

Training Best Practices:
LEARNING TRANSFER

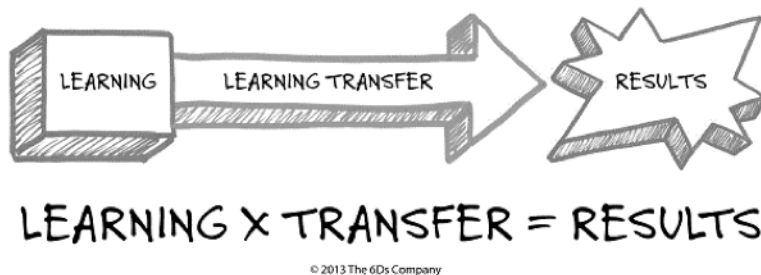


Introduction

The on-the-job application of knowledge or skills gained during a training experience is the ultimate goal of any training program. However, research has shown that this transfer of learning probably will not happen if it is left to chance or not considered in the design.

“Learning transfer is the process of putting learning to work in a way that improves performance.”

Roy Pollock and Andy Jefferson (*The Six Disciplines of Breakthrough Learning*)



When designing instruction, we must remember that managers will not always reinforce the training after the fact. The managers may not have the time or training to support or reinforce the training back on the job. But because learning and training are ongoing processes—receiving information in an educational setting is simply the first step in creating new on-the-job behaviors—a learning transfer strategy is essential for empowering learners to apply new knowledge and skills to their job performance.



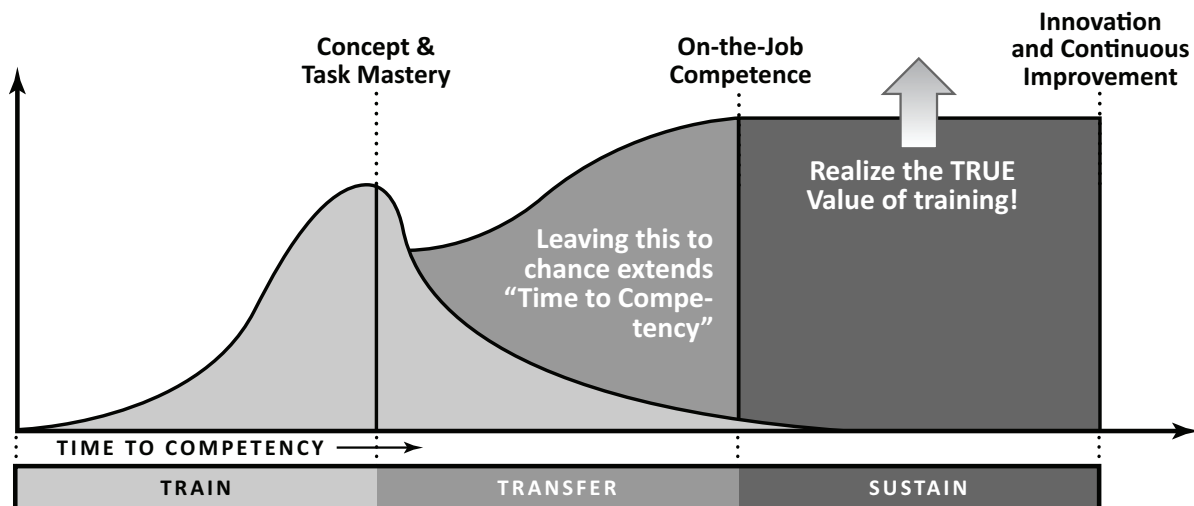
REMINDER: The process of gaining new knowledge is continuous and should happen before the event, during the event, and after the event.

The Best Practices document “Performance Management” also offers excellent thoughts on achieving results, i.e., a “desired state,” within the context of ongoing, continuous learning. Asking the right questions about why performance gaps exist will help generate effective strategies for learning transfer.

How Is Learning Transfer Vital to Performance?

The goal of training is to change a behavior exhibited on the job. This change may be needed because of new technology, a changing process, or a need to improve a particular on-the-job performance. However, when a learning transfer strategy has not been built into the training experience, the behaviors may not be sustained, and a true return on the training investment may not be realized. Often, during training evaluations, learners say that they did not get the time, resources, or opportunities to implement the knowledge and skills they learned during the training. Having a learning transfer strategy can help alleviate this effect.

Take a close look at this diagram from Conrad Gottfredson’s and Bob Mosher’s Learning to Competency Continuum, which illustrates how learning transfer leads to sustained behavior changes. Notice that the training, in red, will decline dramatically with time if the “transfer” process is left to chance. In fact, that green transfer section is the one defining issue between training and sustained learning.



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Gottfredson, C., Mosher, B. (2012, May). 'We're Lost but We're Making Good Time': Performance Support to the Rescue. Retrieved September 2018, from <https://www.learningsolutionsmag.com/articles/934/were-lost-but-were-making-good-time-performance-support-to-the-rescue>

What Makes Learning Transfer So Challenging?

Time Required to Develop a Strategy

The first challenge instructional designers and trainers face is spending the appropriate amount of time designing, developing, and delivering an experience that includes the transfer of learning. Robert Brinkerhoff developed the 40/20/40 Model for High-Impact Learning, which describes the amount of effort that should be spent on the design and development of each phase of a learning experience. In his model, more effort should be spent on the experience before and after the actual learning event. Creating instructionally sound activities before and after the event increases the learner’s ability to transfer new knowledge to a behavioral change.

Before the Learning Event	Learning Event	After the Learning Event
40% Effort	20% Effort	40% Effort
Needs, Preparation, Goals, Motivation	Planning, Instruction, Exercises, Materials, Instructors, Location	Relevance, Translation, Management Feedback, Organizational Obstacles

Brinkerhoff, Robert. *Brinkerhoff, High Impact Learning.*

Mismatch Between the Learning and Work Environments

A second challenge is that the environment in which someone learns a skill or behavior may look nothing like their workplace environment. In order to overcome this challenge, an instructional designer must first understand the behavioral objective and the context for that behavior. Then the instructional designer must try to simulate the work environment as closely as possible.

Keep in mind that a work environment includes physical space and organizational hierarchy, but it also includes dynamics, such as social norms, cultural expectations, and even political outlooks (in addition to “office politics” between coworkers). The more you can understand and account for these factors, the better.

If the environment of the learning experience is created so that it closely replicates the actual work environment, the transfer is known as **Near Transfer**. During the learning event, learners can practice and then be evaluated on the task, providing a high degree of confidence that they will be able to replicate the behavior back on the job (because the environments are similar).

When the learning environment cannot replicate the work environment, the learner needs to make a bigger leap in applying the skill or changing behavior back on the job. This is known as **Far Transfer**. The learner can practice, receive feedback, and be evaluated in the learning environment. But without a learning transfer strategy, a behavioral change on the job is less likely to happen.

Near Transfer vs. Far Transfer

Type of Transfer	Type of Behavior	Example	Additional Situations
Near Transfer <i>The situation in the learning environment is similar to the work environment</i>	<ul style="list-style-type: