factor analysis and modelling is far from clearly defined and needs considerably more evaluation of what constitutes the inputs, transformation and expected outcomes of the process.

The opportunity to test an arrowcore template concept composed of an extended Kirkpatrick-Phillips methodology enhanced by its presence in a balanced scorecard would be valuable in investigating the viability of measuring intangible returns on investment from business events and the associated influence in future organisational performance.

6.7 Conclusion

The objectives set in chapter 1 for this research have been argued as having been met in this chapter in that knowledge has been added to the understanding of the relationship of the business events of business tourism and organisational performance and, the value of business tourism to economies as a whole.

The overall conclusion of this research is that socialisation has been shown as key to value creation in a knowledge value chain as is supported by the existing theory presented in the literature review.

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APPENDICES

Appendix 1: variables acting in the relationship of the business event and organisational performance

Themes and sub-themes of chapter one linked to variables which have influence in business event design

MAIN THEME Chapter one Section 1.4.1	**<u>The value of business tourism in the performance of an organisation</u>** Business tourism events contribute to the organisational value chain, the organisation's overall industry value and thus the economy of a country.
Sub Theme 1.0 Chapter one Table 1.7	**<u>The purpose of an event</u>** "The fundamental purpose of the [business tourism] event is to promote, market or directly engage in commerce or otherwise meet corporate objectives" (Getz, 2007:38-42).
Sub Theme 1.1	**<u>Antecedent for an event (drivers and constrainers) - variable influences</u>** The identification of different variables at work in the business tourism events and organisational knowledge creation interface highlights their significance in relation to improving organisational performance (Bahra, 2001:116-129). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which the organisation's intangible assets that influence that tangible asset are named and tracked as key performance variables from the pre-event stage (Section 2.3.1 and Section 2.4.5) - The degree to which the business event design incorporates triggers for behavioural change such as sensory impacts, facilitators, boundary spanners, meeting areas (Section 2.5, 2.7 and Section 2.8) - The degree to which the business event phases succeed in creating Basho between people at the event (Section 2.8.2) - The degree to which the business event phases succeed in creating Ba and communitas at the event (Section 2.7) - The degree to which business event attendance is driven by first identifying gaps in the organisation and seeking diminishment of this gaps through event participation (Table 2.7, 2.8 and Figure 2.19) - The degree to which a business event attendee is picked by an organisation because they show superior operand traits thus are more likely to share knowledge (Section 3.2.1)

	- The business event attendee needs to reflect aspects of their organisation's vision and mission to produce new organisational value (Section 3.2.2)
	Sub Theme 1.1.1 "Organisations choose it [the business event] as a forum to communicate messages……promote products…… .reward and celebrate……collaborate…generate resources" (Business Events Council of Australia: About business events, 2011b). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which a country undertakes activities that promote their business event capabilities to improve nation wide innovation (Section 2.2 and Section 2.3) - The degree to which an organisation is willing to change to release the value from employee innovation (Section 2.3.2) - The degree of employee/attendee commitment to furthering organisational performance through innovation and creativity (Figure 2.5)
Sub Theme 2.0 Chapter one Table 1.9	**A learning organisation contributes to the value chain** **Critical concept:** "Understanding how we learn, develop and improve: leading true learning and improvement" **(Scholtes, 1998:30)**
Sub Theme 2.1	**Business events initiate behavioural change that potentially changes organisational performance** B = *f* (p,e) Where B (the future behaviour of a person) is a function (*f*) of the people (p) present at the [business] event and the environment (e) of the event itself (Lewin, 1951:25). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which the future behaviour of an employee affects organisational performance (Section 2.3 and Table 2.4) - The degree to which the pre-event build up (event website, selection of venue and others) builds expectation which begins unfreezing of typical behaviours (Section 2.10 and 2.12) - The degree to which an industry and an economy recognizes the potential knowledge value of hosting a business event

	(Section 2.3). - The degree to which the organisation harnesses sponsorship to creating the event experience (Section 2.11.1). - The degree to which the organization realizes that the event experience can change buyer, supplier and competitor behaviour in the future (Section2.11.1). - The degree to which the attitudes of the employee (learning, sharing and storing knowledge) are aligned to ensuring future organisational performance (Section 2.4.7) - The degree to which an organization commits to managing and measuring the change in an employee from event attendance justifies the expenditure of the event participation (Section 3.2) - The degree to which the organization strives to align the employee attitudes to improve organisational future performance (Section 3.2) - The degree to which the organization recognizes and supports informal employee networks (tiger meetings) (Section 2.8.3) - The degree to which the organization recognises and rewards employees (through promotion) who pro-actively take steps to share new knowledge of importance with others in the organization, thus encouraging a continued positive attitude to sharing (Section 3.4) - The degree to which the pre-event message contextualizes the reason to be attending the event, begins the opportunity for a conative change and thus a future behavioural change due to a future cognitive altered state (Section 3.2.3)
Sub Theme 2.2	**<u>Event design is critical in behavioural change</u>** To qualify expenditure on event attendance/creation an organisation needs to understand how best to ensure that elements such as skills development and collaborative relationships do in fact occur at business tourism events (Scholtes, 1998:34-43; Senge *et al.,* 1999:434; Phillips *et al.*, 2007:22). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which an event has a systematic design if a business event is to be a strategy to, "Develop visions in the form of ideas or projects for developing an organisation or community" (Vidal, 2004:403). (Section 2.9.3, Figure 2.14). - The degree to which tools such as negotiated narrative, drawings, facilitators, knowledge leaders are used in the event design to trigger behavioural change (Section 3.2.2)

	- The degree to which the business event cost in terms of invested money including sponsorships and branding value changes the perception of the organisation(s) associated with an event for the attendee by experiencing the entire event experience (Section 3.2). - The degree to which a pre-event experience (such as creating expectation) affects the potential buyers view of the event and its associated stakeholders (Section 2.12). - The degree to which the event designer recognises that in considering the business event design attendees may be seeking either theory and/or knowledge for improved job performance or practicing motivation and behavioural skills (Section 3.6) - The event design can ensure a high degree of accuracy for new knowledge transfer from attendee back into an organisation by providing for documented results of information generated at the business event in formats usable by attendees post-event (Section 4.4.7) - The effectiveness of event design is responsible for the degree of pre-event expectation as to the value to be attained from event attendance (Section 4.4.5) - The degree to which the pre-event design successfully communicates a purposeful reason for the attendee to attend (Figure 2.3.3) - The pre-event design should trigger the beginnings of an emotional response (affective dimension change) about event attendance (excitement, enthusiasm) which in turn introduces the opportunity for behavioural change (Section 2.12). - The degree to which the event design ensures that there is a post-event phase of knowledge embedding at the organisation (Section 4.4). **Sub Theme** **<u>Globalisation defines a new type of business event</u>** **2.2.1** Usage of virtual events highlights another global driver of change in the form of adapting business event delivery to serve globalised business where employees work geographically remote from one another has promoted usage of virtual business meetings and market exhibition technology (Gibson & Cohen, 2003:69; Harris, 2003:159; Desouza & Awazu, 2005:166-167). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which national and global links are built via virtual and face-to-face business events (Section

		2.13)
	Sub Theme	**<u>Knowledge flow depends on business event design</u>**
	2.2.2	The influence of good design of meeting spaces for employees is influential in creating knowledge flows (Appel-Meulenbroek, 2010:189-205; Gorelick *et al.,* 70-73). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which the quality of the business event design is seen in the degree of attendee behavioural change (Section 2.6, Figure 2.7). - The degree to which pre-event design can build excitement conducive to attending the event and wanting to share in it (Section 2.12). - The degree to which past positive experiences with a specific business event drive attendance at the next (word of mouth advertising influence based on past experience) (Section 2.12). - The degree to which potential event attendees build expectation for an event themselves by emailing and calling /texting each other about the event next (word of mouth advertising influence based pre-event experiences) (Section 2.12.2 and Figure 2.18). - The degree to which the event is seen to be supported by its town, province and country can influence the decision to attend the event (Section 2.3). - The degree of value generated by a formal business event can have the value extended by further informal business events post formal event (Section 3.8). - The degree to which informal events extend the value of formal learning depends on the organisational culture to knowledge (Section 3.3) - The degree to which the organisation recognises that the level of trust rises when people come together in an informal manner for knowledge sharing and the value of this is that the overall quality of the organisational value chain improves (Section 4.5.3). - The degree to which the business event links SECI needs with organisational future performance by planning the mixes of customer, supplier and competitor information content (Section 3.2.7, Table 3.2)

		- The degree to which the organisation and the event designer plan together that a business event is part of a learning chain and not an isolated occurrence in value chain (Section 3.2.8). - The degree to which the strength of the links in a learning chain (the person to person link) is reinforced by a business event (Section 3.2). - The degree to which it is recognised that the supply chain knowledge management depends on the strength of every link in building a knowledge flow for its ability to create organisational value (Section 3.2.6). - The degree to which trust is manifested at each link in the chain and then affects the overall value of the value chain (Section 3.2.6). - The degree of knowledge transfer depends on the degree to which people in a knowledge chain will share knowledge (Section 3.2.7, Table 3.8). - The degree of knowledge flow has a relationship with the quality of the organisational information technology that supports knowledge flow (Table 3.3). - The degree to which the business event ensures that post-event organisational actions ensure new knowledge 'sticks' in both individuals, organisational processes and other information repositories (section 3.3.2). - The degree to which to which the design places the right content instructor with the attendees (Section 3.5). - The degree to which the event design recognises that an online business forum may benefit from time to time by having face-to-face meetings (Section 3.5). - The degree to which a template is used to ensure that the business event follows generic steps that helps guarantee that value accrues to the organisation from the event (Section 4.4). - The degree to which using templates to design an event is seen as creating opportunity for knowledge and improved competitive advantage (Section 4.3).
	Sub Theme 2.2.3	**<u>The event organiser's abilities affect event design</u>** Event design is overseen by the event organiser inferring that the event organiser works closely with the organisation and its HR/HPI function to create opportunity for the outcomes anticipated. The ability to create a match between design and needs also requires that the event organiser has the professional competencies to

		support this delivery and that the organisation is conversant enough with the role of event organisers to play a lead role in defining their needs in this relationship. *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which the event is rated pre-event, during the event and post-event by attendees to gauge with accuracy any gaps that appeared between expected delivery and actual delivery (Section 2.9). - The degree to which the event organiser recognises the importance of the pre-event design elements (Section 3.6). - The degree to which the business event organiser is a facilitator for knowledge flow (Section 3.6) - The level or importance/quality of new knowledge flow will depend on the people who have knowledge to share at the event (Section 2.9). - The degree to which people at a business event represent the senses of an organisation and as such they can seek knowledge that is useful to the organisation's vitality (Section 2.5.2). - The degree to which the event organiser satisfies the needs of personnel and organisational knowledge requirements because they have an understanding of these needs (Section 3.4). - The degree to which the different needs of individuals and organisation are addressed by the event design (Section 3.3). - The degree to which a business event supports a CoP can affect the overall individual and organisational value attained (Section 3.3). - The degree to which new concepts are resisted when not typical of current organisational thinking (Section 3.2.7). - The degree to which facilitation is used to unfreeze receptivity and encourage the participation of all in knowledge flow (Section 3.3.2). - The degree to which the facilitator is prepared in pre-event to open dialogue to seek specific inputs to an objective (section 3.4.1). - The degree to which an event organiser is aware that they need to build Ba, a zone of liminality and

		communitas for knowledge transfer (Section 2.8). - The degree to which the onsite event design allows for social (informal and unpressurised) intercommunication activities appropriate to the target audience needs (Table 3.2). - The degree to which the business event provides a safe, neutral place to explore new thoughts and ideas not normally raised in the workplace (Section 4.4.8). - The degree to which the business event allows for an individual to explore new person to person relationships without long term consequences if unsuccessful (Section 4.4.8). - The degree to which the event organiser has the competency to assess that organisational content need with the help of the organisation or in response to a general industry need (Section 4.5.1). - The degree to which the organisation through the event organiser actions shows realisation that it has a continuous knowledge need and that knowledge as an asset requires management and champions (Section 3.8). - The degree to which an event organiser has theoretical understanding of SECI and applies it operationally in event design (Section 4.3). - The degree to which the event organiser establishes outcome goals for every business events and measures the final results against the expected returning a cost-benefit calculation to the organisation (Section 4.5.2). - The degree to which the event organisers professionalism extends a generic business event development template (Figure 4.6). - The degree to which the event organiser's abilities mix delivery mediums to ensure optimised knowledge transfers at a business event (Section 4.4.4). - The degree to which the event organiser uses mentoring and experiential design features to multiple knowledge absorption (Section 4.4). - The degree to which the organisation monitors and affects the content chosen for presentation at a business event (Section 2.12). - The degree to which the chosen knowledge broker (an individual or a team) selects the most appropriate speakers and people to attend a business event and deliver content (Section 3.6).

		- The degree to which the event organiser's experience limits optimised event design (Section 3.6). - The degree to which an event organiser understands the concept of a knowledge strategy will affect the quality of the event design (Section 3.6). - The degree to which the type of employment by an organisation of an event organiser may affect the event design (Section 3.6). The degree to which the event organiser skills are recognised as independent variable and the event value as the dependent variable in the event organiser and event design relationship and as such should fall into ROI calculations (Section 3.6).
	Sub Theme 2.2.4	**<u>Organisational and employee knowledge needs can be met by a business event</u>** It is reasonable to claim that a well designed and delivered business event can convey the client intentions for organisational knowledge development while satisfying the employee need for continued professional development (Nonaka & Takeuchi, quoted by Dalkir, 2007:56-57). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to business event design aligns employee professional benefit with that of organisational knowledge needs affects the level of successfully application of new knowledge in improved organisational performance (Section 3.2.5) - The degree to which an organisation recognises that self-directed learning can add value to the organisation (Section 3..2.4) - The degree to which an organisation recognises that some employees are better knowledge sharers than others so derive more value from business event attendance and create more opportunity for new knowledge inflow into the organisation (Section 4.4.5)
Sub Theme 3.0 Chapter one Table 1.8	**<u>Organisational systems and their employees are inter-related and complex</u>** **Critical concept:** "Understanding the interaction and interdependence between systems, variability, learning and human behaviour: knowing how each affects the others" (Scholtes, 1998:44).	

Sub Theme 3.1	**Understanding variables that influence knowledge flow** In an effort to understand the role of business tourism events in improving organisational performance, the role of variables associated with knowledge creation through business tourism events should be understood. *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which the organisation ensures that internal functional unit's strategic goals are reviewed before business event creation or attendance (Section 3.4) - The degree to which the level of organisational performance is supported by actions that advocate being a learning organisation (Section 2.12) - The degree to which organisational collaboration and communication at a business event improves profitable adaptations over time (Section 2.3) - The degree to which it is recognised that in a learning organisation the support of the employee is pivotal in producing a quality and innovative value adding performance (Section 2.3.4) - The degree to which the internal organisational functions support an integrated knowledge flow depends on the degree to which the organisation implements a knowledge strategy (Section 2.4.1, Figure 2.2) -The degree to which team behaviour is aligned to organisational needs affects future organisational performance (Section 2.5) -The degree to which internal communication processes support the flow of new information from an event, through the organisation (Section 2.3.3) - The degree to which an employee who shares knowledge is seen by the organisation as a node of the organisation's network (Section 3.2.6). - The degree to which the change in business event attendee sentiment (satisfaction, motivation and commitment) is measured pre- and post-event by organisations pursuing improved performance (Section 4.7). - The degree to which the organisation uses a knowledge champion to work with HR and the knowledge strategy to met overall organisational strategic objectives (Section 3.4).
Sub Theme 3.2	**The recursive effect of value adding actions**

	The CATWOE model is used to unravel the co-dependency relationships in the recursive systems of the business tourism industry. *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which the complexity of the organisational system within its internal and external operating environment is understood will affect the value derived from any value enhancing activity (Section 2.3.2) - The degree to which the strength of a nested relationship of individual, team, organisation and inter-organisational relationships drives innovation and diversity (Section 3.2.1). - The degree to which an organisation plans that their business events will have objectives that embrace and promote knowledge sharing ripples through the entire organisation (even to those who do not attend the event) (Section 2.6).
Sub Theme 3.3	**<u>Continued professional development (CPD)</u>** Some professions such as medicine, engineering, banking, insurance, academia, event organisers and accountancy recognise that benefits favourable to improving future organisational performance accrue from renewing and supplementing personal knowledge by attendance at business events. It can be said then that there is a relationship between organisation's performance and individual employee contribution to the knowledge assets (Oltra, 2005:2; Lee-Kelley *et al*., 2007:205-217; Desouza & Awazu, 2005:148-149). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which an individual's undertakes self-directed learning for CPD can positively influence an organisation's future performance (Section 3.2.5). - The degree to which an association offering CPD aligns to industry standards and norms (Section 3.3). - The degree to which the organisational knowledge policies and strategy embrace CPD (Section 3.2.5) - The degree to which learning agreements are integrated into a skills development plan between learner and organisation (Section 3.2.5). - The degree to which reflection is recognised as part of the learning and embedding of knowledge cycle (Section 2.8). - The degree to which time is given by the organisation for learning (Section 3.3.2) - The degree to which associations play a role in ensuring the health of an industry (and thus the economy of a country) through the

	quality and pertinence of their business events (Section 2.3). - The degree to which informal CPD is encouraged within the organisation through access to industry magazines, online databases of knowledge, online forums, cross functional knowledge sharing (Section 3.7). - The degree to which employees view CPD as part of their work-life relationship with an organisation (Section 3.2.5).
Sub Theme 3.4	**Human resource development and organisational learning have a dependent relationship** Leonard (1999:8) and Tissen *et al*. (2010:643-648) argue how interpreting the value of each individual employee is of such importance that it should be an obligatory management action before considering how to apply specific human resource skills. They comment that these actions increase the requisite variety of knowledge in decision making to optimise the organisation's performance. *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which human resource development activities through business events support the overall strategic intent of the organisation (Section 3.4). - The degree to which the quality of knowledge flowing through the organisational system creates a dissonance between the productivity of inter-related organisational functions (Section 3.7). - The degree to which the HR function is limited and used by the organisation only for managing the contractual obligations of the organisation (Section 3.4). - The degree to which transactional workers add to the knowledge repository (Section 2.9.2). - The degree to which employees see their knowledge as an economical exchange item with their organisation and are knowledge hoarders (Section 2.9). - The degree to which an organisation understands the influence on HRM practices in knowledge management and organisational performance (Section 3.4). - The degree to which there is a relationship between HRM strategies and organisational strategies (Section 3.4). - The degree to which PM type employees such as consultants share knowledge with the organisation (Section 2.9). - The degree to which PM type employees are sent by the organisation to business events (Section 3.4).
Sub Theme 4.0	**Knowledge has a relationship with organisational strategic intent**

Chapter one Table 1.10	**Critical concept:** "Strategic management is about building and sustaining performance into the future" (Warren, 2008:4).
Sub Theme 4.1	**<u>Employee behaviour affects organisational performance</u>** The development of employee capabilities that renew and refresh the internal organisational knowledge environment creating renewed possibilities for doing business successfully (Scholtes, 1998:382-384). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which business event design reflects the marketing strategic goals that ensure business events as part of an overall marketing strategy (Section 2.11) **-** The degree to which business event design matches the organisation's strategic goals such as productivity, profitability, sales growth (Section 2.12) The degree to which SECI model conditions are consciously acknowledged by the organisation to influence improved knowledge flow (Section 2.8) - The degree to which an organisation plans activities that create the requisite variety for improved decision-making in planning future activities (Figure 2.6). - The degree to which the organisation seeks specific value drivers and sets specific objectives in the event to influence organisational performance (Table 2.9 and Table 2.10) - The degree to which the business event type matches the organisation's strategy (Section 2.4) - The degree to which individuals who pro-actively and independently share knowledge with other workers in an organisation (Section 3.2.6) - The degree to which informal networks of employees working on issues related to organisational productivity, are encouraged (Section 2.9) - The degree to which an employee has a predisposition (operant trait) to learning will affect their performance (Section 4.5.3). - The degree to which employees are sensitised to the organisational knowledge needs affects the value of the knowledge they obtain from a business event (Section 4.5.3).

	- The degree to which an employee feels that obtaining new knowledge via their organisation by business event attendance adds to their job satisfaction, engenders commitment and innovation and decreases their job dissatisfaction (Section 4.5.3). - The degree to which the knowledge held by contract/transactional employees and the training they undertake while with an organisation is captured in the organisation's knowledge repository (Section 4.5.3.2). - The degree to which contract employees share knowledge post business event with others in the organisation (Section 4.7). - The degree to which contract employees are detrimental to creating an organisational knowledge repository inflow and thus should not be sent to business events where cost accrues to the organisation without benefit (Section 4.7). - The degree to which an organisation embraces employment and thus knowledge sources through contract management of employees (TM), professional partnership based management of employees (PM) or internally developed employees (HRD) (Section 3.4).
Sub Theme 4.2	**Return on investment (ROI) from business events** Businesses want to measure and financially qualify their event investment (Phillips *et al.*, 2007:xxiii-xxvi). **-** The degree to which an organisation plans specific expectations of the outcomes for their event attendance figures or their event financial backing by pre-event setting of goals and objectives (Section 2.4.3). - The degree to which CPD is inhibited by cost to attend a business event (Section 3.2.5). - The degree to which the Internet is used to ascertain the pre-event need (Section 2.12). - The degree to which industries and economies attach a value to the knowledge –through-attendee content of a business event in terms of future economic performance (Section 2.3). - The degree to which international business attendees bring new and valuable knowledge to an event (Section 2.3). - The degree to which local business relationship bring new and valuable knowledge to an event (Section 2.3). - The degree to which industry-specific clustering is recognised as a variable in choosing a venue for a business event (Section 2.3). - The degree to which a business event attendee is seen as a driver for future country economic performance (Section 2.3). **-** The degree to which HRD in an organisation recognises operant and respondent traits in individual employees and plan appropriate business events to develop them (Section 3.2.1) **-** The degree to which an organisation recognises that training for behavioural and motivation can improve job performance (Section

	3.2.1) - The degree to which the people who attend a business event have a higher level of operant traits will affect the value attained by that individual from a business event (Section 3.2.1) - The degree to which the traits to be developed by an individual are pro-actively recognised and aligned to the outcomes expected (objectives) of a business event attendance provides an opportunity to justify the expenditure of attendance (Section 3.2.1 and Figure 3.4). - The degree to which HR tie new knowledge into improved performance and to opportunity for future value creation for the organisation strategic intent through a Human Resource Information System and Human Performance Improvement indicators (Section 3.4). - The degree to which a template will enhance the standardisation of business events for an organisation (Section 4.2). -The degree to which generic (arrow core and part of the organisational business idea) variables and non-generic (specific to a specific unique need) variables are tracked as sections of an ROI single solution concept template to improve value arising from a business event (Section 4.2, Section 4.3). - The degree to which the template concept can guide event design ensuring that all variables of interest are considered (Section 4.3). - The degree to which an event template could focus and begin the 'unfreeze' of an organisation's event attendee(s) and other supporting employees who do not attend (Section 4.3). - The degree to which the KP-enhancer and balanced score-cared instruments in the 'specific to need' section of the template can drive improved pre-event expectation and thus value (Section 4.4). - The degree to which the benefit and value returned from business event attendance can be recognised in the event template enhanced by sending people who share knowledge readily (Section 4.2 and 4.5). - The degree to which modelling the system in focus is used in the event template to identify variables of interest (modifying their behaviour) that requires a business event intervention will affect the ability to produce an event design that satisfies the knowledge need (Section 4.5.3.2). - The degree to which the event designer recognises in the template that intangible knowledge assets have eight drivers that can be modified in their behaviour and thus release value for the organisation (Section 4.5.3).

	- The degree to which the event designer recognises in the template that there are four broad value areas (innovation, organisation, socialisation and culture) that can be enhanced by business event activities and that the event specific objectives align their efforts to these (Section 4.5.3). - The degree to which the event design encourages in the template the recognition that strong links in the value (4.9). - The degree to which the event designer recognises that a template will extend the ability to identify and control of variables of interest and thus the usefulness of the Kirkpatrick-Philips ROI methodology (Section 4.6). - The degree to which the template is used to embrace the PDCA cycle (Section 4.7). - The degree to which the event objectives are identified by generic characteristics (to ensure template standardisation) as summative or formative (Section 4.7). - The degree to which the event ROI process becomes iterative so that longitudinal analyses can take place (Section 4.12). - The degree to which the event design template ensure a post-event knowledge embedding phase to facilitate the value multiplier effect (Section 4.7) - The degree to which the event template contains specific actions to be taken by the organisation post-event to ensure knowledge flow and embedding (Section 4.7). - The degree to which the organisational environment post-event recognises and supports the embedding of knowledge post-event (Section 4.7). - The degree to which actions for knowledge flow and embedding are planned and actioned (Section 4.4). **Sub theme 4.2.1** **Value arising from adaptive and innovative responses** A business tourism event can provide an opportunity to review products, services, intelligence and meet skilled expertise that may have applicability when considering organisational adaptation and innovation interventions (Getz, 2007:209-211; Dalkir, 2005:8-9; Evers & Knight, 2008:544-562). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which a business tourism event design uses the four categories of knowledge assets in a manner that the business event mix of these aligns to organisational knowledge needs (Section 2.4.6).

		- The degree to which the mission and vision of the organisation influences the organisation's business event attendees behaviour at trade shows, exhibitions, meetings in turn affects their ability to interpret their customer's needs in light of their organisational goals, is paramount in ensuring future performance (Section 3.2.2)
	Sub theme 4.2.2 Chapter One	**Integrated methodology across resources application improved organisational performance** Companies that utilise their resources of hardware, people and time in an optimized manner create an improved degree of return-on-financial-investment while delivering improved levels of value-adding to their service/product for their customers (Warren, 2008:239-308; Marchand, 2000:120-133). *Variables whose behaviour is of interest in the business event-organisation relationship:* -The degree to which the objectives of the business event plan for value drivers across various internal departments to influence changes improved organisational performance (Section 2.8). - The degree to which an organisation applies models such as Porter's Value Chain and Porter's Five Forces to ascertaining knowledge requirements (Section 3.2.7).
Sub Theme 4.3	**<u>Employees are organisational knowledge assets</u>** The employees of an organisation are each a unique organisational asset as each has capabilities, skills and tacit knowledge. However the level of this asset constantly drains away as employees leave, skills become outdated or new opportunities/technologies come into play (Warren, 2008:124). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which an employee pro-actively and independently seeks opportunities for sharing knowledge and learning (Section 3.2) - The degree to which employees share knowledge has a relationship with their tendency to listen and think about other's knowledge (Section 3.2.1) - The degree to which an organisation recruits for operant traits affects organisational performance (Section 3.2.5) - The ability of an organisation to identify and train to improve specific traits will affect the degree of organisational performance	

	(section 3.2.5) - The degree to which an employee's inclination to learn and use this learning to add value to the organisation can be motivated in ways other than financial rewards and are specific to each individual's perspective of what is suitable as a reward (Section 3.2.5) - The degree to which sharing knowledge through internal organisational business events gives employees both recognition and a vehicle to share knowledge (Section 2.9) - The degree to which informally shared knowledge is inaccurate if a primary source of data (slides, notes, online material) is not available to substantiate and re-inforce subsequent spin off business events thus degrading the overall value that could have been obtained from the sharing (Section 2.9 and 2.10). - The degree to which professional associations are recognised to provide an important CoP of information for organisations (Section 3.3). - The degree to which association business events lend to reducing organisational risk (Section 3.3). - The degree to which the association business event content and networking influences the value a member believes they lend to their personal knowledge (Section 3.3). - The degree to which the association business event adds extra value with post-event reading, attendee lists and other items (Section 4.7). - The degree to which association business events seek to build individual member self-awareness to improve their ability to share in the organisational knowledge flow (Section 4.5.3). - The degree to which an organisation recognises that employees hold part of the requisite variety of information required to develop informed decision-making and strategic intent (Section 3.2).
Sub Theme 4.4	**<u>Knowledge assets require a management strategy</u>** The [diagram of] behaviour of organisational knowledge assets over time reflects the organisational concern about maintaining an appropriate level of knowledge assets (Scholtes, 1998:23; Warren, 2008:17-35). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which management supports informal knowledge networks and knowledge sharing by employees (Section 2.13)

	- The degree to which an employee is aware of the customer needs has a relationship with the employee's performance (Vroom's equation Figure 3.2.1). - The degree to which HR actions influence a knowledge strategy (Section 3.3.2 and Section 3.4). - The degree to which HR is responsible for measuring employee contribution to strategic performance objectives (Section 3.4). - The degree to which a knowledge strategy aligns to a human capital return on investment (HCROI) strategy in the business event type choice and design (Section 3.4). - The degree to which business events are planned into an overall organisational strategy and act in themselves as virtual stopping points that assess the degree of alignment between knowledge present and knowledge needed and future strategic actions (Section 4.2). - The degree to which the organisation abandons control and fragmentation and supports cross functional knowledge flow (Section 3.7). - The degree to which an organisation extends the value of any meeting or business event by providing online resources for further information access (Section 2.13). - The degree to which online business events stimulate crowd accelerated innovation and competitive advantage (Section 3.2). **Sub Theme 4.4.1** **<u>Every organisation has a knowledge value chain</u>** Shaw and Williams (2008:330-335) note that the concept of a tourism related, "Knowledge value chain" is largely undocumented and untested. *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which an organisation recognises and encourages operant and respondent traits in an employee can positively influence the value chain (The Iceberg Diagram Figure 3.1) - The degree to which an employee performance will add to organisational performance will be dependent on their motivation and their abilities (Section 3.2) - The degree to which employees attending business events are aware of their organisation's mission and vision and key strategic objectives and are constantly aware of their changing customer needs (Section 3.2.2) - The degree to which the organisation encourages internal and external networks to release potential value (Section 3.2.8).

		- The degree to which an ICT infrastructure of quality is part of the knowledge strategy and links people knowledge to organisational knowledge affects the value of the knowledge value chain (Section 3.2.8). - The degree to which ICT, leadership and the people networks individually contribute to an overall knowledge advantage (Section 4.5). The degree to which the industry type (service or manufacture) relies on tacit to tacit information transfers for competitive advantage (Section 2.3).
	Sub Theme 4.4.2	**<u>Management actions are essential for a knowledge strategy</u>** Management actions would need to set the tone for knowledge replenishment and sharing (Marchand, 2000:232-235; Key *et al*., 2009:3-4). *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which an employee performs is affected by their work environment (Section 3.2.1 and York's Equation Figure 3.2) - The degree to which management supports the creation of a knowledge strategy that ensures the mission and vision are part of everyday work affects organisational performance (Section 3.4) - The degree to which management acknowledges that the operational service staff (business to customer contacts, business to business contacts) who are often those in closest contact with the customer and from this organisational level, knowledge of customer needs should be encouraged to flow upwards (Section 3.3.2) - The degree to which organisation's recognise that intangible variables influence on the Porter's value chain model (Section 3.2.7). - The degree to which the organisation recognises that creating strategy requires the knowledge pertinent to planning a strategic intent and this is associated with managing organisational risk (Section 3.2.7). - The degree to which organisations recognise that legislation such as the Sarbanes-Oxley act require a knowledge strategy if risk is to be managed (Section 3.2.7). - The degree to which an organisation recognises that knowledge decays and requires replenishment (Section

		3.2.7). - The degree to which an organisation recognises that managing knowledge is an operational emperative for risk management (Section 3.2.7). - The degree to which the organisation realises that business events encourage communication which in turn helps manage risk (Section 3.2.7). - The degree to which an organisation realises that competitive advantage has a relationship with knowledge (Section 3.2.7). The degree to which the organisation realises that each of the nine functions of the Porter's value chain is a customer to the knowledge strategy (Section 3.2.7). - The degree to which business events are used to create communication in Porter's value chain (Section 3.2.7). - The degree to which business events help an organisation manage the forces of the macro-environment (Section 3.2.7, Porter's Five Force model). The degree to which the organisation has access through business events to knowledge about the customer, the competitors and the suppliers (Section 3.2.7). The degree to which management training adds value to the knowledge value chain can be limited by operational staff turnover (Section 3.2.8). - The degree to which management recognises that the knowledge repositories and its replenishment need a knowledge steward to ensure the knowledge quality (Section 3.2.8). - The degree to which the knowledge strategy includes policies and procedures that drive knowledge embedding (Section 3.2.8). - The degree to which the organisation and business event design recognise that some industries rely on tacit to tacit knowledge transfer (service) while others rely more on tacit to explicit knowledge transfer (manufacturing) and this affects business event design (Section 3.2.8). - The degree to which internet tools such as e-databases, blogs and meeting software can be part of the

	business event design to extend the ROI post-event (Section 3.5).
Sub Theme 4.5	**<u>Innovation evolves in relationships between people</u>** If the event design is appropriate people have the opportunity to develop business relationships with others that can have important implications for future business strategies. Desouza and Awazu (2005:109-113) review the influence of relationships noting that through collaborative relationships the organisation remains aware of changing customer needs and responds appropriately. This is innovation. *Variables whose behaviour is of interest in the business event-organisation relationship:* - The degree to which the event attendee prepares prior to the event with a personal knowledge strategy affects the value obtained from the business event (Section 4.5). - The degree to which a business event attendee uses a business event as a safe space to explore new ideas (Section 4.4.3). The degree to which employees do not want to share new knowledge because they feel that it is a one way street up to management and that management has an apathy in returning this value (2.5). - The degree to which managers do not share new knowledge arising from a business event due to apathy, or in the belief that this knowledge makes them more powerful (Section 3.2.2). - The degree to which a knowledge strategy, policy and framework could minimise employee work place apathy and fear of offering ideas (Section 3.2.2). - The degree to which HR activities support the inflows of knowledge from personnel (Section 3.4). - The degree to which HR is supported in supporting knowledge creating activities by the leadership and management of the organisation (Section 3.4). - The degree to which Internet access and Internet tools accelerate the post-event embedding of knowledge (behavioural change) and thus affect the ability to make creative and innovative organisational change (Section 3.5). - The degree that innovation requires personal face-to-face meetings as opposed to Internet based meetings when developing trust for others (Section 3.5).

Appendix 2: Affinity diagram of the literature review variables categorised into 12 overarching variables of interest

Category of Variable: **Variable 1 –the intensity of support from an organisation for business events as a strategic tool in an organisation's knowledge replenishment strategy.**
- The degree to which the organisation's intangible assets that influence that tangible asset are named and tracked as key performance variables from the pre-event stage (Section 2.3.1 and 2.4.5) - The degree to which business event attendance is driven by fist identifying gaps in the organisation and seeking diminishment of this gaps through event participation (Table 2.7, 2.8 and Figure 2.19) - The degree to which the business event links SECI needs with organisational future performance by planning the mixes of customer, supplier and competitor information content (Section 3.2.7, Table 3.2) - The degree to which the organisation and the event designer plan together that a business event is part of a learning chain and not an isolated occurrence in value chain (Section 3.2.8). - The degree to which the strength of the links in a learning chain (the person to person link) is reinforced by a business event (Section 3.2). - The degree to which it is recognised that the supply chain knowledge management depends on the strength of every link in building a knowledge flow for its ability to create organisational value (Section 3.2.6). - The degree to which trust is manifested at each link in the chain and then affects the overall value of the value chain (Section 3.2.6). - The degree to which the business event organiser is a facilitator for knowledge flow (Section 3.6) - The degree to which people at a business event represent the senses of an organisation and as such they can seek knowledge that is useful to the organisation's vitality (Section 2.5.2). - The degree to which the organisation through the event organiser actions shows realisation that it has a continuous knowledge need and that knowledge as an asset requires management and champions (Section 3.8). - The degree to which an event organiser has theoretical understanding of SECI and applies it operationally in event design (Section 4.3). - The degree to which an organisation plans that their business events will have objectives that embrace and promote knowledge sharing ripples through the

entire organisation (even to those who do not attend the event) (Section 2.6).
- The degree to which business event design reflects the marketing strategic goals that ensure business events as part of an overall marketing strategy (Section 2.11)

- The degree to which an organisation plans activities that create the requisite variety for improved decision-making in planning future activities (Figure 2.10).

- The degree to which the organisation seeks specific value drivers and sets specific objectives in the event to influence organisational performance (Table 2.9 and Table 2.10)

- The degree to which the benefit and value returned from business event attendance can be recognised in the event template enhanced by sending people who share knowledge readily (Section 4.2 and 4.5).

- The degree to which actions for knowledge flow and embedding are planned and actioned (Section 4.4).

- The degree to which the mission and vision of the organisation influences the organisation's business event attendees behaviour at trade shows, exhibitions, meetings in turn affects their ability to interpret their customer's needs in light of their organisational goals, is paramount in ensuring future performance (Section 3.2.2)
- The degree to which business events help an organisation manage the forces of the macro-environment (Section 3.2.7, Porter's Five Force model).

- The degree to which the organisation has access through business events to knowledge about the customer, the competitors and the suppliers (Table 3.2.7).

- The degree to which the event attendee prepares prior to the event with a personal knowledge strategy affects the value obtained from the business event (Section 4.5).

Category of Variable:

Variable 2 - The degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities.

- The business event attendee needs to reflect aspects of their organisation's vision and mission to produce new organisational value (Section 3.2.2)
- The degree to which the organization strives to align the employee attitudes to improve organisational future performance (Section 3.2)

- The degree to which an event has a systematic design if a business event is to be a strategy to, "Develop visions in the form of ideas or projects for developing an organisation or community" (Vidal, 2004:403). (Section 2.9.3, Figure 2.14).

- The degree of knowledge flow has a relationship with the quality of the organisational information technology that supports knowledge flow (Table 3.3).

- The degree to which the event organiser satisfies the needs of personnel and organisational knowledge requirements because they have an understanding of

these needs (Section 3.4).

- The degree to which a business event supports a CoP can affect the overall individual and organisational value attained (Section 3.3).
- The degree to which an event organiser understands the concept of a knowledge strategy will affect the quality of the event design (Section 3.6).

-The degree to which internal communication processes support the flow of new information from an event, through the organisation (Section 2.3.3)

- The degree to which an employee who shares knowledge is seen by the organisation as a node of the organisation's network (Section 3.2.6).

- The degree to which the organisational knowledge policies and strategy embrace CPD (Section 3.2.5)

- The degree to which informal CPD is encouraged within the organisation through access to industry magazines, online databases of knowledge, online forums, cross functional knowledge sharing (Section 3.7).

- The degree to which employees view CPD as part of their work-life relationship with an organisation (Section 3.2.5).
- The degree to which human resource development activities through business events support the overall strategic intent of the organisation (Section 3.4).

- The degree to which the quality of knowledge flowing through the organisational system creates a dissonance between the productivity of inter-related organisational functions (Section 3.7).

- The degree to which an organisation understands the influence on HRM practices in knowledge management and organisational performance (Section 3.4).

- The degree to which there is a relationship between HRM strategies and organisational strategies (Section 3.4).

- The degree to which the business event type matches the organisation's strategy (Section 2.4)

- The degree to which an organisation applies models such as Porter's Value Chain and Porter's Five Forces to knowledge requirements (Section 3.7 and Figure 3.2.7).
- The degree to which an organisation recognises that employees hold part of the requisite variety of information required to develop informed decision-making and strategic intent (Section 3.2).
- The degree to which HR actions influence a knowledge strategy (Section 3.3.2 and Section 3.4).

- The degree to which HR is responsible for measuring employee contribution to strategic performance objectives (Section 3.4).

- The degree to which a knowledge strategy aligns to a human capital return on investment (HCROI) strategy in the business event type choice and design (Section 3.3.3).

- The degree to which management supports the creation of a knowledge strategy that ensures the mission and vision are part of everyday work affects organisational performance (Section 3.4)

- The degree to which the organisation recognises that creating strategy requires the knowledge pertinent to planning a strategic intent and this is associated with managing organisational risk (Section 3.2.7).

- The degree to which organisations recognise that legislation such as the Sarbanes-Oxley act require a knowledge strategy if risk is to be managed (Section 3.2.7). - The degree to which an organisation recognises that knowledge decays and requires replenishment (Section 3.6). - The degree to which an organisation recognises that managing knowledge is an operational emperaive for risk management (Section 3.6). - The degree to which the organisation realises that business events encourage communication which in turn helps manage risk (Section 3.6). - The degree to which an organisation realises that competitive advantage has a relationship with knowledge (Section 3.6). - The degree to which the organisation realises that each of the nine functions of the Porter's value chain is a customer to the knowledge strategy (Section 3.6). - The degree to which business events are used to create communication in Porter's value chain (Section 3.6). - The degree to which management recognises that the knowledge repositories and its replenishment need a knowledge steward to ensure the knowledge quality (Section 3.1.7). - The degree to which the knowledge strategy includes policies and procedures that drive knowledge embedding (Section 3.2.8). - The degree to which HR activities support the inflows of knowledge from personnel (Section 3.4). - The degree to which HR is supported in supporting knowledge creating activities by the leadership and management of the organisation (Section 3.4).
Category of Variable: **Variable 3 – The level of support for an organisational policy on human capital management (an intangible asset) that directs the embedding of knowledge into an organisation.**
- The degree to which the future behaviour of an employee affects organisational performance (Section 2.3 and Table 2.4) - The degree to which the pre-event build up (event website, selection of venue and others) builds expectation which begins unfreezing of typical behaviours (Section 2.10) - The degree to which tools such as negotiated narrative, drawings, facilitators, knowledge leaders are used in the event design to trigger behavioural change (Section 3.2.2) - The event design can ensure a high degree of accuracy for new knowledge transfer from attendee back into an organisation by providing for documented

results of information generated at the business event in formats usable by attendees post-event (Section 4.4.7)

- The degree to which the event design ensures that there is a post-event phase of knowledge embedding at the organisation (Section 4.4.7)

- The degree to which the business event ensures that post-event organisational actions ensure new knowledge 'sticks' in both individuals, organisational processes and other information repositories (section 4.4).

- The degree to which the organisation monitors and affects the content chosen for presentation at a business event (Section 2.12).

- The degree to which the chosen knowledge broker (an individual or a team) selects the most appropriate speakers and people to attend a business event and deliver content (Section 3.6).

- The degree to which the event organiser's experience limits optimised event design (Section 3.6)

- The degree to which the internal organisational functions support an integrated knowledge flow depends on the degree to which the organisation implements a knowledge strategy (Section 2.4.9, Figure 2.2)

- The degree of organisational collaboration and communication can affect the degree of adaptation displayed by the organisation over time (Section 2.3)

-The degree to which team behaviour is aligned to organisational needs affects future organisational performance (Section 2.5)

- The degree to which the organisation uses a knowledge champion to work with HR and the knowledge strategy to met overall organisational strategic objectives (Section 3.4).

- The degree to which the complexity of the organisational system within its internal and external operating environment is understood will affect the value derived from any value enhancing activity (Section 2.3.2)

- The degree to which SECI model conditions are consciously acknowledged by the organisation to influence improved knowledge flow (Section 2.8)

- The degree to which an organisation embraces employment and thus knowledge sources through contract management of employees (TM), professional partnership based management of employees (PM) or internally developed employees (HRD) (Section 3.4).

- The degree to which the event designer recognises in the template that intangible knowledge assets have eight drivers that can be modified in their behaviour and thus release value for the organisation (Section 4.5.3).

- The degree to which the event designer recognises in the template that there are four broad value areas (innovation, organisation, socialisation and culture) that can be enhanced by business event activities and that the event specific objectives align their efforts to these (Section 4.5.3).

- The degree to which the event design template ensure a post-event knowledge embedding phase to facilitate the value multiplier effect (Section 4.7)

- The degree to which the event template contains specific actions to be taken by the organisation post-event to ensure knowledge flow and embedding

(Section 4.7).

- The degree to which the organisational environment post-event recognises and supports the embedding of knowledge post-event (Section 4.7).

- The degree to which management training adds value to the knowledge value chain can be limited by operational staff turnover (Section 3.2.8).

- The degree to which a business event attendee uses a business event as a safe space to explore new ideas (Section 4.4.3).

The degree to which employees do not want to share new knowledge because they feel that it is a one way street up to management and that management has an apathy in returning this value (Section 2.5).

- The degree to which managers do not share new knowledge arising from a business event due to apathy, or in the belief that this knowledge makes them more powerful (Section 3.2.2).

Category of Variable:

Variable 4 – The degree to which the business event is uniquely designed and then monitored over long time periods to deliver both specific tangible an intangible outcomes.

- The degree to which the business event cost in terms of invested money including sponsorships and branding value changes the perception of the organisation(s) associated with an event for the attendee by experiencing the entire event experience (Section 3.11.1).

- The degree to which a pre-event experience (such as creating expectation) affects the potential buyers view of the event and its associated stakeholders (Section 2.11.1).

- The degree to which the event organiser establishes outcome goals for every business events and measures the final results against the expected returning a cost-benefit calculation to the organisation (Section 4.5.2).

- The degree to which the event organisers professionalism extends a generic business event development template (Figure 4.6).

- The degree to which the event organiser skills are recognised as independent variable and the event value as the dependent variable in the event organiser and event design relationship and as such should fall into ROI calculations (Section 3.6).

- The degree to which an organisation plans specific expectations of the outcomes for their event attendance figures or their event financial backing by pre-event setting of goals and objectives (Section 2.4.3).

- The degree to which a business tourism event design uses the four categories of knowledge assets in a manner that the business event mix of these aligns to

organisational knowledge needs (Section 2.4.6). -The degree to which the objectives of the business event plan for value drivers across various internal departments to influence changes improved organisational performance (Section 2.8). - The degree to which organisation's recognise that intangible variables influence on the Porter's value chain model (Section 3.2.7).
Category of Variable: **Variable 5 – The degree to which the organisation has a policy (informal and formal internal meetings etc) for social interaction giving an opportunity for creativity leading to innovation from employees.**
- The degree to which a country undertakes activities that promote their business event capabilities to improve nation wide innovation (Section 2.3, Section 2.2) - The degree to which an organisation is willing to change to release the value from employee innovation (Section 2.3.2) - The degree of employee/attendee commitment to furthering organisational performance through innovation and creativity (Figure 2.5) - The degree to which using templates to design an event is seen as creating opportunity for knowledge and improved competitive advantage (Section 4.3). - The degree to which the organisation ensures that internal functional unit's strategic goals are reviewed before business event creation or attendance (Section 3.4) - The degree to which organisational collaboration and communication at a business event improves profitable adaptations over time (Section 2.4.1.1 and Figure 2.3) - The degree to which it is recognised that in a learning organisation the support of the employee is pivotal in producing a quality and innovative value adding performance (Section 2.3.4) - The degree to which the strength of a nested relationship of individual, team, organisation and inter-organisational relationships drives innovation and diversity (Section 3.2.1). - The degree to which business events are planned into an overall organisational strategy and act in themselves as virtual stopping points that assess the degree of alignment between knowledge present and knowledge needed and future strategic actions (Section 4.2). - The degree to which the organisation abandons control and fragmentation and supports cross functional knowledge flow (Section 2.13). - The degree to which an organisation extends the value of any meeting or business event by providing online resources for further information access (Section

2.13). - The degree to which online business events stimulate crowd accelerated innovation and competitive advantage (Section 3.2). - The degree to which an ICT infrastructure of quality is part of the knowledge strategy and links people knowledge to organisational knowledge affects the value of the knowledge value chain (Section 3.2.8). - The degree to which ICT, leadership and the people networks individually contribute to an overall knowledge advantage (Section 4.5). - The degree to which a knowledge strategy, policy and framework could minimise employee work place apathy and fear of offering ideas (Section 3.2.2). - The degree to which Internet access and Internet tools accelerate the post-event embedding of knowledge (behavioural change) and thus affect the ability to make creative and innovative organisational change (Section 3.5). - The degree that innovation requires personal face-to-face meetings as opposed to Internet based meetings when developing trust for others (Section 3.5).
Category of Variable: **Variable 6 – The degree to which an employee can be motivated to undergo change for improved work performance**
- The effectiveness of event design is responsible for the degree of pre-event expectation as to the value to be attained from event attendance (Section 4.4.5) - The degree to which the pre-event design successfully communicates a purposeful reason for the attendee to attend (Section 3.3.3) - The degree to which individuals who pro-actively and independently share knowledge with other workers in an organisation (Section 3.4) - The degree to which informal networks of employees working on issues related to organisational productivity, are encouraged (Section 2.9) - The degree to which an employee has a predisposition (operant trait) to learning will affect their performance (Section 4.5.3). - The degree to which employees are sensitised to the organisational knowledge needs affects the value of the knowledge they obtain from a business event (Section 4.5.3). - The degree to which an employee feels that obtaining new knowledge via their organisation by business event attendance adds to their job satisfaction, engenders commitment and innovation and decreases their job dissatisfaction (Section 4.5.3). - The degree to which the knowledge held by contract/transactional employees and the training they undertake while with an organisation is captured in the organisation's knowledge repository (Section 4.5.3.2). - The degree to which contract employees share knowledge post business event with others in the organisation (Section 4.7).

- The degree to which contract employees are detrimental to creating an organisational knowledge repository inflow and thus should not be sent to business events where cost accrues to the organisation without benefit (Section 4.7).

- The degree to which the people who attend a business event have a higher level of operant traits will affect the value attained by that individual from a business event (Section 3.2.1)

- The degree to which an employee pro-actively and independently seeks opportunities for sharing knowledge and learning (Section 3.2)

- The degree to which employees share knowledge has a relationship with their tendency to listen and think about other's knowledge (Section 3.2.1)

- The degree to which an organisation recruits for operant traits affects organisational performance (Section 3.2.5)

- The degree to which an employee is aware of the customer needs has a relationship with the employee's performance (Section 3.2.1).

- The degree to which an organisation recognises and encourages operant and respondent traits in an employee can positively influence the value chain (Section 3.2.2 and The Iceberg Diagram Figure 3.1)

- The degree to which an employee performance will add to organisational performance will be dependent on their motivation and their abilities (Section 3.2.2 and Figure 3.2.2)

- The degree to which employees attending business events are aware of their organisation's mission and vision and key strategic objectives and are constantly aware of their changing customer needs (Section 3.2.2)

- The degree to which the organisation encourages internal and external networks to release potential value (Section 3.2.2).

- The degree to which an employee performs is affected by their work environment (Section 3.2.2)

- The degree to which management acknowledges that the operational service staff (business to customer contacts, business to business contacts) who are often those in closest contact with the customer and from this organisational level, knowledge of customer needs should be encouraged to flow upwards (Section 3.2.2)

Category of Variable: **Variable 7 – The degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy.**
- The degree to which the attitudes of the employee (learning, sharing and storing knowledge) are aligned to ensuring future organisational performance (Section 3.2) - The degree to business event design aligns employee professional benefit with that of organisational knowledge needs affects the level of successfully application of new knowledge in improved organisational performance (Section 3.2.5) - The degree to which an individual's undertakes self-directed learning for CPD can positively influence an organisation's future performance (Section 3.2.4). - The degree to which CPD is inhibited by cost to attend a business event (Section 3.2.5).
Category of Variable: **Variable 8 – The degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries.**
- The degree to which the pre-event build up (event website, selection of venue and others) builds expectation which begins unfreezing of typical behaviours (Section 2.10 and Section 2.12) - The degree to which an organization commits to managing and measuring the change in an employee from event attendance justifies the expenditure of the event participation (Section 3.2) - The degree to which to which the design places the right content instructor with the attendees (Section 3.5). - The degree to which the event design recognises that an online business forum may benefit from time to time by having face-to-face meetings (Section 3.5). - The degree to which a template is used to ensure that the business event follows generic steps that helps guarantee that value accrues to the organisation from the event (Section 4.4). - The degree to which the event is rated pre-event, during the event and post-event by attendees to gauge with accuracy any gaps that appeared between expected delivery and actual delivery (Section 2.9).

- The degree to which the event organiser has the competency to assess that organisational content need with the help of the organisation or in response to a general industry need (Section 4.5.1).
- The degree to which the change in business event attendee sentiment (satisfaction, motivation and commitment) is measured pre- and post-event by organisations pursuing improved performance (Section 4.7).
- The degree to which the Internet is used to ascertain the pre-event need (Section 2.12).
- The degree to which the traits to be developed by an individual are pro-actively recognised and aligned to the outcomes expected (objectives) of a business event attendance provides an opportunity to justify the expenditure of attendance (Section 3.2.1 and Figure 3.4).
- The degree to which a template will enhance the standardisation of business events for an organisation (Section 4.2).
-The degree to which generic (arrow core and part of the organisational business idea) variables and non-generic (specific to a specific unique need) variables are tracked as sections of an ROI single solution concept template to improve value arising from a business event (Section 4.2, Section 4.3).
- The degree to which the template concept can guide event design ensuring that all variables of interest are considered (Section 4.3).
- The degree to which an event template could focus and begin the 'unfreeze' of an organisation's event attendee(s) and other supporting employees who do not attend (Section 4.3).
- The degree to which the KP-enhancer and balanced score-cared instruments in the 'specific to need' section of the template can drive improved pre-event expectation and thus value (Section 4.4).
- The degree to which modelling the system in focus is used in the event template to identify variables of interest (modifying their behaviour) that requires a business event intervention will affect the ability to produce an event design that satisfies the knowledge need (Section 4.5.3.2).
- The degree to which the event designer recognises that a template will extend the ability to identify and control of variables of interest and thus the usefulness of the Kirkpatrick-Philips ROI methodology (Section 4.6).
- The degree to which the event objectives are identified by generic characteristics (to ensure template standardisation) as summative or formative (Section 4.7).
- The degree to which the event ROI process becomes iterative so that longitudinal analyses can take place (Section 4.12).
- The degree to which internet tools such as e-databases, blogs and meeting software can be part of the business event design to extend the ROI post-event (Section 3.5).

Category of Variable: **Variable 9 – The degree to which the event design optimises the chance for behavioural change based on (p, e).**
- The degree to which the organization realizes that the event experience can change buyer, supplier and competitor behaviour in the future (Section2.11.1). - The degree to which the future behaviour of an employee affects organisational performance (Section 2.3 and Table 2.4) - The pre-event design should trigger the beginnings of an emotional response (affective dimension change) about event attendance (excitement, enthusiasm) which in turn introduces the opportunity for behavioural change (section 3.2.4). - The degree to which the organization realizes that the event experience can change buyer, supplier and competitor behaviour in the future (Section2.11.1) - The degree to which the pre-event message contextualises the reason to be attending the event, begins the opportunity for a conative change and thus a future behavioural change due to a future cognitive altered state (Section 3.2.4) - The degree to which the event designer recognises that in considering the business event design attendees may be seeking either theory and/or knowledge for improved job performance or practicing motivation and behavioural skills (Section 3.2.4) - The degree to which the quality of the business event design is seen in the degree of attendee behavioural change (Section 2.6, Figure 2.7). - The degree to which an event organiser is aware that they need to build Ba, a zone of liminality and communitas for knowledge transfer (Section 3.2.1). - The degree to which the level of organisational performance is supported by actions that advocate being a learning organisation (Section 2.3 and Section 2.4) - The degree to which HR tie new knowledge into improved performance and to opportunity for future value creation for the organisation strategic intent through a Human Resource Information System and Human Performance Improvement indicators (Section 3.3.3).
Category of Variable: **Variable 10 – The degree to which the organisation applies a standardised template for co-ordination and control for all business events to ensure delivery of the organisation's known (mission) and unknown (strategic intent).**
- The degree to which the business event phases succeed in creating Basho between people at the event (Section 2.8.2) - The degree to which the business event phases succeed in creating Ba and communitas at the event (Section 2.7 and Figure 2.6) - The degree to which a business event attendee is picked by an organisation because they show superior operand traits thus are more likely to share

knowledge (Table 2.7, 2.8 and Figure 2.19)

- The degree to which the attitudes of the employee (learning, sharing and storing knowledge) are aligned to ensuring future organisational performance (Section 2.4.7)

- The degree to which the organization recognizes and supports informal employee networks (tiger meetings) (Section 2.8.3)

- The degree to which the organization recognises and rewards employees (through promotion) who pro-actively take steps to share new knowledge of importance with others in the organization, thus encouraging a continued positive attitude to sharing (Section 3.4)

- The degree of value generated by a formal business event can have the value extended by further informal business events post formal event (Section 3.8).
- The degree to which informal events extend the value of formal learning depends on the organisational culture to knowledge (Section 3.3)

- The degree to which the organisation recognises that the level of trust rises when people come together in an informal manner for knowledge sharing and the value of this is that the overall quality of the organisational value chain improves (Section 4.5.3)

- The degree to which new concepts are resisted when not typical of current organisational thinking (Section 3.2.7).

- The level or importance/quality of new knowledge flow will depend on the people who have knowledge to share at the event (Section 2.9).

- The degree to which an organisation recognises that self-directed learning can add value to the organisation (Section 3.2.4)

- The degree to which an organisation recognises that some employees are better knowledge sharers than others so derive more value from business event attendance and create more opportunity for new knowledge inflow into the organisation (Section 4.4.5)

- The degree to which learning agreements are integrated into a skills development plan between learner and organisation (Section 3.2.5).

- The degree to which reflection is recognised as part of the learning and embedding of knowledge cycle (Section 2.8).

- The degree to which time is given by the organisation for learning (Section 3.3.2)

- The degree to which the HR function is limited and used by the organisation only for managing the contractual obligations of the organisation (Section 3.4).

- The degree to which transactional workers add to the knowledge repository (Section 3.4).

- The degree to which organisations send transactional workers to business events (Section 3.4).

- The degree to which PM type employees such as consultants share knowledge with the organisation (Section 2.9).

- The degree to which PM type employees are sent by the organisation to business events (Section 3.4).

- The degree to which employees see their knowledge as an economical exchange item with their organisation and are knowledge hoarders (Section 2.9).

- The degree to which an organisation recognises that training for behavioural and motivation can improve job performance up to 7 times as training for theory

and knowledge alone (Section 3.2.1) - The degree to which the template is used to embrace the PDCA cycle (Section 4.7). - The ability of an organisation to identify and train to improve specific traits will affect the degree of organisational performance (section 3.2.1) - the degree to which an employee's inclination to learn and use this learning to add value to the organisation can be motivated in ways other than financial rewards and are specific to each individual's perspective of what is suitable as a reward (Section 3.2.2) - The degree to which sharing knowledge through internal organisational business events gives employees both recognition and a vehicle to share knowledge (Section 2.9) - the degree to which informally shared knowledge is inaccurate if a primary source of data (slides, notes, online material) is not available to substantiate and re-inforce subsequent spin off business events thus degrading the overall value that could have been obtained from the sharing (Section 2.9 And Section 2.10). - The degree to which management supports informal knowledge networks and knowledge sharing by employees (Section 3.2)
Category of Variable: **Variable 11 –** **The level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events.**
- The degree to which a country undertakes activities that promote their business event capabilities to improve nation wide innovation (Section 2.2 and Section 2.3) - The degree to which an industry and an economy recognizes the potential knowledge value of hosting a business event (Section 2.3). **-** The degree to which national and global links are built via virtual and face-to-face business events (Section 2.13) - The degree to which the event is seen to be supported by its town, province and country can influence the decision to attend the event (Section 2.3). - The degree to which an association offering CPD aligns to industry standards and norms (Section 3.3). - The degree to which associations play a role in ensuring the health of an industry (and thus the economy of a country) through the quality and pertinence of their business events (Section 2.3). - The degree to which industries and economies attach a value to the knowledge –through-attendee content of a business event in terms of future economic performance (Section 2.3).

- The degree to which international business attendees bring new and valuable knowledge to an event (Section 2.3). - The degree to which local business relationship bring new and valuable knowledge to an event (Section 2.3). - The degree to which industry-specific clustering is recognised as a variable in choosing a venue for a business event (Section 2.3). - The degree to which a business event attendee is seen as a driver for future country economic performance (Section 2.3). - The degree to which professional associations are recognised to provide an important CoP of information for organisations (Section 3.3). - The degree to which association business events lend to reducing organisational risk (Section 3.3). - The degree to which the association business event content and networking influences the value a member believes they lend to their personal knowledge (Section 3.3). - The degree to which the association business event adds extra value with post-event reading, attendee lists and other items (Section 4.7). - The degree to which association business events seek to build individual member self-awareness to improve their ability to share in the organisational knowledge flow (Section 4.5.3). - The degree to which the industry type (service or manufacture) relies on tacit to tacit information transfers for competitive advantage (Section 2.3). - The degree to which the organisation and business event design recognise that some industries rely on tacit to tacit knowledge transfer (service) while others rely more on tacit to explicit knowledge transfer (manufacturing) and this affects business event design (Section 3.2.8).
Category of Variable: **Variable 12 – The degree to which the organisation sees a business event as a work process that adds value in an intangible manner that drives improved tangible outputs in the organisational value chain**
- The degree to which the organisation's intangible assets that influence that tangible asset are named and tracked as key performance variables from the pre-event stage (Section 2.3.1 and Section 2.4.5) - The degree to which the business event design incorporates triggers for behavioural change such as sensory impacts, facilitators, boundary spanners, meeting areas (Section 2.5, Section 2.7 and Section 2.8) - The degree to which the business event phases succeed in creating Basho between people at the event (Section 2.8.2) - The degree to which the business event phases succeed in creating Ba and communitas at the event (Section 2.7)

- The degree to which business event attendance is driven by first identifying gaps in the organisation and seeking diminishment of this gap through event participation (Table 2.7, 2.8 and Figure 2.19)
- The degree to which a business event attendee is picked by an organisation because they show superior operand traits thus are more likely to share knowledge (Section 3.2.1)
- The business event attendee needs to reflect aspects of their organisation's vision and mission to produce new organisational value (Section 3.2.2)
- The degree to which the organisation harnesses sponsorship to creating the event experience (Section 2.12).
- The degree to which the business event design incorporates triggers for behavioural change such as sensory impacts, facilitators, boundary spanners, meeting areas (Section 2.5, 2.7 and Section 2.8)
- The degree to which pre-event design can build excitement conducive to attending the event and wanting to share in it (Section 2.12).
- The degree to which past positive experiences with a specific business event drive attendance at the next (word of mouth advertising influence based on past experience) (Section 2.12).
- The degree to which potential event attendees build expectation for an event themselves by emailing and calling /texting each other about the event next (word of mouth advertising influence based pre-event experiences) (Section 2.12.1 and Figure 2.18).
- The degree to which the event organiser recognises the importance of the pre-event design elements (Section 3.6).
- The degree to which the different needs of individuals and organisation are addressed by the event design (Section 3.3).
- The degree to which facilitation is used to unfreeze receptivity and encourage the participation of all in knowledge flow (Section 3.3.2).
- The degree to which the facilitator is prepared in pre-event to open dialogue to seek specific inputs to an objective (section 3.4.1).
- The degree to which the onsite event design allows for social (informal and unpressurised) intercommunication activities appropriate to the target audience needs (Section 3.2).
- The degree to which the business event provides a safe, neutral place to explore new thoughts and ideas not normally raised in the workplace (Section 4.4.8).
- The degree to which the business event allows for an individual to explore new person to person relationships without long term consequences if unsuccessful (Section 4.4.8).
- The degree to which the event organiser's abilities mix delivery mediums to ensure optimised knowledge transfers at a business event (Section 4.4.4).
- The degree to which the event organiser uses mentoring and experiential design features to multiple knowledge absorption (Section 4.4.4).
- The degree to which the type of employment by an organisation of an event organiser may affect the event design (Section 3.6).

- The degree to which HRD in an organisation recognises operant and respondent traits in individual employees and plan appropriate business events to develop them (Section 3.2.1)

Appendix 3: The qualitative analysis introductory email

Dear xxxxxxxxxxxx,

The focus of my study is on the need for business events (such as conferences, training, workshops) in improving the competitive edge of an organization

The business event can be virtual or face-to-face (for example: it can be a network of IT peers – an informal network web-based; alternatively formal attendance at a conference for learning and relationship building). However business events are just the vehicle to new knowledge and it is IT technology that gives it a multiplier value to the organization by spreading the new ideas and information or storing it in databases and websites.

The major relationships I am assessing are:

4) To what degree is there a relationship between businesses wanting employees to be up-to-date with latest trends and skills and improving the business' chances of competitive advantage over similar other organizations?
5) To what degree is there a demand by employees for access to continued professional development and business events run by a community of practice /association?
6) To what degree is there a role for HR to play in developing employees through events to have the requisite variety of knowledge and improving the possibility of gaining competitive advantage?

These are broad thematic focuses.

My research questions are as follows:

Q1) What economic advantages do you believe accrue to your organization through business meetings (in-house and external stakeholders) and business events such as attendance at launches, conferences, training, exhibitor participation--- for business?

Q2) How do you capture and embed new knowledge into your organization ?

Q3) Who designs and delivers the knowledge strategy (the strategy to gain new knowledge and competencies) of your organisation (this can be an informal strategy) – this would include the technology required to support knowledge flow and the strategic intent behind acquiring new knowledge in line with the overall organisational needs for a given period?

Q4) To what extent do you believe training alone plays in a giving an individual and thus their employer, a competitive edge in aspects such as competence, creativity and innovation?

For instance do you think the value created after the training completes has any dependency on the personality of the individual so you would tend to choose people who show a sharing nature to send on

courses? Or do you think that training is of limited value if the working environment is not conducive to applying it?

Q5) How do you measure/use the post-event value of any business event attended by staff?

Please add any other comments on areas that do not come up in these questions but you consider of importance to the environment I am investigating from your perspective.

I hope you find this of interest.

Kindest regards,

Kind regards,

Researcher Thomas CMP

082 811 0045

Background information

My business tourism PhD supervisor is:

Professor Elmarie Slabbert

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South Africa

Appendix 4: The final transcripts of the qualitative interviews

Transcript 4.1: Stakeholder 1- business events professional organiser; holder of a business tourism designation - postgraduate diploma in management practice, events. The diploma is attainable by course work. Additionally the stakeholder is an experienced exhibition organiser.
[Researcher] How many business event organisers are there in South Africa and how many are qualified?

[Interviewee] I would estimate about 50,000 companies but the big unknown is how many Government and Commercial organizations, organize events as part of their Marketing or HR departments. I expect that just about none of those 50,000 hold event qualifications but they might very likely hold other tertiary qualifications, like marketing.

[Researcher] Do those event organisers that you know of show an active interest and understanding of continued professional development (CPD)?

[Interviewee] It is an alien concept

[Researcher] What role do you think South African event associations see themselves playing in continued professional development (CPD) and why (its only your opinion) ?

[Interviewee] I am proposing that EXSA start CPD from this year starting with the Consumer Protection Act, which will have a major impact on events. SAACI is also planning a workshop on this subject. If the plans come to fruition on the introduction of Event Professional designations, then all people requiring the designation will have to join a relevant association and CPD will be both a requirement in obtaining the qualification and maintaining the designation, offered by the Associations

[Researcher] Do you foresee South Africa monitoring/tracking the notional hours of CPD attained annually by an individual?

[Interviewee] It will be a requirement to maintain your Event Professional Designation

[Researcher] What economic advantages do you see through business meetings and business events for the businesses you create business events for (i.e. what do trade shows do for business attendees and exhibitors)?

[Interviewee] Trade Shows are the most direct form of marketing available therefore have a permanent position in the marketing mix. Trade shows deliver tangible results**.**

[Researcher] What types of business events do you organize and at who's instigation (i.e. business, industry trends etc)?

[Interviewee] I organize trade shows/exhibitions on behalf of Government Depts. and/or commercial organizations

[Researcher] What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)?

[Interviewee] As long as commercial organisations budgets are under pressure, there has to be SMART objectives in participating in/at events, so I don't believe that HR would have much influence.

[Researcher] Why are people in events not getting qualifications and designations?

[Interviewee] There have been few qualifications registered in South Africa. Apart from an exhibition designation at NQF3 registered at SAQA and an RPL exercise - there has been nothing since 2008. Although industry members have met under the auspices of SAQA and THETA meetings, nothing came of it. There are 3-week to one-year qualifications at colleges but they are not suitable.

IAEE – International Association of Exhibitions and Events has a certified events management degree but it is only done by participation in online training. There is no RPL process. This was not suitable for the South African conditions. Additionally the courses are held in remote locations – they are designed for corporates and the costs are expensive (this comment referred to the UFI qualification).

An events professional body will be created, who will act as the registrars of the South African qualifications and anyone who does the qualification will need to register with the professional body. They will then maintain their CPD points with the professional body maintaining information on points gained, so that professional designations can be renewed. The professional body will have representation of interested associations on the board. Professionals will be expected to be members of a member association. SAQA requires that there exists a committee of expert practice.

[Researcher] When you create an event who gives your brief?

[Interviewee] As an exhibition organiser, the client always briefs me. I generally talk to the marketing manager and/or the marketing director. They give me the parameters of the event. If they have done it

before they give guidelines, or if it is something new they give me goals. Based on the requirements I put together a proposal for them. As the project progresses I give them reports. The event has a number of fixed costs such as the exhibitor manual, floor layout plan etc. The costs of the project are covered by selling the stands which at a minimum must cover the fixed costs.

[Researcher] What about the roll through period that is not considered in EMBOK phases – where the current event is running you sell the next year's event to the current attendees?

[Interviewee] This is an absolute necessity for exhibitions – you sell next year at this year's event. This is unlike a wedding where you only get married once. Additionally events can not only be annual but annual and regional. This is becoming common in South Africa and is standard across the USA states.

[Researcher] The PgDip management practice is one of the two qualifications in South Africa that we have actively supported in the past five years. The second being the CMP (Certified Meeting Professional). As a graduate of the first PgDip course in 2009 funded by Services SETA, what value did the PgDip bring to the industry?

[Interviewee] It was an RPL that measured our competency to NQF6 level followed by a post-graduate (honours) diploma. So it firstly established our experience (RPL) and then took us further.

We deserve to be a profession but we have to prove we are serious. Events are a big contributor to the economy but there is no research so no-one including the government believes how much we contribute. I never get to train exhibition management in the events industry. They don't think they need it and they currently resist RPL and designations. Many of them have not updated their skill base in a long time so they have no background formal training, learning everything from on the job experience and many do not know their knowledge is limited.

However, the SANS 10366 and the Events Safety bill which now dictates that there is a requirement for both experience and a qualification. The effect of this legislation will be policed and Durban is the first to begin this. It will be part of the South African police system. The South African Bureau of Standards is thinking of instituting a monitoring and policing body to ensure the safety issue driven by the Department of Arts and Culture. These two pieces of legislation mean that event managers have no choice - they will have to prove that they are qualified to hold and manage an event. Currently the expectation for RPL is 3 years for event co-ordinator, 5 years for event manager and 10 years for event director.

The event co-ordinator and event manager professional designations will be registered on the NQF by SAQA, incorporating the Canadian eMerit qualifications.

[Researcher] How will the Electronic Marketing Communications Act and the Consumer Protection Acts affect event organisers?

[Interviewee] I am quoting on the European exhibitions managers of the Cologne show grounds who said, "Exhibitions are the only product where the client is part of the product". They are both visitors and exhibitors (not really, by becoming an exhibitor they become part of the finished product, as seen by the visitors)

A code of conduct needs to be created by the professional body that dictates the manner in which we manage the profession, manage our contracts with third parties etc. a code of conduct is included in the professional designation, covering individual ethics and performance). As exhibition managers we design the event as per the client specifications. If the event does not sell and the client cancels, there are fixed costs that cannot be recouped. This needs to be dealt with by a professional body – the Consumer Act needs to be differently applied to us. The professional body needs to challenge principles of the Consumer Act that are not fair to our industry. For instance events cannot run without temporary labour. FIFA would not have happened without temporary labour. An event company cannot employ support staff on a full-time basis.

There are apparently 29 acts that affect the industry most importantly the Occupational Health and Safety Act. The 29 include environmental acts as well.

[Researcher] Is an exhibition a marketing exercise?

[Interviewee] Absolutely – it is solid three dimensional marketing. People general use exhibitor stands very badly because it looks easy to promote the product they don't really think out what they are doing. They tend to book a 'shop' which is the stand, in a specialised shopping centre is called XYZ show and they dress it up, and wait for some one to come and buy. The international quoted figure is that eighty percent (80%) of trade show leads are not followed up because as the exhibitor leaves the floor they 'shut the shop'.

[Researcher] Do you agree that organisations do not leverage the exposure from the stands?

[Interviewee] Absolutely. International best practise suggests that the results of trade show exposure can be multiplied 300% by setting multiple objectives (7-12). CEIR Centre for Exhibition Industry Research, in the USA have many studies on the efficacy of trade show marketing, which I have incorporated into my training, which has been presented to 7000 exhibitors to date, with great success but despite this, exhibitors

are reluctant to participate in training. Trade show marketing is not taught at all in academic marketing courses in South Africa.

The exhibition industry has shown more consistent growth than any other marketing channel but it is not being leveraged. Exhibitions are the only medium where you can demonstrate the product. For instance there is nothing like using it, trying it, kicking it. The Internet will not be able to demonstrate a product. Virtual exhibitions are around but they don't work. Exhibitions allow contact with the product and some-one on the stand is there to answer questions. People go to an exhibition with a need and they are open to information that gives them answers.

One of the biggest growth areas is the consumer exhibitions. Trade exhibitions are still doing well but consumer exhibitions are growing in leaps and bounds. Consumers are so bombarded with marketing messages that they want the opportunity to try the product rather than believe the other types of marketing (print, TV). Experiential exhibiting is very powerful because you can bring the brand to life with the way people can interact with the product on an exhibition. This is very powerful with consumer brand building. Multi-media are used extensively to facilitate experiential marketing.

This is very different to doing demonstrations for trade in trade shows. Thanks to the information age we could do our own product research. But because of the marketing material overload, people want the opportunity to see and try the product before making a buy decision. Experiential is very big in the USA as much as four years ago. South Africa is a good five years behind USA. Many stands are a complete waste of money by the organisation. You can se during build-up which stands are going to be successful. The people who man the stand are very important as to how they conduct themselves on the stand. Stand builders say that all you need is a good stand but that is not true. The purpose of the stand is to help people to sell.

It is very hard to convince organisations that they need to really work that stand. They are not prepared to believe there is any other way to do it than what they have been doing. The concept of post-show promotions and budget to follow up those leads is completely unheard of in South Africa. At least 30% of the budget should go to post-show follow-up. Another big problem pre-event is that the exhibitors never read the exhibitor manual. They don't think they need to.

A recent conference I went in Chicago, our first meeting sixty (60) people we were asked what we wanted to discuss and over the next three days the content and discussions were given as per our first day wish list. Facilitators led the meetings. Anyway, all the problems we discussed were exactly the same as we have in South Africa. Local problems are global problems.

A big difference between an USA based event planner and a local event planner is the volume of work. Professional exhibition stand managers run seventy to one hundred and twenty (70-120) exhibits a year. That doesn't happen in that volume in South Africa. All the big shows do Johannesburg, Cape Town and Durban. Homemakers Expo is doing seven provinces.

Most professional exhibition organisers are publishers. If there is a publication then there is already a database of exhibitors and visitors. Exhibitors are advertisers. Specialised Exhibitions (South Africa) was part of the Horters publishing group. Often we are seeing the exhibition and then the publication. For instance the Wedding Expo now publishes a large directory of their exhibitors.

[Researcher] So the Trade journal published yearly by Indaba and which I personally use extensively all year is a good example of an exhibition driving a user publication?

[Interviewee] That's right.

Transcript 4.2: Stakeholder 2 - business events professional organiser. Holder of a business tourism designation Certified Meeting Professional www.conventionindustry.org/CMP/CMPcandidates.aspx. The CMP is attainable by recognition of prior learning and experience and examination. Additionally the stakeholder is an experienced meetings planner.

Researcher] How many members do you have (please split into individual and corporate if appropriate) ?

[Interviewee] At this time there are 33 South African CMP Graduates. All membership is individual. A corporate entity cannot be a CMP.

[Researcher] Do your members overall show an active interest in continued professional development (CPD) ?

[Interviewee] Yes they do.

[Researcher] What role does your association see itself playing in continued professional development (CPD) and why?

[Interviewee] The Network views its role in CPD as extensive. One of the prime philosophies of CMP is lifelong learning. Without CPD, CMP re-certification – after each five year period - is not possible.

[Researcher] Does your association currently monitor/track the notional hours of CPD attained annually by an individual member?

[Interviewee] At this time the CMP Network' Advisory Board is finalising the CPD parameters. The CMP Network cannot view a databank of professional designations - across the board - as the baseline of both academic and practical interpretation / application differs between designation attainment. In other words – unless all individuals within the industry - no matter the sector - "sing from the same song sheet' it is unlikely to be amalgamation into one global CPD entity.

[Researcher] What economic advantages do you see your association's work creating through business meetings and business events such as launches, conferences, training, exhibitor participation--- for business?

[Interviewee] A further philosophy of CMP is that a gathering of people is not an end in itself. In every instance – within the CMP process, a gathering - no matter what capacity or type has the conceptual ingredients, at the very outset, for the next step in the message retention process. Hence the economic advantages become obvious – as the objectives of the first business gathering would have grown the outcomes via the consolidated evaluation into the second meeting, then the third meeting ….and so on. Each meeting outcome therefore signifies a new progressive beginning.

[Researcher] What types of business events do you organize and at who's instigation (i.e. members, industry trends etc)?

[Interviewee] I professionally - at this time - do not organise any type of meeting. Our consultancy does assist in the conceptual, message retention aspects of a number of business meeting programmes. However my career has spanned some 35 years which covered both corporate, association and government end-users/clients. I have professionally organised more than 500 meetings in my career.

[Researcher] What role do you believe organisational leadership has to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)?

[Interviewee] The role of corporate management is to understand the pivotal importance of the gathering of people in relation to the organisation's well-being and ongoing growth plus brand reputation within the market. Meetings no matter type or size are expensive undertakings yet there is no other method that can be as effective as eyeball- to-eyeball contact with instantaneous feedback and rapport dependent solely on the circumstances at the time.

[Researcher] What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)?

[Interviewee] In the majority of corporations the role of HR is not to encourage participation within business events. This remains an individual departmental prerogative.

[Interviewee] There is only one international adjudication body for the CMP process and their entire brief is extensive and paramount to the CMP programme; It should be borne in mind that each year over 1000 accepted candidates are seated in more than 25 cities throughout the world on prescribed dates worldwide.

In the last five years – South Africa and indeed the entire continent of Africa hascommenced embracing the CMP certification programme. The clear evidence of some 13,500 CMPs throughout the world against far less than 500 of any other meeting management certification programme is the ultimate proof of the premier role played by CMP in the past, currently and well into the future.

Transcript 4.3: Stakeholder 3 - business events non-professional organiser. Representative on the board of a business association- association manager for the Johannesburg Chamber of Commerce and Industry www.jcci.co.za .Additionally the events manager of several smaller: direct marketing and engineering associations. This manager has no professional events organisation designations but co-ordinates business events considered of value to their association members.

JCCI holds a number of events to encourage business stakeholders to meet other business stakeholders. JCCI links people inside the country to those outside, those outside to those inside, and the JCCI is a type of repository of business knowledge about South African business and overseas business possibilities.

JCCI helps with legal certificates such as certificates of origin. The JCCI does run trade missions into other countries. If the external company comes to South Africa, the JCCI lets their members know about the company and how the South Africans can contact the company. JCCI is currently undertaking a project that involves the training of small businesses and women to do business including export business.

This includes a Belgian based project called PLATO. PLATO introduces micro exporters to European business opportunities. These micro-exporters (between15-20 in Gauteng region) are previously disadvantaged. The Standard Bank (a JCCI member) provides a financial mentor, and the municipalities in Gauteng provide a venue and facilitator. The small businesses meet regularly throughout the year, and are taught about running a business. The micro business owners have been to Europe for a visit which helped them understand European business, Europe and general and where their possible future trading partners

might originate from. The object of the PLATO project in South Africa is to make these businesses export ready. This project will continue next year (2011).

JCCI looks for sponsorship for elements of PLATO in South Africa such as the overseas trips, co-ordination of Standard Bank activities, municipalities and the business groups. JCCI has in-house project managers and they co-ordinate the Gauteng business groups. The Belgian chamber of commerce behind PLATO contacted the JCCI to initiate the project in South Africa. The exercise in South Africa is typically grass roots business. This exercise requires three members of JCCI and in this way JCCI supports with its corporates and local government, grass roots business. PLATO has thirty-four groups world-wide. PLATO trained JCCI on how to run the project.

The PLATO- South Africa business people were given a list of topics they could choose to learn and they selected their topics of interest and this created the format of the content of the meetings for the next eight months.

PLATO uses its global network of business members to expose the South African traders' products and it has leant to the businessmen becoming exporters. PLATO Belgian is itself a chamber of commerce linked to chambers of commerce across the world. Thus the network has a ready pool of potential buyers for the South African products.

The JCCI nurtures the business relationships for these mini exporters by maintaining the JCCI's relationship with overseas chambers of commerce. PLATO holds terrific potential for micro-exporters via JCCI. JCCI looks to local government and corporate to sponsor the project. JCCI requires corporate sponsorship so a project like PLATO is a form of sponsorship. JCCI is the mentoring group that facilitates the small business opportunities.

Traditionally, JCCI runs a great many training sessions which members and non-members can attend. Non-members pay more for attendance. Examples are: the export certificate course - accredited to the transport SETA; understanding the constitution of companies – this course is certified through the Services SETA and run by an external trainer and held at the JCCI premises. Many courses are legislation linked. JCCI takes an active role in providing their members access to specialist business training. Courses are run at the JCCI all year round. There are 1200 corporate members – as many employees as the corporate wants can attend JCCI functions. Membership costs work on the number of employees in the company. JCCI is not an association – it is a chamber of commerce and a networking hub for corporate members.

JCCI has an event called the South African Exporter of the Year annually. A panel of experts conducts the judging. The event sets a benchmark for export performance and JCCI is custodian of the event.

The Direct Selling Association (Tupperware, Avroy Shlain make-up) falls under the interviewee. This is an international association with a local national member organisation. These have five meetings a year and the meetings are used for industry updates including legislation updates. Direct selling is a big business opportunity for African people. JCCI sources local and international speakers for these Direct Selling events.

The event organisation such as teas and lunches are organised in-house at JCCI. The JCCI venue can sit sixty. The interviewee has noticed that the emphasis on food has changed to quick, simple meals away from time consuming meals.

SACAC - South African Council for Information and Control – is an association of tertiary educational institutes, other associations (such as SAIMC – South African Institute of Mechanical Engineers) and corporates involved with control disciplines, computing and engineering. It is part of an international association IFAC is the international body (International Federation of Automatic Control).

The interviewee cannot see the JCCI being a custodian of CPD notional hours because the association membership covers many industries so the exercise would be complex. SACAC is not a professional body.

However SAIMC is a professional association and all workshops they hold are measured by a peer appointed to ensure the standard - as to their CPD contribution value before the workshop is held. Every course gets a unique CPD number of recognition from the engineering council of South Africa. Every engineer has a unique number by which the CPD points are linked by attendance at the certified CPD'd course. In this association eight hours of training equate to one notional hour of CPD.

Transcript 4.4: Stakeholder 4 - CEO of the largest global business event professional association. President of Meeting Professionals International www.mpiweb.org . An international association of 24000 members who are both providers of business tourism events and business tourism event suppliers. The association is not legally bound to maintain continued professional development although it offers many CPD activities and a number of globally recognised designations. Additionally the stakeholder is a chartered accountant. The stakeholder is not an events organiser but a business expert who was on the Vancouver 2006 winter Olympic event management team.
[Researcher] what is the situation with continued professional development in the business meetings and events industry?

[Interviewee] – MPI has 22 000 members from across the world. Of those 22 000 approximately 12000 are Certified Meeting Professionals (CMP). The current demand for MPI educational products is higher now

than it has been for years. In the past the CMM (Certified Meetings Manager) training took place once a year. In 2011 there will probably be three MPI training sessions with 50-60 attendees per session. That will contribute approximately 150-180 graduates in 2011.

The demand for higher level education in the industry is higher than ever before. In 2010 MPI organised CMM training in China. The training programme was planned for 50-55 people a session. MPI had to turn people way and still had a class of 71. The demand for professional development is huge. Seoul, South Korea is interested for the first time. MPI training courses are focusing strongly on emerging economies such as Asia and Brazil. Brazil has the World Cup and the Olympics. Demand for CPD is very strong in emerging economies. In established economies the training is being undertaken by meeting planners who are a senior level. People with global careers – they are investing in themselves.

[Question: the value of Continued Professional Development (CPD) in the business tourism industry?]

[Interviewee] Professionals realize the need the CEU (Continued Educational Unit) credits. We (MPI) offer CEU credits for every educational session (live, webinar, video) we offer. There is also a place on www.mpiweb.org where they can keep track of their CEU hours. CEUs are recorded in our [web-based] system and tied to the member's record. There are currently 212,037 CEUs documented in the system. We have the ability to drill down by events, dates, members, etc…..

By tracking CEUs (CPDs), members gain enough hours to earn certifications such as CMM and CMP, which differentiates them to possible employers.

[Question: the role of associations in industry CPD?]

[Interviewee] The pace of change has never been as intense as it is today; the ability to share relevant, credible knowledge across our global community has never been more vital. Taking action to support the industry, MPI has shifted gears and developed a multi-layered content generation strategy that focuses on helping the global meetings and events industries forecast trends and activate change on a large scale; supporting meeting professionals to be successful within their individual career paths; and continuously proving the value of our industry and the professions within it.

This long term content generation strategy shifted MPI's core business to content development, aggregation and delivery, ensuring MPI's sustainability and even growth potential amid the current, rapidly evolving business environment. By following this strategy, MPI has revolutionized the way associations approach content generation and dissemination.

At MPI's core, post focus shift, we provide value to our community and our industry through access to relevant and credible content. MPI continues to also provide value through community connection and marketplace opportunities – two of MPI's strong pillars.

The content generation strategy MPI developed focuses on the following six components:

- Deliver Quality, Relevant Digital Content
- Deliver Content Through Live Events (Face-to-face and Virtual)
- MPI's Comprehensive Research Agenda
- MPI's Career Platform
- Industry Analysis, Customized Content Experience
- Technology Alignment

[Question: what types of business events do MPI organize and at who's instigation (i.e. members, industry trends?]

[Interviewee] We hold the European Meetings and Events Conference and the World Education Congress annually for the education and benefit of meeting and event professionals, to arm them with the knowledge and connections they need to do their job

[Researcher] Do you see event organisers at the 'C Suite' meetings [USA term for senior management] – business event organisers in Africa generally have to deal with an independent third party or an intermediate of the organisation – not the senior management when getting event specifications?

[Interviewee] I believe 'C suite' to be an aspirational term. I do not think a meeting professional will generally sit regularly with the CFO and COO of an organisation. It would be great but meeting and events are considered as strategic platforms for HR development, marketing and communication. I suggest the vernacular needs to change.

[Researcher] What about the meetings link to knowledge officers such as employed by CTICC whose new CEO is an MBA and responsible for the Knowledge Officer appointment for the first time at CTICC?

[Interviewee] USA is using the term, "Chief Learning/Knowledge Officer". This title is used extensively at present. This individual connects business to information via business events. Events have to be built to meet strategic intent and an individual like the Chief Learning Officer is the link. An event whether online or live connects people to ideas – human connections and that is the role of the meetings professional. Events have to be considered in terms of cash. How do you get the return on time and money from these

connections? The most precious commodity to harness is the limited time available where people meet people.

[Researcher] From the literature reviews in hospitality and tourism, ROI calculated from models such as Kirkpatrick-Phillips is difficult to apply as it usually requires measurement over long periods of time. It seems that business prefers to relate the success of business vents to continued financial performance results. They are in fact looking backwards assuming economic benefit arising from the event. The contribution of events is not clear?

[Interviewee] I agree people focus on the onsite measurements in events such as how many people attended, how do they find the food and venue. Meeting and event professionals have for years managed input, the operational logistics - but business is now focusing on return on investments. There is a huge shift underway to this point of view. Visitors bureaux and convention centres need to get out of the realm of tourism and hospitality and get into business. I prefer the term business events to MICE – this however is a real shift in thinking for hospitality. To get serious about the value of business tourism, event organisers have to get serious about measuring outputs. Business measures itself on outputs, so must event organisers. This is a key shift in thinking for meeting organisers and hospitality.

Countries that consider business tourism important in GDP are certainly Australia and Singapore. Chief Learning/Knowledge Officers may well be meeting planners in the future but event organisers have to change their focus to managing output value.

[Researcher]Would this person be a masters/ MBA?
[Interviewee] The connections have to be managed – a term like the Chief Connections Officer would be appropriate. This person would manage connections focused on the outputs they will bring.

[Researcher] What role do you see HR playing in business events?
[Interviewee] I agree that HR would be involved in connecting with the Chief Connections Officer. I agree that this would make the HR activities more proactive [in a strategic sense] than reactive. The time people have to spend together is more and more limited so has to be used extremely well. HR can definitely be useful in delivering to strategic outcomes.

[What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building) ?]

[Researcher] What is happening on the front of virtual meetings?

[Interviewee] With regards to balancing the [mix of] face-to-face meetings and virtual, people are a social species who rely on each other for our humanity. However with time being such a valuable commodity these days, when we do get together at face-to-face meetings we will work at getting much more out of the meeting. On a virtual level we will certainly go ahead and met on-line but once there has been a face-to-face meeting, people will get more out of those virtual meetings together. The face-to-face is still where the humanity connection is made that will make the virtual more successful. Virtual may eliminate the "white space" of face-to-face meetings where opportunity manifests if we are not careful. White space is the space for spontaneous knowledge and discussion and often leads to new ideas.

[Interviewee] Meeting pods or mini-meetings as additions to the main meeting are definitely gaining popularity. SAP is doing a study with MPI at present. SAP had two large conferences in the USA. These were linked to their satellite offices outside of USA in Brazil and Japan. These were pod meetings. MPI calls this "thinking outside the room". In this context if you are the Chief Connections Officer, the event has to be designed so that the virtual attendees have opportunity to meet others. This would be a critical part of their job – to connect people for optimum output from the event. The USA and all the Asian countries especially China is investing in band width and technology to facilitate this.

[Question: the role of HR and meetings]

[Interviewee] Depending on the role an HR department plays, meetings can have a huge effect on education training, delivering messages to staff or external clients, help with company culture and camaraderie.

[Researcher] What recent studies are available of the GDP contribution of business events?

[Interviewee] On the MPI website there is the economic impact study for Canada (published eighteen months ago). And in about three weeks the US economic study of business events will be available. This study will be used to leverage more support for the value of business events to the economy.

[Researcher] What about the fact that certain people are better at gathering information from meetings?

[Interviewee] That makes sense and they definitely would be appropriate as connections. I was not aware that this was an ability.

Transcript 4.5: STAKEHOLDER 5 - business events non professional organiser. Informal business network. The Alumni Relationship Manager for the University of Cape Town (UCT) Graduate School of

Business. An informal network/community of practice of UCT graduates of the Masters of Business Administration (MBA) alumni. The stakeholder is not a professional events organiser.
[Researcher] Is your membership both individual and corporate and what is the break-down of each?

[Interviewee] We do not charge a membership fee so all alumni are automatically members for life. Therefore there is no difference between individual and corporate membership.

[Researcher] What role does your alumni group see itself playing in professional continued development (CPD)?

[Interviewee] This is difficult to answer as I cannot speak on their behalf but I would think that in general they certainly do play an active role in CPD. They are always requesting updates on current business trends. This is provided in the form of our guest speaker programmes and the alumni business briefs which I run. MBA alumni often return to do one of our executive courses.

[Researcher] Does your alumni group monitor/track the notional hours of CPD attained annually by an individual? - would you like to / does the marketplace ever request this?

[Interviewee] Not to my knowledge. I am not sure that we would need to track this and also not sure what we would do with the information.

[Researcher] What possible advantages do you think your alumni's work creates for business and industry?

[Interviewee] The MBA is highly regarded in industry and this is evident by the career advancement after obtaining one's MBA. We find that once the student has been through the programme they change. They have a far broader outlook on business and as individuals they grow and I think they take back into the work place and can add great value to any company or small business enterprise.

[Researcher] What types of business events do you organize and at who's instigation (i.e. members, industry trends etc) ?

[Interviewee] I organize MBA class reunions, alumni/student networking breakfasts, social events, student events, business seminars, career networking events with students and guest speaker programmes.

[Researcher] What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building) ?

[Interviewee] I am not too clear on how to answer this.

[Researcher] Please add anything else (a trend or personal feeling, or even a commentary is very acceptable) as to the value of the Alumni events to continued professional development.

[Interviewee] It is difficult today to keep abreast of what is happening in the market. Alumni enjoy coming back to the school for the various speaker events that we offer. The speakers are high profile and various topics. The more intimate events such as the alumni/student events give them an opportunity to network and exchange ideas and contacts. The one day business briefs offer them an opportunity to return to the classroom and be exposed to four speakers covering different aspects of a particular theme.

Transcript 4.6: Stakeholder 6 - a professional trainer but a non-professional event organiser who holds training events. The stakeholder is a director of a professional training organisation for information technology software and hardware courses www.xpert.co.za . In particular this organisation supplies project managers to industries.
[Researcher] Why do your prospective students come to you – are they self motivated for professional development purposes?

[Interviewee] While there are a wide variety of reasons that students attend training at X-Pert Academy I think that there are two major reasons (or categories of motivators).

The first group includes delegates or students from corporate clients whose aim is to enhance both knowledge and capability in project management. This is underpinned by the organizations view that properly executed project management provides competitive advantage in terms of strategy delivery and change capability.

The second group includes delegates or students who attend training for personal and professional (mainly) developmental reasons. Starting from entry level to professional project manager, the students attend training in order to gain knowledge and skill, but also to add additional 'currency' to their Curriculum Vitae in order that they may secure employment opportunities at increasing levels of remuneration and responsibility.

[Researcher] How important do you consider the ergonomics of your training event in adding to the knowledge transfer being successful in the training session?
(this question is referring to issues such as: the lecturers communication skills, teaching tools you use; tests; discussions; hands on practice. This is the design of the training and its delivery)

[Interviewee] Very important, and especially the lecturers ability to support learning with training based activities as learning aids but also to provide actual examples of how theory is translated into practice in the workplace. While short courses provide limited opportunity to provide this, qualifications and professional accreditations do require students to apply themselves to the learning process through assignments, presentations and examinations – which are key to transmission of learning.

[Researcher] What aspects of the training other than the content do you consider important?
For instance is good food and a pleasant venue - criteria you consider?

[Interviewee] Yes, food and venue are important. Also important is the logistical coordination prior to and in support of attendance on training. Get this wrong and the learning process suffers resistance as a result of human nature. The other key aspect to this question is the matching of training to actual trainee requirements and level. It is important that delegates attend training that will be of direct and personal value in the workplace itself, and / or in terms of securing better career opportunities. Further, follow up post training to assess further requirements as part of an ongoing 'learning journey' supports value in the aspect.

[Researcher] To what extent do you believe training alone plays in a giving an individual and thus their employer, a competitive edge in aspects such as competence, creativity and innovation?
For instance do you think the value created after the training completes has any dependency on the personality of the individual?

[Interviewee] Yes, training provides (only) one aspect towards competitive advantage for both the individual and the organisation concerned. In both cases, training value may be (is) limited if the environment to which a student returns does not support the application of learned processes, knowledge, skills etc.

[Researcher] Who typical contacts you to organise training when you deal with a business organisation?
For instance does the HR department contact you, or perhaps it is the IT head?

[Interviewee] X-Pert typically deals with Line Management from either Project Management or IT Management, but to a lesser extent HR in the process of organising training. While HR is involved in some cases it is my general view that HR does not provide strategic or strong support in general to the Project Management and or IT Management functions in this process.

X-Pert provides a range of client events with guest speakers on topical subjects in our field. Often these are breakfast sessions at which a guest speaker is invited to speak before fielding questions and providing

attendees with the opportunity to network with colleagues in the industry. These events are extremely well attended and do seem to add value to knowledge transfer in our industry as well as value in terms of building our brand as a leader in our field. The correlation between knowledge transfer, sharing etc and brand development is an important one, and an opportunity which is not always realized, especially in knowledge based industries such as where we are. This may vary between industries.

[Researcher] Do you go to business tourism events for CPD/

[Interviewee] We manage and run our own events generally for our clients. We go to other peoples' events only to learn about our area of training. Our events are usually half-day. We tend to do quick events and try to squeeze in a great deal of value in to that time. The client needs to qualify that time out of the office so we find the more we minimise that time, the better support we get for the events.

Unless they are learning a skill and then they come to us for between 3-5 days.

[Researcher] Do you feel that HR acts in a strategic way for a company or are they more involved with meeting day to day legislative demands?

[Interviewee] HR has for a long time not contributed in the strategic direction of a company. They seem to be more involved in legislative matters – contracts, payroll.
[Researcher] Do you believe that the CIO is implementing the strategic intent?

[Interviewee] Not from our experience. IT is a support function.

We get input into the training business from our clients. We respond to their need as far as knowledge is concerned. Our consultants are project managers and they drive the flow of information. We do not actively pursue cutting edge knowledge which may be a fault of ours. Organisations need to adapt very fast these days to survive. The one way that you can do this is to build in a capability to change quickly and to bring in skills that help drive change quickly. That skill is project manager. External drivers are forcing organisations to use project managers to drive quick adaptations. They need to make specific projects happen fast. This is their solution – project management.

[Researcher] so the project manager has become the link between the organisation's CIO and the quick adaptive changes needed for survival?

[Interviewee] Absolutely. There is so much going on these organisations. You are trying to get the every day business done from 0800 to 1800 every day and you are trying to make the change you need for the

future. If you hand that to your operational manager they are dealing with enough on a day to day basis so you need some one else to push forward specific projects. So bringing in a temporary project manager allows the project manager to force the extra work required with out affecting the day to day deliveries.

[Researcher] Do you think virtual will take over from face-to-face in training?

[Interviewee] I personally don't think so. I have never participated in a single webinar but I don't think so. I believe the most value is attained when people sit in a room and talk. That creates value. Perhaps as the technology for virtual meetings improves it will get better. Looking people in the eye is worth so much. 10% is looking people in the eye and the rest is non-verbal communication that you only get face-to-face.

[Researcher] What ROI models do you use – Sigma Six?

[Interviewee] ROI models like Sigma Six/Prince have a place but you still need it to be project managed. They have all value but they are all underpinned by project management. Our clients need to look firstly at which project they pick to apply their resources to. The client then has to select the one that gives them the best ROI. Sometimes they have to do it because of a legislative requirement but otherwise they need to pick the ones that give them best benefit in the shortest possible time.

There has been a huge increase in South Africa for project managers. They are project management professionals is now a career. Most clients have projects with an IT element. For instance Nedbank might be launching a new insurance product but tracking the data about how it is launched, managed etc is an IT function and that falls to project management.

Transcript 4.7: Stakeholder 7 - The event manager of an association for business directors and others with no formal CPD basis. The stakeholder is the member relationship manager for South African The Institute of Directors. This stakeholder organises events but is not qualified as a professional event manager. The association members do not attain CPD points by being a member of this association.

[Researcher}To what degree is there a relationship between businesses wanting employees to be up-to-date with latest trends and skills and improving the business' chances of competitive advantage over similar others?

[Interviewee] We do not maintain this kind of information however with the war for talent and the high rate of unemployment, there is certainly competition amongst potential employees and therefore employers have a greater selection of qualified and skilled individuals which should enhance the company's competitive advantage.

[Researcher] To what degree is there a demand by employees for access to continued professional development and business events run by a community of practice /association?

[Interviewee] There is always a demand for development of employees and likewise for people to remain marketable, a demand to stay up to date.

[Researcher] How many members do you have (please split into individual and corporate if appropriate)?
[Interviewee] Approx 4400 of which 1144 are Board members

[Researcher] What role does your association see itself playing in informal and formal continued professional development (CPD) through business events?

[Interviewee] We play a CPD role not only through events but also our training. This is not CPD as a requirement for our members as ours is a voluntary membership, however other professional institutes that require CPD may recognise our training and events as counting toward CPD for their professionals.

[Researcher] What economic advantages do you see your association's work creating through business meetings and business events such as launches, conferences, training, exhibitor participation--- for business?

[Interviewee] "Better Directors, Better Boards, Better Business" this is our motto/slogan. By equipping Directors with the skills to make informed decisions in the Board room we can help to ensure better business decisions.

[Researcher] What types of business events do you organize and at who's instigation (i.e. members, industry trends etc)?

[Interviewee] Variety of events focused at director level or in line with our objective to empower those charged with governance duties. We also elicit member feedback and input regarding topics or events of interest.

Transcript 4.8: Stakeholder 8 - the CEO of a professional association with a CPD database The CEO of the Association of South African Travel Agents (ASATA). A professional association www.asata.co.za . This CEO does not organise events but is responsible for the CPD programme integrity. The association holds many events and a large proportion of the events are designed to support the continued professional development of their members. Some of these events are to fulfil legislative

requirements to practice their profession. In addition this association maintains a database of professional continued development attained for each member.

[Researcher] How many members do you have (please split into individual and corporate if appropriate)?

[Interviewee] 500 Retail Travel agents in total about 20% focus on the Corporate Market and 80% on the leisure market however the volumes in the industry are the exact opposite 20% leisure and 80% corporate.

[Researcher] Do your members overall show an active interest in continued professional development (CPD)?

[Interviewee] The intention is there however, the downturn in the economy has resulted in awful cuts as far as CPD is concerned.

[Researcher] What role does your association see itself playing in continued professional development (CPD) and why?

[Interviewee] Through our ASATA Academy we have launched the ASATA Professional Program which is an electronic data base of the consultants in the industry. The consultants load their skills and experience but the focus is on the competency of the individual. We believe that the employer is responsible for ensuring that the individual has the required skills to perform the job effectively, however we have a serious concern that competencies in a changing environment are not addressed at all.

We have many consultants with over 30 years experience but have not kept abreast with changing technology, changing trends, changing markets, changing clients etc.

[Researcher] Does your association currently monitor/track the notional hours of CPD attained annually by an individual member?

[Interviewee] We are getting there and that is the intention behind the Professional Programme. Through a collection of points consultants must attain a score of 100 that will ensure their status on the programme is maintained.

If no, do you ever see the tracking of notional CPD hours formalized by one global databank of professional designations/ CVs / CPD points etc overseen by an association on behalf of its members?

[Researcher] What economic advantages do you see your association's work creating through business meetings and business events such as launches, conferences, training, exhibitor participation--- for business?

[Interviewee] Always difficult to place a rand value on our work but in reverse I always ask members to think of what will happen if we didn't host these events. Input from speakers – huge value, considering that 80% of the market is small business ownership, where would they ever be exposed to that level in their individual aspect. Workshops obviously offer great educational aspects and exhibitions alike.

[Researcher] What types of business events do you organize and at who's instigation (i.e. members, industry trends etc) ?

[Interviewee] Workshops, showcase (exhibition), conference, forums, meetings and regional meetings every 6 weeks. Most of the meetings are required through the terms of the Constitution but for the best part ASATA takes the initiative on most events

[Researcher] What role do you believe organisational leadership has to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)?

[Interviewee] I think organisational leadership is critical. One of the strongest objectives I have right now is to make ASATA the dynamic leader of the industry. We compete with other associations, corporate brands and commercial conference organisers and only through continuous dialogue with our base do we get the support that will ultimately ensure our position. This dialogue can only happen through the types of events we host.

[Researcher] What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)?

[Interviewee] Managing performance both good and bad is critical to developing a culture of learning in any organisation. Often development/training is seen as a pain and therefore the necessary processes are required to maintain an environment that embraces learning.

Transcript 4.9: Stakeholder 9- a CEO of a marketing association which is currently setting up professional marketer accreditation processes An executive director of the Marketing Association of South Africa www.marketingsa.co.za . The association members are marketers aspiring to follow best practice and fulfil all legal onus placed upon them Additionally, the stakeholder is a chartered secretary.

[Researcher] What role does your association see itself playing in continued professional development (CPD) and why?

[Interviewee] CPD is a core factor in being a professional. It is an ethical notion that if you are offering yourself as a marketer to an employer or employee, you need to be completely up to date with developing trends and the latest in marketing trends. It is compulsory for all designated members (CMSA and MPSA) to meet pre-defined CPD targets on a bi-annual basis.

[Researcher] To what degree is there a relationship between businesses wanting employees to be up-to-date with latest trends and skills and improving the business' chances of competitive advantage over similar others?

[Interviewee] 100% correlation

[Researcher] To what degree is there a demand by employees for access to continued professional development and business events run by a community of practice /association?

[Interviewee] 100% correlation

[Researcher] To what degree is there a role for HR to play in developing employees through events to have the requisite variety of knowledge and improving the possibility of gaining competitive advantage?

[Interviewee] 100% correlation

[Researcher] What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)?

[Interviewee] A core role – as explained above. Either the HR or whatever other person or department is in charge of HR development.

[Researcher] How many members do you have - please split into individual and corporate if appropriate?

[Interviewee] 50 corporates, 200 individuals

[Researcher] Do your members overall show an active interest in continued professional development (CPD)?

[Interviewee] Yes they do – generally, and if the offerings meet their developmental needs.

[Researcher] Does your association currently monitor/track the notional hours of CPD attained annually by an individual member?

[Interviewee] Yes – members are required to either fill in a detailed report form on their CPD for each year, or if they have attained a certain level they are required to sign a CPD declaration form on an annual basis. CPD reports are audited on a random basis or when a disciplinary event is triggered

[Researcher] What role do you believe marketers have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)?

[Interviewee] As members of a professional organisation they should be applying pressure to their companies to ensure that they have access to CPD events in order for them to maintain their professional edge. This, in our opinion, ensures that the company is implementing appropriate and effective marketing strategy as its core brand development and protection strategy.

[Researcher] What economic advantages do you see your association's work creating through business meetings and business events such as launches, conferences, training, exhibitor participation--- for business?

[Interviewee] Currently we do not run many seminars or events of our own – we rather endorse or accredit the events of other organisations that specialize in this aspect. We do negotiate discounts for our members as a benefit of membership

[Researcher] Who is responsible for CPD events?

[Interviewee] Some like Peter Aspinall run seminars with experts such as Professor Malcolm McDonald who is a marketer. This is particular seminar is about marketing directors and their role on the corporate board. This links into King III. Prof. is a marketer who's brings a marketing perspective to King III requirements and recommendations.

[Researcher] How do marketers who do events all the time know what they should be doing in running an event?

[Interviewee] Marketers in South Africa tend to shy away from qualifications and designations. They tend to do the lowest level of IMM if they do anything. Many believe that they have enough experience on the job that they do not need to get a qualification.

Members of the MA(SA) do CPD because they believe in CPD. Many of the people who come to our events are one man organisations, young in their development. Senior marketers tend not to attend.

[Researcher] What role does your association see itself playing in continued professional development (CPD) and why?

[Interviewee] CPD is a core factor in being a professional. It is an ethical notion that if you are offering yourself as a marketer to an employer or employee, you need to be completely up to date with developing trends and the latest in marketing trends. It is compulsory for all designated members (CMSA – Chartered Marketer South Africa and MPSA – Marketing Practitioner South Africa) to meet pre-defined CPD targets on a bi-annual basis.

[Researcher] The literature says that many small organisations join associations to network and learn from and connect with bigger members. Would you agree?

[Interviewee] I believe that this is true. Generally senior marketers do not want to do evaluation programmes (RPL) like the Chartered Marketer while the one man bands hope that this will gain them entry to bigger business.

For marketing people in South Africa there was a 10 year gap when there was no professional marketing body. This association has been running since 2007. Prior to that for a decade there was nothing. There was no where to look to for best practice guidelines. Because of this lack of CPD, marketers are often currently thought of as a cost heading in a budget. There is often no relationship between the benefits of their marketing and their budgets. There are no measurements made of value-add from their actions. There is little or no alignment between the corporate strategy and marketing results and budget. Companies tend to look backwards at the financial results and extrapolate that the marketing was a success.

It is acknowledged that brand and reputation are intangible assets of an organisation. If the right marketer is running the marketing they will ensure that risk caused by any marketing activities to the brand and reputation is understood and minimised. Marketers' actions should be strategically aligned to this goal. If the marketer in charge is not qualified the marketer is flaunting the reputation and brand of the organisation. The risk of damage to both is raised. It is as good as putting the brand and reputation in the hands of anyone – some one who is no way accountable. This is where risk arises. I have a back ground as

a company secretary and that profession only hires someone who is qualified to ensure that risk is minimised.

Marketers do not think that marketing needs to be a profession. In the interim their image is questionable due to their actions and until they are a profession the bottom-line for a company is that risk arising from marketing activities will continue to be uncontrolled. The marketers are currently not relating to the organisation's strategy.

[Interviewee] The association is trying to get marketers to take the high ground. As it is not a profession the company does not expect it to behave like a professional. Because marketing is not regarded as a profession, it looses its image within the company and not treated as being professionals. Marketers are relegated to the backroom and they become a cost centre. Alternatively, their budget is increased if they seem to be doing some good because it might do something for the company and it's a tax-deductable expense. Marketers sit on the side of the company because they will not grab the high ground required of professionalism.

[Researcher] Do you agree that company's give marketing money without qualifying the expenditure?

[Interviewee] I agree. In fact their decision to allocate funding can be based on the latest financial report looking favourable and therefore it must be due to marketing – based on no key performance indicators other than the financial.

[Interviewee] I believe that the attitudinal change required of a typical current marketer to become a 'marketing professional' requires another 5-8 year. SAQA and the association are looking at a more streamlined methodology to bring in the 200 top marketers to push the attitudinal process.

The company's act drives the legal aspect. King III drives the code of conduct. The Companies Act and the King III are both sanctioned by the Johannesburg Stock Exchange. If a listed corporate does something different from the King code of conduct it has to be reported in the year-end report. It is not law but it can be reported by the media. South Africa follows the UK standards which it is code of conduct driven. The Sabre-Oxley act of 2002 which is the American makes all actions governed by law. Further to this the Sabre-Oxley can bring in the Patriots act and then it has jurisdiction across borders.

[Researcher] Many events are globally rotating and based out of the USA. The Sabre-Oxley act is the reason that many event organisers in the MPI association which is predominantly American, choose to take professional designations. How does the South African SANS 10366 for events affect South African marketers actions?

[Interviewee] We have told the marketers about that SANS 10366. They are in fact directed by both corporate governance regulations and SANS 10366 and yet they still think it does not apply to them

We work with the European Marketing Council (the EMC) and the World Federation of Advertisers. The latter are hugely involved in marketing and have international committees set up to investigate and monitor all sorts of marketing topics around social issues such as: Social media; alcohol; social marketing; NGOs in marketing – a message that is of benefit to society for instance blood transfusions are a new context of marketing. This has religious and cultural aspects.

Transcript 4.10: Stakeholder 10- a marketing professional and a director of a face-to-face and a virtual marketing association. A marketing professional with international designation accreditation. A director of the Institute of Interactive and Direct Marketing South Africa, a branch of the Direct Marketing Association of South Africa.

[Researcher] If you belong to a marketing association, what role does your marketing association play in your continued professional development (CPD) – for instance can you attend lectures and can you attain designations and qualifications through the association?

[Interviewee] Marketing Association of SA – No lectures, they offer Chartered Marketer and Marketing Practitioner but know next to nothing about either. Offer no value to individual members – at last AGM de Villiers said, "There are only two of us, so give us a break" or equivalent! SAMRA – no – but at least it interacts with individual members.

[Researcher] Which designations do you hold?

[Interviewee] I hold the MMRS from UK.

[Researcher] Does your Direct marketing/ IIDM association currently monitor/store the notional hours of CPD attained annually by yourself and other marketers?

[Interviewee] Neither.

[Researcher] What economic advantages do you know arise for a business from marketing interventions such as product launches, branded conferences, exhibitor participation?

[Interviewee] These are marketing lead activities. They are integral to the business. The issue is more about convincing CFOs that there is an ROI, which is the marketers fault in not planning and analysing their activities well.

[Researcher] To what degree are marketers involved in the planning of strategic intent behind participation in business events such as branding conferences, participating at exhibitions, product launches? These have to stem from needs identified by marketers.

[Interviewee] Marketers have to LEAD.

[Researcher] In your past experience to what degree have companies you have worked with shown you financial and leadership support for measuring the behavioural change arising from a marketing event post the actual event?

[Interviewee] Close to zero.

[Researcher] To what extent do you believe organisations embrace needs analysis and ROI measurements?

[Interviewee] Few marketers use ROI although this is improving. Recently we have arranged major events via sponsorship and the sponsor has imposed his own analysis template on the events.

[Researcher] Is it typical or atypical?

[Interviewee] Atypical but very encouraging.

[Researcher] Have you found in your experience that management typically look back at the past year's financial performance and extrapolate the success of a marketing campaign from their profit?

[Interviewee] No. A single marketing campaign will not show directly in the organisation's financial performance, in most cases. Also campaigns and activities are instruments in brand building where profit may come later.

[Researcher] When creating a business strategy is it your experience that the senior marketing executive will be asked to input to, and agree with the over arching business strategy?

[Interviewee] It depends on the organisation and on the relationship between senior marketers and senior management. Reality says that 'no marketing, no business' CMO has to be part of the C team and work with other senior executives in developing a business strategy and then deciding how to implement the marketing components.

[Researcher] Or do you find the marketing strategy is designed by management and then you are asked to design a marketing campaign?

[Interviewee] No – won't let them!

[Researcher] Have you ever worked with a marketing event with an event organiser (either in-house or contracted in)?

[Interviewee] Yes

[Researcher] What were a few of the strengths and/or disadvantages of using a 3rd party in your marketing intervention?

[Interviewee] Some areas need specialist knowledge and resources. Finding the right person – chemistry is crucial – is hard. They have to understand your objectives, your market, your business and you. They also have to be realistic in costs and be prepared to work within agreed financial constraints.

[Researcher] Do you have virtual marketers like Quirk as members of the marketing association?

[Interviewee] Not yet.

The interactive marketing way covers one to one relationship. It can be experiential for example like Mobi; interactive marketing, sms like the financial services use with sms to clients, emails to client. E-retailing like Amazon, Apple; at store level there is the FMCG (fast moving consumer goods) like Woolworths has its clubs with direct one-on-one contact with clients and interactive activities like Nedbank who has their green cards. It is a natural progression in to virtual one-on-one. Customer relationship management matters. The institute of interactive and direct marketers is attempting to cover all these areas especially experiential and virtual. Www.iidm.co.za
There are triggers that effect people at an event, make them want to know more about this product and these triggers should be part of an event organiser's planning and ROI.

[Researcher] Marketing people seem to be treated like a back department? Sales is rewarded but not often marketing. Why?

[Interviewee] Yes sales are often rewarded. Basically people who should have marketers on every board have not done so. If they are on the board it becomes a marketing driven company. This occurred when I was at Simba and a made a huge difference. There is no specific home for marketing – I belong to several associations to cover what I do. You have a marketing designation as you too are a marketer.

Because Simba had a marketing director on the board, sales and marketing always worked very closely with each other. We had a feedback loop between us. Now many companies have separated the two. It seems that CEOs, CFOs and senior managers are not marketers and they don't recognise the value of marketing. The marketing value is easy to cut because it is so hard to track and prove the intangible value created by marketing.

There needs to be short, medium and long term measurement of marketing results to prove its worth and until marketers start doing this their efforts will be sidelined.

The IIDM has four levels of designation for professionals.

[Researcher] I have the marketing practitioner through the Marketing Association and the Services SETA so where does this fit into the four IIDM designations? I am disappointed after doing a major RPL exercise in 2010 for this designation that nothing in South Africa is done to recognise and promote it?

[Interviewee] We are hoping to move marketing practitioners in at level two of the four levels. This has to be confirmed. I am also disappointed that this has gone unrecognised. We hope to rectify this with the IIDM.

[Researcher] Why would marketers recognise my contribution as a business event organiser of business tourism events? Currently the marketers do not recognise my responsibility and the event organisers do not recognise my expertise in marketing? Where do event organisers fall?

[Interviewee] I believe they should be part of the IIDM and I will be making approaches to EXSA and Saaci soon. What is business tourism? We hear 'business tourism' all the time but I am not sure what this is as a marketer. Some one needs to make it clear and what it has to do with marketing. What does the role of business tourism event organisers actually cover?

There are 14 laws affecting the interactive marketing environment. This drives the need for marketing designations and CPD.

The Direct Marketing Association is the professional body and they have created:

i) Strategic interactive and direct marketer
ii) An interactive and direct practitioner
iii) Tactical and Implementation level
iv) Entry level

We have endorsement from the Direct Marketing Association of USA. We are talking to Europe and Australia for recognition.

[Researcher] How do you tie marketing efforts to the overall strategic intent of the organisation? Marketers cannot do the CFOs and CEOs job so how do marketers deliver to the overall strategic intent?

I think we need to educate marketers better through the training of company aspects such as accessing and using databases, email, sms etc. then they can take responsibility for strategic actions that they initiate.

[Researcher] How do your needs get met by the technology support aspect of an organisation?

[Interviewee] I believe there are gaps. For instance when a marketer goes to an e-specialist company for marketing tools, these companies try to make us do what they want to do as opposed to serving what we want. They don't understand what we want and we don't know enough to direct them to do what we want so they end up creating something of their own

[Interviewee] Marketers do not get involved in HR enough. HR has money for training – we need that in the marketing department. We need assessment of the existing skill sets we have in the department and we need access to money to train for the gaps. HR should be working with us on this but it doesn't really happen.

[Researcher] Research shows that you are often told what to market for a given period designed by senior managers working from the overall strategic intent plan as opposed to letting marketing design their own strategic marketing aligned to the overall strategic intent plan?

[Interviewee] Marketers are not taken seriously – they are not qualified and they give a lot of their responsibility to advertising agencies. It takes time to get responses from a marketing campaign and these responses are generally not being tracked to qualify the actions of marketing".

[Researcher] I do not deal with marketers when planning business events – why? For example, no one checks the website we create for their organisation and they don't check where we put their branding onsite – why?

[Interviewee] There is a lack of understanding as to how to get to people. We see you as a separate industry. We see you 'doing your own thing'. There is a silo mentality from marketers. That's why we have to get people from different marketing environments to meet and talk to each other through the association.

Transcript 4.11: Stakeholder 11 – a human resource practitioner. The sales line manager of Paracon recruitment services, South Africa. The organisation interprets organisation's staffing needs in information technology and provides contract and full time staff. The organisation has a training division for contractors.

[Researcher] Why is contract work so successful for IT industry type staff?

[Interviewee] The level of educational maturity of the individual within the industry (ie education level/qualifications in particular) allows Paracon to engage with the individual at a more advanced level than within for example the manufacturing or mining industry. In addition the variety of work, exposure to different organizations/industries, the flexibility of contracting and the pay rates applicable to the IT industry tend to be a lot higher than most.

[Researcher] Clients involved in training?

[Interviewee] Generally contractors cover their own costs. They are not working if they are training so there is a cost to them. Paracon suggests training for career improvement. Clients will pay if they see benefit for themselves.

[Researcher] To what extent is continued professional development pursued by your contract workers by themselves?

[Interviewee] I have found that this is very dependant on the individual as the issue with contractors' is that as they generally have to pay for the training course and in addition need to take time off to attend courses (as in some instances the Client will not cover the cost) they tend to not want to embark on training.

However some contractors' realise that it is beneficial to them to have certification based on their position, which in turn enables them to enhance their opportunity of securing follow on contracts and become more marketable based on the current trends within IT, which is an ever-changing market.

[Researcher] To what extent do you suggest to the contract workers that they train to meet needs that you KNOW your clients have?

[Interviewee] I personally always encourage my contractors to identify a career path (especially the younger ones),and then in conjunction with the Client's needs, suggest they embark on the relevant training course/courses which will in turn give the Company the basis on which to motivate if and when contract renewals are due. In addition I explain that the training certification is something the individual achieves, is not relevant to the Client site and this certification moves with them when looking for other opportunities and therefore once again makes them more marketable and can give them the advantage over another applicant with a similar skill set.

[Researcher] How do organisations with contractors protect their contracted knowledge when the contractor leaves?

[Interviewee] The contractor definitely holds the knowledge of the systems and users. Some companies document but most seem not to so there is risk there but I am not sure how the organisations manage this risk. One of my contractors is promoting ITIL which is a system to manage business processes.

[Researcher] Do contractors have networks they can turn to for solutions?

[Interviewee] The contractors can approach Paracon who will try to source a person who can help. Many do their own research.

[Researcher] Do you believe that your contractors get cynical with their clients and give only in proportion to what they are given by the client?

[Interviewee] The contractors are advised to make themselves indispensable to keep their contracts. Some will move for extra money. Generally though contractors are treated like part of the organisation by the client so this affects their perspective in a positive way.

[Researcher] Do you believe that the relationships you create with your clients makes you an equal not an employee?

[Interviewee] I work hard on building relationships on trust with organisations. I often put my clients in touch with people who have nothing to do with the Paracon contracting. I refer them to organisations I believe that are ethical and transparent in their practise and can address a need that I can't from Paracon's area of expertise. I use my own informal network and experience to do this.

This works for Paracon too as we get not only the client's return work but also referrals for jobs that are not related to us directly. These relationships I have extra benefit for Paracon from the CVs which are referred for potential placements.

[Researcher] To what extent do you help your clients – who may not be aware of the latest IT skills – define the type of person they need to employ?

[Interviewee] In my case I feel that on occasions I can personally influence a Client's decision as I always endeavour and work hard to formulate a "partnership" with my Clients and prefer to work "with them rather than for them" and this then leads to Paracon not being seen as another "vendor" but being able to act in a "consulting" or advisory capacity. This then can result in the Client asking for assistance in identifying the type of individual they may need to contract or employ in a particular position and with this the HR advice that goes with the potential appointment.

[Researcher] How do you keep up with global trends?

[Interviewee] I do not have a technical background but I will take technical expertise with me to the meetings. I learn from the technical staff and I do personal informal research and networks to extend my knowledge.

In my meetings we try and stay as informal as possible as this relaxes the client and they share their needs more easily. Generally I will have a coffee meeting. We do spend a fair amount of time on informal chat that has nothing to do with the organisational need. We share talk about family and local happenings. This informal chat is very important in building our relationship.

[Researcher] How does Paracon know how IT trends are demands are changing and therefore adjust their training to global trends (for instance do you have a sister international company who advises trends)?

[Interviewee] Paracon has industry specific subsidiaries and within those organizations we can call on "subject matter experts" for advice on global trends. By consulting with and visiting Client sites we ascertain what projects are in the pipeline which in turn keeps us abreast of changing technology trends

across various industries such as retail, oil industry, financial etc. In addition we have Sales meetings where we share information with our colleagues, attend workshops and seminars where possible and refer to media reports, publications and internet research.

[Researcher] How does your internal sales team stay up to date with trends?

[Interviewee] I bring extra information to my sales team during internal staff meetings. It is informal and as I find it I bring it to the staff meetings. I believe sharing is a personality trait. Some people do, some don't. I find with my team they are focused on their own world and not outward looking. They feel threatened if they share information as if you know more than they do you might take their job.

[Researcher] What training do you and your team attend?

[Interviewee] I identify aspects of industry talks that I believe are important to attend and I approach my sales director for permission to attend. I share information I learn but it is not required of me. I do wish that there was a policy that encouraged sharing.

[Researcher] Who defines the technology needs – who do you meet with?

[Interviewee] I generally speak to who is recruiting the contractors. This is their manager. It is sometimes HR it is often some one from IT though. For instance the lead developer of an IT system may do the recruiting.

[Researcher] What contact do you have with Paracon's HR department?

[Interviewee] Paracon's HR department generally advises us on legislative matters around my permanent staff and contractors. They do not generally have any other interface with us. They do not have many people in the department so generally focus on legislative HR matters.

[Researcher] What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)?

[Interviewee] I believe attending business events creates awareness, networking opportunities and the return on investment for the appropriate training keeps staff loyal, motivated and they feel that the company has their best interests at heart as they are willing to invest in their development.

Team building and functions are also excellent ways of motivating staff and keeping their loyalty to the organization as these events are referred to and talked about for many months and sometimes even years by both contractors and permanent staff.

These investments enable a company to reduce staff turnover and retention enables the organization to function more effectively and efficiently if HR is not continuously involved in recruiting for positions and in turn the viability of the company is sound as when Client's hear that you are looked after by an organization it increases their confidence in the product/service they are buying, in this case contractors.

[Researcher] Do the events you attend follow up as to how well the event satisfied your need?

[Interviewee] We attend many information forums that bring us up to date on trends and legislation. When it is informal and no charge the is often no survey. Generally they do ask us how the venue was, was the information of use. If I am not satisfied I will give them that feedback as I have wasted my time and my staff time attending. If I haven't paid for the event it is hard to complain but then you have to question their ethics of getting us to a meeting under the guise of sharing information, they are actually selling their company or business.

I prefer opportunities like coffee mornings than taking a client to a conference as the outcome (more business) is not assured if we select the wrong person to take. Being seen at the conference creates brand awareness which is good. Generally Paracon prefers to subsidise the individual to enable him/her to build a number of one on one relationships. I spend a great deal of time building these relationships.

Transcript 4.12: STAKEHOLDER 12 - a human resources practitioner. The sales director of Paracon recruitment services, South Africa. The organisation interprets organisation's staffing needs in information technology and provides contract and full time staff. The organisation has a training division for contractors.

[Researcher] What do you perceive as the CIO's role between Paracon and their own organisation?

[Interviewee] He is building the ICT framework aligned to the organisation's strategic objectives. He recruits the IT staff he needs for this from us.

[Researcher] Do you agree that the CIO is making the knowledge flow strategy a reality for the organisation?

[Interviewee] I agree.

[Interviewee] Do Paracon and the CIO make sure that the organisation does not loose the knowledge when your contractor leaves?

[Interviewee] The CIO works within his budget and head count constraints. He has a combination of long term contractors and permanent staff as a core (knowledge repository). He does not know all the knowledge required for a project so sometimes keeps a key contractor taking them on as permanent staff to ensure he has the knowledge within the organisation to continue.

Additionally he may use an ad hoc contract basis where he brings a key contractor in for a day or two as required after the end of the original contract. Paracon is happy to facilitate this.

[Researcher] Why is contract work so successful for IT industry type staff?

[Interviewee]IT projects tend to have a fluctuating requirement for resources. Some projects may require the client to triple their resource numbers for a project or at least for phases of a project. It is not practical for them to employ large numbers of resources for short durations. The contracting model thus allows the client to have access to the right skills at the right time. "The right" time is normally defined by the phase of IT maturity or industry life cycle for the specific client.

[Researcher] To what extent is the project new knowledge generated by the contractors, documented?

[Interviewee] ICT work has historically made use of extensive documentation of knowledge in their systems in general.

[Researcher] How are key contractors on site following knowledge new needs? Is this linked to attending the Paracon training department offerings?

[Interviewee] It is important to separate the general knowledge such as software expertise for example Java and SAP knowledge from the organisation's specific purpose for the knowledge. The CIO ensures that the contractor's knowledge is aligned to the specific requirements of his project.

The CIO gives the overall ICT guidance but most of the implementation advice comes from others such as user groups/topical experts and advisors from within the business or industry. The type of business dictates the application of the contractor's expertise to deliver the organisation's business ideas. The CIO acts as the link to make the organisation's strategy happen.

[Researcher] To what extent do you help your clients – who may not be aware of the latest IT skills – define the type of person they need to employ?

[Interviewee] Information departments are normally headed up by competent CIO's with research teams and architects that provide a technology roadmap for the specific client. We do however receive requests from time to time to assist in drafting specific job specifications, especially where the client has created new roles that did not exist in their organisation before.

The CIO has programme managers and project managers and analysts under him. There is a hierarchal structure that the CIO heads up. Typically his interaction is at board level to interpret how the ICT strategy can support the business. He delivers this to his support staff.

[Researcher] How does Paracon know how IT trends and demands are changing and therefore adjust their training to global trends (for instance do you have a sister international company who advises trends)?

[Interviewee] Paracon stays abreast of technology changes through industry forums, online information and general interactions with clients and contractors. Key contractors on site are often the biggest source of information in terms of the technologies used.

[Researcher] To what extent is continued professional development pursued by your contract workers by themselves?

[Interviewee] This differs depending on the level and experience of the contractors. Contractors who have achieved a level of certification (e.g. PMP, MCSE etc.) tend to ensure that they keep their certification levels current. Most industry certifications have changed over the years from a once-off qualification to one where the individual needs to keep up to date (e.g. Specialist doctors have to study and demonstrate that they are up to date with the latest research in their field of expertise). In contrast to this you still find contractors that expect to be trained by some unknown "force". Most of contractors realise that development contributes to their personal success. The rate of change and innovation in the Information Technology field often drives their development.

[Researcher] To what extent do you suggest to the contract workers that they train to meet needs that you know your clients have?

[Interviewee] We are constantly focussing on this aspect and will use any opportunity that may arise in the industry or at the client site to improve the contractor's skills.

[Researcher] How do you know your contractors are applying new knowledge in their work place?

[Interviewee] We ask our in house line managers to evaluate the contractor's new training. They decide if the training has been successful for the contractor and implemented by the contractor. We find that contract renewals for those contractors who are applying their training are more successful - the client wants them to continue. The contractor meets a short term project needs but an additional feature often becomes the host organisation's long term survival benefit.

[Researcher] Your own sales department of Paracon sends internal staff on training continually. How do you know that they are applying their new training productively for the organisation?

[Interviewee] The client's do not expect the sales line managers to provide ICT solutions but we try and give our line managers ongoing ICT updates so that they can deal with competence with the clients.

No, we do not ask our staff for feedback from themselves on their training.

I have reservations on attendance by internal staff at industry forums. I do wonder how much is absorbed at the forums. The direct cost of training and the loss of productive time in the office is where the cost to our company comes. Industry forums are mainly to up skill our sales staff.

[Researcher] What role do you believe HR functions have to play in creating company viability through participating in business events (workshops, conferences, training, team-building)?

[Interviewee] I believe that HR has a different focus from that of the line of business functions and do not often take in account the opportunity cost of having people out of office for workshops etc. When these events do take place it is important to have HR participating though, as they are an important support function to the line of business functions.

[Researcher] What value do you get from attendance at an IT conference?

[Interviewee] I find that the annual IT conference GovTech provides a suitable level of content. I find the presenters are approachable for more knowledge. The conference is important for relationship building with our clients. Topics are presented that are important for the client and being there to discuss these issues at the time with the client ahs great value.

[Researcher] How much do the conference's leisure activities help influence the relationships?

[Interviewee] These are very useful times to learn more about your client. We get the opportunity to spend time with our client and strengthen our relationships.

[Researcher] Are face-to-face more productive than virtual?

[Interviewee] Definitely. Nothing beats a face-to-face relationship. I do have virtual relationships on business websites like Linked-In. We can follow industry discussions and make comments. But you can't beat face-to-face. Where practical it definitely is an advantage to physically meet. I believe it is core to our human spirit to have face-to-face contact. I can read the body language as well which I can't do in a virtual forum..

[Researcher] What would you think about attending a sub-conference which is a virtual link from a main conference being held geographically remote from your company?

[Interviewee] There is value in it. There is time to interact with others there (at the sub-conference).

I watch podcasts on my laptop but to do that for two days would not be much fun. I agree I can get more people there than if attendance was out of country and I could only send one person. Even if I can interact with the main conference via sms or online Q&A it is not the same as a face-to-face attendance.

[Researcher] Do you review the purpose of an application to attend training and after training assess its value to your organisation?

[Interviewee] I make the final call as to whether the person is going to add benefit to the company and have a personal growth experience by attendance. We ask their manager to ascertain whether the training was of benefit to our organisation.

As a manager I believe it is part of my responsibility to ensure benefit to my organisation.

Transcript 4.13: Stakeholder 13 - a human resources practitioner and a Director of a virtual human resources network. An executive director and founder of a Human Capital website, www.humancapital.org.za .Additionally the stakeholder is both an Organisational & Industrial Psychologist with the Health Professions Council of South Africa (HPCSA) and as a Chartered Human Resource (CHR) Practitioner with the South African Board for Personnel Practice (SABPP).

The interviewee is the founder, and Executive Director of the Human Capital Institute Africa (HCI Africa). Jeff is registered as both an Organisational & Industrial Psychologist with the Health Professions Council

of South Africa (HPCSA) and as a Chartered Human Resource (CHR) Practitioner with the South African Board for Personnel Practice (SABPP). His major strength is to custom-design solutions in the areas of Human Capital & Talent Management, Change Management, Performance Management, & Organisation Assessment amongst others. He consults to line managers and HR Professionals in both the Public and Private sectors. Jeff has extensive corporate level experience having worked predominantly in Head Office specialist project units for large blue chip companies in the Food Retailing, Metals Marketing, and Electricity Supply industries" (www.humancapital.org.za, 2010).

The taped interview follows:

Human Capital Institute Africa (HCI Africa) is named to be differentiated from the original HCI serving the USA market. The HCI Africa title aligns to possible expansion in the African continent in the future. HCI USA issued the HCI Africa licence to Africa over 4 years ago. The HCI Africa website (www.humancapital.org.za, 2010) is virtual attendance created from content aggregate from sources both local and international. This content endeavours to present cutting edge thoughts and white papers on matters pertaining to creating and maintenance of talent bases within every business. Future business performance is extrapolated from this planning for talent.

HCI Africa's stated purpose is, "To help companies become Talented Places 2Work4. We firmly believe that companies that work towards becoming Talented Places 2Work4 collectively contribute to South Africa standing out from the crowd in a globally competitive business environment" (www.humancapital.org.za, 2010).

HCI Africa reviews the stated purpose in the context of South African business talent needs for the future. HCI Africa notes the fact that SA has a total population of 60 million of which 5 million are currently tax payers. The tax payers represent the aging population of the baby boomers and in the next 5 years a large proportion of these tax payers will be retiring. South African business is relying on financial success by being able to recruit a talented and globally competitive workforce and this will be a problem as the baby boomers and the knowledge they own, retire. This requires that succession planning and management for talent is urgently addressed both in government, academia and private sectors.

It is the opinion of HCI Africa that universities in South Africa are not currently filling the role of knowledge creators in the field of human capital and talent management . Especially in consideration of the fact that HR is often no longer taught as a specific degree at many South African universities. There exist a few HR explicit diplomas but in general HR training is scattered through several different tertiary degree disciplines. This situation currently exists although the HR function is intrinsically accepted as pivotal to

business performance. The HR practitioner participating at the strategic planning at C_Suite/ CEO level is then often not equipped to be there even if invited at all.

This creates gaps between: HR knowledge of how the business actually makes money on the operational end of the business; and the dependence of CEO team future goals on correct and timely HR interventions. As such it would be difficult for HR to align strategic action planning from the top management with equipping operational units with appropriate talent in support of these planned future financial successes. Not surprisingly the quality of the reverse communication/knowledge flow (bottom-up) from operational functions through HR to top management will obviously also affect future performance. HCI Africa notes that in most South African business it is not only the HR function that had become uncoupled from the strategic and business planning processes. Often the IT function and the marketing and communication function are affected in the same way. It is HCI Africa's opinion that future business success is reliant for future performance on the performance of all these three functions working together to support the talent goals of the organisation.

There are approximately twenty associations representing human resources in South Africa. HCI Africa plays the role of a think tank not a pressure group promoting change that benefits the company as a whole. In the next two years HCI Africa sees its role as working pre-dominantly with medium and large business. HCI Africa believes that steering change on the role of HR practitioners in talent management for a company's future performance can currently most effectively be influenced by educating from the top, down. HCI Africa believes that HR interventions at the operational level will continue to be re-active responses unless efforts are made to address communication between the top management, HR and operational managers.

Thought leadership events are the chosen vehicle of HCI Africa to equip business for the future. To this end, HCI Africa's next two year plan incorporates continuing the business events that it has established referred to as Summits (conference-like event). The well established target audience is broad in capabilities and is both individual and corporate representatives of many types of business. The Summit events are organised logistically in-house and HCI Africa has not found a need to use a conference organiser for the event logistics such as venue hire, meals, food etc. While this aspect is considered important by HCI Africa it is also considered relatively easy to facilitate. HCI Africa notes that their typical attendee does enjoy a day out of the office at a business event function and a business event day-out certainly does have implications of well-being for attendees. However, HCI Africa believes it is the event content that drives their attendance. As the attendance is strong year on year, this suggests that HCI evaluation of content relevant to business and business talent is seen as valuable to business delegates.

It is not surprising that the content used for HCI Africa events takes considerable time to define. One constraint encountered when planning an event has proven to be that if the material gathered by HCI Africa experts for a local conference is too far ahead of the local market's ability to absorb and apply, the event's impact on the target market is negligible even if the content was considered cutting-edge overseas. HCI Africa looks for content that not only has applicability locally but contributes to making "light-bulbs go off" changing attendees attitudes and thoughts about business and talent. HCI Africa contextualises the content. The perception by local South African business of their knowledge needs when compared to the knowledge being presented in overseas competitor countries such as Singapore and India, has been a historical problem for HCI Africa to overcome if they are to lead business talent interventions in South Africa. HCI Africa attempts to gauge what the South African market is ready to accept and in some cases this means curtailing what is available from overseas until the time is right if the event is to actually have a desired impact. No formal analysis of attendee view of event content has been undertaken to-date due to cost and manpower constraints.

HCI Africa notes that in South Africa training is often undertaken by business as "of the minute" and "as required". This suggests that strategic planning does not involve a medium to long term planning for training and succession. HCI Africa notes that there is little focus currently on promoting specific talent segments within most South African companies' strategies. In South Africa business it is generally about short term profit wins not a balance of short term and long term strategic interventions leading to future profit. Sacht noted that this might be short-sighted when viewed against external competitors' use of knowledge to gain business advantages in countries such as Singapore and India.

In addition to their existing summit-conferences, HCI Africa plan internal training interventions. In the future it is envisaged that these would be of a maximum size of 15-20 attendees and the meetings would be held within a particular company. HCI Africa has found this size of internal training meeting to be the maximum when adding value through class interactions. HCI Africa' research shows that size of meeting combined with the content brought to the trainees can bring change for future organisational performance within a specific company. The class attendees would optimally be diverse from operational managers through HR practitioners to top management to ensure that platforms are established for enhanced, joint future performance. It is anticipated that this type of business intervention will have particular value for medium size companies who require knowledge and innovation to surpass competitors. HCI Africa has found that large corporates tend to find knowledge sources of their own having the money to spend on research and development.

HCI Africa association membership includes individuals. However, HCI Africa sees its current role as being of most use at the management level so membership by companies is important if change leading to

improved business competitiveness, innovation and knowledge are to result from top, middle and operational levels training interventions such as those offered by HCI Africa.

HCI Africa has two boards who oversee the vision of HCI Africa. One is the executive board as required by law in this section 21 company and the second is an advisory board drawn from business. The team members of both are listed on the HCI Africa website. HCI Africa uses its board members and industry specialists to source local and international summit and training content. The members have extensive HR training and exposure to international HR trends. HCI Africa does see a need for post graduate diplomas in management-HR intervention planning. This may well be in the future of South Africa and may well fall under the auspices of local universities. Two universities are presently represented on the HCI Africa boards. Funding to run the association is currently raised by membership, events and CPD training. The association is self sufficient from these activities.

HCI Africa believes that it would be currently extremely difficult to set up a formal structure of CPD assessments and monitoring for South African HR practitioners. This is because it would take a huge amount of practical organisation and it would be very administratively heavy to manage. Additionally the market place does not see a need for it. HCI Africa has noted that the there is a huge churn of human resource personnel both between companies and leaving the industry entirely and this would be an aggravating factor to tracking HR CPD. HCI Africa noted that this churn may be as a result of human resource functions being relatively easy to get into as a career as opposed to an industry like accountancy where there is a need for tertiary education and there is legislative accreditation which in turn drives CPD.

Transcript 4.14: Stakeholder 14 - the Canadian national tourism human resource strategic planning manager. The senior vice-president of the Canadian Tourism and Hospitality Research Council (CTHRC). Additional: A 2009, 2010 and 2011 funder of a global initiative led by Canada to create a globally recognised event manager designation. The designation is attainable by recognition of prior learning, experience and an examination. This stakeholder is in charge of programmes to create and maintain Canadian tourism qualifications and designations that require CPD. This designation has subsequently been adapted in 2011 by MPI specifically as a business event professional global designation.

Q1) Do members of the Canadian business tourism (MICE) segment show an active interest in continued professional development (CPD) in their field of business events?

From our knowledge and experience, MICE stakeholders show interest in CPD especially when the requirements is required to maintain a credential in the marketplace. Often discussions are had on *what constitutes CPD*, and whether the objectives associated with CPD are truly designed to *help individuals remain current and competent.* It appears that many CPD activities associated with industry credentials

are essentially designed as a revenue vehicle for the governing organization or to help secure technical input/expertise in continued program development (i.e. the C-P-D being continued program development, not continued professional development).

Most would agree that continued professional development is important and inherently valuable. The challenge for some is rationalizing the value and effort when the activity is not actually designed to support individual skills or knowledge acquisition. Effective and appropriate CPD must also be accessible (including being affordable, offered in the right format and time, etc) while aligning with current and emergent needs to ensure that practitioners are relevant in their field. Rarely does it appear that these minimal conditions are satisfied or factored into the objectives.

Q2) What role does CTHRC see itself playing in continued professional development (CPD) of business events and why?

As part of its mandate, CTHRC is to be *responsive* to the labour market needs with an overall goal to "create a competitive and sustainable tourism workforce in Canada". Specific to the events sector, this translates to work plans dedicated to setting occupational standards (i.e. defined competencies or expectations of professionals in the field), training materials (various formats, e.g. modular, on-line or paper-based, workshop versions, self-directed, French and English), and assessment tools (i.e. diagnostic and certification/summative).

The CTHRC also routinely includes events-related content in its annual HR forum, presents at conferences and events dedicated to CPD activities for the sector, and hosts development meetings dedicated to the sector.

Q3) What economic (financial and other) advantages do you see for Canada through training that creates event professionals? Please feel free to mention any advantages that you believe accrue to Canada by hoisting business events both local and global.

I have attached a study that was recently published on this front. Scott Meis from our office was a major player in developing the methodology and has been involved in similar research. In his e-mail Scott states: Attached for your information is the just released study commissioned by our partner, Convention Industry Council along with a long list of other industry partners in the U.S. on the subject of the economic significance, definition and description of the meetings industry in the United States. The study situates the meeting planner in the broader mix of agents and stakeholders in the productive activity of meetings and selected events in the U.S. economy. Using a research methodology developed

previously in Canada, the study identifies and quantifies the relationships between the meetings industries and the tourism industries in the U.S. economy.

Perhaps the study is the best statement on defining possible advantages.

Q4) What role do you believe HR functions have to play in creating future (strategic) company viability through participation in business events (workshops, conferences, training, team-building)?

Philosophically the CTHRC believes that HR functions are essential to the success and profitability of an organization or company. The basic tenet is recognizing that human resources are behind all activities that enable a company or organization to function; without the people there is no service or capacity. (Oddly enough, the human resources are not cited in company financial statements except as a liability, i.e. payroll.)

What is important to consider is the fact that a lot of HR practice is also done poorly; it takes good HR practice to achieve meaningful results. A challenge is the limited capacity (e.g. resources, skills/abilities) for companies or organizations to manage HR. Tools, information, counselling/mentoring is part of the solution.

Q5) Do you see the HR function of organisations having a great deal of control in implementing business events – i.e. designing events with the event organiser to ensure that the event delivers the knowledge that HR needs to meet future strategic planning activities?

It would be lovely, although I haven't seen examples of organizations that would support this approach. This idea is worth pursuing because it would have a positive impact. The plan would need to be long-term in its vision and be supported with sufficient resources, appropriate governance, linked to *business goals* or *bottom-line* results. Ultimately, it would work (I believe) if the HR activities were inherent in the business model (and not viewed as an extra activity). This would involve education, supporting research and evidence of the value or investment, effective leadership and time.

Q6) What value do you think a business network has for employees and their company (stimulated by business events)

Limited value unless companies are savvy and equipped with capacity/competency to be effective with networking opportunities. Networking in itself is very good; companies/organizations that use their networks effectively benefit. However, many are simply not effective – so, aside from social aspect, often the outcomes or value of the network is not linked to change in practices, behaviours, or revenues.

I think the emphasis or focus may better be placed on 'outreach and research' activities (not limited to networking per se). Companies should inherently be seeking information on their sector, competitors, etc., and evaluate and act on opportunities.

Transcript 4.15: Stakeholder 15 - an IT practitioner. The manager of Distributed Computing, Information systems and Technology, of the city of Cape Town municipality.

[Researcher] What would you miss about not going into the office?

[Interviewee] Interacting with others. Its all very well being able to email and teleconference but there is a whole lot of information that you miss out on when its not person to person. Body language conveys a lot. It gives you a better understanding of what a person is trying to get across. And just being with other people is far more important than allowing technology to convey a one dimensional message of what you want to get across. It is very sterile. The latter does allow you to get an idea of what a person is trying to convey but its better to be able to see them.

[Researcher] You have over 100 people in your task force

[Interviewee] It is between 135-140 people. I don't meet with them as often as I should but I meet with my heads, the team leaders. Formally once a month and informally, daily. I expect them to do the same with their teams. At least once a year I try and attend a social activity where I can meet the staff I might not normally get to meet. I tried having my monthly meetings at the various regional sites but logistically this didn't work. The team leaders have their own operational obligations and they get fidgety to get on with their other obligations especially when they have to travel across town in afternoon peak-hour traffic. We are in the process of establishing a central office/headquarters in which all IS&T staff will be based making communication with my direct-reports easier. Once we have better network connectivity with our poorly-connected regional sites (through the broadband project) we will explore tele- and video-conferencing with our staff more. For now, I found it was better that they come into me.

[Researcher] Do you feel that staff will focus better when they are out of their environment?

[Interviewee] Yes. We do break-away sessions where we go to a facility that lends to getting out of the office environment. That feeling is like going away for a weekend. We are able then to have strategy discussions very successfully. The degree of energy and innovativeness depends on who is present. Often they take awhile to warm up depending on whom is present and what has recently happened in their work environment. Sometimes they feel intimidated by more senior staff and don't want to voice their opinions.

But, the more often we have these break away sessions the more comfortable they are in sharing with those present. In removes them from the operational day to day task issues as well and gets them to think about longer term strategies.

[Researcher] For the junior staff to voice their opinion you must have created a culture that allows them to do so in front of the senior staff?

[Interviewee] Yes. I have tried to not distance myself from any staff. I sit in the open plan environment just as my junior staff do. I get transparency and communication with them. I hear from them and I can express my views on how things should be done. So by the time we get to the formal meetings they already have my position on certain issues. It is not a democracy as I am appointed into this position and need to perform my duties according to the position but at the same time there has to be a sympathetic ear to individual operations. We do not all know everything all the time. People from their various perspectives pick up things that you don't. When people meet face-to-face this comes through. When people communicate with technologies they don't get their full message across. Some people don't have English as a first language. They would be more effective if they were speaking drawing diagrams and using hand signals. I encourage the entertainment of everybody's views. Another technique is to get people to write down on paper, issues that they think are obstacles – no names on the paper. We put them up on a board for discussion and we find that often there are several who have the same feeling so now they start opening up and sharing. They don't feel that they are the only ones with this problem.

[Researcher] Do you use scribing to capture the knowledge flow at these meetings?

[Interviewee] Yes we do capture the data from the meetings and the white boards. We circulate it to the attendees. We set our path from agreeing these documents. It is not cast in concrete but it does represent the views of the people at a specific point in time. The things that last – the things that people believe are important – remain. Personality clashes or short comings in a software package become irrelevant as time goes on and other issues arise.

[Researcher] How do you get new knowledge into your system and to your people?

[Interviewee] We had a Microsoft Share-point site (a document management system). It has a collaborative feature where you can delete/add/update content. We tried this for a couple of years but w found that unless it is kept alive by a custodian it becomes very slow. There is a great deal of information and content value but the custodian needs to draw attention to specific items to stop it stagnating. With direct access to the Internet there is so much happening that sometimes it is pointless downloading documents from the web

internally. There are new issues all the time. We still use Sharepoint, and the new version of it promises new levels of collaboration, sharing, and interaction.

The most effective way we have found [to communicate information] is the person to person interaction. The Gartner group are a research body and they have a variety of experts researching technology. We subscribe to their content and we base our strategy and goals around what we get on specific topics from them. The problem with this is that it is still just a research paper so unless it is discussed within a gathering of people that is all it is. The only time that it is really useful is if it is shared with others in face-to-face meetings. We get a research analyst in the room and now we have the person who created the research and we can cross question and they too cross question us. Others sit around the table and they are making their own notes about this shared experience. Now the team have this shared experience – we don't capture this in a repository for others but these people have a better knowledge with all the others in the room.

[Researcher] How do ensure contract and full time workers document their knowledge of your systems?

[Interviewee] The IT project office controls this as either short term or long term work. If it is short time resolution it is termed a works order (6 weeks). Longer than this it is termed a project and this latter contains the more detailed information. All stakeholders make hand written comments on the master documents and these are scanned and uploaded into the office document management system This is available for reference by others but its not ideal as hand written comments are not searchable. We build up 1000s of scanned documents and they can only be searched by tags in the meta-data or the document title.

[Researcher] How do you meet your customers?

[Interviewee] Our customers are the departments of the council. There are five levels. The first is at our service desk.

The next is with our project teams. For example: the film location system needs enhancements that show photos of possible film shoot locations and who has used it for what in the past. This is a new development so we meet with the economic department to discuss their requirements.

The next level is the business representatives. These are one or two people from every business department in the council. They meet with IT and discuss where there are short comings or we tell them about any projects that will impact them. This happens monthly. Every three months all the executive directors together with the city manager meets with the CIO and 1 or 2 of his Managers to report-back or make presentations on new strategic topics that are ICT-related. This forum is where specific strategic initiatives are discussed. This flows both ways both on new strategy from IT and requirements arising from the city.

The fifth level is the portfolio committees where we meet with councillors, officials and business units. Again the communication is two way.

[Researcher] This seems to be a very structured human communication system plus a backup of document repositories?

[Interviewee] That's right.

[Researcher] To what extent do you use virtual meetings?

[Interviewee] The city has its own public telecommunications licence so it now has the ability to provide telecommunications services internally and externally. With that in mind we have embarked on a broad band project. We will connect the physical sites. With this capacity we will be able to introduce video-conferencing. We have got Microsoft Office Communication server. Up to now it has been person to person contact. I suspect that two years from now it will be a group to group contact because of the broadband connectivity.

[Researcher] What do you like about a conference and what can conferences do better?

[Interviewee] The first thing I dislike is that it is marketing, marketing, marketing. We have paid to go to this conference but they use the opportunity to promote their companies to tell you about their successes. That's the first thing. The second thing is that their presentations are very general so if I am sitting there with several different customer types the presenters can't get too detailed with you as to how it applies to your environment – so they give a general response. That kind of stuff I can get off the web. There was a time when I enjoyed conferences but it was a long time ago.

More recently I would rather not attend a conference but I will get the presenters to come and talk to us about out unique situation and needs. I will get all our stakeholders together to attend the meeting. I will brief the supplier/presenter before hand on our particular environment so they come prepared to us. That's when we get down to the things that are meaningful to us. Often the conference content may not have much applicability once you return to your environment.

[Researcher] Did you know that there are people who are using online webinar interactive forums to ascertain their customer needs before designing an event?

[Interviewee] That doesn't surprise me.

Transcript 4.16: Stakeholder 16 - IT practitioner. The Business Relationship Development and Business Applications manager of the city of Cape Town municipality.

[Researcher] The City of Cape Town seems to practice knowledge transfer like the multi-national global corporates and seem to have a very advanced knowledge strategy that keeps the knowledge flowing throughout the organisation. How do you assess the value of training?

[Interviewee] Every time some one goes on a course we get them to debrief to us afterwards. We lead with questions and we review from the time they heard that they were going to attend the training. For instance in November 2010 we got bad feedback from all levels of our staff that had attended a particular programme. The problem lay with the trainer who referred them to text books when they asked questions – they didn't get an interactive session going where our staff could ask about their specific problems and needs in relation to the training.

In order to enable staff in a software development and technical environment to perform optimally they have to attend courses. The environment is constantly changing and staff needs to stay abreast with technology. Every staff member will get an opportunity to go on training but on different technologies. In that way the lack of a substantial training budget is overcome by knowledge sharing amongst peers. It is important to introduce staff members to new technology in the work environment first before they are sent on training. They grasped it better when they have firsthand experience in the technology first.

The corporate training (HR) department manages the Workplace Skills Plan and other formal training:

- A dedicated department, the Knowledge Resource center drives the initiatives around the sharing of information already in the organization.
- Information Systems & Technology provides the architecture and technology platforms in order to distribute the knowledge across the organisation
- Executive Directors, Directors and senior managers drive the strategic intend to the lower operational levels by aligning training and development (knowledge) up with the overall strategy of the organization, directorate, department and branch levels
- The attendance of conferences and seminars that don't have a free entry or that requires travel and accommodation fees, has to be pre-approved by the Executive Director. A report is required that stipulates the motivation, benefits and advantages before the time. On return the attendees of such initiatives need to submit a report on their findings to the Executive Director. The post report contains the presented content and as well as opportunities where the obtained knowledge can be applied to.

We get feedback from every training attendee about the course. The feedback is categorized in the following categories:

- Evaluation of the training company and the facilities
- Evaluation of the trainer
- Evaluation of the training material
- Relevance of the training

The last step is to team the individual up with other staff members who did not attend the training, in order for peer-to-peer skills transfer to take place.

We pull our staff together. For instance we will send a developer on training and then we pair him with another developer who didn't go on the training but they work on the same job. The one who learnt then teaches the one who didn't go on training. Then on the next project we separate them and join them to some-one else who hasn't been on the course so we multiply the knowledge value.

We do this very quickly - we plan this to keep the information flowing. The course attendees know they will have to do this so they are prepared for this sharing. If you don't do this and make sure there are time limits they don't bother to share – they ride on the back of the other employee. This forces the sharing and makes each of them independent and useful.

It is up to the new one to gain the knowledge as quickly as possible because they know they are going to have to work on the next project on their own. When they get their own first project we do sometimes notice that they have knowledge gaps and the transfer didn't work so well so we will bring the one who was trained in again but only for sporadic periods so that the learning has to take place and there is no dependency.

[Researcher] Do you have some people who share knowledge better than others?

[Interviewee} Absolutely. We select people to go on training we try to select people that we have found from experience bring back better knowledge than other employees and share it better.

[Researcher] How do you recognise these people?

[Interviewee] we can see it in their work environment. They apply it quickly and we can see those that do a lot of research have not learnt what they should have on the course.

The use of senior specialists on contract to bring “fresh” knowledge and perspective into the organization and to pair them with permanent resources

- An active Workplace Skills Plan assures that resources attend at least one training intervention per year
- Resources from the same job families don’t attend all the same training course, in order to bring a wider knowledge into the environment that can be shared amongst colleagues
- Sending resources on seminars and conferences as an incentive
- Get speakers or leading industry specific groups in to share new trends or current best practices with the staff
- Online training e-learning
- Provision of bursaries to staff members
- Research and development
- The use of knowledge hubs
- With the use of technology – wiki’s, FAQ’s, Intranet and Internet portals of the organisation

[Researcher] Who do they use for informal knowledge when they have a problem?

[Interviewee] There are work groups of Youtube, Microsoft websites and Facebook. They have many forums that they use and they watch videos on many of these that help them with their problems. On Youtube there are over 100 website forums they can register for and they can join alert systems that inform them from these forums when something happens. If we cut the staff from Youtube it would be like cutting off their arm. It shows them screen by screen how to deal with problems.

[Researcher] Do they attend face-to-face meetings on these issues?

[Interviewee} Yes they do and they like this but we don’t have the time to allow them to do that. I provide an hour on a Friday and the developers sit together. What they do in that hour is up to them – what I want to see is evidence of what they do in that hour. They have to show me something innovative at the end of the hour.

[Researcher] So they staff like to work with pictorials when they are solving problems?

[Interviewee] Yes – for instance in Google type in Sharepoint work flow and there will be a video and it circles and indicates coding they need to change. It saves them reading text books – it solves the problems very fast.

[Researcher] Is most of their knowledge coming from the Internet in preference to textbooks.

[Interviewee] We hardly use text books any more. It is forums and support websites . They sit at their desk tops.

[Researcher] So conferences and seminars would need to be very specific to your needs to send them along to?

[Interviewee] Conferences and seminars are often pointless. We need help on very specific problems. General workshops are not useful to us. We use the social network and websites to get quick answers.

From a local government perspective I want to categorize it as direct economic advantages and indirect economic advantages. However, I need to add that the City of Cape Town's policies are very strict in regards with Supply Chain. The City must never be in a position where it can be perceived that companies benefit when City employees attend these kind of interactions and interventions.

Direct economic advantages:

- Grants
  - Social development grants
  - Housing development grants
  - Community organization grants
  - Etc.

Indirect economic advantages

- An increase in skill and knowledge levels can produce better mechanisms to improve revenue collection .

  It can be in the form of:
  - Creation and development of more channels through which rate payers can pay their municipal accounts
  - Development of software solutions that can be used online, to provide a facility through which accounts can be paid

[Researcher] How do you capture information in to your systems (not lost to employees / contract workers) leaving?

[Interviewee] We are ISO 9001 certified and this requires that our processes such as documentation essential at certain points. We follow standard methodologies from our project office and we have quality assurance people who assure the quality of this information capture.

[Researcher] The knowledge resource centre?

[Interviewee] This is I still in an infant stage and linking to intranet databases. They are loading information to the databases scanning in old documents. They are meta-tagging everything on a set of standardised keys. We use an enterprise search engine to search the database with key words.

[Researcher] You mentioned the skills development plan (SDP) of the government for the City of Cape Town. This forced a formal structure of staff education for the first time. Have you found implementation of such a plan to carry out continued professional development of staff a help?

[Interviewee] Definitely so. Before we struggled to get authority to send people on training and now we have the budget available and a policy as the SDP insists that there is training. The onus is on us to pick the right person to send on the courses. There are some negatives around this training as unfortunately training is selected as to what the bulk of people want. So specialised courses are hard to get because there is not enough perceived interest in a particular course – its relevance cannot be seen by everybody. Actually it is only the stream within Business Applications with the most resources that benefit from it. The problem is not that we don't get specialised training it is because the developer stream (biggest group) does select the same specialised training individually, so they go on WSP training. The Project Management stream however is the smallest group and therefore they are never selected. The same is valid for the Business Analyst stream. Only one WSP training intervention is provided per branch (Business Applications) per annum. Like I mentioned that goes normally to the developer stream and the PM's and BA's sit on the sideline.

[Researcher] So there can be a bias as to the knowledge that is being allowed into the information system?

[Interviewee] That's right. We are trying to address this and we are aware of this but it has to be a policy we set to balance this.

[Researcher} So you like small focused meetings as opposed to conferences because you can drill down on problems?

[Interviewee] Definitely so. We often have a video conference with a specialised supplier. We pull together a group of our people who are dealing with the conference and then we have a tele-conference with the specialist. Once the call is finished we have a further talk amongst the attendees to digest and process the information. Nearly all of our support like this comes from overseas tele-conferences.

Transcript 4.17: Stakeholder 17 – academic. The academic manager of a not-for-profit community and government training organisation, Tanzania.

These are confidential inputs to a survey of my personal perspective and experience in the use of "business events". This is in response as part of a baseline qualitative survey for a PhD study using the MacKenzie-Phillips ROI model for measuring the value such events bring. This personal perspective is based on first hand experiential facts, gut feelings and observations to help bring insight vision to the study as there is very little work done in this area.

Business events as used here are defined as: conferences, trade shows, seminars, meetings, etc, any event that is used as tool to bring people from the work place and the same environment together, for networking, communication, exchange of ideas, etc. This experience can be virtual or face-to-face (eg. Event attendance or use of online meeting tools such as Go To Meeting for virtual attendance OR networks on line like a blog).

It seems most people do not get the opportunity to use what they learn or share what they learn with colleagues (post business event), and the study sets out to examine why?

At the onset it is important to clarify the vocabulary, personal perspective and background in which certain terms are used. Upfront, it is important to categorise the "business environment" in which the respondent is drawing life experience information from, and the "business events" that are being referred to.

The perspectives given here are drawn from 30 years of life experience in a professional working environment that spans over 30 countries mostly working as a: researcher, trainer, development consultant or advisor at senior decision making level.

The **"business environment"** is interpreted to mean the work environment. This includes provisioning of advise, dealing with local and central government departments working for development partners, either donor or NGO. The business context is one of supporting sustainable management in development work in a cross-sectional spectrum of natural resource sectors, namely: aquaculture, fisheries, wildlife, environmental and wetlands. Specialisation has been in community based natural resource management (= CBNRM), with a more recent focus on delivery through decentralised administration (ie empowering management by natural resource user groups at the lowest administrative level in governance, the village level, working through district administration, guide by central government). This is akin to CAMPFIRE in Zimbabwe! Most of the experience is drawn from Africa, with some reference also to SE Asia.

Further, it must be put into context that these observations may not reflect the true meaning of the **"business"** environment as relates to the pure definition of business as: commerce, trade, industry, selling, etc. The term "business" as used here, relates to the business of: development work or donor aid or NGO support programs and working with government in technical support, capacity building, administration and project management to help grassroots communities, the target group.

Observations on the term **"business events"** therefore also relate to the context of the development world and are based on the use of group communication or educational events like: conferences, trade shows, seminars, workshops, meetings, retreats, task force sessions, field visits, stakeholder consultations, working groups, etc.

It must be put into context that as part of daily work as an advisor, I am generally the one organizing in-house "business" events and often become the facilitator of these meetings. Such events are generally tools used as part of my terms of reference in: providing technical assistance, advising government, achieving common understanding, capacity building, coordination of development planning, compiling and editing training materials and course design, assisting working groups, imparting knowledge, etc. The other means of communication to my development group which at the moment spans 14 district administrations, is networking by e-mail sharing information and dialoguing.

General observations in the context of the 3 questions on major relationships being assessed, include:

Q1) To what degree do you believe there should be attendance at meetings and business events such as conferences to get communication flowing and remove 'road-blocks' of misunderstanding. For instance do you find in your professional life that attending a business event with a colleague strengths your relationships as a professional network from which to draw support later?

In the development world there has become established a culture called the "Workshop Syndrome". This has emerged out of necessity to hold a focused communication session. Due to the work environment, in order to get anything done with counterparts and colleagues, one must generally leave the work place and retreat to a more isolated venue where a collective of like minded stakeholders can meet, dialogue and exchange ideas freely, without interruption and develop deliverables and tools that help drive development work.

This has come about for several reasons, mostly due to:

a. Work Overload: In the office, government, NGO, donor and development staff are generally very busy with the everyday demands of the bureaucracy of the desk they occupy, answering e-mails, preparing

reports, dealing with crisis, problem solving, pushing files, responding to queries, preparing briefings, dealing with visitors, etc such that to get any work done, or in particular, to have a focused group discussion, a retreat away from the pressures of the office has become essential to achieve the concentration that is needed.

b. Supplementing Low Salaries: Attendance at meetings and workshops in the development world brings with it the expectation of financial incentives. This can take two forms, a) The sitting allowance: to pay senior management for their time and technical inputs and b) The per diem: to cover the daily cost of board and lodgings, incidentals, etc. With the low salaries civil servants and NGOs get in developing countries, this is often seen by staff as an opportunity to earn a little extra, and with the ever rising cost of living and low wages, this has become an essential means of topping up so one can get by with the financial burden of everyday life. This makes staff keen to attend workshops.

c. Donor Demand: For development programs to have the full, concentrated attention of stakeholders to do project development, implementation and the like, often a retreat to a workshop away from the office demands is the only way to get and hold stakeholders attention to get a deliverable. This also makes workshops a competitive environment where development partners offer incentives to get people to come to 'their" meetings. This has lead to a standardization in allowance according to staff seniority, but is a complex part of such events.

d. Consultancy Competition: All too often, development partners to get an assignment done tend to go outside the government institution and hire consultants for which they pay top dollar. This leads to a situation of understandable jealousy as often these consultancy fees daily rate can represent a month's salary (and more) for the counterpart.

e. Conflict of Intellectual Ownership: Further, using consultants to abstract and compile information has the complexity of conflict of interest in "intellectual property rights". The challenge here is that the consultant, in most cases, is gleaning and profiting from the very information for which they are being paid for, which comes from the very staff who will be the recipients of the outcome. In this situation, workshops become a means of sharing information with some compensation for the information exchange in the form of the allowances.

Workshops as business events of this nature in the development world therefore have become a vital tool and play a key role in open communication, education, exchange of dialogue and ideas, harmonizing views and clarifying mis-understandings, and often lead to consolidation of information that is compiled and published, either as a report, training manual or compiled into a project document.

In addition, events of this nature in development are generally used as a key to the "participatory" process of consultation of a wide spectrum of stakeholders to get their views in project design, planning, etc. Eventing of this nature therefore allows a broad exchange leading to a consolidation of ideas, opinions, political expressions, etc and can be used to brainstorm on problem solving (eg SWOT analysis) or provide technical inputs and the like. In this way development partners support during project design and subsequent planning takes into consideration the will and need of the people, and thereby is more responsive to needs on the ground of the target group.

In addition, when working in a multi-sectoral field like CBNRM, meeting a cross-section of sector stakeholders at such events helps not only to synchronize between sectors but to build up personal networks and contacts that can be called upon to assist at some later stage as and when needed.

Q2) To what degree is there a demand for access to continued professional development and business events (learning and training) run by a community of practice such as an association (are you a member of a FISH group for instance)?

It is clear that education at college and university does not necessarily equip development workers and practitioners with the practical, grass-roots skills and technical knowledge that they need to subsequently apply for the service they are expected to provide. Events like workshops and seminars provide a broader exposure to a spectrum of possible solutions to real life problems that the worker can solve and so, yes there is continued need for such events to add the in-service, hands on building blocks and the tailor made tools and technical solutions that college and university educations do not provide

Further, the need to institutionalize eventing so that this can become part of cadre development, is an interesting idea. All too often training done by projects, done in-house by staff through in-service group training sessions or workshops, does not necessarily leave behind the institutional memory and ability to perpetuate this training. Further, this ad hoc, non-certificated training is not recognized by government for cadre development and therefore not considered for promotion. As a result, what we are currently exploring is the anchor this type of training as short in-service cadre development courses held at recognized colleges so that:

a) The capacity to continue the training lives on at the college and
b) The training can become building blocks to a certificate and
c) The college will institutionalize the topic by mainstreaming it in their future curriculum.

Whereas the provisioning of business events by a service provider (or opportunity to hire a professional) event organizer is a good idea, its uncertain if this would be cost effective given the small nature of the

workshop events, and budget implications. Generally, in government departments and event organizer could help bring a systematic approach to organizing such workshop meetings, however, the problem is government is so diverse and budgets so meager that each individual managing an event budget would like to keep this and do the arrangements in-house as resource are not enough to go around, to pay to outsource a service provider. Further, to hire a service provider would also require a cumbersome procurement procedure. However, large events like national meetings, conferences, etc, are often contracted out to professional facilitators.

I belong to several networks and associations and these all have value in offering exposure to a wide spectrum of knowledge bases to draw from.

Q3) To what degree is there a role for HR to play in developing all employees tied into attendance at events – for instance when you get back from a conference do you write a report and disseminate it/do you give an in-house lecture would you like to do any of these things – does HR in your experience facilitate or encourage this?

I assume HR means "human resources"?

Most government staff, like I do, when returning from workshops write a back to office report, but generally this is of an administrative nature and for the files. Very rarely is there any sharing of technical matters, except though published conference/meeting proceedings, but these are generally sent to senior management, end up in the files and not widely disseminated.

For my part as adviser I make sure documents from events I attend or know of are circulated widely by e-mail so that people have the information resource base. But sadly, my observation is in-service people in NGOs, government and private sector, don't read (or do not have time to read technical reports) unless they have to professionally comment on the material. To be effective therefore, after any major conference, it would be wise to have HR organize departmental retreats or seminars to exchange this information with colleagues (like we used to have at University).

More specific elaboration in response to the research questions, include:

Q1) Do you belong to a professional association or network and what role does this play in your continued professional development (CPD) and/or your day to day business working?

I belong to several in: fisheries, aquaculture, wetlands, development, international NGOs, natural resource or wildlife societies, donor group, etc. These networks, the events and meeting they organize and their electronic platforms are great sources of information for my day-to-day work.

Some like the Tilapia group tend to be more chat rooms exchanging problems and solutions, but non-the-less educational in helping understanding common man problems in the field. Others like Danish Development research Network (DDRN) are more academic, exchanging scientific data, publications and resource materials, and are great from that perspective, but sometimes with all these networks, there is an overload of data that it's not always possible to make use of all that is put on the web-site. But, it's nice to know it's there!

In addition, as a Danida employee, they offer e-learning sessions. These are great, a bit intense, and theoretical, but another good way of in-service exposure to current trends in development fields.

Q2) What economic advantages do you know arise for an NGO and government from attendance at group meetings, conferences, exhibitor participation, etc?

As stated above, workshop syndrome means that NGOs and government staff see these meetings as venues to get allowances and look at this as economic incentives to attend conferences, especially overseas conferences or courses.

In country attendance depending upon status would range from USD 30 to 55/day, and as much as USD 200 for senior level. International conferencing would start at USD 200/day. This could double if not triple take home pay!

As stated above, as attendance at these events does not necessarily bring recognition in terms of cadre development, often there is very little economic incentive in terms of career promotion value from attending such events.

In addition, it is important to consider, eventing may not have direct financial benefit to the participant, however, it certainly does have economic spin-off to the provisioning community in the form of: transport, hotels, catering services, bars, restaurants and other local tourism facilities. Transport (ie public as well as fuel for self-drive vehicles), hotels and catering services are straight forward direct economic consequences of holding an event at a venue away from home base. However, there are also indirect economic benefits associated with attending a workshop which brings with it allowances, and therefore a few extra USD to spend. As participants travel away from home to an event, they general generate an element of local tourism around the event and as is typical, spend part of their allowances on entertainment at local bars,

meat BBQ restaurants and other discos and night clubs, with all the associated entertainment (including prostitution).

This hidden economy from events can be large! In Tanzania TNRF estimated that the beef industry alone was as big as international tourism, valued then at USD 1.3 billion. A large portion of which was catering for local tourism in the form of BBQ bars and restaurants, mostly catering for entertainment associated around local eventing.

Q3) To what degree does your attendance at a business event align to planning of strategic intent in your workplace – for instance do you go with a list of problems or 'knowledge holes' you would like to find more about from the business event? Do you typically prepare a list of goals before attendance**?**

As a facilitator, as part of my role as technical adviser, yes, I prepare the workshop meeting handouts with the clear structure of the objectives, expected outputs, and the structure of the workshop and the type of questions or problems that we need to address and answer collectively so as to solve a problem, fill a knowledge gap, or develop a way forward.

When attending events organised by others, then yes, I look for areas of interest, where I can learn more to address the situation and take back information I find applicable back home, and the like. In this sense, I do not have a structured written list of goals, but more an innate list of interest areas and topics for which I make a judgement on choice at big conference venues as to what lectures, presentations, exhibits and side meetings to attend based on my needs to deliver better advice back home.

Q4) In your past experience to what degree have companies you have worked with shown you financial and leadership support for measuring the behavioural change arising from a business event post the actual event?

I have worked cross-spectrum with business community, NGO, government and donors, and in neither situation have I found leadership that is interested to measure the behavioural change resulting from an event, nor to organise a post-event retreat. Most decision makers are happy to sponsor attendance at a meeting, or in the case of government, to agree to let individuals attend if there is sponsorship, but mostly the outcome ends with attendance.

On the other hand, in development work, follow-up monitoring and evaluation (M&E) visits are generally used as a form of evaluation tool post an event like a planning workshop. However, in most cases M&E is mistaken for supervision and the team going out tend to not be equipped with the tools and the means to do a proper M&E the feedback from which could also serve as a training needs assessment (TNA). To this

extend, in my role as advisor, I tend to develop M&E systems that will both look at progress in terms of outputs to meet the project objectives, but also to identify gaps that need to be strengthened.

The donors have also realised the need for this and conduct what is termed value for money audits (VFMA), to see if they are getting mileage from the resources they spend, but also more importantly to assess if the cost effectiveness could also be a feature of the capacity development program, ie changes brought about by events that held build up technical and administrative capabilities.

Q5) To what extent do you believe organisations embrace customer needs analysis and ROI measurements?

In development work, we can interpret "customer needs analysis" as the business order of the day in that development partners and governments (politically) are very sensitive that target group needs are addressed, and the approach can be defined in the following ways:

a) as a **"training needs analysis"** (TNA)" that look at what does the stakeholder, the community, the client need in the way of training so that we can train the trainers to deliver these messages bearing in mind in development work the key factor of change is training or education, and

b) **"participator rural appraisal"** (PRA) processes whereby wide consultation of stakeholders takes place so as to develop solutions to conflict or to ensure development projects are needs oriented.

To elaborate:

TNA: Both in Malawi and Tanzania as part of the development program, we involved a consultant to undertake a TNA so as to develop a national training strategy in the topic under development. Sadly, in both cases the consultant was unable to deliver as there seemed to be some technical difficulty in understanding what is and how to do a TNA?

I looked this up, and from my scientific background was astonished to find that no such TNA methodology was available (or perhaps I just did not know where to look)! Consequently I developed my own set of tools for a TNA and development of a training strategy.

PRA: This is a much wider tool now finding common application by development partners and government to:

a) Survey a large audiences opinion on a subject, be it for conflict resolution (normally of a politically sensitive nature) or

b) To survey stakeholders at all levels through workshops and field meetings to find out what are key development needs that can be addressed by development projects generally of development partners, or

c) As a mainstream tool used by local government to consult villages and communities to identify their aspirations and development needs that can be included in village development plans and funded through local government channels. This process is known as "obstacles and opportunities to development" (O&OD), and

d) In land use planning (LUP) a tool used by central government at village level to assess the village resource base and develop zonation, setting aside land for livelihoods and for nature, with laid down by laws to govern sustainable and wise use, stop illegal practices, etc.

ROI: And I assume ROI means "result oriented indicators" or more commonly referred to in logical framework approach (LFA) as "objectively verifiable indicators" (= OVI).

OVI: If ROI = OVI, then development partners embrace logical framework approach (LFA) as the basis to do all planning and programming. OVIs (or ROI) are a key tool for measuring and monitoring (M&E) success... or a measure of achievement of outputs and are reported during project steering processes. Likewise the same approach is adopted by governments in their medium term expenditure framework (MTEF) planning system where OVIs are key monitoring tools of outputs achieved for fund spent.

Whereas OVIs exist in planning, often they are not monitored or measured properly. The culture of reporting become more about accounting for money spent rather than value for money in terms of the outputs achieved for the funds used. More is needed to develop M&E tools that link finances and ROI so as to measure value for money and determine more cost effective approaches.

Q6) When creating a business strategy is it your experience that <u>you</u> will be asked to input to, and agree with the over arching business strategic intent? Or do you find the strategy is designed by management and you are expected to deliver to goals that you did not set?

A bit of both. As I work on short contracts, there are occasions when I inherit a strategy developed by others.

However, as an adviser, generally I am involved in guiding counterparts and colleagues in strategic thinking to stimulate and to develop strategic plans, or programmatic documents or policies. As part of this

process we use events at all levels to consult a broad spectrum of stakeholders as is practically possible so that the outcome is edited and owned by the future implementers and beneficiaries.

Generally we ensure that strategic planning is done in line with sector policies, and these policies may often be a top-down development, but, more and more through PRA processes, even sector policies are becoming more stakeholder oriented through wider consultation processes.

Q7) Have you ever worked with an event organiser (either in-house or contracted in)? If yes, what were a few of the strengths and/or disadvantages of using a 3rd party in your conference?

Hmm, yes there have been events where the project has hired an external or internal event organizer, and I have attended meetings where the organizers have used external facilitators. Although the event went well, logistically, in almost all circumstances, I could not help feel that in involving an external facilitator for the technical part of the meeting, in so doing the organizers were losing the control of the outcome or the results were diluted.

What I mean by that is that external facilitators in technical events generally help to "facilitate" rather than steer the technical outcome. Sometimes, in this way, by adopting the rather regimented German LFA philosophy or Zopp approach, the answers may not be correct. Here the belief was that the combine intellect of the meeting from within will precipitate the results and solution needed by SWOT analysis (strengths, weaknesses, opportunities and threats), with only a facilitator and no external influence. This is not true! A facilitator who does not guide the technical direction can often allow the audience to come up with the "wrong answers".

If the idea of the event is that simply by meeting and consulting each other stakeholders can come up with solutions to their problems, however, this begs the question, if the community being consulted can come up with the solution to their problems, there should have been no problem in the first place. In the early days when PRA (participatory rural appraisal) was the flavor of the day, it was designed with the idea to have as wide a cross-section of resource specialists on hand to help guide and focus the meeting in the correct, technical direction. These resource specialist help to manipulate and massage the audience's knowledge to get the most out of them, to diagnose the problem and come up with a solution based on providing them with the technical knowledge needed for informed decision making.

I believe that in a technical workshop meeting if you are designing a research program, development project, or analysing solutions from problems determined by SWOT analysis, the facilitator must be more of a **"facipulator"**, guiding based on some pre-conceived back-pocket solution that is derived from solid scientific or knowledgeable facts.

To ensure an event achieves its goals, positive, strong and decisive steering is needed based on the goal, and a facilitator who can steer the direction to this outcome, based on a preconceived objective for the meeting, but remain sensitive to feedback, and subtly guide the outcome.

Pre-event Preparations: All too often you are invited to meetings, workshops, conferences without having seen the pre-conference materials nor the technical papers that are to be presented. This means attending a mass of presentation is hardly time enough to absorb all that is said and this leads to an "information overload". With all that comes from a meeting of larger magnitude, if you leave without the papers, often you can recall little of the pearls of the meeting. It is important therefore that pre-event papers are circulated, objectives and output questions are posed so as to arm and prepare the participant pre-event, to become an active participating member and a knowledgeable contributor to the meeting.

I recall accompanying a Minister to a Global meeting on wetlands, and because I was armed with the pre-conference technical papers, I was prepared with review comments and could feed the Minister with points for discussion to bring up in plenary, and the country received an accolade by being invited to join the Standing Committee thanks to the dynamic and constructive contributions.

Workshops Undervalued: Workshops in development work have become a way of life, a way of collective, participatory stakeholder involvement. It is now an institutionalized tool for program development, planning, reporting and information exchange. However, the donor community grow weary, are fatigued by too many meetings, and are not sure of their value. I am not aware that this eventing tool of workshops has ever been evaluated for its effectiveness and value for money in bringing people of a common background together for participatory consultation, to consolidate thinking, to exchange ideas and knowledge, to come to consensus and to bring new technical advice and support material. There is donor fatigue that much resources are consigned in this way and used for allowances, transport, meals, etc and that too little of this development money reaches the target, the grassroots rural poor. A balance is needed!

A value for money assessment of workshops in development work would be of tremendous use to not only convince donors and government that this is a worthwhile investment, but also would help to advise how to streamline the process, how to make it to be more cost effective and to overcome the regimented current approach.

Workshop Event Manual: I am sure a VFMA would add new perspectives how to make information exchange more efficient and effective considering pre-, during and post-event tools and techniques. An eventing manual "how to maximise participatory processes during a workshop" however would be of tremendous help. Some years back for GTZ when Zopp (LFA) was the flavor of the day for workshops, I

developed a Manual on Participatory Processes in Fisheries Development, and was astonished at the depth of tools that exist, however future development workers like myself where NEVER trained in these techniques! Training in eventing as a development tool I feel is a vital new frontier in this science of communication and PRA.

Transcript 4.18: Stakeholder 18 – academic. A researcher for a leading tobacco company at the University of Kentucky, U.S.A.

Q1) Do you belong to a professional association or network and what role does this play in your continued professional development (CPD) and/or your day to day business working?

I belong to CORESTA, an international tobacco research organization which holds annual conferences and also coordinates collaborative studies. I regularly attend, and have served on the committees of, two other tobacco conferences, but these do not have an organization as such, and do not have members – they just hold annual conferences. The conferences are valuable as a forum for exchange of information, and also for networking and keeping up with colleagues. These are small groups, most of us have worked in the area for many years, and most of us know each other. The collaborative studies run by CORESTA are vital for tobacco researchers, as they offer researchers resources none of us could achieve on our own.

Q2) What economic/organisational advantages do you know arise from attendance at group meetings, conferences, exhibitor participation, etc?

For us, the advantages are academic (access to new information, exchange of ideas), not economic or organizational.

Q3) To what degree does your attendance at a business event align to planning of strategic intent in your workplace – for instance do you go with a list of problems or 'knowledge holes' you would like to find more about from a business event? Do you typically prepare a list of goals before attendance?

We go to listen to academic presentations – results of specific experiments. Attendance to not align to strategic planning most cases – unless we hear a presentation which may suggest a new direction for our research. A list of gaols would not be relevant for us, but we might have a list of presentations we particularly want to attend.

Q4) In your past experience to what degree have companies you have worked with shown you financial and leadership support for measuring the behavioural change arising from a business event post the actual event (do they listen to new ideas and change current behaviour based on your feedback)?

Not really relevant for us. Our type of conference does not typically lead to behavioural change – they are just forums for presentation of experimental results.

Q5) When creating a strategy is it your experience that you will be asked to input to, and agree with the over arching business strategic intent for the work your are researching? Or do you find the strategy is designed by 'a.n.other' management and you are expected to deliver to goals that you may find rather obscure?

I design my own experiments, write my own proposals and seek my own funding for the work.

Q6) Have you ever worked with an event organiser (either in-house or contracted in)? If yes, what were a few of the strengths and/or disadvantages of using a 3rd party in your conference?

Yes. I used a conference organizer when it was my turn to host a conference. This conference organizer has organized this conference for many years, for different hosts (we each take a turn to host it) – so he is very familiar with the requirement. There were no disadvantages – I could not have done this without him.

Strengths – he did all the negotiating with the hotel, where he knows everyone – and secured considerable discounts and perks for us. Being familiar with the conference and its requirements, he uses the same AV company every year, and the AV staff and equipment are exactly what we need. I did the fundraising with a committee of my colleagues, but he collected the money and handled all the accounting and advertising, as well as the registration fees.

With reference to conference attendance, I attend all three of these tobacco conferences every year, and present papers at all of them. It's my choice, but Dr Bush supports it.

7) To what degree do you believe there should be attendance at meetings and business events such as conferences to get communication flowing and remove 'road-blocks' of misunderstanding. For instance do you find in your professional life that attending a business event with a colleague strengths your relationships as a professional network from which to draw support later?

For us, attendance at academic conferences are very important – not to "remove road-blocks", but to keep up with new work. I find attendance in person much more valuable that webinars, because the behind-scenes discussions are such a large part of it.

8) To what degree is there a demand for access to continued professional development and business events (learning and training) run by a community of practice such as an association (are you a member of a Tobacco/ plant group for instance)?

Big demand for the conferences already in existence. Not for training, because the areas are so specialized.

9) To what degree is there a role for HR to play in developing all employees tied into attendance at events – for instance when you get back from a conference do you write a report and disseminate it / do you give an inhouse lecture/ would you like to do any of these things – does HR in your experience facilitate or encourage this?

Not applicable for us. HR is not involved in training academics (too specialized), although they do training for admin and others.

We don't give formal lectures on our return, but we do discuss what we have learned with our colleagues – there are only a few of us working on tobacco.

Appendix 5: Atlas.ti v6.2 analysis of themes by interview using the 12 variables

Appendix 5.1a: V1 positive
The intensity of support from an organisation for business events as a strategic tool in an organisation's knowledge replenishment strategy.
Report: 43 quotation(s) for 1 code

HU: Analysis interviews May2012
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Date/Time: 2012-07-02 10:27:18

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:5 [We do break-away sessions wher..] (20:20)
Codes: [V1] [V2] [V5] [V9]
We do break-away sessions where we go to a facility that lends to getting out of the office environment. That feeling is like going away for a weekend. We are able then to have strategy discussions very successfully.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:8 [the more often we have these b..] (20:20)
Codes: [V1] [V2] [V5]
The more often we have these break away sessions the more comfortable they are in sharing with those present. In removes them from the operational day to day task issues as well and gets them to think about longer term strategies.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:9 [We do not all know everything ..] (24:24)
Codes: [V1] [V5] [V9]
We do not all know everything all the time. People from their various perspectives pick up things that you don't. When people meet face-to-face this comes through.

Stakeholder 10 - marketing professional - 3:1 [economic advantages do you kno..] (24:26)
Codes: [V1] [V2] [V4-]
Economic advantages do you know arise for a business from marketing interventions such as product launches, branded conferences, exhibitor participation? These are marketing lead activities. They are integral to the business. The issue is more about convincing CFOs that there is an ROI, which is the marketers fault in not planning and analysing their activities well.

Stakeholder 11 - Paracon HR sales line manager - 6:5 [he training certification is s..] (25:25)
Codes: [V1] [V7]
The training certification is something the individual achieves, is not relevant to the Client site and this certification moves with them when looking for other opportunities and therefore once again makes them more marketable and can give them the advantage over another applicant with a similar skill set.

Stakeholder 11 - Paracon HR sales line manager - 6:16 [I believe attending business e..] (82:82)
Codes: [V1] [V6]
I believe attending business events creates awareness, networking opportunities and the return on investment for the appropriate training keeps staff loyal, motivated and they feel that the company has their best interests at heart as they are willing to invest in their development.

Stakeholder 11 - Paracon HR sales line manager - 6:20 [Being seen at the conference c..] (93:93)

Codes: [V1]
Being seen at the conference creates brand awareness which is good.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:6 [The CTHRC also routinely inclu..] (24:24)
Codes: [V1] [V11]
The CTHRC also routinely includes events-related content in its annual HR forum, presents at conferences and events dedicated to CPD activities for the sector, and hosts development meetings dedicated to the sector.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:7 [CTHRC is to be responsive to t..] (22:22)
Codes: [V1] [V11]
CTHRC is to be responsive to the labour market needs with an overall goal to "create a competitive and sustainable tourism workforce in Canada".

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:8 [Attached for your information ..] (28:28)
Codes: [V1] [V11]
Attached for your information is the just released study commissioned by our partner, Convention Industry Council along with a long list of other industry partners in the U.S. on the subject of the economic significance, definition and description of the meetings industry in the United States. The study situates the meeting planner in the broader mix of agents and stakeholders in the productive activity of meetings and selected events in the U.S. economy.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:9 [Using a research methodology d..] (28:28)
Codes: [V1] [V11]
Using a research methodology developed previously in Canada, the study identifies and quantifies the relationships between the meetings industries and the tourism industries in the U.S. economy.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:15 [This idea is worth pursuing be..] (40:40)
Codes: [V1] [V2] [V7]
This idea is worth pursuing because it would have a positive impact. The plan would need to be long-term in its vision and be supported with sufficient resources, appropriate governance, linked to business goals or bottom-line results. Ultimately, it would work (I believe) if the HR activities were inherent in the business model (and not viewed as an extra activity).

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:6 [MPI has shifted gears and deve..] (27:27)
Codes: [V1] [V11] [V7]
MPI has shifted gears and developed a multi-layered content generation strategy that focuses on helping the global meetings and events industries forecast trends and activate change on a large scale;

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:11 [Events have to be built to mee..] (52:52)
Codes: [V1] [V10] [V2] [V4]
Events have to be built to meet strategic intent

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:5 [Trade Shows are the most direc..] (26:26)
Codes: [V1] [V12] [V2]
Trade Shows are the most direct form of marketing available therefore have a permanent position in the marketing mix. Trade shows deliver tangible results**.**

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:7 [As an exhibition organiser, th..] (47:47)
Codes: [V1]
As an exhibition organiser, the client always briefs me.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:10 [events can not only be annual ..] (51:51)
Codes: [V1] [V12] [V4] [V8]
Events can not only be annual but annual and regional. This is becoming common in South Africa and is standard across the USA states.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:15 ["Exhibitions are the only prod..] (65:65)
Codes: [V1] [V2] [V4]
"Exhibitions are the only product where the client is part of the product". They are both visitors and exhibitors (not really, by becoming an exhibitor they become part of the finished product, as seen by the visitors)

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:16 [As exhibition managers we desi..] (67:67)
Codes: [V1] [V4]
As exhibition managers we design the event as per the client specifications. If the event does not sell and the client cancels, there are fixed costs that cannot be recouped.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:17 [People general use exhibitor s..] (73:73)
Codes: [V1] [V8-]
People {organisations} general use exhibitor stands very badly because it looks easy to promote the product they don't really think out what they are doing. They tend to book a 'shop' which is the stand, in a specialised shopping centre is called XYZ show and they dress it up, and wait for some one to come and buy. The international quoted figure is that eighty percent (80%) of trade show leads are not followed up because as the exhibitor leaves the floor they 'shut the shop'.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:18 [International best practise su..] (77:77)
Codes: [V1] [V12] [V2] [V4]
International best practise suggests that the results of trade show exposure can be multiplied 300% by setting multiple objectives (7-12).

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:19 [The exhibition industry has sh..] (79:79)
Codes: [V1] [V12] [V2] [V9]
The exhibition industry has shown more consistent growth than any other marketing channel but it is not being leveraged. Exhibitions are the only medium where you can demonstrate the product

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:20 [Exhibitions allow contact with..] (79:79)
Codes: [V1] [V5]
Exhibitions allow contact with the product and some-one on the stand is there to answer questions.

Stakeholder 7 - IOD business events manager - 11:5 [We play a CPD role not only th..] (21:21)
Codes: [V1] [V12] [V2] [V4]
We play a CPD role not only through events but also our training.

Stakeholder 7 - IOD business events manager - 11:8 [Variety of events focused at d..] (28:28)
Codes: [V1] [V7]
A Variety of events focused at director level or in line with our objective to empower those charged with governance duties. We also elicit member feedback and input regarding topics or events of interest.

Stakeholder 3 - Business events non-professional organiser - 12:1 [JCCI holds a number of events ..] (14:14)
Codes: [V1] [V2]
JCCI holds a number of events to encourage business stakeholders to meet other business stakeholders.

Stakeholder 3 - Business events non-professional organiser - 12:3 [The small businesses meet regu..] (18:18)
Codes: [V1] [V3]
The small businesses meet regularly throughout the year, and are taught about running a business.

Stakeholder 3 - Business events non-professional organiser - 12:5 [- South Africa business people..] (22:22)
Codes: [V1] [V10] [V2]
South Africa business people were given a list of topics they could choose to learn and they selected their topics of interest and this created the format of the content of the meetings for the next eight months.

Stakeholder 3 - Business events non-professional organiser - 12:7 [PLATO Belgian is itself a cham..] (24:24)
Codes: [V1] [V11] [V12]
PLATO Belgian is itself a chamber of commerce linked to chambers of commerce across the world. Thus the network has a ready pool of potential buyers for the South African products.

Stakeholder 3 - Business events non-professional organiser - 12:8 [The JCCI nurtures the business..] (26:26)
Codes: [V1] [V11] [V12]
The JCCI nurtures the business relationships for these mini exporters by maintaining the JCCI's relationship with overseas chambers of commerce. PLATO holds terrific potential for micro-exporters via JCCI.

Stakeholder 3 - Business events non-professional organiser - 12:10 [y, JCCI runs a great many trai..] (28:28)
Codes: [V1]
JCCI runs a great many training sessions which members and non-members can attend.

Stakeholder 2 - Business events professional organiser - 13:3 [A further philosophy of CMP is..] (31:31)
Codes: [V1] [V2] [V5] [V9]
A further philosophy of CMP is that a gathering of people is not an end in itself. In every instance - within the CMP process, a gathering - no matter what capacity or type has the conceptual ingredients, at the very outset, for the next step in the message retention process.

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:7 [The one day business briefs of..] (39:39)
Codes: [V1] [V9]
The one day business briefs offer them an opportunity to return to the classroom and be exposed to four speakers covering different aspects of a particular theme.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:16 [These events are extremely wel..] (40:40)
Codes: [V1]
These events are extremely well attended and do seem to add value to knowledge transfer in our industry as well as value in terms of building our brand as a leader in our field

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:28 [Looking people in the eye is w..] (63:63)
Codes: [V1] [V9]

Looking people in the eye is worth so much. 10% is looking people in the eye and the rest is non-verbal communication that you only get face-to-face.

Stakeholder 8 - ASATA CEO manager - 16:6 [I always ask members to think ..] (37:37)
Codes: [V1]
I always ask members to think of what will happen if we didn't host these events. Input from speakers - huge value, considering that 80% of the market is small business ownership, where would they ever be exposed to that level in their individual aspect. Workshops obviously offer great educational aspects and exhibitions alike.

Stakeholder 8 - ASATA CEO manager - 16:7 [Workshops, Showcase (exhibitio..] (41:41)
Codes: [V1]
Workshops, Showcase (exhibition), conference, forums, meetings and regional meetings every 6 weeks.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:1 [I am generally the one organiz..] (36:36)
Codes: [V1] [V11]
I am generally the one organizing in-house "business" events and often become the facilitator of these meetings. Such events are generally tools used as part of my terms of reference in: providing technical assistance, advising government, achieving common understanding, capacity building, coordination of development planning, compiling and editing training materials and course design, assisting working groups, imparting knowledge, etc

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:5 [Work Overload: In the office, ..] (50:50)
Codes: [V1] [V9]
Work Overload: In the office, government, NGO, donor and development staff are generally very busy with the everyday demands of the bureaucracy of the desk they occupy, answering e-mails, preparing reports, dealing with crisis, problem solving, pushing files, responding to queries, preparing briefings, dealing with visitors, etc such that to get any work done, or in particular, to have a focused group discussion, a retreat away from the pressures of the office has become essential to achieve the concentration that is needed.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:10 [In addition, events of this na..] (62:62)
Codes: [V1] [V12] [V3] [V5]
In addition, events of this nature in development are generally used as a key to the "participatory" process of consultation of a wide spectrum of stakeholders to get their views in project design, planning, etc. Eventing of this nature therefore allows a broad exchange leading to a consolidation of ideas, opinions, political expressions, etc and can be used to brainstorm on problem solving (eg SWOT analysis) or provide technical inputs and the like. In this way development partners support during project design and subsequent planning takes into consideration the will and need of the people, and thereby is more responsive to needs on the ground of the target group.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:13 [currently exploring is the anc..] (72:76)
Codes: [V1] [V10] [V11]
Currently exploring is the anchor this type of training as short in-service cadre development courses held at recognized colleges so that:
a) The capacity to continue the training lives on at the college and
b) The training can become building blocks to a certificate and
The college will institutionalize the topic by mainstreaming it in their future curriculum.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:15 [Generally, in government depar..] (78:78)
Codes: [V1] [V9]
Generally, in government departments and event organizer could help bring a systematic approach to organizing such workshop meetings, however, the problem is government is so diverse and budgets so meager that each individual managing an event budget would like to keep this and do the arrangements in-house as resource are not enough to go around, to pay to outsource a service provider

Stakeholder 18 - Academic, research, USA - 18:1 [The conferences are valuable a..] (19:20)
Codes: [V1] [V9]
The conferences are valuable as a forum for exchange of information, and also for networking and keeping up with colleagues. These are small groups, most of us have worked in the area for many years, and most of us know each other.
The collaborative studies run by CORESTA are vital for tobacco researchers, as they offer researchers resources none of us could achieve on our own.

Appendix 5.1b: V1- negative
The intensity of support from an organisation for business events as a strategic tool in an organisation's knowledge replenishment strategy.
Report: 2 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:26:33

Stakeholder 12 - Paracon HR sales director - 5:9 [I have reservations on attenda..] (66:66)
Codes: [V1-] [V4-]
I have reservations on attendance by internal staff at industry forums. I do wonder how much is absorbed at the forums. The direct cost of training and the loss of productive time in the office is where the cost to our company comes. Industry forums are mainly to up skill our sales staff.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:17 [The correlation between knowle..] (40:40)
Codes: [V1-]
The correlation between knowledge transfer, sharing etc and brand development is an important one, and an opportunity which is not always realized, especially in knowledge based industries

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Appendix 5.2a: V2 positive
The degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities.
Report: 74 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:21:03

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:3 [Every staff member will get an..] (11:11)

Codes: [V2] [V3] [V5]
Every staff member will get an opportunity to go on training but on different technologies. In that way the lack of a substantial training budget is overcome by knowledge sharing amongst peers.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:4 [The corporate training (HR) de..] (13:13)
Codes: [V2] [V7]
The corporate training (HR) department manages the Workplace Skills Plan

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:5 [A dedicated department, the Kn..] (14:15)
Codes: [V12] [V2]
A dedicated department, the Knowledge Resource center drives the initiatives around the sharing of information already in the organization.
 Information Systems & Technology provides the architecture and technology platforms in order to distribute the knowledge across the organisation

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:6 [The attendance of conferences ..] (17:17)
Codes: [V12] [V2]
The attendance of conferences and seminars that don't have a free entry or that requires travel and accommodation fees, has to be pre-approved by the Executive Director. A report is required that stipulates the motivation, benefits and advantages before the time. On return the attendees of such initiatives need to submit a report on their findings to the Executive Director. The post report contains the presented content and as well as opportunities where the obtained knowledge can be applied to.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:9 [We pull our staff together. Fo..] (28:28)
Codes: [V10] [V12] [V2]
We pull our staff together. For instance we will send a developer on training and then we pair him with another developer who didn't go on the training but they work on the same job. The one who learnt then teaches the one who didn't go on training. Then on the next project we separate them and join them to some-one else who hasn't been on the course so we multiply the knowledge value.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:10 [we plan this to keep the infor..] (30:30)
Codes: [V2] [V8]
We plan this to keep the information flowing. The course attendees know they will have to do this so they are prepared for this sharing. If you don't do this and make sure there are time limits they don't bother to share - they ride on the back of the other employee. This forces the sharing and makes each of them independent and useful.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:12 [Do you have some people who sh..] (34:36)
Codes: [V2] [V6] [V7]
Do you have some people who share knowledge better than others?
Absolutely. We select people to go on training we try to select people that we have found from experience bring back better knowledge than other employees and share it better.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:13 [How do you recognise these peo..] (38:40)
Codes: [V10] [V2]
How do you recognise these people?
We can see it in their work environment. They apply it quickly and we can see those that do a lot of research have not learnt what they should have on the course.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:22 [the skills development plan (S..] (96:98)
Codes: [V2] [V7]
The skills development plan (SDP) of the government for the City of Cape Town. This forced a formal structure of staff education for the first time. Have you found implementation of such a plan to carry out continued professional development of staff a help? Definitely so

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:3 [I meet with my heads, the team..] (16:16)
Codes: [V10] [V2]
I meet with my heads, the team leaders. Formally once a month and informally, daily. I expect them to do the same with their teams.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:5 [We do break-away sessions wher..] (20:20)
Codes: [V1] [V2] [V5] [V9]
We do break-away sessions where we go to a facility that lends to getting out of the office environment. That feeling is like going away for a weekend. We are able then to have strategy discussions very successfully.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:8 [the more often we have these b..] (20:20)
Codes: [V1] [V2] [V5]
The more often we have these break away sessions the more comfortable they are in sharing with those present. In removes them from the operational day to day task issues as well and gets them to think about longer term strategies.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:12 [Yes we do capture the data fro..] (28:28)
Codes: [V2] [V8] [V9]
Yes we do capture the data from the meetings and the white boards. We circulate it to the attendees. We set our path from agreeing these documents.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:19 [I would rather not attend a co..] (62:62)
Codes: [V2] [V4] [V9]
I would rather not attend a conference but I will get the presenters to come and talk to us about out unique situation and needs. I will get all our stakeholders together to attend the meeting.

Stakeholder 10 - marketing professional - 3:1 [economic advantages do you kno..] (24:26)
Codes: [V1] [V2] [V4-]
Economic advantages do you know arise for a business from marketing interventions such as product launches, branded conferences, exhibitor participation? These are marketing lead activities. They are integral to the business. The issue is more about convincing CFOs that there is an ROI, which is the marketers fault in not planning and analysing their activities well.

Stakeholder 10 - marketing professional - 3:6 [Reality says that 'no marketin..] (50:50)
Codes: [V2] [V4] [V9]
Reality says that 'no marketing, no business' CMO has to be part of the C team and work with other senior executives in developing a business strategy and then deciding how to implement the marketing components.

Stakeholder 10 - marketing professional - 3:9 [It seems that CEOs, CFOs and s..] (75:75)
Codes: [V12] [V2]

It seems that CEOs, CFOs and senior managers are not marketers and they don't recognise the value of marketing. The marketing value is easy to cut because it is so hard to track and prove the intangible value created by marketing.

Stakeholder 9 - MA(SA) CEO - 4:2 [you need to be completely up t..] (13:13)
Codes: [V10] [V2]
You need to be completely up to date with developing trends and the latest in marketing trends. It is compulsory for all designated members (CMSA and MPSA) to meet pre-defined CPD targets

Stakeholder 9 - MA(SA) CEO - 4:3 [To what degree is there a rela..] (15:17)
Codes: [V2] [V4] [V7]
To what degree is there a relationship between businesses wanting employees to be up-to-date with latest trends and skills and improving the business' chances of competitive advantage over similar others? 100% correlation

Stakeholder 9 - MA (SA) CEO - 4:4 [To what degree is there a dema..] (19:21)
Codes: [V12] [V2]
To what degree is there a demand by employees for access to continued professional development and business events run by a community of practice /association? 100% correlation

Stakeholder 9 - MA (SA) CEO - 4:5 [To what degree is there a role..] (23:25)
Codes: [V2] [V7]
To what degree is there a role for HR to play in developing employees through events to have the requisite variety of knowledge and improving the possibility of gaining competitive advantage? 100% correlation

Stakeholder 9 - MA (SA) CEO - 4:6 [What role do you believe HR fu..] (27:29)
Codes: [V12] [V2] [V7]
What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)? A core role - as explained above. Either the HR or whatever other person or department is in charge of HR development.

Stakeholder 9 - MA (SA) CEO - 4:7 [seminars with experts such as ..] (55:55)
Codes: [V10] [V2]
Seminars with experts such as Professor Malcolm McDonald who is a marketer. This is particular seminar is about marketing directors and their role on the corporate board. This links into King III. Prof. is a marketer who brings a marketing perspective to King III requirements and recommendations.

Stakeholder 9 - MA (SA) CEO - 4:9 [CPD is a core factor in being ..] (65:65)
Codes: [V12] [V2] [V7]
CPD is a core factor in being a professional. It is an ethical notion that if you are offering yourself as a marketer to an employer or employee, you need to be completely up to date with developing trends and the latest in marketing trends.

Stakeholder 9 - MA (SA) CEO - 4:10 [brand and reputation are intan..] (73:73)
Codes: [V12] [V2]
Brand and reputation are intangible assets of an organisation. If the right marketer is running the marketing they will ensure that risk caused by any marketing activities to the brand and reputation is understood and minimised. Marketers' actions should be strategically aligned to this goal.

Stakeholder 12 - Paracon HR sales director - 5:2 [The CIO ensures that the contr..] (34:34)
Codes: [V10] [V2] [V7]
The CIO ensures that the contractor's knowledge is aligned to the specific requirements of his project.

Stakeholder 12 - Paracon HR sales director - 5:7 [We find that contract renewals..] (58:58)
Codes: [V12] [V2] [V6]

We find that contract renewals for those contractors who are applying their training are more successful - the client wants them to continue.

Stakeholder 12 - Paracon HR sales director - 5:11 [When these events do take plac..] (70:70)
Codes: [V2] [V7]
When these events do take place it is important to have HR participating though, as they are an important support function to the line of business functions.

Stakeholder 11 - Paracon HR sales line manager - 6:1 [Paracon suggests training for ..] (17:17)
Codes: [V2] [V4] [V7]
Paracon suggests training for career improvement. Clients will pay if they see benefit for themselves.

Stakeholder 11 - Paracon HR sales line manager - 6:11 [we have Sales meetings where w..] (61:61)
Codes: [V10] [V2] [V4]
We have Sales meetings where we share information with our colleagues, attend workshops and seminars where possible and refer to media reports, publications and internet research.

Stakeholder 13 - HCI HR practitioner - 7:20 [It is anticipated that this ty..] (32:32)
Codes: [V2] [V9]
It is anticipated that this type of business intervention will have particular value for medium size companies who require knowledge and innovation to surpass competitors.

Stakeholder 13 - HCI HR practitioner - 7:21 [HCI Africa has found that larg..] (32:32)
Codes: [V2] [V6]
HCI Africa has found that large corporates tend to find knowledge sources of their own having the money to spend on research and development.

Stakeholder 13 - HCI HR practitioner - 7:22 [HCI Africa uses its board memb..] (37:37)
Codes: [V2] [V4] [V7] [V9]
HCI Africa uses its board members and industry specialists to source local and international summit and training content. The members have extensive HR training and exposure to international HR trends

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:15 [This idea is worth pursuing be..] (40:40)
Codes: [V1] [V2] [V7]
This idea is worth pursuing because it would have a positive impact. The plan would need to be long-term in its vision and be supported with sufficient resources, appropriate governance, linked to *business goals* or *bottom-line* results. Ultimately, it would work (I believe) if the HR activities were inherent in the business model (and not viewed as an extra activity).

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:8 [We hold the European Meetings ..] (44:44)
Codes: [V2] [V4] [V7]
We hold the European Meetings and Events Conference and the World Education Congress annually for the education and benefit of meeting and event professionals, to arm them with the knowledge and connections they need to do their job

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:10 [USA is using the term, "Chief ..] (52:52)
Codes: [V2] [V4] [V6]
USA is using the term, "Chief Learning/Knowledge Officer". This title is used extensively at present. This individual connects business to information via business events.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:11 [Events have to be built to mee..] (52:52)
Codes: [V1] [V10] [V2] [V4]
Events have to be built to meet strategic intent

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:17 [The connections have to be man..] (61:61)
Codes: [V10] [V12] [V2] [V6]
The connections have to be managed - a term like the Chief Connections Officer would be appropriate. This person would manage connections focused on the outputs they will bring.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:5 [Trade Shows are the most direc..] (26:26)
Codes: [V1] [V12] [V2]
Trade Shows are the most direct form of marketing available therefore has a permanent position in the marketing mix. Trade shows deliver tangible results**.**

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:8 [I generally talk to the market...] (47:47)
Codes: [V2]
I generally talk to the marketing manager and/or the marketing director. They give me the parameters of the event.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:15 ["Exhibitions are the only prod..] (65:65)
Codes: [V1] [V2] [V4]
"Exhibitions are the only product where the client is part of the product". They are both visitors and exhibitors (not really, by becoming an exhibitor they become part of the finished product, as seen by the visitors)

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:18 [International best practise su..] (77:77)
Codes: [V1] [V12] [V2] [V4]
International best practise suggests that the results of trade show exposure can be multiplied 300% by setting multiple objectives (7-12).

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:19 [The exhibition industry has sh..] (79:79)
Codes: [V1] [V12] [V2] [V9]
The exhibition industry has shown more consistent growth than any other marketing channel but it is not being leveraged. Exhibitions are the only medium where you can demonstrate the product

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:21 [People go to an exhibition wit..] (79:79)
Codes: [V2]
People go to an exhibition with a need and they are open to information that gives them answers.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:24 [This is very powerful with con..] (81:81)
Codes: [V12] [V2] [V9]
This is very powerful with consumer brand building. Multi-media are used extensively to facilitate experiential marketing.

Stakeholder 7 - IOD business events manager - 11:2 [qualified and skilled individu..] (12:12)
Codes: [V10] [V2]
Qualified and skilled individuals which should enhance the company's competitive advantage.

Stakeholder 7 - IOD business events manager - 11:5 [We play a CPD role not only th..] (21:21)
Codes: [V1] [V12] [V2] [V4]
We play a CPD role not only through events but also our training.

Stakeholder 3 - Business events non-professional organiser - 12:1 [JCCI holds a number of events ..] (14:14)
Codes: [V1] [V2]
JCCI holds a number of events to encourage business stakeholders to meet other business stakeholders.

Stakeholder 3 - Business events non-professional organiser - 12:5 [- South Africa business people..] (22:22)
Codes: [V1] [V10] [V2]
South Africa business people were given a list of topics they could choose to learn and they selected their topics of interest and this created the format of the content of the meetings for the next eight months.

Stakeholder 3 - Business events non-professional organiser - 12:11 [These have five meetings a yea..] (32:32)
Codes: [V2] [V4]
These have five meetings a year and the meetings are used for industry updates including legislation updates.

Stakeholder 3 - Business events non-professional organiser - 12:14 [very course gets a unique CPD ..] (40:40)
Codes: [V12] [V2] [V7]
Very course gets a unique CPD number of recognition from the engineering council of South Africa.

Stakeholder 2 - Business events professional organiser - 13:3 [A further philosophy of CMP is..] (31:31)
Codes: [V1] [V2] [V5] [V9]
A further philosophy of CMP is that a gathering of people is not an end in itself. In every instance - within the CMP process, a gathering - no matter what capacity or type has the conceptual ingredients, at the very outset, for the next step in the message retention process.

Stakeholder 2 - Business events professional organiser - 13:5 [The role of corporate manageme..] (42:42)
Codes: [V2] [V5]
The role of corporate management is to understand the pivotal importance of the gathering of people in relation to the organisation's well-being and ongoing growth plus brand reputation within the market

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:1 [there are two major reasons (o..] (14:16)
Codes: [V2] [V5] [V7]
There are two major reasons (or categories of motivators). The first group includes delegates or students from corporate clients whose aim is to enhance both knowledge and capability in project management.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:8 [The other key aspect to this q..] (28:28)
Codes: [V2] [V6] [V8]
The other key aspect to this question is the matching of training to actual trainee requirements and level.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:9 [It is important that delegates..] (28:28)
Codes: [V2] [V8] [V9]
It is important that delegates attend training that will be of direct and personal value in the workplace itself, and / or in terms of securing better career opportunities.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:18 [We go to other peoples' events..] (44:44)
Codes: [V2] [V6]

We go to other peoples' events only to learn about our area of training.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:23 [Organisations need to adapt ve..] (55:55)
Codes: [V12] [V2] [V5]
Organisations need to adapt very fast these days to survive. The one way that you can do this is to build in a capability to change quickly and to bring in skills that help drive change quickly.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:24 [External drivers are forcing o..] (55:55)
Codes: [V12] [V2]
External drivers are forcing organisations to use project managers to drive quick adaptations. They need to make specific projects happen fast

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:25 [so the project manager has bec..] (57:59)
Codes: [V2] [V7]
So the project manager has become the link between the organisation's CIO and the quick adaptive changes needed for survival? Absolutely. There is so much going on these organisations

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:29 [ROI models like Sigma Six/Prin..] (67:67)
Codes: [V2] [V4-]
ROI models like Sigma Six/Prince have a place but you still need it to be project managed. They have all value but they are all underpinned by project management

Stakeholder 8 - ASATA CEO manager - 16:3 [We believe that the employer i..] (25:25)
Codes: [V2]
We believe that the employer is responsible for ensuring that the individual has the required skills to perform the job effectively,

Stakeholder 8 - ASATA CEO manager - 16:8 [the meetings are required thro..] (41:41)
Codes: [V11] [V2]
The meetings are required through the terms of the Constitution but for the best part ASATA takes the initiative on most events

Stakeholder 8 - ASATA CEO manager - 16:9 [We compete with other associat..] (45:45)
Codes: [V11] [V2]
We compete with other associations, corporate brands and commercial conference organisers and only through continuous dialogue with our base do we get the support that will ultimately ensure our position. This dialogue can only happen through the types of events we host.

Stakeholder 8 - ASATA CEO manager - 16:10 [Managing performance both good..] (49:49)
Codes: [V2] [V4]
Managing performance both good and bad is critical to developing a culture of learning in any organisation

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:8 [using consultants to abstract ..] (58:58)
Codes: [V11] [V2]
Using consultants to abstract and compile information has the complexity of conflict of interest in "intellectual property rights". The challenge here is that the consultant, in most cases, is gleaning and profiting from the very information for which they are being paid for,

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:9 [Workshops as business events o..] (60:60)
Codes: [V2] [V3]

Workshops as business events of this nature in the development world therefore have become a vital tool and play a key role in open communication, education, exchange of dialogue and ideas, harmonizing views and clarifying mis-understandings, and often lead to consolidation of information that is compiled and published, either as a report, training manual or compiled into a project document.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:11 [meeting a cross-section of sec..] (64:64)
Codes: [V2] [V6] [V7]
Meeting a cross-section of sector stakeholders at such events helps not only to synchronize between sectors but to build up personal networks and contacts that can be called upon to assist at some later stage as and when needed

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:12 [Events like workshops and semi..] (70:70)
Codes: [V11] [V2] [V4] [V7]
Events like workshops and seminars provide a broader exposure to a spectrum of possible solutions to real life problems that the worker can solve and so, yes there is continued need for such events to add the in-service, hands on building blocks and the tailor made tools and technical solutions that college and university educations do not provide

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:27 [follow-up monitoring and evalu..] (126:126)
Codes: [V10] [V2] [V4]
Follow-up monitoring and evaluation (M&E) visits are generally used as a form of evaluation tool post an event like a planning workshop. However, in most cases M&E is mistaken for supervision and the team going out tend to not be equipped with the tools and the means to do a proper M&E the feedback from which could also serve as a training needs assessment (TNA). To this extend, in my role as advisor, I tend to develop M&E systems that will both look at progress in terms of outputs to meet the project objectives, but also to identify gaps that need to be strengthened.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:29 [In development work, we can in..] (132:132)
Codes: [V2] [V4] [V5] [V8]
In development work, we can interpret “customer needs analysis” as the business order of the day in that development partners and governments (politically) are very sensitive that target group needs are addressed,

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:38 [To ensure an event achieves it..] (179:179)
Codes: [V2]
To ensure an event achieves its goals, positive, strong and decisive steering is needed based on the goal, and a facilitator who can steer the direction to this outcome, based on a preconceived objective for the meeting, but remain sensitive to feedback, and subtly guide the outcome.

Stakeholder 18 - Academic, research, USA - 18:7 [With reference to conference a..] (54:54)
Codes: [V2]
With reference to conference attendance, I attend all three of these tobacco conferences every year, and present papers at all of them. It’s my choice, but Dr Bush supports it.

Stakeholder 18 - Academic, research, USA - 18:10 [Big demand for the conferences..] (63:63)
Codes: [V2]
Big demand for the conferences already in existence. Not for training, because the areas are so specialized.

Appendix 5.2b: V2 negative
The degree to which there is alignment between business event strategic intent (proposed outcomes) to gain required knowledge and organisational strategic intent through human capital management activities.
Report: 12 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:20:13

Stakeholder 10 - marketing professional - 3:11 [I do not deal with marketers w..] (114:116)
Codes: [V12-] [V2-] [V9-]
I do not deal with marketers when planning business events - why? For example, no one checks the website we create for their organisation and they don't check where we put their branding onsite - why? There is a lack of understanding as to how to get to people. We see you as a separate industry. We see you 'doing your own thing'. There is a silo mentality from marketers. That's why we have to get people from different marketing environments to meet and talk to each other

Stakeholder 13 - HCI HR practitioner - 7:13 [The perception by local South ..] (28:28)
Codes: [V11] [V2-]
The perception by local South African business of their knowledge needs when compared to the knowledge being presented in overseas competitor countries such as Singapore and India, has been a historical problem for HCI Africa to overcome if they are to lead business talent interventions in South Africa. HCI Africa attempts to gauge what the South African market is ready to accept and in some cases this means curtailing what is available from overseas until the time is right if the event is to actually have a desired impact.

Stakeholder 13 - HCI HR practitioner - 7:14 [HCI Africa notes that in South..] (30:30)
Codes: [V2-]
HCI Africa notes that in South Africa training is often undertaken by business as "of the minute" and "as required". This suggests that strategic planning does not involve a medium to long term planning for training and succession

Stakeholder 13 - HCI HR practitioner - 7:16 [In South Africa business it is..] (30:30)
Codes: [V11-] [V2-]
In South Africa business it is generally about short term profit wins not a balance of short term and long term strategic interventions leading to future profit. Sacht noted that this might be short-sighted when viewed against external competitors' use of knowledge to gain business advantages in countries such as Singapore and India.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:17 [Networking in itself is very g..] (44:44)
Codes: [V2-] [V4-] [V6-]
Networking in itself is very good; companies/organizations that use their networks effectively benefit. However, many are simply not effective - so, aside from social aspect, often the outcomes or value of the network is not linked to change in practices, behaviours, or revenues.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:26 [It is very hard to convince or..] (85:85)
Codes: [V10-] [V12-] [V2-] [V4-]
It is very hard to convince organisations that they need to really work that stand. They are not prepared to believe there is any other way to do it than what they have been doing

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:20 [HR has for a long time not con..] (50:50)
Codes: [V2-] [V4-] [V7-]

HR has for a long time not contributed in the strategic direction of a company.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:21 [o you believe that the CIO is ..] (51:53)
Codes: [V2-]
Do you believe that the CIO is implementing the strategic intent? Not from our experience. IT is a support function.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:22 [Our consultants are project ma..] (55:55)
Codes: [V10-] [V2-] [V5-]
Our consultants are project managers and they drive the flow of information. We do not actively pursue cutting edge knowledge which may be a fault of ours.

Stakeholder 8 - ASATA CEO manager - 16:4 [however we have a serious conc..] (25:25)
Codes: [V2-]
However we have a serious concern that competencies in a changing environment are not addressed at all.

Stakeholder 8 - ASATA CEO manager - 16:11 [Often development/training is ..] (49:49)
Codes: [V11-] [V2-] [V5-]
Often development/training is seen as a pain and therefore the necessary processes are required to maintain an environment that embraces learning.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:25 [I do not have a structured wri..] (120:120)
Codes: [V2-] [V7-]
I do not have a structured written list of goals, but more an innate list of interest areas and topics for which I make a judgement on choice at big conference venues as to what lectures, presentations, exhibits and side meetings to attend based on my needs to deliver better advice back home.

Appendix 5.3a: V3 positive
The level of support for an organisational policy on human capital management (HCM as an intangible asset) that directs the embedding of knowledge into an organisation
Report: 27 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:19:34

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:1 [Every time some one goes on a ..] (9:9)
Codes: [V10] [V12] [V3]
Every time some one goes on a course we get them to debrief to us afterwards. We lead with questions and we review from the time they heard that they were going to attend the training.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:3 [Every staff member will get an..] (11:11)
Codes: [V2] [V3] [V5]
Every staff member will get an opportunity to go on training but on different technologies. In that way the lack of a substantial training budget is overcome by knowledge sharing amongst peers.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:8 [The last step is to team the i..] (25:25)
Codes: [V3] [V5] [V6]
The last step is to team the individual up with other staff members who did not attend the training, in order for peer-to-peer skills transfer to take place.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:18 [Do they attend face-to-face me..] (58:60)
Codes: [V3] [V5] [V9]
Do they attend face-to-face meetings on these issues? Yes they do and they like this but we don't have the time to allow them to do that. I provide an hour on a Friday and the developers sit together. What they do in that hour is up to them - what I want to see is evidence of what they do in that hour. They have to show me something innovative at the end of the hour.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:21 [We are ISO 9001 certified and ..] (90:90)
Codes: [V3]
We are ISO 9001 certified and this requires that our processes such as documentation essential at certain points. We follow standard methodologies from our project office and we have quality assurance people who assure the quality of this information capture.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:23 [Before we struggled to get aut..] (98:98)
Codes: [V3] [V7]
Before we struggled to get authority to send people on training and now we have the budget available and a policy as the SDP insists that there is training. The onus is on us to pick the right person to send on the courses.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:24 [you like small focused meeting..] (104:106)
Codes: [V3] [V8] [V9]
You like small focused meetings as opposed to conferences because you can drill down on problems? Definitely so. We often have a video conference with a specialised supplier. We pull together a group of our people who are dealing with the conference and then we have a tele-conference with the specialist. Once the call is finished we have a further talk amongst the attendees to digest and process the information. Nearly all of our support like this comes from overseas tele-conferences.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:13 [It is not cast in concrete but..] (28:28)
Codes: [V10] [V3] [V8]
It is not cast in concrete but it does represent the views of the people at a specific point in time. The things that last - the things that people believe are important - remain.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:14 [The most effective way we have..] (34:34)
Codes: [V3] [V5] [V6]
The most effective way we have found [to communicate information] is the person to person interaction.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:15 [he problem with this is that i..] (34:34)
Codes: [V10] [V12] [V3] [V9]
The problem with this is that it is still just a research paper so unless it is discussed within a gathering of people that is all it is. The only time that it is really useful is if it is shared with others in face-to-face meetings. We get a research analyst in the room and now we have the person who created the research and we can cross question and they too cross question us. Others sit around the table and they are making their

own notes about this shared experience. Now the team have this shared experience - we don't capture this in a repository for others but these people have a better knowledge with all the others in the room.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:16 [All stakeholders make hand wri..] (38:38)
Codes: [V3]
All stakeholders make hand written comments on the master documents and these are scanned and uploaded into the office document management system

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:17 [his seems to be a very structu..] (50:52)
Codes: [V3]
This seems to be a very structured human communication system plus a backup of document repositories? That's right.

Stakeholder 12 - Paracon HR sales director - 5:1 [ICT work has historically made..] (30:30)
Codes: [V3]
ICT work has historically made use of extensive documentation of knowledge in their systems in general.

Stakeholder 11 - Paracon HR sales line manager - 6:12 [I bring extra information to m..] (66:66)
Codes: [V10] [V3]
I bring extra information to my sales team during internal staff meetings. It is informal and as I find it I bring it to the staff meetings. I believe sharing is a personality trait. Some people do, some don't.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:13 [Events have to be considered i..] (52:52)
Codes: [V12] [V3] [V4] [V8]
Events have to be considered in terms of cash. How do you get the return on time and money from these connections? The most precious commodity to harness is the limited time available where people meet people.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:28 [certain people are better at g..] (82:84)
Codes: [V10] [V3]
Certain people are better at gathering information from meetings? That makes sense and they definitely would be appropriate as connections. I was not aware that this was an ability.

Stakeholder 3 - Business events non-professional organiser - 12:3 [The small businesses meet regu..] (18:18)
Codes: [V1] [V3]
The small businesses meet regularly throughout the year, and are taught about running a business.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:10 [Further, follow up post traini..] (28:28)
Codes: [V3] [V8]
Further, follow up post training to assess further requirements as part of an ongoing 'learning journey' supports value in the aspect.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:15 [X-Pert provides a range of cli..] (40:40)
Codes: [V3] [V5] [V6]
X-Pert provides a range of client events with guest speakers on topical subjects in our field. Often these are breakfast sessions at which a guest speaker is invited to speak before fielding questions and providing attendees with the opportunity to network with colleagues in the industry

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:3 [means of communication to my d..] (36:36)
Codes: [V3] [V5]
A means of communication to my development group which at the moment spans 14 district administrations, is networking by e-mail sharing information and dialoging.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:4 [In the development world there..] (46:46)
Codes: [V3] [V9]
In the development world there has become established a culture called the "Workshop Syndrome". This has emerged out of necessity to hold a focused communication session. Due to the work environment, in order to get anything done with counterparts and colleagues, one must generally leave the work place and retreat to a more isolated venue where a collective of like minded stakeholders can meet, dialogue and exchange ideas freely, without interruption and develop deliverables and tools that help drive development work.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:9 [Workshops as business events o..] (60:60)
Codes: [V2] [V3]
Workshops as business events of this nature in the development world therefore have become a vital tool and play a key role in open communication, education, exchange of dialogue and ideas, harmonizing views and clarifying mis-understandings, and often lead to consolidation of information that is compiled and published, either as a report, training manual or compiled into a project document.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:10 [In addition, events of this na..] (62:62)
Codes: [V1] [V12] [V3] [V5]
In addition, events of this nature in development are generally used as a key to the "participatory" process of consultation of a wide spectrum of stakeholders to get their views in project design, planning, etc. Eventing of this nature therefore allows a broad exchange leading to a consolidation of ideas, opinions, political expressions, etc and can be used to brainstorm on problem solving (eg SWOT analysis) or provide technical inputs and the like. In this way development partners support during project design and subsequent planning takes into consideration the will and need of the people, and thereby is more responsive to needs on the ground of the target group.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:17 [Most government staff, like I ..] (88:88)
Codes: [V3]
Most government staff, like I do, when returning from workshops write a back to office report, but generally this is of an administrative nature and for the files.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:19 [For my part as adviser I make ..] (90:90)
Codes: [V3]
For my part as adviser I make sure documents from events I attend or know of are circulated widely by e-mail so that people have the information resource base

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:22 [In addition, as a Danida emplo..] (102:102)
Codes: [V10] [V3] [V8]
In addition, as a Danida employee, they offer e-learning sessions. These are great, a bit intense, and theoretical, but another good way of in-service exposure to current trends in development fields

Stakeholder 18 - Academic, research, USA - 18:3 [We go to listen to academic pr..] (28:28)
Codes: [V3] [V9]
We go to listen to academic presentations - results of specific experiments. Attendance to not align to strategic planning most cases - unless we hear a presentation which may suggest a new direction for our

research. A list of gaols would not be relevant for us, but we might have a list of presentations we particularly want to attend.

Appenidx 5.3b: V3 negative
The level of support for an organisational policy on human capital management (HCM as an intangible asset) that directs the embedding of knowledge into an organisation
Report: 7 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:18:46

Stakeholder 11 - Paracon HR sales line manager - 6:6 [he contractor definitely holds..] (30:30)
Codes: [V3-]
The contractor definitely holds the knowledge of the systems and users. Some companies document but most seem not to so there is risk

Stakeholder 11 - Paracon HR sales line manager - 6:7 [Do you believe that your contr..] (38:40)
Codes: [V3-]
Do you believe that your contractors get cynical with their clients and give only in proportion to what they are given by the client? The contractors are advised to make themselves indispensable to keep their contracts. Some will move for extra money.

Stakeholder 11 - Paracon HR sales line manager - 6:13 [I find with my team they are f..] (66:66)
Codes: [V10-] [V12-] [V3-]
I find with my team they are focused on their own world and not outward looking. They feel threatened if they share information as if you know more than they do you might take their job.

Stakeholder 13 - HCI HR practitioner - 7:3 [As such it would be difficult ..] (22:22)
Codes: [V3-] [V4-] [V7-]
As such it would be difficult for HR to align strategic action planning from the top management with equipping operational units with appropriate talent in support of these planned future financial successes.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:11 [training value may be (is) lim..] (33:33)
Codes: [V12] [V3-]
Training value may be (is) limited if the environment to which a student returns does not support the application of learned processes, knowledge, skills etc.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:18 [Very rarely is there any shari..] (88:88)
Codes: [V3-]
Very rarely is there any sharing of technical matters, except though published conference/meeting proceedings, but these are generally sent to senior management, end up in the files and not widely disseminated.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:26 [I found leadership that is int..] (124:124)
Codes: [V3-] [V8-]
I found leadership that is interested to measure the behavioural change resulting from an event, nor to organise a post-event retreat. Most decision makers are happy to sponsor attendance at a meeting, or in the

case of government, to agree to let individuals attend if there is sponsorship, but mostly the outcome ends with attendance.

Appendix 5.4a: V4 positive
The degree to which the business event is uniquely designed and then monitored over long time periods to deliver both specific tangible and intangible outcomes.
Report: 39 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hprj6]
Edited by: Super
Date/Time: 2012-07-02 10:17:58

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:7 [We get feedback from every tra..] (20:24)
Codes: [V4]
We get feedback from every training attendee about the course. The feedback is categorized in the following categories:

- Evaluation of the training company and the facilities
- Evaluation of the trainer
- Evaluation of the training material
- Relevance of the training

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:19 [I would rather not attend a co..] (62:62)
Codes: [V2] [V4] [V9]
I would rather not attend a conference but I will get the presenters to come and talk to us about out unique situation and needs. I will get all our stakeholders together to attend the meeting.

Stakeholder 10 - marketing professional - 3:6 [Reality says that 'no marketin..] (50:50)
Codes: [V2] [V4] [V9]
Reality says that 'no marketing, no business' CMO has to be part of the C team and work with other senior executives in developing a business strategy and then deciding how to implement the marketing components.

Stakeholder 10 - marketing professional - 3:7 [Have you ever worked with a ma..] (56:62)
Codes: [V4] [V7] [V9]
Have you ever worked with a marketing event with an event organiser (either in-house or contracted in)? Yes

What were a few of the strengths and/or disadvantages of using a 3rd party in your marketing intervention? Some areas need specialist knowledge and resources. Finding the right person - chemistry is crucial - is hard. They have to understand your objectives, your market, your business and you. They also have to be realistic in costs and be prepared to work within agreed financial constraints

Stakeholder 9 - MA(SA) CEO - 4:3 [To what degree is there a rela..] (15:17)
Codes: [V2] [V4] [V7]
To what degree is there a relationship between businesses wanting employees to be up-to-date with latest trends and skills and improving the business' chances of competitive advantage over similar others? 100% correlation

Stakeholder 12 - Paracon HR sales director - 5:19 [We ask their manager to ascert..] (92:92)
Codes: [V4] [V5]
We ask their manager to ascertain whether the training was of benefit to our organisation.

Stakeholder 11 - Paracon HR sales line manager - 6:1 [Paracon suggests training for ..] (17:17)
Codes: [V2] [V4] [V7]
Paracon suggests training for career improvement. Clients will pay if they see benefit for themselves.

Stakeholder 11 - Paracon HR sales line manager - 6:11 [we have Sales meetings where w..] (61:61)
Codes: [V10] [V2] [V4]
We have Sales meetings where we share information with our colleagues, attend workshops and seminars where possible and refer to media reports, publications and internet research.

Stakeholder 13 - HCI HR practitioner - 7:22 [HCI Africa uses its board memb..] (37:37)
Codes: [V2] [V4] [V7] [V9]
HCI Africa uses its board members and industry specialists to source local and international summit and training content. The members have extensive HR training and exposure to international HR trends

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:8 [We hold the European Meetings ..] (44:44)
Codes: [V2] [V4] [V7]
We hold the European Meetings and Events Conference and the World Education Congress annually for the education and benefit of meeting and event professionals, to arm them with the knowledge and connections they need to do their job

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:9 [It would be great but meeting ..] (48:48)
Codes: [V10] [V12] [V4] [V7]
It would be great but meeting and events are considered as strategic platforms for HR development, marketing and communication

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:10 [USA is using the term, “Chief ..] (52:52)
Codes: [V2] [V4] [V6]
USA is using the term, “Chief Learning/Knowledge Officer”. This title is used extensively at present. This individual connects business to information via business events.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:11 [Events have to be built to mee..] (52:52)
Codes: [V1] [V10] [V2] [V4]
Events have to be built to meet strategic intent

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:13 [Events have to be considered i..] (52:52)
Codes: [V12] [V3] [V4] [V8]
Events have to be considered in terms of cash. How do you get the return on time and money from these connections? The most precious commodity to harness is the limited time available where people meet people.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:15 [but business is now focusing o..] (56:56)
Codes: [V12] [V4] [V5]
Business is now focusing on return on investments. There is a huge shift underway to this point of view.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:16 [Business measures itself on ou..] (56:56)

Codes: [V10] [V12] [V4] [V6]
Business measures itself on outputs, so must event organisers. This is a key shift in thinking for meeting organisers and hospitality.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:26 [if you are the Chief Connectio..] (72:72)
Codes: [V12] [V4] [V6]
If you are the Chief Connections Officer, the event has to be designed so that the virtual attendees have opportunity to meet others. This would be a critical part of their job - to connect people for optimum output from the event.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:10 [events can not only be annual ..] (51:51)
Codes: [V1] [V12] [V4] [V8]
Events can not only be annual but annual and regional. This is becoming common in South Africa and is standard across the USA states.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:15 ["Exhibitions are the only prod..] (65:65)
Codes: [V1] [V2] [V4]
"Exhibitions are the only product where the client is part of the product". They are both visitors and exhibitors (not really, by becoming an exhibitor they become part of the finished product, as seen by the visitors)

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:16 [As exhibition managers we desi..] (67:67)
Codes: [V1] [V4]
As exhibition managers we design the event as per the client specifications. If the event does not sell and the client cancels, there are fixed costs that cannot be recouped.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:18 [International best practise su..] (77:77)
Codes: [V1] [V12] [V2] [V4]
International best practise suggests that the results of trade show exposure can be multiplied 300% by setting multiple objectives (7-12).

Stakeholder 7 - IOD business events manager - 11:5 [We play a CPD role not only th..] (21:21)
Codes: [V1] [V12] [V2] [V4]
We play a CPD role not only through events but also our training.

Stakeholder 3 - Business events non-professional organiser - 12:11 [These have five meetings a yea..] (32:32)
Codes: [V2] [V4]
These have five meetings a year and the meetings are used for industry updates including legislation updates.

Stakeholder 2 - Business events professional organiser - 13:6 [Meetings no matter type or siz..] (42:43)
Codes: [V4] [V6]
Meetings no matter type or size are expensive undertakings yet there is no other method that can be as effective as eyeball- to-eyeball contact with instantaneous feedback and rapport dependent solely on the circumstances at the time.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:2 [his is underpinned by the orga..] (16:16)
Codes: [V12] [V4] [V5]

This is underpinned by the organizations view that properly executed project management provides competitive advantage in terms of strategy delivery and change capability.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:19 [We tend to do quick events and..] (44:44)
Codes: [V4] [V9]
We tend to do quick events and try to squeeze in a great deal of value in to that time. The client needs to qualify that time out of the office so we find the more we minimise that time

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:30 [The client then has to select ..] (67:67)
Codes: [V4]
The client then has to select the one that gives them the best ROI. Sometimes they have to do it because of a legislative requirement but otherwise they need to pick the ones that give them best benefit in the shortest possible time.

Stakeholder 8 - ASATA CEO manager - 16:10 [Managing performance both good..] (49:49)
Codes: [V2] [V4]
Managing performance both good and bad is critical to developing a culture of learning in any organisation

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:7 [workshops become a means of sh..] (58:58)
Codes: [V4]
Workshops become a means of sharing information with some compensation for the information exchange in the form of the allowances

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:12 [Events like workshops and semi..] (70:70)
Codes: [V11] [V2] [V4] [V7]
Events like workshops and seminars provide a broader exposure to a spectrum of possible solutions to real life problems that the worker can solve and so, yes there is continued need for such events to add the in-service, hands on building blocks and the tailor made tools and technical solutions that college and university educations do not provide

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:24 [As a facilitator, as part of m..] (118:118)
Codes: [V10] [V12] [V4] [V9]
As a facilitator, as part of my role as technical adviser, yes, I prepare the workshop meeting handouts with the clear structure of the objectives, expected outputs, and the structure of the workshop and the type of questions or problems that we need to address and answer collectively so as to solve a problem, fill a knowledge gap, or develop a way forward.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:27 [follow-up monitoring and evalu..] (126:126)
Codes: [V10] [V2] [V4]
Follow-up monitoring and evaluation (M&E) visits are generally used as a form of evaluation tool post an event like a planning workshop. However, in most cases M&E is mistaken for supervision and the team going out tend to not be equipped with the tools and the means to do a proper M&E the feedback from which could also serve as a training needs assessment (TNA). To this extend, in my role as advisor, I tend to develop M&E systems that will both look at progress in terms of outputs to meet the project objectives, but also to identify gaps that need to be strengthened.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:28 [The donors have also realised ..] (128:128)
Codes: [V4] [V8]

The donors have also realised the need for this and conduct what is termed value for money audits (VFMA), to see if they are getting mileage from the resources they spend, but also more importantly to assess if the cost effectiveness could also be a feature of the capacity development program

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:29 [In development work, we can in..] (132:132)
Codes: [V2] [V4] [V5] [V8]
In development work, we can interpret "customer needs analysis" as the business order of the day in that development partners and governments (politically) are very sensitive that target group needs are addressed,

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:31 [Survey a large audiences opini..] (146:148)
Codes: [V4] [V8]
To survey a large audiences opinion on a subject, be it for conflict resolution (normally of a politically sensitive nature) or to survey stakeholders at all levels through workshops and field meetings to find out what are key development needs that can be addressed by development projects generally of development partners, or

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:33 [OVIs (or ROI) are a key tool f..] (156:156)
Codes: [V11] [V4] [V8]
OVIs (or ROI) are a key tool for measuring and monitoring (M&E) success... or a measure of achievement of outputs and are reported during project steering processes. Likewise the same approach is adopted by governments in their medium term expenditure framework (MTEF) planning system where OVIs are key monitoring tools of outputs achieved for fund spent.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:34 [More is needed to develop M&E ..] (158:158)
Codes: [V4] [V8]
More is needed to develop M&E tools that link finances and ROI so as to measure value for money and determine more cost effective approaches.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:35 [Generally we ensure that strat..] (167:167)
Codes: [V11] [V4]
Generally we ensure that strategic planning is done in line with sector policies, and these policies may often be a top-down development, but, more and more through PRA processes, even sector policies are becoming more stakeholder oriented through wider consultation processes.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:43 [A value for money assessment o..] (189:189)
Codes: [V4]
A value for money assessment of workshops in development work would be of tremendous use to not only convince donors and government that this is a worthwhile investment, but also would help to advise how to streamline the process, how to make it to be more cost effective and to overcome the regimented current approach.

Appendix 5.4b: V4 negative
The degree to which the business event is uniquely designed and then monitored over long time periods to deliver both specific tangible and intangible outcomes.
Report: 10 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hprd6]
Edited by: Super
Date/Time: 2012-07-02 10:17:10

Stakeholder 10 - marketing professional - 3:1 [economic advantages do you kno..] (24:26)
Codes: [V1] [V2] [V4-]
Economic advantages do you know arise for a business from marketing interventions such as product launches, branded conferences, exhibitor participation? These are marketing lead activities. They are integral to the business. The issue is more about convincing CFOs that there is an ROI, which is the marketers fault in not planning and analysing their activities well.

Stakeholder 10 - marketing professional - 3:4 [To what extent do you believe ..] (36:38)
Codes: [V4-]
To what extent do you believe organisations embrace needs analysis and ROI measurements? Few marketers use ROI although this is improving

Stakeholder 10 - marketing professional - 3:10 [What is business tourism? We h..] (87:87)
Codes: [V4-]
What is business tourism? We hear 'business tourism' all the time but I am not sure what this is as a marketer. Some one needs to make it clear and what it has to do with marketing. What does the role of business tourism event organisers actually cover?

Stakeholder 12 - Paracon HR sales director - 5:8 [No, we do not ask our staff fo..] (64:64)
Codes: [V4-]
No, we do not ask our staff for feedback from themselves on their training.

Stakeholder 12 - Paracon HR sales director - 5:9 [I have reservations on attenda..] (66:66)
Codes: [V1-] [V4-]
I have reservations on attendance by internal staff at industry forums. I do wonder how much is absorbed at the forums. The direct cost of training and the loss of productive time in the office is where the cost to our company comes. Industry forums are mainly to up skill our sales staff.

Stakeholder 13 - HCI HR practitioner - 7:3 [As such it would be difficult ..] (22:22)
Codes: [V3-] [V4-] [V7-]
As such it would be difficult for HR to align strategic action planning from the top management with equipping operational units with appropriate talent in support of these planned future financial successes.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:17 [Networking in itself is very g..] (44:44)
Codes: [V2-] [V4-] [V6-]
Networking in itself is very good; companies/organizations that use their networks effectively benefit. However, many are simply not effective - so, aside from social aspect, often the outcomes or value of the network is not linked to change in practices, behaviours, or revenues.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:26 [It is very hard to convince or..] (85:85)
Codes: [V10-] [V12-] [V2-] [V4-]
It is very hard to convince organisations that they need to really work that stand. They are not prepared to believe there is any other way to do it than what they have been doing

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:20 [HR has for a long time not con..] (50:50)
Codes: [V2-] [V4-] [V7-]
HR has for a long time not contributed in the strategic direction of a company.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:29 [ROI models like Sigma Six/Prin..] (67:67)
Codes: [V2] [V4-]
ROI models like Sigma Six/Prince have a place but you still need it to be project managed. They have all value but they are all underpinned by project management

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Appendix 5.5a: V5 positive
The degree to which the organisation has a policy (informal and formal internal meetings etc) for social interaction giving an opportunity for creativity leading to innovation from employees.
Report: 33 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:16:13

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:3 [Every staff member will get an..] (11:11)
Codes: [V2] [V3] [V5]
Every staff member will get an opportunity to go on training but on different technologies. In that way the lack of a substantial training budget is overcome by knowledge sharing amongst peers.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:8 [The last step is to team the i..] (25:25)
Codes: [V3] [V5] [V6]
The last step is to team the individual up with other staff members who did not attend the training, in order for peer-to-peer skills transfer to take place.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:15 [Resources from the same job fa..] (44:44)
Codes: [V10] [V12] [V5]
Resources from the same job families don't attend all the same training course, in order to bring a wider knowledge into the environment that can be shared amongst colleagues

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:18 [Do they attend face-to-face me..] (58:60)
Codes: [V3] [V5] [V9]
Do they attend face-to-face meetings on these issues? Yes they do and they like this but we don't have the time to allow them to do that. I provide an hour on a Friday and the developers sit together. What they do in that hour is up to them - what I want to see is evidence of what they do in that hour. They have to show me something innovative at the end of the hour.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:20 [We use the social network and ..] (72:72)
Codes: [V12] [V5]
We use the social network and websites to get quick answers.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:5 [We do break-away sessions wher..] (20:20)
Codes: [V1] [V2] [V5] [V9]

We do break-away sessions where we go to a facility that lends to getting out of the office environment. That feeling is like going away for a weekend. We are able then to have strategy discussions very successfully.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:6 [The degree of energy and innov..] (20:20)
Codes: [V5] [V9]
The degree of energy and innovativeness depends on who is present.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:8 [the more often we have these b..] (20:20)
Codes: [V1] [V2] [V5]
The more often we have these break away sessions the more comfortable they are in sharing with those present. In removes them from the operational day to day task issues as well and gets them to think about longer term strategies.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:9 [We do not all know everything ..] (24:24)
Codes: [V1] [V5] [V9]
We do not all know everything all the time. People from their various perspectives pick up things that you don't. When people meet face-to-face this comes through.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:14 [The most effective way we have..] (34:34)
Codes: [V3] [V5] [V6]
The most effective way we have found [to communicate information] is the person to person interaction.

Stakeholder 12 - Paracon HR sales director - 5:19 [We ask their manager to ascert..] (92:92)
Codes: [V4] [V5]
We ask their manager to ascertain whether the training was of benefit to our organisation.

Stakeholder 11 - Paracon HR sales line manager - 6:4 [I personally always encourage ..] (25:25)
Codes: [V5] [V7]
I personally always encourage my contractors to identify a career path (especially the younger ones),and then in conjunction with the Client's needs, suggest they embark on the relevant training course/courses which will in turn give the Company the basis on which to motivate if and when contract renewals are due.

Stakeholder 13 - HCI HR practitioner - 7:1 [We firmly believe that compani..] (16:16)
Codes: [V11] [V5]
We firmly believe that companies that work towards becoming Talented Places 2Work4 collectively contribute to South Africa standing out from the crowd in a globally competitive business environment

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:18 [Companies should inherently be..] (46:46)
Codes: [V10] [V5]
Companies should inherently be seeking information on their sector, competitors, etc., and evaluate and act on opportunities.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:12 [An event whether online or liv..] (52:52)
Codes: [V5] [V9]
An event whether online or live connects people to ideas - human connections and that is the role of the meetings professional.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:15 [but business is now focusing o..] (56:56)

Codes: [V12] [V4] [V5]
Business is now focusing on return on investments. There is a huge shift underway to this point of view.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:20 [Exhibitions allow contact with..] (79:79)
Codes: [V1] [V5]
Exhibitions allow contact with the product and some-one on the stand is there to answer questions.

Stakeholder 7 - IOD business events manager - 11:6 [Better Directors, Better Board..] (24:24)
Codes: [V10] [V5] [V7]
Better Directors, Better Boards, Better Business" this is our motto/slogan

Stakeholder 3 - Business events non-professional organiser - 12:9 [JCCI is the mentoring group th..] (26:26)
Codes: [V5] [V6]
JCCI is the mentoring group that facilitates the small business opportunities.

Stakeholder 2 - Business events professional organiser - 13:3 [A further philosophy of CMP is..] (31:31)
Codes: [V1] [V2] [V5] [V9]
A further philosophy of CMP is that a gathering of people is not an end in itself. In every instance - within the CMP process, a gathering - no matter what capacity or type has the conceptual ingredients, at the very outset, for the next step in the message retention process.

Stakeholder 2 - Business events professional organiser - 13:5 [The role of corporate manageme..] (42:42)
Codes: [V2] [V5]
The role of corporate management is to understand the pivotal importance of the gathering of people in relation to the organisation's well-being and ongoing growth plus brand reputation within the market

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:3 [We find that once the student ..] (27:27)
Codes: [V5] [V7]
We find that once the student has been through the programme they change. They have a far broader outlook on business and as individuals they grow

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:4 [I think they take back into th..] (27:27)
Codes: [V5] [V6]
I think they take back into the work place and can add great value to any company or small business enterprise.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:1 [there are two major reasons (o..] (14:16)
Codes: [V2] [V5] [V7]
There are two major reasons (or categories of motivators). The first group includes delegates or students from corporate clients whose aim is to enhance both knowledge and capability in project management.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:2 [his is underpinned by the orga..] (16:16)
Codes: [V12] [V4] [V5]
This is underpinned by the organizations view that properly executed project management provides competitive advantage in terms of strategy delivery and change capability.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:15 [X-Pert provides a range of cli..] (40:40)

Codes: [V3] [V5] [V6]
X-Pert provides a range of client events with guest speakers on topical subjects in our field. Often these are breakfast sessions at which a guest speaker is invited to speak before fielding questions and providing attendees with the opportunity to network with colleagues in the industry

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:23 [Organisations need to adapt ve..] (55:55)
Codes: [V12] [V2] [V5]
Organisations need to adapt very fast these days to survive. The one way that you can do this is to build in a capability to change quickly and to bring in skills that help drive change quickly.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:3 [means of communication to my d..] (36:36)
Codes: [V3] [V5]
Events is a means of communication to my development group which at the moment spans 14 district administrations, is networking by e-mail sharing information and dialoging.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:10 [In addition, events of this na..] (62:62)
Codes: [V1] [V12] [V3] [V5]
In addition, events of this nature in development are generally used as a key to the "participatory" process of consultation of a wide spectrum of stakeholders to get their views in project design, planning, etc. Eventing of this nature therefore allows a broad exchange leading to a consolidation of ideas, opinions, political expressions, etc and can be used to brainstorm on problem solving (eg SWOT analysis) or provide technical inputs and the like. In this way development partners support during project design and subsequent planning takes into consideration the will and need of the people, and thereby is more responsive to needs on the ground of the target group.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:21 [To be effective therefore, aft..] (90:90)
Codes: [V10] [V5]
To be effective therefore, after any major conference, it would be wise to have HR organize departmental retreats or seminars to exchange this information with colleagues

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:29 [In development work, we can in..] (132:132)
Codes: [V2] [V4] [V5] [V8]
In development work, we can interpret "customer needs analysis" as the business order of the day in that development partners and governments (politically) are very sensitive that target group needs are addressed,

Stakeholder 18 - Academic, research, USA - 18:8 [For us, attendance at academic..] (59:59)
Codes: [V5]
For us, attendance at academic conferences are very important - not to "remove road-blocks", but to keep up with new work.

Stakeholder 18 - Academic, research, USA - 18:11 [We don't give formal lectures ..] (69:69)
Codes: [V5]
We don't give formal lectures on our return, but we do discuss what we have learned with our colleagues - there are only a few of us working on tobacco.

Appendix 5.5b: V5 negative
The degree to which the organisation has a policy (informal and formal internal meetings etc) for social interaction giving an opportunity for creativity leading to innovation from employees.

Report: 6 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:15:04

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:7 [Often they take awhile to warm..] (20:20)
Codes: [V5-] [V9-]
Often they take awhile to warm up depending on whom is present and what has recently happened in their work environment. Sometimes they feel intimidated by more senior staff and don't want to voice their opinions

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:16 [What value do you think a busi..] (42:44)
Codes: [V5-] [V6-]
What value do you think a business network has for employees and their company (stimulated by business events? Limited value unless companies are savvy and equipped with capacity/competency to be effective with networking opportunities.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:22 [Our consultants are project ma..] (55:55)
Codes: [V10-] [V2-] [V5-]
Our consultants are project managers and they drive the flow of information. We do not actively pursue cutting edge knowledge which may be a fault of ours.

Stakeholder 8 - ASATA CEO manager - 16:5 [many consultants with over 30 ..] (27:27)
Codes: [V5-]
Many consultants with over 30 years experience but have not kept abreast with changing technology, changing trends, changing markets, changing clients

Stakeholder 8 - ASATA CEO manager - 16:11 [Often development/training is ..] (49:49)
Codes: [V11-] [V2-] [V5-]
Often development/training is seen as a pain and therefore the necessary processes are required to maintain an environment that embraces learning.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:20 [But sadly, my observation is i..] (90:90)
Codes: [V5-]
But sadly, my observation is in-service people in NGOs, government and private sector, don't read (or do not have time to read technical reports) unless they have to professionally comment on the material

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Appendix 5.6a: V6 positive
The degree to which an employee can be motivated to undergo change for improved work performance.
Report: 24 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super

Date/Time: 2012-07-02 10:14:10

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:8 [The last step is to team the i..] (25:25)
Codes: [V3] [V5] [V6]
The last step is to team the individual up with other staff members who did not attend the training, in order for peer-to-peer skills transfer to take place.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:12 [Do you have some people who sh..] (34:36)
Codes: [V2] [V6] [V7]
Do you have some people who share knowledge better than others? Absolutely. We select people to go on training we try to select people that we have found from experience bring back better knowledge than other employees and share it better.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:14 [The most effective way we have..] (34:34)
Codes: [V3] [V5] [V6]
The most effective way we have found [to communicate information] is the person to person interaction.

Stakeholder 10 - marketing professional - 3:8 [There are triggers that effect..] (69:69)
Codes: [V6] [V9]
There are triggers that effect people at an event, make them want to know more about this product and these triggers should be part of an event organiser's planning and ROI.

Stakeholder 12 - Paracon HR sales director - 5:6 [in house line managers to eval..] (58:58)
Codes: [V6]
In house line managers evaluate the contractor's new training. They decide if the training has been successful for the contractor

Stakeholder 12 - Paracon HR sales director - 5:7 [We find that contract renewals..] (58:58)
Codes: [V12] [V2] [V6]
We find that contract renewals for those contractors who are applying their training are more successful - the client wants them to continue.

Stakeholder 11 - Paracon HR sales line manager - 6:16 [I believe attending business e..] (82:82)
Codes: [V1] [V6]
I believe attending business events creates awareness, networking opportunities and the return on investment for the appropriate training keeps staff loyal, motivated and they feel that the company has their best interests at heart as they are willing to invest in their development.

Stakeholder 11 - Paracon HR sales line manager - 6:17 [Team building and functions ar..] (84:84)
Codes: [V6] [V9]
Team building and functions are also excellent ways of motivating staff and keeping their loyalty to the organization as these events are referred to and talked about for many months and sometimes even years by both contractors and permanent staff.

Stakeholder 11 - Paracon HR sales line manager - 6:18 [These investments enable a com..] (86:86)
Codes: [V12] [V6] [V8]
These investments enable a company to reduce staff turnover and retention enables the organization to function more effectively and efficiently if HR is not continuously involved in recruiting for positions and in turn the viability of the company is sound as when Client's hear that you are looked after by an organization it increases their confidence in the product/service they are buying, in this case contractors.

Stakeholder 13 - HCI HR practitioner - 7:12 [HCI Africa looks for content t..] (28:28)
Codes: [V6] [V9]

HCI Africa looks for content that not only has applicability locally but contributes to making "light-bulbs go off" changing attendees attitudes and thoughts about business and talent. HCI Africa contextualises the content.

Stakeholder 13 - HCI HR practitioner - 7:21 [HCI Africa has found that larg..] (32:32)
Codes: [V2] [V6]
HCI Africa has found that large corporates tend to find knowledge sources of their own having the money to spend on research and development.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:10 [USA is using the term, "Chief ..] (52:52)
Codes: [V2] [V4] [V6]
USA is using the term, "Chief Learning/Knowledge Officer". This title is used extensively at present. This individual connects business to information via business events.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:16 [Business measures itself on ou..] (56:56)
Codes: [V10] [V12] [V4] [V6]
Business measures itself on outputs, so must event organisers. This is a key shift in thinking for meeting organisers and hospitality.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:17 [The connections have to be man..] (61:61)
Codes: [V10] [V12] [V2] [V6]
The connections have to be managed - a term like the Chief Connections Officer would be appropriate. This person would manage connections focused on the outputs they will bring.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:26 [if you are the Chief Connectio..] (72:72)
Codes: [V12] [V4] [V6]
If you are the Chief Connections Officer, the event has to be designed so that the virtual attendees have opportunity to meet others. This would be a critical part of their job - to connect people for optimum output from the event.

Stakeholder 7 - IOD business events manager - 11:7 [By equipping Directors with th..] (24:24)
Codes: [V12] [V6]
By equipping Directors with the skills to make informed decisions in the Board room we can help to ensure better business decisions.

Stakeholder 3 - Business events non-professional organiser - 12:9 [JCCI is the mentoring group th..] (26:26)
Codes: [V5] [V6]
JCCI is the mentoring group that facilitates the small business opportunities.

Stakeholder 2 - Business events professional organiser - 13:6 [Meetings no matter type or siz..] (42:43)
Codes: [V4] [V6]
Meetings no matter type or size are expensive undertakings yet there is no other method that can be as effective as eyeball- to-eyeball contact with instantaneous feedback and rapport dependent solely on the circumstances at the time.

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:4 [I think they take back into th..] (27:27)
Codes: [V5] [V6]
I think they take back into the work place and can add great value to any company or small business enterprise.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:8 [The other key aspect to this q..] (28:28)
Codes: [V2] [V6] [V8]
The other key aspect to this question is the matching of training to actual trainee requirements and level.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:15 [X-Pert provides a range of cli..] (40:40)
Codes: [V3] [V5] [V6]
X-Pert provides a range of client events with guest speakers on topical subjects in our field. Often these are breakfast sessions at which a guest speaker is invited to speak before fielding questions and providing attendees with the opportunity to network with colleagues in the industry

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:18 [We go to other peoples' events..] (44:44)
Codes: [V2] [V6]
We go to other peoples' events only to learn about our area of training.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:6 [This also makes workshops a co..] (54:54)
Codes: [V6]
This also makes workshops a competitive environment where development partners offer incentives to get people to come to 'their" meetings.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:11 [meeting a cross-section of sec..] (64:64)
Codes: [V2] [V6] [V7]
Meeting a cross-section of sector stakeholders at such events helps not only to synchronize between sectors but to build up personal networks and contacts that can be called upon to assist at some later stage as and when needed

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Appendix 5.6b: V6 negative
The degree to which an employee can be motivated to undergo change for improved work performance.
Report: 3 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:12:46

Stakeholder 10 - marketing professional - 3:3 [In your past experience to wha..] (32:34)
Codes: [V6-] [V9-]
In your past experience to what degree have companies you have worked with shown you financial and leadership support for measuring the behavioural change arising from a marketing event post the actual event? Close to zero

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:16 [What value do you think a busi..] (42:44)
Codes: [V5-] [V6-]
What value do you think a business network has for employees and their company (stimulated by business events? Limited value unless companies are savvy and equipped with capacity/competency to be effective with networking opportunities.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:17 [Networking in itself is very g..] (44:44)
Codes: [V2-] [V4-] [V6-]
Networking in itself is very good; companies/organizations that use their networks effectively benefit. However, many are simply not effective - so, aside from social aspect, often the outcomes or value of the network is not linked to change in practices, behaviours, or revenues.

Appendix 5.7a: V7 positive
The degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy.
Report: 60 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:11:51

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:4 [The corporate training (HR) de..] (13:13)
Codes: [V2] [V7]
The corporate training (HR) department manages the Workplace Skills Plan

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:12 [Do you have some people who sh..] (34:36)
Codes: [V2] [V6] [V7]
Do you have some people who share knowledge better than others? Absolutely. We select people to go on training we try to select people that we have found from experience bring back better knowledge than other employees and share it better.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:14 [An active Workplace Skills Pla..] (43:43)
Codes: [V7]
An active Workplace Skills Plan assures that resources attend at least one training intervention per year

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:16 [Sending resources on seminars ..] (45:45)
Codes: [V7]
Sending resources on seminars and conferences as an incentive

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:22 [the skills development plan (S..] (96:98)
Codes: [V2] [V7]
The skills development plan (SDP) of the government for the City of Cape Town. This forced a formal structure of staff education for the first time. Have you found implementation of such a plan to carry out continued professional development of staff a help? Definitely so

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:23 [Before we struggled to get aut..] (98:98)
Codes: [V3] [V7]
Before we struggled to get authority to send people on training and now we have the budget available and a policy as the SDP insists that there is training. The onus is on us to pick the right person to send on the courses.

Stakeholder 10 - marketing professional - 3:7 [Have you ever worked with a ma..] (56:62)
Codes: [V4] [V7] [V9]
Have you ever worked with a marketing event with an event organiser (either in-house or contracted in)? Yes. What were a few of the strengths and/or disadvantages of using a 3rd party in your marketing intervention? Some areas need specialist knowledge and resources. Finding the right person - chemistry is crucial - is hard. They have to understand your objectives, your market, your business and you. They also have to be realistic in costs and be prepared to work within agreed financial constraints

Stakeholder 9 - MA(SA) CEO - 4:1 [CPD is a core factor in being ..] (13:13)
Codes: [V7]
CPD is a core factor in being a professional.

Stakeholder 9 - MA(SA) CEO - 4:3 [To what degree is there a rela..] (15:17)
Codes: [V2] [V4] [V7]
To what degree is there a relationship between businesses wanting employees to be up-to-date with latest trends and skills and improving the business' chances of competitive advantage over similar others? 100% correlation

Stakeholder 9 - MA(SA) CEO - 4:5 [To what degree is there a role..] (23:25)
Codes: [V2] [V7]
To what degree is there a role for HR to play in developing employees through events to have the requisite variety of knowledge and improving the possibility of gaining competitive advantage? 100% correlation

Stakeholder 9 - MA(SA) CEO - 4:6 [What role do you believe HR fu..] (27:29)
Codes: [V12] [V2] [V7]
What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)? A core role - as explained above. Either the HR or whatever other person or department is in charge of HR development.

Stakeholder 9 - MA(SA) CEO - 4:9 [CPD is a core factor in being ..] (65:65)
Codes: [V12] [V2] [V7]
CPD is a core factor in being a professional. It is an ethical notion that if you are offering yourself as a marketer to an employer or employee, you need to be completely up to date with developing trends and the latest in marketing trends.

Stakeholder 12 - Paracon HR sales director - 5:2 [The CIO ensures that the contr..] (34:34)
Codes: [V10] [V2] [V7]
The CIO ensures that the contractor's knowledge is aligned to the specific requirements of his project.

Stakeholder 12 - Paracon HR sales director - 5:3 [The type of business dictates ..] (36:36)
Codes: [V12] [V7]
The type of business dictates the application of the contractor's expertise to deliver the organisation's business ideas. The CIO acts as the link to make the organisation's strategy happen.

Stakeholder 12 - Paracon HR sales director - 5:4 [Contractors who have achieved ..] (50:50)
Codes: [V7]
Contractors who have achieved a level of certification (e.g. PMP, MCSE etc.) tend to ensure that they keep their certification levels current.

Stakeholder 12 - Paracon HR sales director - 5:5 [Most industry certifications h..] (50:50)
Codes: [V7]
Most industry certifications have changed over the years from a once-off qualification to one where the individual needs to keep up to date

Stakeholder 12 - Paracon HR sales director - 5:11 [When these events do take plac..] (70:70)

Codes: [V2] [V7]
When these events do take place it is important to have HR participating though, as they are an important support function to the line of business functions.

Stakeholder 11 - Paracon HR sales line manager - 6:1 [Paracon suggests training for ..] (17:17)
Codes: [V2] [V4] [V7]
Paracon suggests training for career improvement. Clients will pay if they see benefit for themselves.

Stakeholder 11 - Paracon HR sales line manager - 6:3 [some contractors' realise that..] (21:21)
Codes: [V7]
Some contractors' realise that it is beneficial to them to have certification based on their position, which in turn enables them to enhance their opportunity of securing follow on contracts and become more marketable based on the current trends

Stakeholder 11 - Paracon HR sales line manager - 6:4 [I personally always encourage ..] (25:25)
Codes: [V5] [V7]
I personally always encourage my contractors to identify a career path (especially the younger ones),and then in conjunction with the Client's needs, suggest they embark on the relevant training course/courses which will in turn give the Company the basis on which to motivate if and when contract renewals are due.

Stakeholder 11 - Paracon HR sales line manager - 6:5 [he training certification is s..] (25:25)
Codes: [V1] [V7]
The training certification is something the individual achieves, is not relevant to the Client site and this certification moves with them when looking for other opportunities and therefore once again makes them more marketable and can give them the advantage over another applicant with a similar skill set.

Stakeholder 11 - Paracon HR sales line manager - 6:8 [I can personally influence a C..] (50:50)
Codes: [V7]
I can personally influence a Client's decision as I always endeavour and work hard to formulate a "partnership" with my Clients and prefer to work "with them rather than for them" and this then leads to Paracon not being seen as another "vendor" but being able to act in a "consulting" or advisory capacity. This then can result in the Client asking for assistance in identifying the type of individual they may need to contract or employ in a particular position and with this the HR advice that goes with the potential appointment.

Stakeholder 13 - HCI HR practitioner - 7:22 [HCI Africa uses its board memb..] (37:37)
Codes: [V2] [V4] [V7] [V9]
HCI Africa uses its board members and industry specialists to source local and international summit and training content. The members have extensive HR training and exposure to international HR trends

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:1 [From our knowledge and experie..] (16:16)
Codes: [V7]
From our knowledge and experience, MICE stakeholders show interest in CPD especially when the requirements is required to maintain a credential in the marketplace

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:2 [CPD are truly designed to help..] (16:16)
Codes: [V7]
CPD are truly designed to *help individuals remain current and competent.*

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:3 [continued professional develop..] (18:18)
Codes: [V7]
Continued professional development is important and inherently valuable.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:15 [This idea is worth pursuing be..] (40:40)
Codes: [V1] [V2] [V7]

This idea is worth pursuing because it would have a positive impact. The plan would need to be long-term in its vision and be supported with sufficient resources, appropriate governance, linked to *business goals* or *bottom-line* results. Ultimately, it would work (I believe) if the HR activities were inherent in the business model (and not viewed as an extra activity).

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:1 [22 000 approximately 12000 are..] (15:15)
Codes: [V7]
22 000 approximately 12000 are Certified Meeting Professionals (CMP).

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:2 [e current demand for MPI educa..] (15:15)
Codes: [V7]
The current demand for MPI educational products is higher now than it has been for years.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:4 [In established economies the t..] (17:17)
Codes: [V7]
In established economies the training is being undertaken by meeting planners who are a senior level. People with global careers - they are investing in themselves.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:6 [MPI has shifted gears and deve..] (27:27)
Codes: [V1] [V11] [V7]
MPI has shifted gears and developed a multi-layered content generation strategy that focuses on helping the global meetings and events industries forecast trends and activate change on a large scale;

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:7 [MPI has revolutionized the way..] (29:29)
Codes: [V7]
MPI has revolutionized the way associations approach content generation and dissemination.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:8 [We hold the European Meetings ..] (44:44)
Codes: [V2] [V4] [V7]
We hold the European Meetings and Events Conference and the World Education Congress annually for the education and benefit of meeting and event professionals, to arm them with the knowledge and connections they need to do their job

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:9 [It would be great but meeting ..] (48:48)
Codes: [V10] [V12] [V4] [V7]
It would be great but meeting and events are considered as strategic platforms for HR development, marketing and communication

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:18 [I agree that HR would be invol..] (64:64)
Codes: [V7]
I agree that HR would be involved in connecting with the Chief Connections Officer. I agree that this would make the HR activities more proactive [in a strategic sense] than reactive.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:20 [HR can definitely be useful in..] (64:64)
Codes: [V7]
HR can definitely be useful in delivering to strategic outcomes.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:27 [Depending on the role an HR de..] (76:76)
Codes: [V7]
Depending on the role an HR department plays, meetings can have a huge effect on education training, delivering messages to staff or external clients, help with company culture and camaraderie.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:4 [monitoring/tracking the notion..] (20:22)
Codes: [V7]
Monitoring/tracking the notional hours of CPD attained annually by an individual? It will be a requirement to maintain your Event Professional Designation

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:25 [The people who man the stand a..] (83:83)
Codes: [V10] [V7] [V9]
The people who man the stand are very important as to how they conduct themselves on the stand.

Stakeholder 7 - IOD business events manager - 11:1 [the war for talent and the hig..] (12:12)
Codes: [V7]
The war for talent and the high rate of unemployment, there is certainly competition amongst potential employees and therefore employers have a greater selection of qualified and skilled individuals

Stakeholder 7 - IOD business events manager - 11:3 [There is always a demand for d..] (13:13)
Codes: [V7]
There is always a demand for development of employees

Stakeholder 7 - IOD business events manager - 11:4 [likewise for people to remain ..] (13:13)
Codes: [V7]
Likewise for people to remain marketable, a demand to stay up to date.

Stakeholder 7 - IOD business events manager - 11:6 [Better Directors, Better Board..] (24:24)
Codes: [V10] [V5] [V7]
Better Directors, Better Boards, Better Business" this is our motto/slogan

Stakeholder 7 - IOD business events manager - 11:8 [Variety of events focused at d..] (28:28)
Codes: [V1] [V7]
Variety of events focused at director level or in line with our objective to empower those charged with governance duties. We also elicit member feedback and input regarding topics or events of interest.

Stakeholder 3 - Business events non-professional organiser - 12:13 [a professional association and..] (40:40)
Codes: [V7]
A professional association and all workshops they hold are measured by a peer appointed to ensure the standard - as to their CPD contribution value before the workshop is held.

Stakeholder 3 - Business events non-professional organiser - 12:14 [very course gets a unique CPD ..] (40:40)
Codes: [V12] [V2] [V7]
Every course gets a unique CPD number of recognition from the engineering council of South Africa.

Stakeholder 2 - Business events professional organiser - 13:1 [One of the prime philosophies ..] (23:23)
Codes: [V7]
One of the prime philosophies of CMP is lifelong learning.

Stakeholder 2 - Business events professional organiser - 13:9 [CMP programme; It should be bo..] (49:49)
Codes: [V7]
CMP programme; It should be borne in mind that each year over 1000 accepted candidates are seated in more than 25 cities throughout the world on prescribed dates worldwide.

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:1 [What role does your alumni gro..] (17:19)
Codes: [V7]
What role does your alumni group see itself playing in professional continued development (CPD)? This is difficult to answer as I cannot speak on their behalf but I would think that in general they certainly do play an active role in CPD.

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:2 [They are always requesting upd..] (19:19)
Codes: [V7]
They are always requesting updates on current business trends.

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:3 [We find that once the student ..] (27:27)
Codes: [V5] [V7]
We find that once the student has been through the programme they change. They have a far broader outlook on business and as individuals they grow

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:6 [The more intimate events such ..] (39:39)
Codes: [V7] [V9]
The more intimate events such as the alumni/student events give them an opportunity to network and exchange ideas and contacts.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:1 [there are two major reasons (o..] (14:16)
Codes: [V2] [V5] [V7]
There are two major reasons (or categories of motivators). The first group includes delegates or students from corporate clients whose aim is to enhance both knowledge and capability in project management.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:3 [The second group includes dele..] (18:18)
Codes: [V7]
The second group includes delegates or students who attend training for personal and professional (mainly) developmental reasons.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:4 [Starting from entry level to p..] (18:18)
Codes: [V7]
Starting from entry level to professional project manager, the students attend training in order to gain knowledge and skill, but also to add additional 'currency' to their Curriculum Vitae in order that they may secure employment opportunities at increasing levels of remuneration and responsibility.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:25 [so the project manager has bec..] (57:59)
Codes: [V2] [V7]
So the project manager has become the link between the organisation's CIO and the quick adaptive changes needed for survival? Absolutely. There is so much going on these organisations

Stakeholder 8 - ASATA CEO manager - 16:2 [Through our ASATA Academy we h..] (25:25)

Codes: [V7]
Through our ASATA Academy we have launched the ASATA Professional Program which is an electronic data base of the consultants in the industry. The consultants load their skills and experience but the focus is on the competency of the individual

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:11 [meeting a cross-section of sec..] (64:64)
Codes: [V2] [V6] [V7]
Meeting a cross-section of sector stakeholders at such events helps not only to synchronize between sectors but to build up personal networks and contacts that can be called upon to assist at some later stage as and when needed

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:12 [Events like workshops and semi..] (70:70)
Codes: [V11] [V2] [V4] [V7]
Events like workshops and seminars provide a broader exposure to a spectrum of possible solutions to real life problems that the worker can solve and so, yes there is continued need for such events to add the in-service, hands on building blocks and the tailor made tools and technical solutions that college and university educations do not provide

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:16 [I belong to several networks a..] (80:80)
Codes: [V7]
I belong to several networks and associations and these all have value in offering exposure to a wide spectrum of knowledge bases to draw from.

Appendix 5.7b: V7 negative
The degree to which HR can influence individual employee development (CPD) aligned to an organisational knowledge strategy knowledge strategy.
Report: 26 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:10:46

Stakeholder 9 - MA(SA) CEO - 4:8 [Marketers in South Africa tend..] (59:59)
Codes: [V7-]
Marketers in South Africa tend to shy away from qualifications and designations. They tend to do the lowest level of IMM if they do anything. Many believe that they have enough experience on the job that they do not need to get a qualification.

Stakeholder 12 - Paracon HR sales director - 5:10 [HR has a different focus from ..] (70:70)
Codes: [V7-]
HR has a different focus from that of the line of business functions and do not often take in account the opportunity cost of having people out of office for workshops

Stakeholder 11 - Paracon HR sales line manager - 6:2 [the issue with contractors' is..] (21:21)
Codes: [V7-]

The issue with contractors' is that as they generally have to pay for the training course and in addition need to take time off to attend courses (as in some instances the Client will not cover the cost) they tend to not want to embark on training.

Stakeholder 11 - Paracon HR sales line manager - 6:15 [Paracon's HR department genera..] (78:78)
Codes: [V7-]

Paracon's HR department generally advises us on legislative matters around my permanent staff and contractors. They do not generally have any other interface with us.

Stakeholder 13 - HCI HR practitioner - 7:2 [This creates gaps between: HR ..] (22:22)
Codes: [V7-]
This creates gaps between: HR knowledge of how the business actually makes money on the operational end of the business; and the dependence of CEO team future goals on correct and timely HR interventions.

Stakeholder 13 - HCI HR practitioner - 7:3 [As such it would be difficult ..] (22:22)
Codes: [V3-] [V4-] [V7-]
As such it would be difficult for HR to align strategic action planning from the top management with equipping operational units with appropriate talent in support of these planned future financial successes.

Stakeholder 13 - HCI HR practitioner - 7:6 [HCI Africa believes that HR in..] (24:24)
Codes: [V12-] [V7-]
HCI Africa believes that HR interventions at the operational level will continue to be re-active responses unless efforts are made to address communication between the top management, HR and operational managers.

Stakeholder 13 - HCI HR practitioner - 7:15 [HCI Africa notes that there is..] (30:30)
Codes: [V7-]
HCI Africa notes that there is little focus currently on promoting specific talent segments within most South African companies' strategies

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:4 [he challenge for some is ratio..] (18:18)
Codes: [V7-]
The challenge for some is rationalizing the value and effort when the activity is not actually designed to support individual skills or knowledge acquisition.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:5 [Effective and appropriate CPD ..] (18:18)
Codes: [V7-]
Effective and appropriate CPD must also be accessible (including being affordable, offered in the right format and time, etc) while aligning with current and emergent needs to ensure that practitioners are relevant in their field. Rarely does it appear that these minimal conditions are satisfied or factored into the objectives.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:10 [Philosophically the CTHRC beli..] (34:34)
Codes: [V7-]
Philosophically the CTHRC believes that HR functions are essential to the success and profitability of an organization or company. The basic tenet is recognizing that human resources are behind all activities that enable a company or organization to function; without the people there is no service or capacity.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:11 [Oddly enough, the human resour..] (34:34)
Codes: [V7-]
Oddly enough, the human resources are not cited in company financial statements except as a liability, i.e. payroll

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:12 [What is important to consider ..] (36:36)
Codes: [V7-]
What is important to consider is the fact that a lot of HR practice is also done poorly

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:13 [it takes good HR practice to a..] (36:36)
Codes: [V7-]
It takes good HR practice to achieve meaningful results. A challenge is the limited capacity (e.g. resources, skills/abilities) for companies or organizations to manage HR.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:14 [Do you see the HR function of ..] (38:40)
Codes: [V7-]
Do you see the HR function of organisations having a great deal of control in implementing business events - i.e. designing events with the event organiser to ensure that the event delivers the knowledge that HR needs to meet future strategic planning activities? It would be lovely, although I haven't seen examples of organizations that would support this approach.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:1 [I expect that just about none ..] (10:10)
Codes: [V7-]
I expect that just about none of those 50,000 hold event qualifications but they might very likely hold other tertiary qualifications, like marketing.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:2 [Do those event organisers that..] (12:14)
Codes: [V7-]
Do those event organisers that you know of show an active interest and understanding of continued professional development (CPD)? It is an alien concept

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:6 [As long as commercial organisa..] (34:34)
Codes: [V7-]
As long as commercial organisations budgets are under pressure, there has to be SMART objectives in participating in/at events, so I don't believe that HR would have much influence

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:12 [I never get to train exhibitio..] (57:57)
Codes: [V7-] [V9-]
I never get to train exhibition management in the events industry. They don't think they need it and they currently resist RPL and designations

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:13 [Many of them have not updated ..] (57:57)
Codes: [V7-] [V9-]
Many of them have not updated their skill base in a long time so they have no background formal training, learning everything from on the job experience and many do not know their knowledge is limited.

Stakeholder 2 - Business events professional organiser - 13:7 [In the majority of corporation..] (47:47)
Codes: [V7-]
In the majority of corporations the role of HR is not to encourage participation within business events

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:13 [X-Pert typically deals with Li..] (38:38)
Codes: [V7-]

X-Pert typically deals with Line Management from either Project Management or IT Management, but to a lesser extent HR in the process of organising training.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:14 [HR is involved in some cases i..] (38:38)
Codes: [V7-]
HR is involved in some cases it is my general view that HR does not provide strategic or strong support

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:20 [HR has for a long time not con..] (50:50)
Codes: [V2-] [V4-] [V7-]
HR has for a long time not contributed in the strategic direction of a company.

Stakeholder 8 - ASATA CEO manager - 16:1 [the downturn in the economy ha..] (21:21)
Codes: [V7-]
The downturn in the economy has resulted in awful cuts as far as CPD is concerned.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:25 [I do not have a structured wri..] (120:120)
Codes: [V2-] [V7-]
I do not have a structured written list of goals, but more an innate list of interest areas and topics for which I make a judgement on choice at big conference venues as to what lectures, presentations, exhibits and side meetings to attend based on my needs to deliver better advice back home.

Appendix 5.8a: V8 positive
The degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries.
Report: 29 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:09:29

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:10 [we plan this to keep the infor..] (30:30)
Codes: [V2] [V8]
We plan this to keep the information flowing. The course attendees know they will have to do this so they are prepared for this sharing. If you don't do this and make sure there are time limits they don't bother to share - they ride on the back of the other employee. This forces the sharing and makes each of them independent and useful.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:11 [It is up to the new one to gai..] (32:32)
Codes: [V8]
It is up to the new one to gain the knowledge as quickly as possible because they know they are going to have to work on the next project on their own. When they get their own first project we do sometimes notice that they have knowledge gaps and the transfer didn't work so well so we will bring the one who was trained in again but only for sporadic periods so that the learning has to take place and there is no dependency.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:24 [you like small focused meeting..] (104:106)
Codes: [V3] [V8] [V9]
You like small focused meetings as opposed to conferences because you can drill down on problems? Definitely so. We often have a video conference with a specialised supplier. We pull together a group of our people who are dealing with the conference and then we have a tele-conference with the specialist. Once the call is finished we have a further talk amongst the attendees to digest and process the information. Nearly all of our support like this comes from overseas tele-conferences.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:12 [Yes we do capture the data fro..] (28:28)
Codes: [V2] [V8] [V9]
Yes we do capture the data from the meetings and the white boards. We circulate it to the attendees. We set our path from agreeing these documents.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:13 [It is not cast in concrete but..] (28:28)
Codes: [V10] [V3] [V8]
It is not cast in concrete but it does represent the views of the people at a specific point in time. The things that last - the things that people believe are important - remain.

Stakeholder 12 - Paracon HR sales director - 5:17 [What would you think about att..] (84:86)
Codes: [V8] [V9]
What would you think about attending a sub-conference which is a virtual link from a main conference being held geographically remote from your company? There is value in it. There is time to interact with others there (at the sub-conference).

Stakeholder 11 - Paracon HR sales line manager - 6:18 [These investments enable a com..] (86:86)
Codes: [V12] [V6] [V8]
These investments enable a company to reduce staff turnover and retention enables the organization to function more effectively and efficiently if HR is not continuously involved in recruiting for positions and in turn the viability of the company is sound as when Client's hear that you are looked after by an organization it increases their confidence in the product/service they are buying, in this case contractors.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:13 [Events have to be considered i..] (52:52)
Codes: [V12] [V3] [V4] [V8]
Events have to be considered in terms of cash. How do you get the return on time and money from these connections? The most precious commodity to harness is the limited time available where people meet people.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:24 [Meeting pods or mini-meetings ..] (72:72)
Codes: [V8]
Meeting pods or mini-meetings as additions to the main meeting are definitely gaining popularity.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:25 [SAP had two large conferences ..] (72:72)
Codes: [V8] [V9]
SAP had two large conferences in the USA. These were linked to their satellite offices outside of USA in Brazil and Japan. These were pod meetings. MPI calls this "thinking outside the room".

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:10 [events can not only be annual ..] (51:51)
Codes: [V1] [V12] [V4] [V8]

Events can not only be annual but annual and regional. This is becoming common in South Africa and is standard across the USA states.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:28 [At least 30% of the budget sho..] (85:85)
Codes: [V8]
At least 30% of the budget should go to post-show follow-up.

Stakeholder 2 - Business events professional organiser - 13:4 [Hence the economic advantages ..] (31:32)
Codes: [V8]
Hence the economic advantages become obvious - as the objectives of the first business gathering would have grown the outcomes via the consolidated evaluation into the second meeting, then the third meeting ….and so on.
Each meeting outcome therefore signifies a new progressive beginning.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:8 [The other key aspect to this q..] (28:28)
Codes: [V2] [V6] [V8]
The other key aspect to this question is the matching of training to actual trainee requirements and level.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:9 [It is important that delegates..] (28:28)
Codes: [V2] [V8] [V9]
It is important that delegates attend training that will be of direct and personal value in the workplace itself, and / or in terms of securing better career opportunities.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:10 [Further, follow up post traini..] (28:28)
Codes: [V3] [V8]
Further, follow up post training to assess further requirements as part of an ongoing 'learning journey' supports value in the aspect.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:14 [Whereas the provisioning of bu..] (78:78)
Codes: [V8]
Whereas the provisioning of business events by a service provider (or opportunity to hire a professional) event organizer is a good idea, its uncertain if this would be cost effective given the small nature of the workshop events, and budget implications

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:22 [In addition, as a Danida emplo..] (102:102)
Codes: [V10] [V3] [V8]
In addition, as a Danida employee, they offer e-learning sessions. These are great, a bit intense, and theoretical, but another good way of in-service exposure to current trends in development fields

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:28 [The donors have also realised ..] (128:128)
Codes: [V4] [V8]
The donors have also realised the need for this and conduct what is termed value for money audits (VFMA), to see if they are getting mileage from the resources they spend, but also more importantly to assess if the cost effectiveness could also be a feature of the capacity development program

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:29 [In development work, we can in..] (132:132)
Codes: [V2] [V4] [V5] [V8]

In development work, we can interpret “customer needs analysis” as the business order of the day in that development partners and governments (politically) are very sensitive that target group needs are addressed,

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:31 [Survey a large audiences opini..] (146:148)
Codes: [V4] [V8]
To survey a large audiences opinion on a subject, be it for conflict resolution (normally of a politically sensitive nature) or to survey stakeholders at all levels through workshops and field meetings to find out what are key development needs that can be addressed by development projects generally of development partners

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Appendix 5.8b: V8 negative
The degree to which business event design extends the work process of the event considering it to be a unique value chain that networks with other people, organisations and industries.
Report: 4 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:08:23

Stakeholder 11 - Paracon HR sales line manager - 6:14 [I share information I learn bu..] (70:70)
Codes: [V8-]
I share information I learn but it is not required of me. I do wish that there was a policy that encouraged sharing.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:17 [People general use exhibitor s..] (73:73)
Codes: [V1] [V8-]
People general use exhibitor stands very badly because it looks easy to promote the product they don’t really think out what they are doing. They tend to book a ‘shop’ which is the stand, in a specialised shopping centre is called XYZ show and they dress it up, and wait for some one to come and buy. The international quoted figure is that eighty percent (80%) of trade show leads are not followed up because as the exhibitor leaves the floor they ‘shut the shop’.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:27 [he concept of post-show promot..] (85:85)
Codes: [V12-] [V8-]
The concept of post-show promotions and budget to follow up those leads is completely unheard of in South Africa.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:26 [I found leadership that is int..] (124:124)
Codes: [V3-] [V8-]
I found leadership that is interested to measure the behavioural change resulting from an event, nor to organise a post-event retreat. Most decision makers are happy to sponsor attendance at a meeting, or in the case of government, to agree to let individuals attend if there is sponsorship, but mostly the outcome ends with attendance.

Appendix 5.9a: V9 positive
The degree to which the event design optimises the chance for behavioural change based on (p,e).
Report: 77 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:00:28

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:17 [Get speakers or leading indust..] (46:46)
Codes: [V9]
Get speakers or leading industry specific groups in to share new trends or current best practices with the staff

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:18 [Do they attend face-to-face me..] (58:60)
Codes: [V3] [V5] [V9]
Do they attend face-to-face meetings on these issues? Yes they do and they like this but we don't have the time to allow them to do that. I provide an hour on a Friday and the developers sit together. What they do in that hour is up to them - what I want to see is evidence of what they do in that hour. They have to show me something innovative at the end of the hour.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:24 [you like small focused meeting..] (104:106)
Codes: [V3] [V8] [V9]
You like small focused meetings as opposed to conferences because you can drill down on problems? Definitely so. We often have a video conference with a specialised supplier. We pull together a group of our people who are dealing with the conference and then we have a tele-conference with the specialist. Once the call is finished we have a further talk amongst the attendees to digest and process the information. Nearly all of our support like this comes from overseas tele-conferences.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:1 [Its all very well being able t..] (12:12)
Codes: [V9]
Its all very well being able to email and teleconference but there is a whole lot of information that you miss out on when its not person to person. Body language conveys a lot.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:2 [Body language conveys a lot. I..] (12:12)
Codes: [V9]
Body language conveys a lot. It gives you a better understanding of what a person is trying to get across. And just being with other people is far more important than allowing technology to convey a one dimensional message of what you want to get across. It is very sterile. The latter does allow you to get an idea of what a person is trying to convey but its better to be able to see them.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:4 [At least once a year I try and..] (16:16)
Codes: [V9]
At least once a year I try and attend a social activity where I can meet the staff I might not normally get to meet.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:5 [We do break-away sessions wher..] (20:20)
Codes: [V1] [V2] [V5] [V9]
We do break-away sessions where we go to a facility that lends to getting out of the office environment. That feeling is like going away for a weekend. We are able then to have strategy discussions very successfully.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:6 [The degree of energy and innov..] (20:20)
Codes: [V5] [V9]
The degree of energy and innovativeness depends on who is present.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:9 [We do not all know everything ..] (24:24)
Codes: [V1] [V5] [V9]
We do not all know everything all the time. People from their various perspectives pick up things that you don't. When people meet face-to-face this comes through.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:10 [Some people don't have English..] (24:24)
Codes: [V9]
Some people don't have English as a first language. They would be more effective if they were speaking drawing diagrams and using hand signals.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:11 [Another technique is to get pe..] (24:24)
Codes: [V10] [V9]
Another technique is to get people to write down on paper, issues that they think are obstacles - no names on the paper. We put them up on a board for discussion and we find that often there are several who have the same feeling so now they start opening up and sharing. They don't feel that they are the only ones with this problem.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:12 [Yes we do capture the data fro..] (28:28)
Codes: [V2] [V8] [V9]
Yes we do capture the data from the meetings and the white boards. We circulate it to the attendees. We set our path from agreeing these documents.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:15 [he problem with this is that i..] (34:34)
Codes: [V10] [V12] [V3] [V9]
The problem with this is that it is still just a research paper so unless it is discussed within a gathering of people that is all it is. The only time that it is really useful is if it is shared with others in face-to-face meetings. We get a research analyst in the room and now we have the person who created the research and we can cross question and they too cross question us. Others sit around the table and they are making their own notes about this shared experience. Now the team have this shared experience - we don't capture this in a repository for others but these people have a better knowledge with all the others in the room.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:19 [I would rather not attend a co..] (62:62)
Codes: [V2] [V4] [V9]
I would rather not attend a conference but I will get the presenters to come and talk to us about out unique situation and needs. I will get all our stakeholders together to attend the meeting.

Stakeholder 10 - marketing professional - 3:2 [To what degree are marketers i..] (28:30)

Codes: [V9]
To what degree are marketers involved in the planning of strategic intent behind participation in business events such as branding conferences, participating at exhibitions, product launches? These have to stem from needs identified by marketers. Marketers have to LEAD.

Stakeholder 10 - marketing professional - 3:6 [Reality says that 'no marketin..] (50:50)
Codes: [V2] [V4] [V9]
Reality says that 'no marketing, no business' CMO has to be part of the C team and work with other senior executives in developing a business strategy and then deciding how to implement the marketing components.

Stakeholder 10 - marketing professional - 3:7 [Have you ever worked with a ma..] (56:62)
Codes: [V4] [V7] [V9]
Have you ever worked with a marketing event with an event organiser (either in-house or contracted in)? Yes. What were a few of the strengths and/or disadvantages of using a 3rd party in your marketing intervention? Some areas need specialist knowledge and resources. Finding the right person - chemistry is crucial - is hard. They have to understand your objectives, your market, your business and you. They also have to be realistic in costs and be prepared to work within agreed financial constraints

Stakeholder 10 - marketing professional - 3:8 [There are triggers that effect..] (69:69)
Codes: [V6] [V9]
There are triggers that effect people at an event, make them want to know more about this product and these triggers should be part of an event organiser's planning and ROI.

Stakeholder 12 - Paracon HR sales director - 5:12 [I find that the annual IT conf..] (74:74)
Codes: [V10] [V12] [V9]
I find that the annual IT conference GovTech provides a suitable level of content. I find the presenters are approachable for more knowledge. The conference is important for relationship building with our clients. Topics are presented that are important for the client and being there to discuss these issues at the time with the client ahs great value.

Stakeholder 12 - Paracon HR sales director - 5:13 [How much do the conference's l..] (76:78)
Codes: [V9]
How much do the conference's leisure activities help influence the relationships? These are very useful times to learn more about your client. We get the opportunity to spend time with our client and strengthen our relationships.

Stakeholder 12 - Paracon HR sales director - 5:14 [Nothing beats a face-to-face r..] (82:82)
Codes: [V9]
Nothing beats a face-to-face relationship

Stakeholder 12 - Paracon HR sales director - 5:15 [I do have virtual relationship..] (82:82)
Codes: [V9]
I do have virtual relationships on business websites like Linked-In. We can follow industry discussions and make comments. But you can't beat face-to-face.

Stakeholder 12 - Paracon HR sales director - 5:16 [Where practical it definitely ..] (82:82)
Codes: [V9]
Where practical it definitely is an advantage to physically meet. I believe it is core to our human spirit to have face-to-face contact. I can read the body language as well which I can't do in a virtual forum..
Stakeholder 12 - Paracon HR sales director - 5:17 [What would you think about att..] (84:86)
Codes: [V8] [V9]
What would you think about attending a sub-conference which is a virtual link from a main conference being held geographically remote from your company? There is value in it. There is time to interact with others there (at the sub-conference).

Stakeholder 12 - Paracon HR sales director - 5:18 [Even if I can interact with th..] (88:88)
Codes: [V9]
Even if I can interact with the main conference via sms or online Q&A it is not the same as a face-to-face attendance.

Stakeholder 11 - Paracon HR sales line manager - 6:9 [In my meetings we try and stay..] (57:57)
Codes: [V9]
In my meetings we try and stay as informal as possible as this relaxes the client and they share their needs more easily. Generally I will have a coffee meeting.

Stakeholder 11 - Paracon HR sales line manager - 6:10 [I will have a coffee meeting. ..] (57:57)
Codes: [V9]
I will have a coffee meeting. We do spend a fair amount of time on informal chat that has nothing to do with the organisational need. We share talk about family and local happenings. This informal chat is very important in building our relationship.

Stakeholder 11 - Paracon HR sales line manager - 6:17 [Team building and functions ar..] (84:84)
Codes: [V6] [V9]
Team building and functions are also excellent ways of motivating staff and keeping their loyalty to the organization as these events are referred to and talked about for many months and sometimes even years by both contractors and permanent staff.

Stakeholder 13 - HCI HR practitioner - 7:7 [Thought leadership events are ..] (26:26)
Codes: [V9]
Thought leadership events are the chosen vehicle of HCI Africa to equip business for the future. To this end, HCI Africa's next two year plan incorporates continuing the business events that it has established referred to as Summits (conference-like event). The well established target audience is broad in capabilities and is both individual and corporate representatives of many types of business.

Stakeholder 13 - HCI HR practitioner - 7:8 [HCI Africa has not found a nee..] (26:26)
Codes: [V9]
HCI Africa has not found a need to use a conference organiser for the event logistics such as venue hire, meals, food etc. While this aspect is considered important by HCI Africa it is also considered relatively easy to facilitate

Stakeholder 13 - HCI HR practitioner - 7:9 [HCI Africa notes that their ty..] (26:26)
Codes: [V9]
HCI Africa notes that their typical attendee does enjoy a day out of the office at a business event function and a business event day-out certainly does have implications of well-being for attendees.

Stakeholder 13 - HCI HR practitioner - 7:10 [HCI Africa believes it is the ..] (26:26)
Codes: [V9]
HCI Africa believes it is the event content that drives their attendance. As the attendance is strong year on year, this suggests that HCI evaluation of content relevant to business and business talent is seen as valuable to business delegates.

Stakeholder 13 - HCI HR practitioner - 7:11 [It is not surprising that the ..] (28:28)
Codes: [V9]
It is not surprising that the content used for HCI Africa events takes considerable time to define.

Stakeholder 13 - HCI HR practitioner - 7:12 [HCI Africa looks for content t..] (28:28)
Codes: [V6] [V9]
HCI Africa looks for content that not only has applicability locally but contributes to making "light-bulbs go off" changing attendees attitudes and thoughts about business and talent. HCI Africa contextualises the content.

Stakeholder 13 - HCI HR practitioner - 7:17 [HCI Africa plan internal train..] (32:32)
Codes: [V9]
HCI Africa plan internal training interventions. In the future it is envisaged that these would be of a maximum size of 15-20 attendees and the meetings would be held within a particular company

Stakeholder 13 - HCI HR practitioner - 7:18 [HCI Africa has found this size..] (32:32)
Codes: [V9]
HCI Africa has found this size of internal training meeting to be the maximum when adding value through class interactions. HCI Africa' research shows that size of meeting combined with the content brought to the trainees can bring change for future organisational performance within a specific company.

Stakeholder 13 - HCI HR practitioner - 7:19 [The class attendees would opti..] (32:32)
Codes: [V9]
The class attendees would optimally be diverse from operational managers through HR practitioners to top management to ensure that platforms are established for enhanced, joint future performance.

Stakeholder 13 - HCI HR practitioner - 7:20 [It is anticipated that this ty..] (32:32)
Codes: [V2] [V9]
It is anticipated that this type of business intervention will have particular value for medium size companies who require knowledge and innovation to surpass competitors.

Stakeholder 13 - HCI HR practitioner - 7:22 [HCI Africa uses its board memb..] (37:37)
Codes: [V2] [V4] [V7] [V9]
HCI Africa uses its board members and industry specialists to source local and international summit and training content. The members have extensive HR training and exposure to international HR trends

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:5 [he pace of change has never be..] (27:27)
Codes: [V9]
The pace of change has never been as intense as it is today; the ability to share relevant, credible knowledge across our global community has never been more vital.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:12 [An event whether online or liv..] (52:52)
Codes: [V5] [V9]
An event whether online or live connects people to ideas - human connections and that is the role of the meetings professional.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:14 [Meeting and event professional..] (56:56)
Codes: [V9]
Meeting and event professionals have for years managed input, the operational logistics

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:19 [The time people have to spend ..] (64:64)
Codes: [V9]
The time people have to spend together is more and more limited so has to be used extremely well

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:21 [With regards to balancing the ..] (70:70)
Codes: [V9]
With regards to balancing the [mix of] face-to-face meetings and virtual, people are a social species who rely on each other for our humanity. However with time being such a valuable commodity these days, when we do get together at face-to-face meetings we will work at getting much more out of the meeting. On a

virtual level we will certainly go ahead and met on-line but once there has been a face-to-face meeting, people will get more out of those virtual meetings together.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:22 [The face-to-face is still wher..] (70:70)
Codes: [V9]
The face-to-face is still where the humanity connection is made that will make the virtual more successful.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:25 [SAP had two large conferences ..] (72:72)
Codes: [V8] [V9]
SAP had two large conferences in the USA. These were linked to their satellite offices outside of USA in Brazil and Japan. These were pod meetings. MPI calls this "thinking outside the room".

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:9 [Based on the requirements I pu..] (47:47)
Codes: [V9]
Based on the requirements I put together a proposal for them.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:14 [SANS 10366 and the Events Safe..] (59:59)
Codes: [V11] [V9]
SANS 10366 and the Events Safety bill which now dictates that there is a requirement for both experience and a qualification

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:19 [The exhibition industry has sh..] (79:79)
Codes: [V1] [V12] [V2] [V9]
The exhibition industry has shown more consistent growth than any other marketing channel but it is not being leveraged. Exhibitions are the only medium where you can demonstrate the product

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:22 [Experiential exhibiting is ver..] (81:81)
Codes: [V9]
Experiential exhibiting is very powerful because you can bring the brand to life with the way people can interact with the product on an exhibition

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:23 [consumer exhibitions are growi..] (81:81)
Codes: [V9]
Consumer exhibitions are growing in leaps and bounds. Consumers are so bombarded with marketing messages that they want the opportunity to try the product rather than believe the other types of marketing (print, TV)

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:24 [This is very powerful with con..] (81:81)
Codes: [V12] [V2] [V9]
This is very powerful with consumer brand building. Multi-media are used extensively to facilitate experiential marketing.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:25 [The people who man the stand a..] (83:83)
Codes: [V10] [V7] [V9]
The people who man the stand are very important as to how they conduct themselves on the stand.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:29 [our first meeting sixty (60) p..] (87:87)
Codes: [V9]
Our first meeting sixty (60) people we were asked what we wanted to discuss and over the next three days the content and discussions were given as per our first day wish list. Facilitators led the meetings.

Stakeholder 3 - Business events non-professional organiser - 12:12 [McKenzie has noticed that the ..] (34:34)
Codes: [V9]
I have noticed that the emphasis on food has changed to quick, simple meals away from time consuming meals

Stakeholder 2 - Business events professional organiser - 13:3 [A further philosophy of CMP is..] (31:31)
Codes: [V1] [V2] [V5] [V9]
A further philosophy of CMP is that a gathering of people is not an end in itself. In every instance - within the CMP process, a gathering - no matter what capacity or type has the conceptual ingredients, at the very outset, for the next step in the message retention process.

Stakeholder 2 - Business events professional organiser - 13:8 [he clear evidence of some 13,5..] (52:52)
Codes: [V9]
The clear evidence of some 13,500 CMPs throughout the world

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:5 [MBA class reunions, alumni/stu..] (31:31)
Codes: [V9]
MBA class reunions, alumni/student networking breakfasts, social events, student events, business seminars, career networking events with students and guest speaker programmes.

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:6 [The more intimate events such ..] (39:39)
Codes: [V7] [V9]
The more intimate events such as the alumni/student events give them an opportunity to network and exchange ideas and contacts.

Stakeholder 5 - Business events non-professional organiser (UCT Alumni) - 14:7 [The one day business briefs of..] (39:39)
Codes: [V1] [V9]
The one day business briefs offer them an opportunity to return to the classroom and be exposed to four speakers covering different aspects of a particular theme.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:5 [the lecturers ability to suppo..] (23:23)
Codes: [V9]
The lecturers ability to support learning with training based activities as learning aids but also to provide actual examples of how theory is translated into practice in the workplace.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:6 [students to apply themselves t..] (23:23)
Codes: [V9]
Students to apply themselves to the learning process through assignments, presentations and examinations - which are key to transmission of learning.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:7 [food and venue are important. ..] (28:28)

Codes: [V9]
Food and venue are important. Also important is the logistical coordination prior to and in support of attendance on training. Get this wrong and the learning process suffers resistance as a result of human nature.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:9 [It is important that delegates..] (28:28)
Codes: [V2] [V8] [V9]
It is important that delegates attend training that will be of direct and personal value in the workplace itself, and / or in terms of securing better career opportunities.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:19 [We tend to do quick events and..] (44:44)
Codes: [V4] [V9]
We tend to do quick events and try to squeeze in a great deal of value in to that time. The client needs to qualify that time out of the office so we find the more we minimise that time

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:27 [I believe the most value is at..] (63:63)
Codes: [V9]
I believe the most value is attained when people sit in a room and talk. That creates value

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:28 [Looking people in the eye is w..] (63:63)
Codes: [V1] [V9]
Looking people in the eye is worth so much. 10% is looking people in the eye and the rest is non-verbal communication that you only get face-to-face.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:4 [In the development world there..] (46:46)
Codes: [V3] [V9]
In the development world there has become established a culture called the “Workshop Syndrome”. This has emerged out of necessity to hold a focused communication session. Due to the work environment, in order to get anything done with counterparts and colleagues, one must generally leave the work place and retreat to a more isolated venue where a collective of like minded stakeholders can meet, dialogue and exchange ideas freely, without interruption and develop deliverables and tools that help drive development work.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:5 [Work Overload: In the office, ..] (50:50)
Codes: [V1] [V9]
Work Overload: In the office, government, NGO, donor and development staff are generally very busy with the everyday demands of the bureaucracy of the desk they occupy, answering e-mails, preparing reports, dealing with crisis, problem solving, pushing files, responding to queries, preparing briefings, dealing with visitors, etc such that to get any work done, or in particular, to have a focused group discussion, a retreat away from the pressures of the office has become essential to achieve the concentration that is needed.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:15 [Generally, in government depar..] (78:78)
Codes: [V1] [V9]
Generally, in government departments and event organizer could help bring a systematic approach to organizing such workshop meetings, however, the problem is government is so diverse and budgets so meager that each individual managing an event budget would like to keep this and do the arrangements in-house as resource are not enough to go around, to pay to outsource a service provider

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:23 [it is important to consider, e..] (112:112)

Codes: [V11] [V9]
It is important to consider, eventing may not have direct financial benefit to the participant, however, it certainly does have economic spin-off to the provisioning community in the form of: transport, hotels, catering services, bars, restaurants and other local tourism facilities. Transport (ie public as well as fuel for self-drive vehicles), hotels and catering services are straight forward direct economic consequences of holding an event at a venue away from home base. However, there are also indirect economic benefits associated with attending a workshop which brings with it allowances, and therefore a few extra USD to spend. As participants travel away from home to an event, they general generate an element of local tourism around the event and as is typical, spend part of their allowances on entertainment at local bars, meat BBQ restaurants and other discos and night clubs, with all the associated entertainment (including prostitution).

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:24 [As a facilitator, as part of m..] (118:118)
Codes: [V10] [V12] [V4] [V9] As a facilitator, as part of my role as technical adviser, yes, I prepare the workshop meeting handouts with the clear structure of the objectives, expected outputs, and the structure of the workshop and the type of questions or problems that we need to address and answer collectively so as to solve a problem, fill a knowledge gap, or develop a way forward.

Stakeholder 18 - Academic, research, USA - 18:1 [The conferences are valuable a..] (19:20)
Codes: [V1] [V9]
The conferences are valuable as a forum for exchange of information, and also for networking and keeping up with colleagues. These are small groups, most of us have worked in the area for many years, and most of us know each other.
The collaborative studies run by CORESTA are vital for tobacco researchers, as they offer researchers resources none of us could achieve on our own.

Stakeholder 18 - Academic, research, USA - 18:3 [We go to listen to academic pr..] (28:28)
Codes: [V3] [V9]
We go to listen to academic presentations - results of specific experiments. Attendance to not align to strategic planning most cases - unless we hear a presentation which may suggest a new direction for our research. A list of gaols would not be relevant for us, but we might have a list of presentations we particularly want to attend.

Stakeholder 18 - Academic, research, USA - 18:5 [I used a conference organizer ..] (42:42)
Codes: [V9]
I used a conference organizer when it was my turn to host a conference. This conference organizer has organized this conference for many years, for different hosts (we each take a turn to host it) - so he is very familiar with the requirement.

Stakeholder 18 - Academic, research, USA - 18:6 [Strengths - he did all the neg..] (46:46)
Codes: [V9]
Strengths - he did all the negotiating with the hotel, where he knows everyone - and secured considerable discounts and perks for us. Being familiar with the conference and its requirements, he uses the same AV company every year, and the AV staff and equipment are exactly what we need. I did the fundraising with a committee of my colleagues, but he collected the money and handled all the accounting and advertising, as well as the registration fees.

Stakeholder 18 - Academic, research, USA - 18:9 [I find attendance in person mu..] (59:59)
Codes: [V9]
I find attendance in person much more valuable that webinars, because the behind-scenes discussions are such a large part of it.

Appendix 5.9b: V9 negative feedback on design
The degree to which the event design optimises the chance for behavioural change based on (p,e).

Report: 15 quotation(s) for V9 negative

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 09:57:32

Stakeholder 18 - Academic, research, USA - 18:4 [Our type of conference does no..] (32:32)
Codes: [-V9]
Our type of conference does not typically lead to behavioural change - they are just forums for presentation of experimental results.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:2 [For instance in November 2010 ..] (9:9)
Codes: [V9-]
For instance in November 2010 we got bad feedback from all levels of our staff that had attended a particular programme. The problem lay with the trainer who referred them to text books when they asked questions - they didn't get an interactive session going where our staff could ask about their specific problems and needs in relation to the training.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:19 [Conferences and seminars are o..] (72:72)
Codes: [V9-]
Conferences and seminars are often pointless. We need help on very specific problems. General workshops are not useful to us.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:7 [Often they take awhile to warm..] (20:20)
Codes: [V9-]
Often they take awhile to warm up depending on whom is present and what has recently happened in their work environment. Sometimes they feel intimidated by more senior staff and don't want to voice their opinions

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:18 [he first thing I dislike is th..] (60:60)
Codes: [V9-]
The first thing I dislike is that it is marketing, marketing, marketing. We have paid to go to this conference but they use the opportunity to promote their companies to tell you about their successes. That's the first thing. The second thing is that their presentations are very general so if I am sitting there with several different customer types the presenters can't get too detailed with you as to how it applies to your environment - so they give a general response. That kind of stuff I can get off the web.

Stakeholder 10 - marketing professional - 3:3 [In your past experience to wha..] (32:34)
Codes: [V6-] [V9-]
In your past experience to what degree have companies you have worked with shown you financial and leadership support for measuring the behavioural change arising from a marketing event post the actual event?

Stakeholder 10 - marketing professional - 3:11 [I do not deal with marketers w..] (114:116)
Codes: [V12-] [V2-] [V9-]

I do not deal with marketers when planning business events - why? For example, no one checks the website we create for their organisation and they don't check where we put their branding onsite - why? There is a lack of understanding as to how to get to people. We see you as a separate industry. We see you 'doing your own thing'. There is a silo mentality from marketers. That's why we have to get people from different marketing environments to meet and talk to each other

Stakeholder 11 - Paracon HR sales line manager - 6:19 [I prefer opportunities like co..] (93:93)
Codes: [V9-]
I prefer opportunities like coffee mornings than taking a client to a conference as the outcome (more business) is not assured if we select the wrong person to take

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:23 [Virtual may eliminate the "whi..] (70:70)
Codes: [V9-]
Virtual may eliminate the "white space" of face-to-face meetings where opportunity manifests if we are not careful. White space is the space for spontaneous knowledge and discussion and often leads to new ideas.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:12 [I never get to train exhibitio..] (57:57)
Codes: [V7-] [V9-]
I never get to train exhibition management in the events industry. They don't think they need it and they currently resist RPL and designations

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:13 [Many of them have not updated ..] (57:57)
Codes: [V7-] [V9-]
Many of them have not updated their skill base in a long time so they have no background formal training, learning everything from on the job experience and many do not know their knowledge is limited.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:26 [virtual will take over from fa..] (61:63)
Codes: [V9-]

Virtual will take over from face-to-face in training?] I personally don't think so.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:30 [Sadly, in both cases the consu..] (140:140)
Codes: [V9-]
Sadly, in both cases the consultant was unable to deliver as there seemed to be some technical difficulty in understanding what is and how to do a training event.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:36 [yes there have been events whe..] (171:171)
Codes: [V9-]
Yes there have been events where the project has hired an external or internal event organizer, and I have attended meetings where the organizers have used external facilitators. Although the event went well, logistically, in almost all circumstances, I could not help feel that in involving an external facilitator for the technical part of the meeting, in so doing the organizers were losing the control of the outcome or the results were diluted.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:39 [All too often you are invited ..] (183:183)
Codes: [V9-]
All too often you are invited to meetings, workshops, conferences without having seen the pre-conference materials nor the technical papers that are to be presented. This means attending a mass of presentation is hardly time enough to absorb all that is said and this leads to an "information overload".

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:42 [r, the donor community grow we..] (187:187)
Codes: [V9-]

The donor community grow weary, are fatigued by too many meetings, and are not sure of their value. I am not aware that this eventing tool of workshops has ever been evaluated for its effectiveness and value for money in bringing people of a common background together for participatory consultation, to consolidate thinking, to exchange ideas and knowledge, to come to consensus and to bring new technical advice and support material.

Appendix 5.10a: V10 positive
The degree to which the human resources applies a standardised template for co-ordination and control for all business events to ensure delivery of the organisation's known (mission) and unknown (strategic intent).
Report: 33 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:25:48

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:1 [Every time some one goes on a ..] (9:9)
Codes: [V10] [V12] [V3]
Every time some one goes on a course we get them to debrief to us afterwards. We lead with questions and we review from the time they heard that they were going to attend the training.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:9 [We pull our staff together. Fo..] (28:28)
Codes: [V10] [V12] [V2]
We pull our staff together. For instance we will send a developer on training and then we pair him with another developer who didn't go on the training but they work on the same job. The one who learnt then teaches the one who didn't go on training. Then on the next project we separate them and join them to some-one else who hasn't been on the course so we multiply the knowledge value.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:13 [How do you recognise these peo..] (38:40)
Codes: [V10] [V2]
How do you recognise these people? we can see it in their work environment. They apply it quickly and we can see those that do a lot of research have not learnt what they should have on the course.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:15 [Resources from the same job fa..] (44:44)
Codes: [V10] [V12] [V5]
Resources from the same job families don't attend all the same training course, in order to bring a wider knowledge into the environment that can be shared amongst colleagues

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:3 [I meet with my heads, the team..] (16:16)
Codes: [V10] [V2]
I meet with my heads, the team leaders. Formally once a month and informally, daily. I expect them to do the same with their teams.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:11 [Another technique is to get pe..] (24:24)
Codes: [V10] [V9]
Another technique is to get people to write down on paper, issues that they think are obstacles - no names on the paper. We put them up on a board for discussion and we find that often there are several who have the same feeling so now they start opening up and sharing. They don't feel that they are the only ones with this problem.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:13 [It is not cast in concrete but..] (28:28)
Codes: [V10] [V3] [V8]
It is not cast in concrete but it does represent the views of the people at a specific point in time. The things that last - the things that people believe are important - remain.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:15 [he problem with this is that i..] (34:34)
Codes: [V10] [V12] [V3] [V9]
The problem with this is that it is still just a research paper so unless it is discussed within a gathering of people that is all it is. The only time that it is really useful is if it is shared with others in face-to-face meetings. We get a research analyst in the room and now we have the person who created the research and we can cross question and they too cross question us. Others sit around the table and they are making their own notes about this shared experience. Now the team have this shared experience - we don't capture this in a repository for others but these people have a better knowledge with all the others in the room.

Stakeholder 10 - marketing professional - 3:5 [A single marketing campaign wi..] (46:46)
Codes: [V10] [V12]
A single marketing campaign will not show directly in the organisation's financial performance, in most cases. Also campaigns and activities are instruments in brand building where profit may come later.

Stakeholder 9 - MA(SA) CEO - 4:2 [you need to be completely up t..] (13:13)
Codes: [V10] [V2]
You need to be completely up to date with developing trends and the latest in marketing trends. It is compulsory for all designated members (CMSA and MPSA) to meet pre-defined CPD targets

Stakeholder 9 - MA(SA) CEO - 4:7 [seminars with experts such as ..] (55:55)
Codes: [V10] [V2]
Seminars with experts such as Professor Malcolm McDonald who is a marketer. This is particular seminar is about marketing directors and their role on the corporate board. This links into King III. Prof. is a marketer who's brings a marketing perspective to King III requirements and recommendations.

Stakeholder 12 - Paracon HR sales director - 5:2 [The CIO ensures that the contr..] (34:34)
Codes: [V10] [V2] [V7]
The CIO ensures that the contractor's knowledge is aligned to the specific requirements of his project.

Stakeholder 12 - Paracon HR sales director - 5:12 [I find that the annual IT conf..] (74:74)
Codes: [V10] [V12] [V9]
I find that the annual IT conference GovTech provides a suitable level of content. I find the presenters are approachable for more knowledge. The conference is important for relationship building with our clients. Topics are presented that are important for the client and being there to discuss these issues at the time with the client ahs great value.

Stakeholder 11 - Paracon HR sales line manager - 6:11 [we have Sales meetings where w..] (61:61)
Codes: [V10] [V2] [V4]
We have Sales meetings where we share information with our colleagues, attend workshops and seminars where possible and refer to media reports, publications and internet research.

Stakeholder 11 - Paracon HR sales line manager - 6:12 [I bring extra information to m..] (66:66)
Codes: [V10] [V3]
I bring extra information to my sales team during internal staff meetings. It is informal and as I find it I bring it to the staff meetings. I believe sharing is a personality trait. Some people do, some don't.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:18 [Companies should inherently be..] (46:46)
Codes: [V10] [V5]
Companies should inherently be seeking information on their sector, competitors, etc., and evaluate and act on opportunities.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:9 [It would be great but meeting ..] (48:48)
Codes: [V10] [V12] [V4] [V7]
It would be great but meeting and events are considered as strategic platforms for HR development, marketing and communication

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:11 [Events have to be built to mee..] (52:52)
Codes: [V1] [V10] [V2] [V4]
Events have to be built to meet strategic intent

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:16 [Business measures itself on ou..] (56:56)
Codes: [V10] [V12] [V4] [V6]
Business measures itself on outputs, so must event organisers. This is a key shift in thinking for meeting organisers and hospitality.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:17 [The connections have to be man..] (61:61)
Codes: [V10] [V12] [V2] [V6]
The connections have to be managed - a term like the Chief Connections Officer would be appropriate. This person would manage connections focused on the outputs they will bring.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:28 [certain people are better at g..] (82:84)
Codes: [V10] [V3]
Certain people are better at gathering information from meetings? That makes sense and they definitely would be appropriate as connections. I was not aware that this was an ability.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:3 [EXSA start CPD from this year ..] (18:18)
Codes: [V10] [V11]
EXSA start CPD from this year starting with the Consumer Protection Act, which will have a major impact on events.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:25 [The people who man the stand a..] (83:83)
Codes: [V10] [V7] [V9]
The people who man the stand are very important as to how they conduct themselves on the stand.

Stakeholder 7 - IOD business events manager - 11:2 [qualified and skilled individu..] (12:12)
Codes: [V10] [V2]
Qualified and skilled individuals which should enhance the company's competitive advantage.

Stakeholder 7 - IOD business events manager - 11:6 [Better Directors, Better Board..] (24:24)
Codes: [V10] [V5] [V7]
Better Directors, Better Boards, Better Business" this is our motto/slogan
Stakeholder 3 - Business events non-professional organiser - 12:5 [- South Africa business people..] (22:22)
Codes: [V1] [V10] [V2]
South Africa business people were given a list of topics they could choose to learn and they selected their topics of interest and this created the format of the content of the meetings for the next eight months.

Stakeholder 2 - Business events professional organiser - 13:2 [Without CPD, CMP re-certificat..] (23:23)
Codes: [V10]
Without CPD, CMP re-certification - after each five year period - is not possible.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:12 [raining provides (only) one as..] (33:33)
Codes: [V10] [V12]
Training provides (only) one aspect towards competitive advantage for both the individual and the organisation concerned.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:13 [currently exploring is the anc..] (72:76)
Codes: [V1] [V10] [V11]
Currently exploring is the anchor this type of training as short in-service cadre development courses held at recognized colleges so that:
a) The capacity to continue the training lives on at the college and
b) The training can become building blocks to a certificate and
The college will institutionalize the topic by mainstreaming it in their future curriculum.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:21 [To be effective therefore, aft..] (90:90)
Codes: [V10] [V5]
To be effective therefore, after any major conference, it would be wise to have HR organize departmental retreats or seminars to exchange this information with colleagues

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:22 [In addition, as a Danida emplo..] (102:102)
Codes: [V10] [V3] [V8]
In addition, as a Danida employee, they offer e-learning sessions. These are great, a bit intense, and theoretical, but another good way of in-service exposure to current trends in development fields

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:24 [As a facilitator, as part of m..] (118:118)
Codes: [V10] [V12] [V4] [V9]
As a facilitator, as part of my role as technical adviser, yes, I prepare the workshop meeting handouts with the clear structure of the objectives, expected outputs, and the structure of the workshop and the type of questions or problems that we need to address and answer collectively so as to solve a problem, fill a knowledge gap, or develop a way forward.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:27 [follow-up monitoring and evalu..] (126:126)
Codes: [V10] [V2] [V4]
Follow-up monitoring and evaluation (M&E) visits are generally used as a form of evaluation tool post an event like a planning workshop. However, in most cases M&E is mistaken for supervision and the team going out tend to not be equipped with the tools and the means to do a proper M&E the feedback from which could also serve as a training needs assessment (TNA). To this extend, in my role as advisor, I tend to develop M&E systems that will both look at progress in terms of outputs to meet the project objectives, but also to identify gaps that need to be strengthened.

Appendix 5.10b: V10 negative
The degree to which the human resources applies a standardised template for co-ordination and control for all business events to ensure delivery of the organisation's known (mission) and unknown (strategic intent).
Report: 5 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:25:08

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:2 [For instance in November 2010 ..] (9:9)
Codes: [V10-] [V9-]
For instance in November 2010 we got bad feedback from all levels of our staff that had attended a particular programme. The problem lay with the trainer who referred them to text books when they asked questions - they didn't get an interactive session going where our staff could ask about their specific problems and needs in relation to the training.

Stakeholder 11 - Paracon HR sales line manager - 6:13 [I find with my team they are f..] (66:66)
Codes: [V10-] [V12-] [V3-]
I find with my team they are focused on their own world and not outward looking. They feel threatened if they share information as if you know more than they do you might take their job.

Stakeholder 13 - HCI HR practitioner - 7:4 [Not surprisingly the quality o..] (22:22)
Codes: [V10-]
Not surprisingly the quality of the reverse communication/knowledge flow (bottom-up) from operational functions through HR to top management will obviously also affect future performance

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:26 [It is very hard to convince or..] (85:85)
Codes: [V10-] [V12-] [V2-] [V4-]
It is very hard to convince organisations that they need to really work that stand. They are not prepared to believe there is any other way to do it than what they have been doing

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:22 [Our consultants are project ma..] (55:55)
Codes: [V10-] [V2-] [V5-]
Our consultants are project managers and they drive the flow of information. We do not actively pursue cutting edge knowledge which may be a fault of ours.

Appendix 5.11a: V11
The level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events.
Report: 24 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:24:20

Stakeholder 13 - HCI HR practitioner - 7:1 [We firmly believe that compani..] (16:16)
Codes: [V11] [V5]
We firmly believe that companies that work towards becoming Talented Places 2Work4 collectively contribute to South Africa standing out from the crowd in a globally competitive business environment

Stakeholder 13 - HCI HR practitioner - 7:13 [The perception by local South ..] (28:28)
Codes: [V11] [V2-]
The perception by local South African business of their knowledge needs when compared to the knowledge being presented in overseas competitor countries such as Singapore and India, has been a historical problem for HCI Africa to overcome if they are to lead business talent interventions in South Africa. HCI Africa attempts to gauge what the South African market is ready to accept and in some cases this means curtailing what is available from overseas until the time is right if the event is to actually have a desired impact.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:6 [The CTHRC also routinely inclu..] (24:24)
Codes: [V1] [V11]
The CTHRC also routinely includes events-related content in its annual HR forum, presents at conferences and events dedicated to CPD activities for the sector, and hosts development meetings dedicated to the sector.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:7 [CTHRC is to be responsive to t..] (22:22)
Codes: [V1] [V11]
CTHRC is to be *responsive* to the labour market needs with an overall goal to "create a competitive and sustainable tourism workforce in Canada".

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:8 [Attached for your information ..] (28:28)
Codes: [V1] [V11]
Attached for your information is the just released study commissioned by our partner, Convention Industry Council along with a long list of other industry partners in the U.S. on the subject of the economic significance, definition and description of the meetings industry in the United States. The study situates the meeting planner in the broader mix of agents and stakeholders in the productive activity of meetings and selected events in the U.S. economy.

Stakeholder 14 - CTHRC (Canada) HR practitioner - 8:9 [Using a research methodology d..] (28:28)
Codes: [V1] [V11]
Using a research methodology developed previously in Canada, the study identifies and quantifies the relationships between the meetings industries and the tourism industries in the U.S. economy.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:3 [MPI training courses are focus..] (17:17)
Codes: [V11]
MPI training courses are focusing strongly on emerging economies such as Asia and Brazil. Brazil has the World Cup and the Olympics.
Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:6 [MPI has shifted gears and deve..] (27:27)
Codes: [V1] [V11] [V7]
MPI has shifted gears and developed a multi-layered content generation strategy that focuses on helping the global meetings and events industries forecast trends and activate change on a large scale;

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:3 [EXSA start CPD from this year ..] (18:18)
Codes: [V10] [V11]
EXSA start CPD from this year starting with the Consumer Protection Act, which will have a major impact on events.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:14 [SANS 10366 and the Events Safe..] (59:59)
Codes: [V11] [V9]
SANS 10366 and the Events Safety bill which now dictates that there is a requirement for both experience and a qualification

Stakeholder 3 - Business events non-professional organiser - 12:2 [CCI links people inside the co..] (14:14)
Codes: [V11]
JCCI links people inside the country to those outside, those outside to those inside, and the JCCI is a type of repository of business knowledge about South African business and overseas business possibilities.

Stakeholder 3 - Business events non-professional organiser - 12:4 [This exercise requires three m..] (20:20)
Codes: [V11]
This exercise requires three members of JCCI and in this way JCCI supports with its corporates and local government, grass roots business. PLATO has thirty-four groups world-wide. PLATO trained JCCI on how to run the project.

Stakeholder 3 - Business events non-professional organiser - 12:6 [PLATO uses its global network ..] (24:24)
Codes: [V11]
PLATO uses its global network of business members to expose the South African traders' products and it has leant to the businessmen becoming exporters.

Stakeholder 3 - Business events non-professional organiser - 12:7 [PLATO Belgian is itself a cham..] (24:24)
Codes: [V1] [V11] [V12]
PLATO Belgian is itself a chamber of commerce linked to chambers of commerce across the world. Thus the network has a ready pool of potential buyers for the South African products.

Stakeholder 3 - Business events non-professional organiser - 12:8 [The JCCI nurtures the business..] (26:26)
Codes: [V1] [V11] [V12]
The JCCI nurtures the business relationships for these mini exporters by maintaining the JCCI's relationship with overseas chambers of commerce. PLATO holds terrific potential for micro-exporters via JCCI.

Stakeholder 8 - ASATA CEO manager - 16:8 [the meetings are required thro..] (41:41)
Codes: [V11] [V2]
The meetings are required through the terms of the Constitution but for the best part ASATA takes the initiative on most events

Stakeholder 8 - ASATA CEO manager - 16:9 [We compete with other associat..] (45:45)
Codes: [V11] [V2]
We compete with other associations, corporate brands and commercial conference organisers and only through continuous dialogue with our base do we get the support that will ultimately ensure our position. This dialogue can only happen through the types of events we host.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:1 [I am generally the one organiz..] (36:36)
Codes: [V1] [V11]
I am generally the one organizing in-house "business" events and often become the facilitator of these meetings. Such events are generally tools used as part of my terms of reference in: providing technical assistance, advising government, achieving common understanding, capacity building, coordination of development planning, compiling and editing training materials and course design, assisting working groups, imparting knowledge, etc

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:8 [using consultants to abstract ..] (58:58)
Codes: [V11] [V2]
Using consultants to abstract and compile information has the complexity of conflict of interest in "intellectual property rights". The challenge here is that the consultant, in most cases, is gleaning and profiting from the very information for which they are being paid for,

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:12 [Events like workshops and semi..] (70:70)
Codes: [V11] [V2] [V4] [V7]
Events like workshops and seminars provide a broader exposure to a spectrum of possible solutions to real life problems that the worker can solve and so, yes there is continued need for such events to add the in-service, hands on building blocks and the tailor made tools and technical solutions that college and university educations do not provide

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:13 [currently exploring is the anc..] (72:76)
Codes: [V1] [V10] [V11]
Currently exploring is the anchor this type of training as short in-service cadre development courses held at recognized colleges so that:
a) The capacity to continue the training lives on at the college and
b) The training can become building blocks to a certificate and
The college will institutionalize the topic by mainstreaming it in their future curriculum.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:23 [it is important to consider, e..] (112:112)
Codes: [V11] [V9]
It is important to consider, eventing may not have direct financial benefit to the participant, however, it certainly does have economic spin-off to the provisioning community in the form of: transport, hotels, catering services, bars, restaurants and other local tourism facilities. Transport (ie public as well as fuel for self-drive vehicles), hotels and catering services are straight forward direct economic consequences of holding an event at a venue away from home base. However, there are also indirect economic benefits associated with attending a workshop which brings with it allowances, and therefore a few extra USD to spend. As participants travel away from home to an event, they general generate an element of local tourism around the event and as is typical, spend part of their allowances on entertainment at local bars, meat BBQ restaurants and other discos and night clubs, with all the associated entertainment (including prostitution).

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:33 [OVIs (or ROI) are a key tool f..] (156:156)
Codes: [V11] [V4] [V8]
OVIs (or ROI) are a key tool for measuring and monitoring (M&E) success... or a measure of achievement of outputs and are reported during project steering processes. Likewise the same approach is adopted by governments in their medium term expenditure framework (MTEF) planning system where OVIs are key monitoring tools of outputs achieved for fund spent.
Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:35 [Generally we ensure that strat..] (167:167)
Codes: [V11] [V4]

Generally we ensure that strategic planning is done in line with sector policies, and these policies may often be a top-down development, but, more and more through PRA processes, even sector policies are becoming more stakeholder oriented through wider consultation processes.

Appendix 5.11b: V11 negative
The level of the effect of value creation from business events for a national economy not only from spinoff hospitality value but from improved organisational performance in industries using business events.
Report: 3 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:23:34

Stakeholder 13 - HCI HR practitioner - 7:16 [In South Africa business it is..] (30:30)
Codes: [V11-] [V2-]
In South Africa business it is generally about short term profit wins not a balance of short term and long term strategic interventions leading to future profit. Sacht noted that this might be short-sighted when viewed against external competitors' use of knowledge to gain business advantages in countries such as Singapore and India.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:11 [Events are a big contributor t..] (57:57)
Codes: [V11-]
Events are a big contributor to the economy but there is no research so no-one including the government believes how much we contribute.

Stakeholder 8 - ASATA CEO manager - 16:11 [Often development/training is ..] (49:49)
Codes: [V11-] [V2-] [V5-]
Often development/training is seen as a pain and therefore the necessary processes are required to maintain an environment that embraces learning.

Appendix 5.12a: V12 positive
The degree to which the organisation sees a business event as a work process that adds value in an intangible manner that drives improved tangible outputs in the organisational value chain
Report: 41 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:22:52

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:1 [Every time some one goes on a ..] (9:9)

Codes: [V10] [V12] [V3]
Every time some one goes on a course we get them to debrief to us afterwards. We lead with questions and we review from the time they heard that they were going to attend the training.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:5 [A dedicated department, the Kn..] (14:15)
Codes: [V12] [V2]
A dedicated department, the Knowledge Resource center drives the initiatives around the sharing of information already in the organization. Information Systems & Technology provides the architecture and technology platforms in order to distribute the knowledge across the organisation

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:6 [The attendance of conferences ..] (17:17)
Codes: [V12] [V2]
The attendance of conferences and seminars that don't have a free entry or that requires travel and accommodation fees, has to be pre-approved by the Executive Director. A report is required that stipulates the motivation, benefits and advantages before the time. On return the attendees of such initiatives need to submit a report on their findings to the Executive Director. The post report contains the presented content and as well as opportunities where the obtained knowledge can be applied to.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:9 [We pull our staff together. Fo..] (28:28)
Codes: [V10] [V12] [V2]
We pull our staff together. For instance we will send a developer on training and then we pair him with another developer who didn't go on the training but they work on the same job. The one who learnt then teaches the one who didn't go on training. Then on the next project we separate them and join them to some-one else who hasn't been on the course so we multiply the knowledge value.

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:15 [Resources from the same job fa..] (44:44)
Codes: [V10] [V12] [V5]
Resources from the same job families don't attend all the same training course, in order to bring a wider knowledge into the environment that can be shared amongst colleagues

Stakeholder 16 - City of Cape Town IT manager business relationships - 1:20 [We use the social network and ..] (72:72)
Codes: [V12] [V5]
We use the social network and websites to get quick answers.

Stakeholder 15 - City of Cape Town IT manager distributed computing - 2:15 [he problem with this is that i..] (34:34)
Codes: [V10] [V12] [V3] [V9]
The problem with this is that it is still just a research paper so unless it is discussed within a gathering of people that is all it is. The only time that it is really useful is if it is shared with others in face-to-face meetings. We get a research analyst in the room and now we have the person who created the research and we can cross question and they too cross question us. Others sit around the table and they are making their own notes about this shared experience. Now the team have this shared experience - we don't capture this in a repository for others but these people have a better knowledge with all the others in the room.

Stakeholder 10 - marketing professional - 3:5 [A single marketing campaign wi..] (46:46)
Codes: [V10] [V12]
A single marketing campaign will not show directly in the organisation's financial performance, in most cases. Also campaigns and activities are instruments in brand building where profit may come later.

Stakeholder 10 - marketing professional - 3:9 [It seems that CEOs, CFOs and s..] (75:75)
Codes: [V12] [V2]

It seems that CEOs, CFOs and senior managers are not marketers and they don't recognise the value of marketing. The marketing value is easy to cut because it is so hard to track and prove the intangible value created by marketing.

Stakeholder 9 - MA(SA) CEO - 4:4 [To what degree is there a dema..] (19:21)
Codes: [V12] [V2]
To what degree is there a demand by employees for access to continued professional development and business events run by a community of practice /association? 100% correlation

Stakeholder 9 - MA(SA) CEO - 4:6 [What role do you believe HR fu..] (27:29)
Codes: [V12] [V2] [V7]

What role do you believe HR functions have to play in creating company viability through encouraging participation in business events (workshops, conferences, training, team-building)? A core role - as explained above. Either the HR or whatever other person or department is in charge of HR development.

Stakeholder 9 - MA(SA) CEO - 4:9 [CPD is a core factor in being ..] (65:65)
Codes: [V12] [V2] [V7]
CPD is a core factor in being a professional. It is an ethical notion that if you are offering yourself as a marketer to an employer or employee, you need to be completely up to date with developing trends and the latest in marketing trends.

Stakeholder 9 - MA(SA) CEO - 4:10 [brand and reputation are intan..] (73:73)
Codes: [V12] [V2]
Brand and reputation are intangible assets of an organisation. If the right marketer is running the marketing they will ensure that risk caused by any marketing activities to the brand and reputation is understood and minimised. Marketers' actions should be strategically aligned to this goal.

Stakeholder 12 - Paracon HR sales director - 5:3 [The type of business dictates ..] (36:36)
Codes: [V12] [V7]
The type of business dictates the application of the contractor's expertise to deliver the organisation's business ideas. The CIO acts as the link to make the organisation's strategy happen.

Stakeholder 12 - Paracon HR sales director - 5:7 [We find that contract renewals..] (58:58)
Codes: [V12] [V2] [V6]
We find that contract renewals for those contractors who are applying their training are more successful - the client wants them to continue.

Stakeholder 12 - Paracon HR sales director - 5:12 [I find that the annual IT conf..] (74:74)
Codes: [V10] [V12] [V9]
I find that the annual IT conference GovTech provides a suitable level of content. I find the presenters are approachable for more knowledge. The conference is important for relationship building with our clients. Topics are presented that are important for the client and being there to discuss these issues at the time with the client ahs great value.

Stakeholder 11 - Paracon HR sales line manager - 6:18 [These investments enable a com..] (86:86)
Codes: [V12] [V6] [V8]
These investments enable a company to reduce staff turnover and retention enables the organization to function more effectively and efficiently if HR is not continuously involved in recruiting for positions and in turn the viability of the company is sound as when Client's hear that you are looked after by an organization it increases their confidence in the product/service they are buying, in this case contractors.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:9 [It would be great but meeting ..] (48:48)
Codes: [V10] [V12] [V4] [V7]

It would be great but meeting and events are considered as strategic platforms for HR development, marketing and communication

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:13 [Events have to be considered i..] (52:52)
Codes: [V12] [V3] [V4] [V8]
Events have to be considered in terms of cash. How do you get the return on time and money from these connections? The most precious commodity to harness is the limited time available where people meet people.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:15 [but business is now focusing o..] (56:56)
Codes: [V12] [V4] [V5]
Business is now focusing on return on investments. There is a huge shift underway to this point of view.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:16 [Business measures itself on ou..] (56:56)
Codes: [V10] [V12] [V4] [V6]
Business measures itself on outputs, so must event organisers. This is a key shift in thinking for meeting organisers and hospitality.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:17 [The connections have to be man..] (61:61)
Codes: [V10] [V12] [V2] [V6]
The connections have to be managed - a term like the Chief Connections Officer would be appropriate. This person would manage connections focused on the outputs they will bring.

Stakeholder 4 - CEO of the largest global business event professional association 29Jan2011.doc - 9:26 [if you are the Chief Connectio..] (72:72)
Codes: [V12] [V4] [V6]
If you are the Chief Connections Officer, the event has to be designed so that the virtual attendees have opportunity to meet others. This would be a critical part of their job - to connect people for optimum output from the event.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:5 [Trade Shows are the most direc..] (26:26)
Codes: [V1] [V12] [V2]
Trade Shows are the most direct form of marketing available therefore have a permanent position in the marketing mix. Trade shows deliver tangible results**.**

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:10 [events can not only be annual ..] (51:51)
Codes: [V1] [V12] [V4] [V8]
Events can not only be annual but annual and regional. This is becoming common in South Africa and is standard across the USA states.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:18 [International best practise su..] (77:77)
Codes: [V1] [V12] [V2] [V4]
International best practise suggests that the results of trade show exposure can be multiplied 300% by setting multiple objectives (7-12).

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:19 [The exhibition industry has sh..] (79:79)
Codes: [V1] [V12] [V2] [V9]

The exhibition industry has shown more consistent growth than any other marketing channel but it is not being leveraged. Exhibitions are the only medium where you can demonstrate the product

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:24 [This is very powerful with con..] (81:81)
Codes: [V12] [V2] [V9]
This is very powerful with consumer brand building. Multi-media are used extensively to facilitate experiential marketing.

Stakeholder 7 - IOD business events manager - 11:5 [We play a CPD role not only th..] (21:21)
Codes: [V1] [V12] [V2] [V4]
We play a CPD role not only through events but also our training.

Stakeholder 7 - IOD business events manager - 11:7 [By equipping Directors with th..] (24:24)
Codes: [V12] [V6]
By equipping Directors with the skills to make informed decisions in the Board room we can help to ensure better business decisions.

Stakeholder 3 - Business events non-professional organiser - 12:7 [PLATO Belgian is itself a cham..] (24:24)
Codes: [V1] [V11] [V12]
PLATO Belgian is itself a chamber of commerce linked to chambers of commerce across the world. Thus the network has a ready pool of potential buyers for the South African products.

Stakeholder 3 - Business events non-professional organiser - 12:8 [The JCCI nurtures the business..] (26:26)
Codes: [V1] [V11] [V12]
The JCCI nurtures the business relationships for these mini exporters by maintaining the JCCI's relationship with overseas chambers of commerce. PLATO holds terrific potential for micro-exporters via JCCI.

Stakeholder 3 - Business events non-professional organiser - 12:14 [very course gets a unique CPD ..] (40:40)
Codes: [V12] [V2] [V7]
Every course gets a unique CPD number of recognition from the engineering council of South Africa.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:2 [his is underpinned by the orga..] (16:16)
Codes: [V12] [V4] [V5]
This is underpinned by the organizations view that properly executed project management provides competitive advantage in terms of strategy delivery and change capability.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:11 [training value may be (is) lim..] (33:33)
Codes: [V12] [V3-]
Training value may be (is) limited if the environment to which a student returns does not support the application of learned processes, knowledge, skills etc.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:12 [raining provides (only) one as..] (33:33)
Codes: [V10] [V12]
Training provides (only) one aspect towards competitive advantage for both the individual and the organisation concerned.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:23 [Organisations need to adapt ve..] (55:55)
Codes: [V12] [V2] [V5]
Organisations need to adapt very fast these days to survive. The one way that you can do this is to build in a capability to change quickly and to bring in skills that help drive change quickly.

Stakeholder 6 - Xpert professional trainer but a non-professional event organiser - 15:24 [External drivers are forcing o..] (55:55)
Codes: [V12] [V2]
External drivers are forcing organisations to use project managers to drive quick adaptations. They need to make specific projects happen fast

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:10 [In addition, events of this na..] (62:62)
Codes: [V1] [V12] [V3] [V5]
In addition, events of this nature in development are generally used as a key to the "participatory" process of consultation of a wide spectrum of stakeholders to get their views in project design, planning, etc. Eventing of this nature therefore allows a broad exchange leading to a consolidation of ideas, opinions, political expressions, etc and can be used to brainstorm on problem solving (eg SWOT analysis) or provide technical inputs and the like. In this way development partners support during project design and subsequent planning takes into consideration the will and need of the people, and thereby is more responsive to needs on the ground of the target group.

Stakeholder 17 - Academic, not-for-profit, Tanzania - 17:24 [As a facilitator, as part of m..] (118:118)
Codes: [V10] [V12] [V4] [V9]
As a facilitator, as part of my role as technical adviser, yes, I prepare the workshop meeting handouts with the clear structure of the objectives, expected outputs, and the structure of the workshop and the type of questions or problems that we need to address and answer collectively so as to solve a problem, fill a knowledge gap, or develop a way forward.

Stakeholder 18 - Academic, research, USA - 18:2 [For us, the advantages are aca..] (24:24)
Codes: [V12] [V8]
For us, the advantages are academic (access to new information, exchange of ideas), not economic or organizational.

Appendix 5.12b: V12 negative
The degree to which the organisation sees a business event as a work process that adds value in an intangible manner that drives improved tangible outputs in the organisational value chain
Report: 6 quotation(s) for 1 code

HU: Analysis interviews May2012
File: [C:\Documents and Settings\Administrator\My Documents\Scientific Soft...\Analysis interviews May2012.hpr6]
Edited by: Super
Date/Time: 2012-07-02 10:21:46

Stakeholder 10 - marketing professional - 3:11 [I do not deal with marketers w..] (114:116)
Codes: [V12-] [V2-] [V9-]
I do not deal with marketers when planning business events - why? For example, no one checks the website we create for their organisation and they don't check where we put their branding onsite - why? There is a lack of understanding as to how to get to people. We see you as a separate industry. We see you 'doing your own thing'. There is a silo mentality from marketers. That's why we have to get people from different marketing environments to meet and talk to each other

Stakeholder 11 - Paracon HR sales line manager - 6:13 [I find with my team they are f..] (66:66)
Codes: [V10-] [V12-] [V3-]
I find with my team they are focused on their own world and not outward looking. They feel threatened if they share information as if you know more than they do you might take their job.

Stakeholder 13 - HCI HR practitioner - 7:5 [HCI Africa notes that in most ..] (22:22)
Codes: [V12-]
HCI Africa notes that in most South African business it is not only the HR function that had become uncoupled from the strategic and business planning processes. Often the IT function and the marketing and communication function are affected in the same way

Stakeholder 13 - HCI HR practitioner - 7:6 [HCI Africa believes that HR in..] (24:24)
Codes: [V12-] [V7-]
HCI Africa believes that HR interventions at the operational level will continue to be re-active responses unless efforts are made to address communication between the top management, HR and operational managers.

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:26 [It is very hard to convince or..] (85:85)
Codes: [V10-] [V12-] [V2-] [V4-]
It is very hard to convince organisations that they need to really work that stand. They are not prepared to believe there is any other way to do it than what they have been doing

Stakeholder 1 - Business events professional organiser 01 Nov 2011.doc - 10:27 [he concept of post-show promot..] (85:85)
Codes: [V12-] [V8-]
The concept of post-show promotions and budget to follow up those leads is completely unheard of in South Africa.

Appendix 6: Quantitative survey instruments

Appendix 6a: All respondents answer pages 1 to 6 inclusive

Welcome to the business events evaluation survey

Welcome to this PhD research survey.
The survey is being conducted by a PhD student at North-West University in South Africa.
contact: africaresearch1@gmail.com
School of Business Management
Potchefstroom, SouthAfrica.
Tel: +27 18 299 1806
www.nwu.ac.za

The research is exploring the value of business tourism events (conferences, meetings, seminars, exhibitions, trade shows, training) in an organisation's performance.

We are asking for your perceptions (your personal experiences)with business events - every opinion is valuable.

Your individual responses are confidential used only by myself to compliment the PhD with your thoughts and perceptions of the current situation.

I thank you for your support as I know we are all inundated by emails in this age.

If you wish to learn more about this survey confidentiality please link to
http://www.surveymonkey.net/mp/policy/privacy-policy.

This online survey is also governed by the Consumer Protection and ICT acts of South Africa which give you the right to opt-out of the survey now.

***1. Choose to participate in the survey ?**

- ○ I will participate in this survey - I agree I have read the privacy policies with regards to this research
- ○ I will not participate in this survey

The Kindle draw for a lucky respondent

This survey is exploring the value of business events in an organisation's performance.
A kindle is offered to a respondent in a random draw.

***2. Have you been involved in any of the following business events: conference, meeting, seminar, trade show, exhibition, seminar, training ?**

- I have been involved in a business event
- I have not been involved in one of these events

Page 2

Survey complete

Thank-you for participating in this research.

If you have entered the kindle draw and are the winner you will be contacted by the 31 March 2012. We will be contacting only the winner.

Click on "EXIT THIS SURVEY" top right hand-side of your screen or "DONE" below - to leave the survey now.

Enter Kindel draw option

If you miss compulsory information a warning in red will appear at the top of the page

You cannot continue until you provide the information

3. The business event types considered are: meetings, conferences, seminars, exhibitions, trade shows, training.

If you wish to remain anonymous please skip the entry of your email address.
If you wish to be entered into a draw for a kindle, please enter your email address.
Only a completed survey will be considered for the draw.

Please note the kindle can only be awarded to countries that support:
1) Amazon.com - www.amazon.com (Kindle Fire - Full Color 7" Multi-touch Display, Wi-Fi - non-keyboard)
2) Southern Africa that support "Incredible Connection" (Kindle sole distributors) (Amazon Kindle Wifi 6" - Non-Keyboard)

*****no responsibility is taken for your country adding charges to the kindle delivery e.g. customs, post office charges etc.**

The survey creator reserves the right to award the kindle.
The kindle is awarded by a random draw after the survey closes.
The survey is closing shortly on 31st March 2012 so please respond now.

All information provided in this survey is confidential and will only be used for this research.

Email Address:

Page 3

Demographics

THIS SURVEY WILL ONLY TAKE 10-15 MINUTES TO COMPLETE

***4. Which category below includes your age?**

- 18-29
- 30-39
- 40-49
- 50-59
- 60-69
- 70 or older

Type of industry

Tell us what type of business your organisation is most involved in.

***5. What type of organisation do you work for?**

- A predominantly service orientated organisation
- A predominantly manufacturing orientated organisation

Page 5

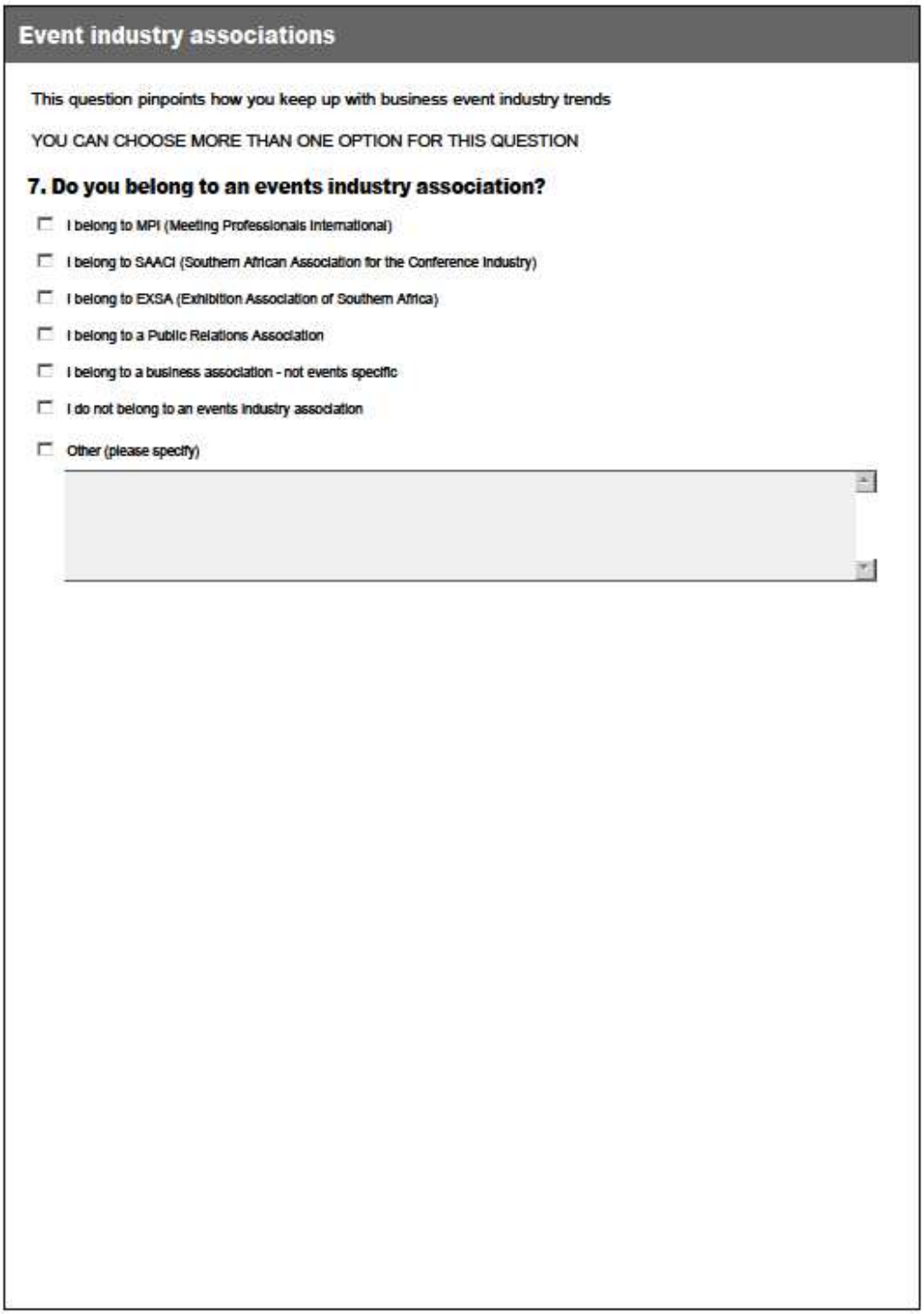
What function do you typically work at in your organisation

***6. What is your main function within your organisation?**

- ○ Business event organisation function
- ○ Human resource function
- ○ Operational management function
- ○ Strategic management function
- ○ Information technology (IT) function
- ○ Academic function
- ○ Other (please specify)

Page 6

Appendix 6b: Event organisers answer pages 7 to 12 inclusive



Event industry associations

This question pinpoints how you keep up with business event industry trends

YOU CAN CHOOSE MORE THAN ONE OPTION FOR THIS QUESTION

7. Do you belong to an events industry association?

- ☐ I belong to MPI (Meeting Professionals International)
- ☐ I belong to SAACI (Southern African Association for the Conference Industry)
- ☐ I belong to EXSA (Exhibition Association of Southern Africa)
- ☐ I belong to a Public Relations Association
- ☐ I belong to a business association - not events specific
- ☐ I do not belong to an events industry association
- ☐ Other (please specify)

Page 7

Event industry qualification

YOU MAY CHOOSE MORE THAN ONE ANSWER FOR THIS QUESTION

***8. How have you qualified for the business event organisation function?**

- ☐ Professional business events industry qualification (e.g. CMP, CEMP, CMM or similar)
- ☐ Professional Public Relations industry event organisation qualification
- ☐ Tertiary general events qualification (Certificate, Diploma, Degree)
- ☐ Many years of events experience in the events industry

Event design

YOU CAN MAKE MORE THAN ONE CHOICE FOR EACH ROW IN THIS QUESTION.

Assume your client owns this business event.

***9. Who typically chooses the following in the design of the business event? (This question is asking who works with you - if anyone - on the items below. This question is not referring to sign-off/authorisations. This is the step before sign-off)**

	Human Resources (HR)	Myself - the event organiser	The knowledge manager	Managers other than HR or the knowledge manager	The manager's personal assistant	Public Relations	Marketing	Other
The organisational performance criteria required for the business event (e.g. a Balanced Score card type instrument)	☐	☐	☐	☐	☐	☐	☐	☐
The business event content	☐	☐	☐	☐	☐	☐	☐	☐
The business event speakers	☐	☐	☐	☐	☐	☐	☐	☐
The business event venue	☐	☐	☐	☐	☐	☐	☐	☐
Who attends the business event	☐	☐	☐	☐	☐	☐	☐	☐
The business event length (days)	☐	☐	☐	☐	☐	☐	☐	☐
The business event geographic location (near/in the office or out-of-town)	☐	☐	☐	☐	☐	☐	☐	☐
The business event break-aways/social events/ smaller sub-meetings	☐	☐	☐	☐	☐	☐	☐	☐
The business event website (pre-registration, programme details etc)	☐	☐	☐	☐	☐	☐	☐	☐

10. If you answered "OTHER" in the previous question - please tell us who in your client's organisation typically gives you input for the business event.

The Human Resource (HR) function input to your client's business event

Please give your perceptions of how your client's organisation uses the HR function in event organisation

***11. How important is the client's Human Resource department typically considered in event organisation ?**

	Not at all Important	Slightly Important	Important	Very Important	Extremely Important
HR involvement in defining the organisation's knowledge acquisition strategies from business events	○	○	○	○	○
HR's involvement in defining the content of the organisation's business events	○	○	○	○	○
HR's recommendations as to which employee(s) attend a business event	○	○	○	○	○
HR's management of a post-event strategy to ensure new knowledge from a business event becomes available to the organisation	○	○	○	○	○
HR matching employee knowledge needs to the strategic intentions of the business event	○	○	○	○	○
Feedback (from the event organiser) to include HR at the end of the business event	○	○	○	○	○

Event organisation post-event

***12. How important are your post event reports to your client ?**

	Not at all Important	Less Important	Important	Very Important	Extremely Important
A budget to expenditure report (return-on-investment ROI)	○	○	○	○	○
A return-on-objectives report (ROO)	○	○	○	○	○
A post event review meeting	○	○	○	○	○
A post event knowledge business events strategy (i.e. to ensure employees are using their new knowledge)	○	○	○	○	○
Adding the business event feedback to the organisational performance criteria (e.g. a Balanced Score card type instrument)	○	○	○	○	○

Identifying the Intangible Needs of Organisations

YOU HAVE REACHED THE LAST QUESTION OF THE SURVEY.
I now need your feedback to try and make defining return-on-objectives (ROO) easier.

The return-on-investment equation (Profit=reward-cost) has been used extensively for years to show the expenditure as regards to budget for business events.

However there is now a strong demand for business event organisers to prove the effect of a business event on INTANGIBLE aspects of an organisation.

"Intangible" means hard to define - e.g. an intangible OBJECTIVE of a business event would be: 'strengthening my firm's relationship with customers'

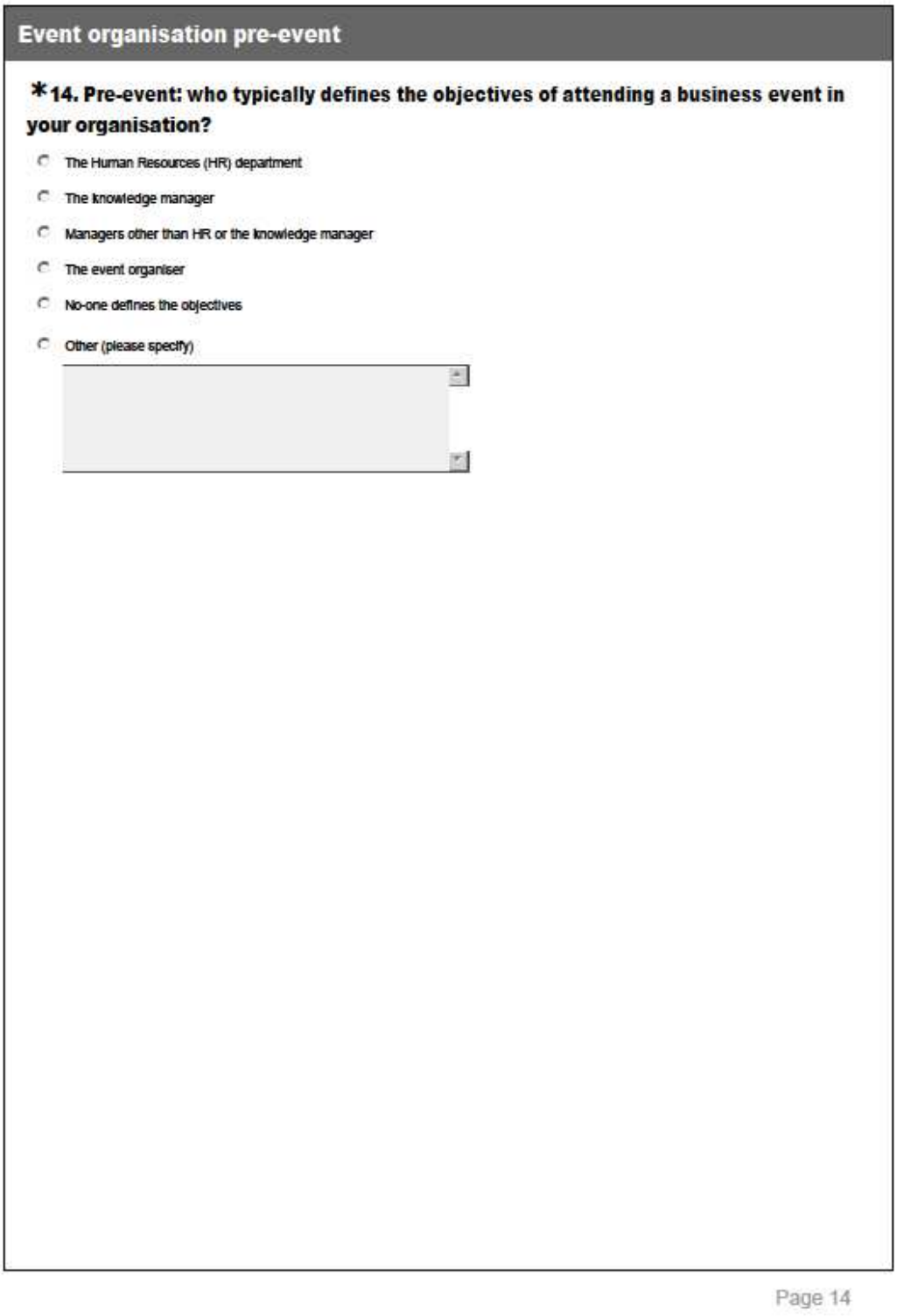
This is complex and firms themselves often find it hard to state exactly what they want.

***13. How important would generic processes to manage the intangible expectations of a business event be to you and your client?**

	Not at all Important	Less Important	Important	Very Important	Extremely Important
A process to define the INTANGIBLE business event objectives e.g. Improving team spirit	○	○	○	○	○
A process to define the drivers that will deliver these INTANGIBLE objectives	○	○	○	○	○
A process to define the variables that influence changes in INTANGIBLES e.g. Improving the relationship of employee & organisational culture	○	○	○	○	○
Short descriptors of the intangible processes: as to how they improve the organisation's performance	○	○	○	○	○

Page 12

Appendix 6c: Event attendees answer pages 14 to 21 inclusive



Event organisation pre-event

*14. Pre-event: who typically defines the objectives of attending a business event in your organisation?

- The Human Resources (HR) department
- The knowledge manager
- Managers other than HR or the knowledge manager
- The event organiser
- No-one defines the objectives
- Other (please specify)

Page 14

The Human Resource (HR) function in knowledge strategy

Please give your perceptions of how your organisation uses the HR function in knowledge acquisition

***15. Please indicate how important you believe the HR function input is in business events.**

	Not at all important	Slightly important	Important	Very important	Extremely important
HR involvement in defining the organisation's knowledge acquisition strategies from business events	○	○	○	○	○
HR involvement in defining the content of the organisation's business events	○	○	○	○	○
HR recommendations as to which employee(s) attend a business event	○	○	○	○	○
HR management of a post-event strategy to ensure new knowledge from a business event becomes available to the organisation	○	○	○	○	○
HR matching employee knowledge needs to the strategic intentions of the business event	○	○	○	○	○
Feedback (from the event organiser) to include HR at the end of the business event	○	○	○	○	○

Business Event Attendees

Please give your perceptions of business events from your own experience

***16. Do you agree with the following statements ?**

	Strongly disagree	Moderately disagree	Neither disagree or agree	Moderately agree	Strongly agree
Event organisers should use an events evaluation model for every event (e.g. Phillips ROI model (return-on-investment))	○	○	○	○	○
My manager briefs me on the event objectives before I attend	○	○	○	○	○
Some managers fear employees will know more than them if they send them to an event	○	○	○	○	○
Some of the people I work with are better at explaining than others	○	○	○	○	○
The event content is more important than the venue to me to learn	○	○	○	○	○
The event venue is equally as important as the event content for me to learn	○	○	○	○	○
Informal meetings within the business event are important for me to learn	○	○	○	○	○
The HR department has designed my professional development path with me	○	○	○	○	○
My professional development path has relevance to the business events I attend	○	○	○	○	○
I quickly forget what I learn if I don't use it at work	○	○	○	○	○
My organisation encourages me to share my learning	○	○	○	○	○
I am as comfortable holding online meetings as I am holding face-to face meetings	○	○	○	○	○

Your Organisation's Input to Business Event Design

This section gains your perspective of the relationship between organisations and business event design.

***17. Who typically defines the design elements of business events from your organisation ?**

	Human Resources (HR)	The event organiser	Managers other than HR or the Knowledge manager	The knowledge manager	PR & Marketing	Don't know	Other
The business event content	○	○	○	○	○	○	○
The business event branding (if any)	○	○	○	○	○	○	○
The business event speakers	○	○	○	○	○	○	○
The business event venue	○	○	○	○	○	○	○
The target market as to who attends the business event	○	○	○	○	○	○	○
The business event length (days)	○	○	○	○	○	○	○
The business event geographic location (near/in the office or out-of-town)	○	○	○	○	○	○	○
The business event break-aways/ smaller sub-events	○	○	○	○	○	○	○
The business event website (pre-registration, programme details etc)	○	○	○	○	○	○	○
The employees from your department/section/function who attend	○	○	○	○	○	○	○

If you have selected "OTHER" please explain

Page 17

Leveraging social interactions to gain new knowledge

When you attend a business event (meeting, conference, seminar, exhibition, trade show, training) what are your perceptions of the importance of reinforcing social relationships.

***18. At a business event, how important do you consider the following in improving your work performance?**

	Not at all Important	Slightly Important	Important	Very Important	Extremely Important
Strengthening relationships i.e. trust, shared experiences, networking opportunities, shared interests	○	○	○	○	○
Receiving guidance from others i.e. advise, mentoring, informal feedback, ideas, recommendations	○	○	○	○	○
Receiving stimulation to work better i.e. excitement, motivation, re-assurance, validation	○	○	○	○	○
Receiving work pertinent information i.e. subject matter knowledge, know-how, lessons learned	○	○	○	○	○
Developing new ideas from personal contact with your industry experts	○	○	○	○	○
Developing new ideas from personal contact with experts from industries related to yours	○	○	○	○	○
Developing new ideas from personal contact with experts from other countries	○	○	○	○	○
Feeling part of the event community at the business event helps me learn (feeling happy and excited when at the event -a sense of loss when you leave)	○	○	○	○	○
Informal social interactions with colleagues,customers, competitors as side-events to the main face-to-face event to build relationships? (side-event meetings/discussions,social evenings/events)	○	○	○	○	○
Social interactions through face-to-face meetings build trust within a business relationship	○	○	○	○	○
Social interactions through online meetings technology build trust in a business relationship	○	○	○	○	○

Ensuring my Professional Development

Business events are a good tool to ensure your own Continued Professional Development (CPD).

This question looks at the relationship between you and your organisation as regards your CPD.

***19. My organisation's knowledge development and my continued professional development knowledge development (CPD)**

	Agree	Disagree	Don't know
My organisation uses a performance management tool (like the Balanced ScoreCard)	○	○	○
My organisation has a person dedicated to managing the organisation's knowledge	○	○	○
I undertake my own continued professional development (CPD)	○	○	○
My organisation encourages me to undertake continued professional development (CPD)	○	○	○
My industry association gives me access to continued professional development (CPD)	○	○	○

Leveraging your organisation's systems to integrate new knowledge gained at...

A business event for this survey is a meeting, conference, seminar, exhibition, trade show, training.

***20. How important does your organisation consider the following in supporting new knowledge you have acquired from a business event?**

	Not at all important	Slightly important	Important	Very important	Extremely important
Having a formal knowledge management system (e.g. this standardises the capture of my new knowledge making it available to others)	○	○	○	○	○
Using my new knowledge to improve organisational functions (e.g. analysis, decision-making, planning)	○	○	○	○	○
Encouraging me to 'flow' the new knowledge myself through the organisation (e.g. collaboration, communication, updating others if I am an expert)	○	○	○	○	○
Integrating my new knowledge into existing information normative management systems (e.g. databases, policies, processes)	○	○	○	○	○
Aligning my business event attendance to improving my workplace performance	○	○	○	○	○

Copy of page: Identifying the Intangible Needs of Organisations

YOU HAVE REACHED THE LAST QUESTION OF THE SURVEY.
I now need your feedback to try and make defining return-on-objectives (ROO) easier.

The return-on-investment equation (Profit=reward-cost) has been used extensively for years to show the expenditure as regards to budget for business events.

"Intangible" means hard to define - e.g. an intangible OBJECTIVE of a business event would be: 'strengthening my firm's relationship with customers'

Describing INTANGIBLES is hard so is explaining your expectation of improving various intangibles from business event attendance.

***21. How important would having a set of generic processes to define intangible expectations of business event attendance be to you ?**

	Not at all important	Less important	Important	Very important	Extremely important
A process to define the INTANGIBLE business event objectives e.g. improving team spirit	○	○	○	○	○
A process to define the drivers that will deliver these INTANGIBLE objectives	○	○	○	○	○
A process to define the variables that influence changes in INTANGIBLES e.g. improving the relationship of employee & organisational culture	○	○	○	○	○
Short descriptors of the intangible processes: as to how they improve the organisation's performance	○	○	○	○	○

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Appendix 7: Email requests for survey participation

Appendix 7a: The typical quantitative introductory email sent to individuals

From: Peta Thomas [mailto:totalimpact@iafrica.com]
Sent: 30 January 2012 09:22 AM
To: 'peter.green@infixion.co.za'; 'robinson@kmmtravel.co.za'; 'teresa@lithacommunications.co.za'; 'nthipi@modmanagement.co.za'; 'patrickc@oasys.co.za'
Subject: Business Events Support & Organisers - PhD Survey: Business events and Organisational Performance
Importance: High

Dear Event Organisers and Organistions that Host business events,

I am a member of SAACI and I am based in Johannesburg South Africa.
I am doing a Phd on the value of business events to organisations and would love your help **– there is a Kindle to a lucky respondent.**

Working events has made me realise there are some big gaps between organisations and their perceptions of what we do.
So this is my PhD and please can I ask you all to take the survey and pass it onto others.
You can pass it onto both organisations you arrange events for and event organisers.
Thank you for your help – the results are in the public domain and would be available towards the end of 2012 from myself.

Kindest regards,
Peta Thomas
South Africa

WELCOME TO THIS PHD RESEARCH SURVEY – a Kindle for a lucky respondent.
Click on or, Cut & Paste, the following link into your Internet browser to enter the survey.
SURVEYMONKEY LINK: https://www.surveymonkey.com/s/Business_event_value

The survey is being conducted by a PhD student at North-West University in South Africa.
Contact: africaresearch1@gmail.com
School of Business Management
Potchefstroom, South Africa.
Tel: +27 18 299 1806
www.nwu.ac.za

The research is exploring the value of business tourism events (conferences, meetings, seminars, exhibitions, trade shows, training) in an organisation's performance.
We are asking for your perceptions (your personal experiences) with business events - every opinion is valuable. Your individual responses are confidential used only by myself to compliment the PhD with your thoughts and perceptions of the current situation.

You may opt to enter a KINDLE draw.
Please note the kindle can only be awarded to countries that support:
1) Amazon.com - www.amazon.com (Kindle Fire - Full Color 7" Multi-touch Display, Wi-Fi - non-keyboard)
2) Southern Africa that support "Incredible Connection" (Kindle sole distributors) (Amazon Kindle Wifi 6" - Non-Keyboard)
SURVEY CLOSES 17 FEBRUARY 2012.

Appendix 7b: Paper survey request of business event attendees

From: Graham Soderland-Moore [mailto:gmoore@xpert.co.za]
Sent: 02 April 2012 09:38 AM
To: Peta Thomas
Subject: RE: Peta PhD request

Hi Peta
We can certainly accommodate you, so yes, please bring paper versions of your PhD survey. I can imagine how difficult it is to get willing research respondents. Probably the best way is to ask participants to do /complete quickly after the presentation – this should not be a problem

Regards
Graham
Graham Moore
Executive Director
Tel: 021 510 8655
Cell: 082 900 7198
Fax: 086 682 4035



From: Peta Thomas [mailto:totalimpact@iafrica.com]
Sent: Monday, April 02, 2012 7:13 AM
To: 'Graham Soderland-Moore'
Subject: Peta PhD request

Hi Graham,

My request is – can I bring paper versions of my PhD survey and ask attendees to fill in immediately and return immediately after the event before they leave site?
I am not sure of the running order of the event – do you have a tea after the event?
May I add 10 mins on and ask people to complete in the lecture area?
As a researcher it is hard to get people to give time as everyone is so busy but by the same token I understand they have work time constraints.

Best regards,
Peta Thomas

Appendix 7c Paper survey request of Meetings Africa (business tourism forum) 2012

From: Nomasonto Ndlovu [mailto:nomasonto@southafrica.net]
Sent: 28 February 2012 02:08 AM
To: Peta Thomas
Subject: Re: Survey Phd Value of Meetings: Meetings Africa

Peta

You can come to MeetingsAfrica, however it will be up to the
Exhibitors and attendees if they will agree to the interview.

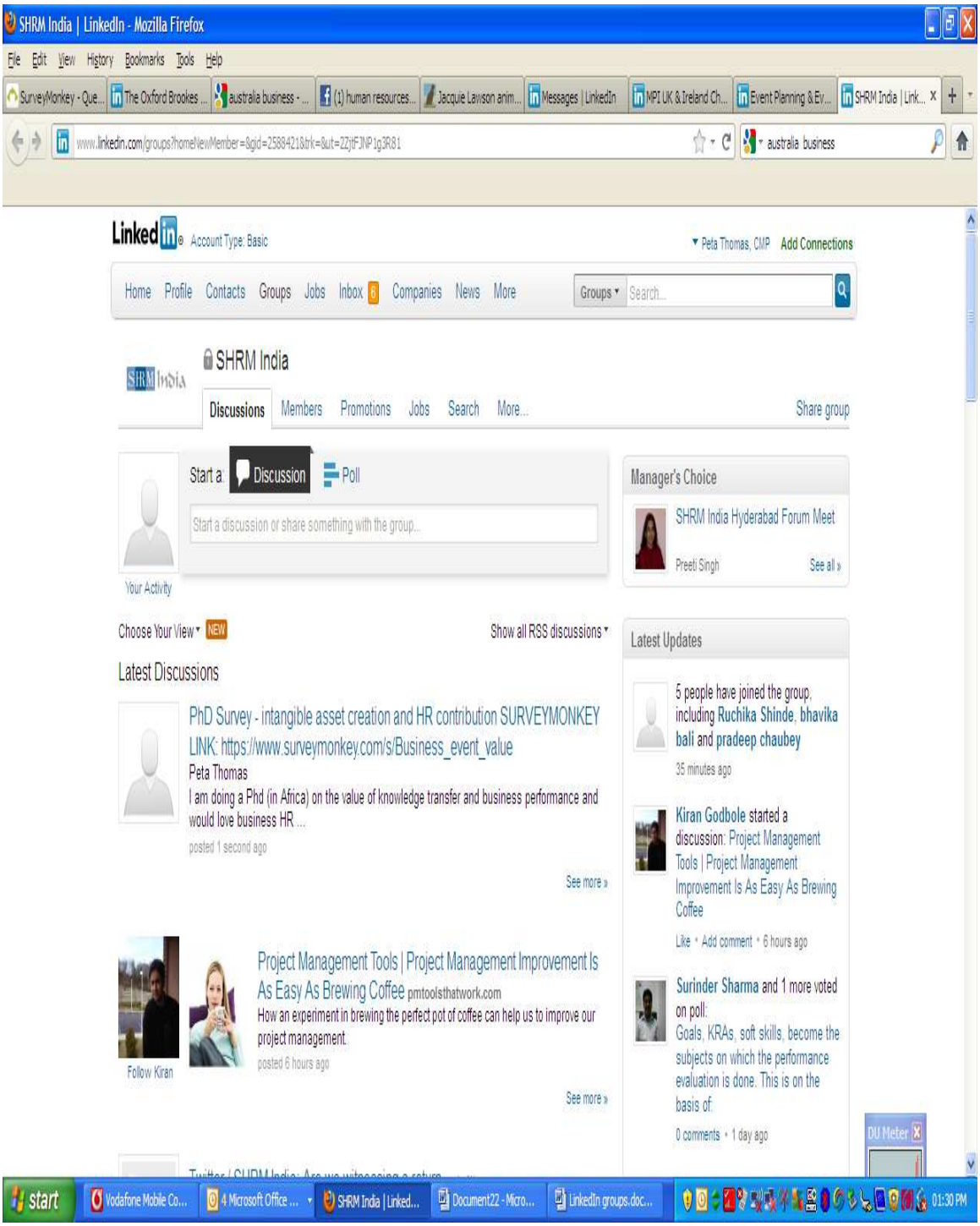
Thanks
Nomasonto Ndlovu

> Global Manager: Business Tourism
> Tel: +27 11 895 3000
> Ms Nomasonto Ndlovu
> Meetings Africa 2012
> Cc Shirley (PA)
>
> Dear Ma'am,
> I am a member of Meeting professionals International (MPI) and a Certified
> Meetings Planner (CMP).I am conducting PhD research on the Value of Meetings in an Organisation's
> Performance.

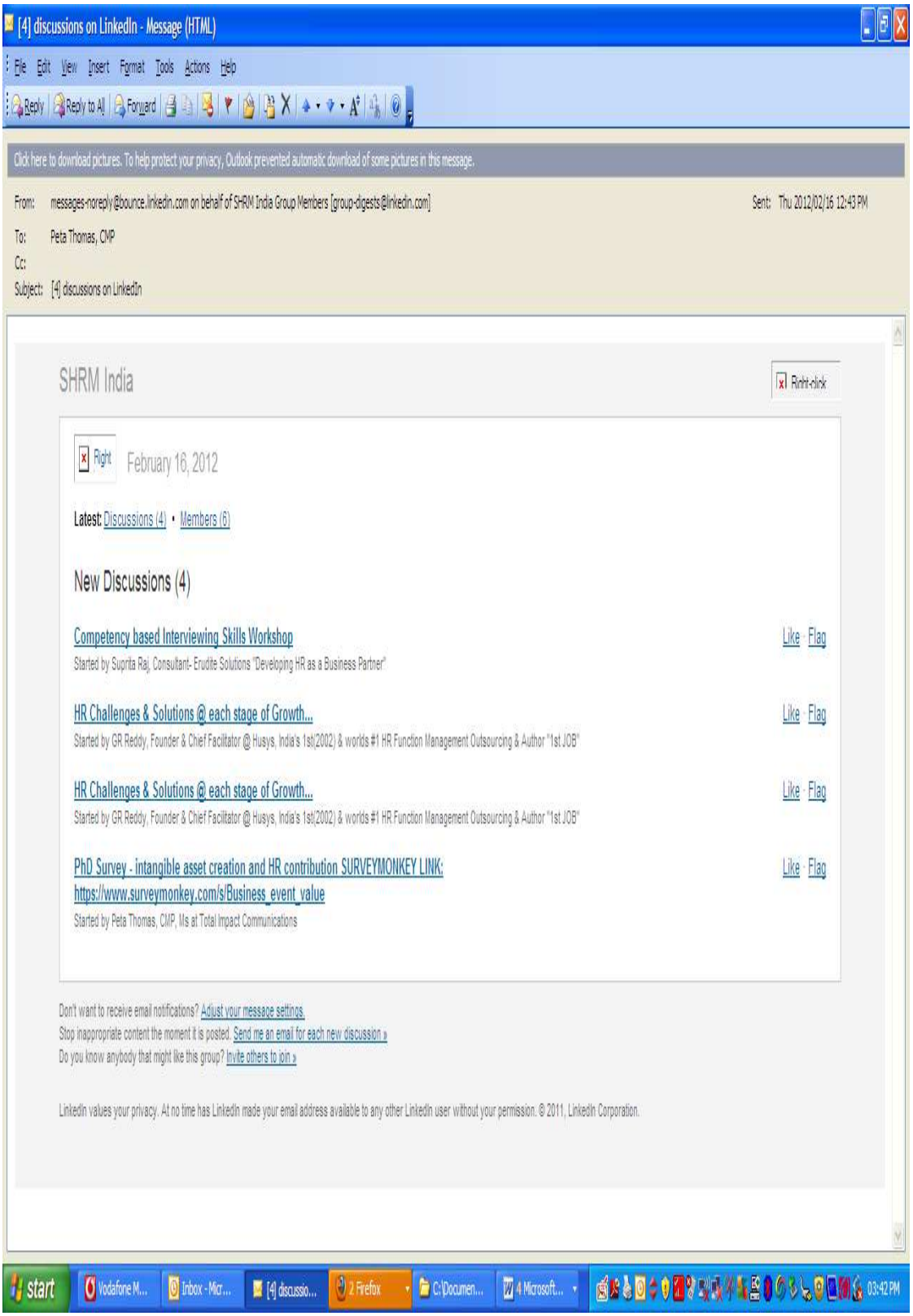
> I would like to have permission to attend Meetings Africa 2012 with three
> students and get survey responses from exhibitors and attendees to the
> event. I have attached the questionnaire to this email for you to look.
>
> The literature review notes to-date that meetings are essential for business
> performance and this would help prove the case.
>
>The results of the research will be made available to South African Tourism
>for your use.
>
Kind regards
Peta
Peta Thomas

Appendix 8: Linked-in webpage shots of the PhD online quantitative survey request

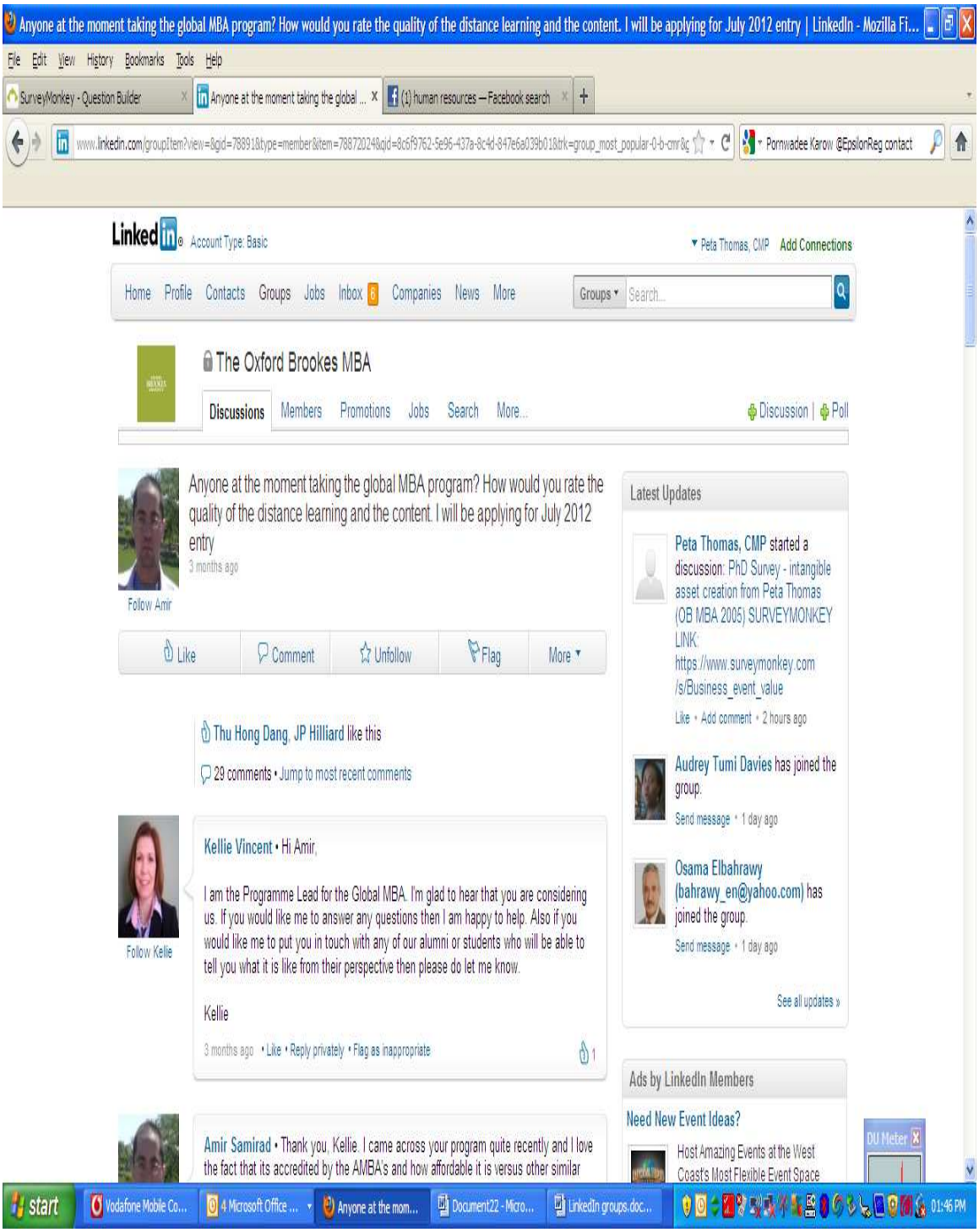
Appendix 8.1a: SHRM India (Strategic Human Resource Management India)



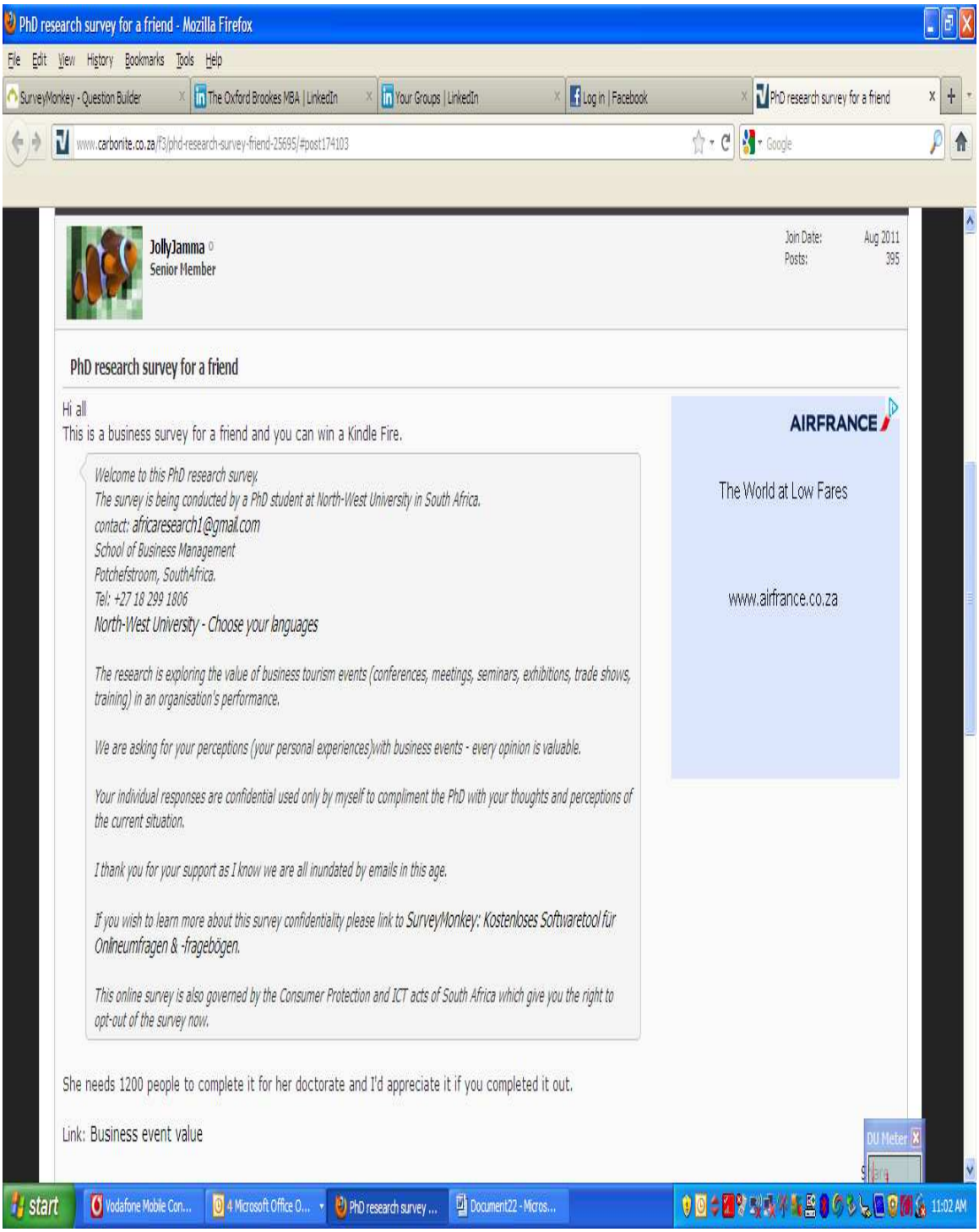
Appendix 8.1b: Linked-in: SHRM India (Strategic Human Resource Management)



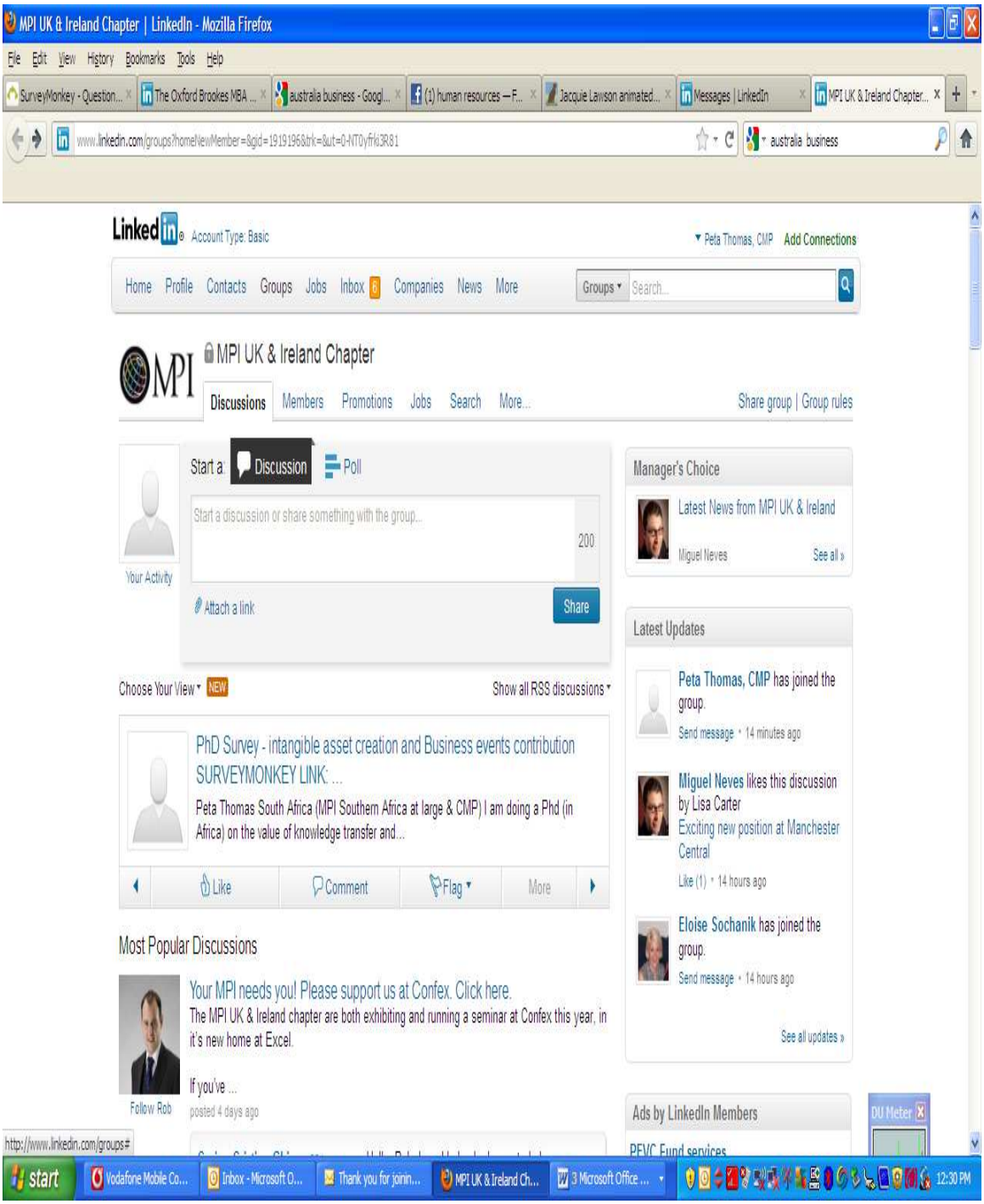
Appendix 8.2: Linked-in: The Oxford Brookes MBA alumni



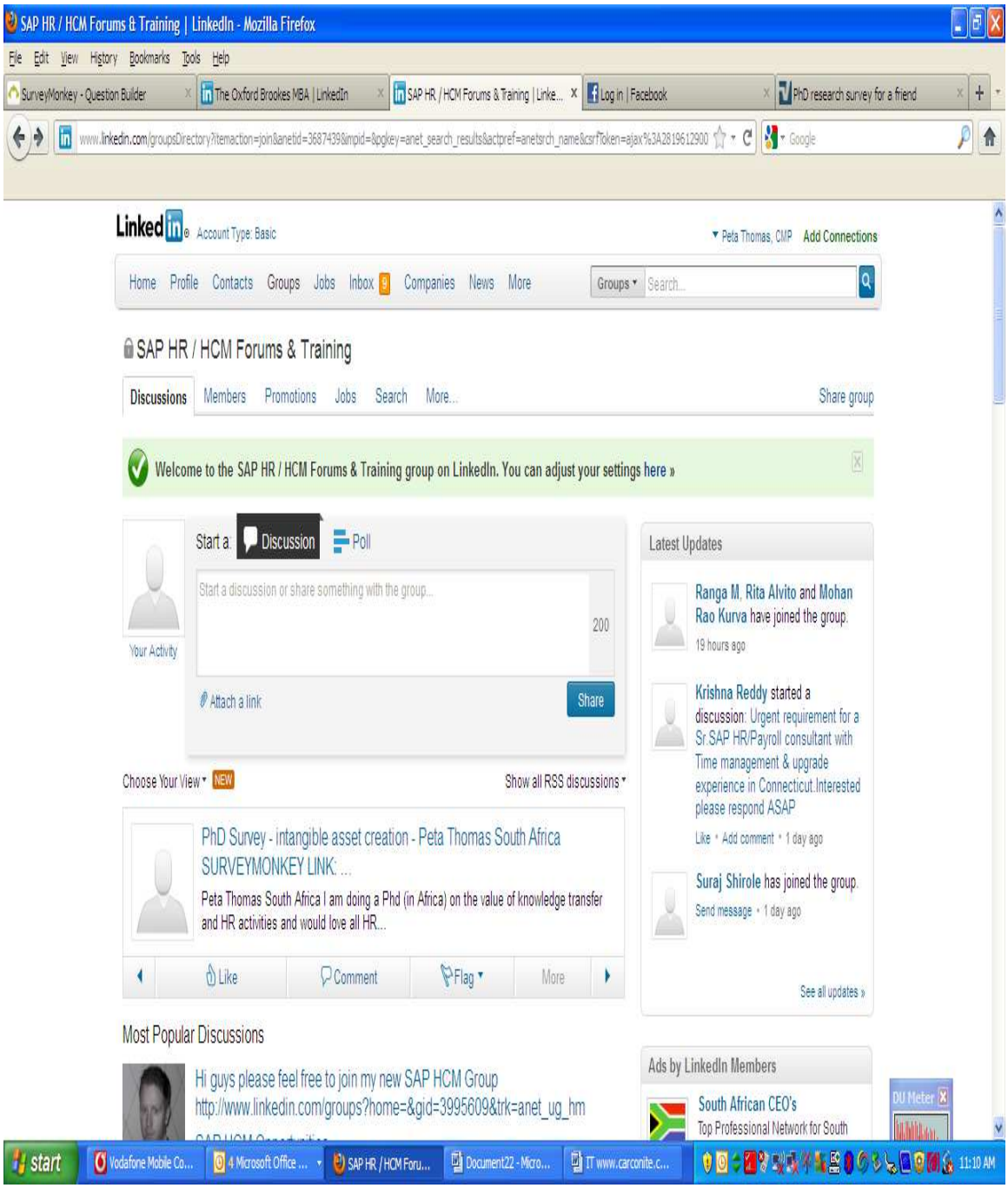
Appendix 8.3: IT target audience website: www.carbonite.co.za



Appenidx 8.4: Linked-in: MPI UK & Ireland Chapter



Appendix 8.5: Linked-in: SAP systems HR/HCM forums and training



Appendix 9: English editing certification

DIRECTION TRAINING

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30 October 2012

To whom it may concern

Language Editing – PhD Tourism – P. Thomas

I have reviewed the thesis entitled *The Value of Business Tourism in the Performance of an Organisation* in terms of spelling, language, and grammar and have made recommendations to the author concerning the changes necessary.



R. Taylor
CEO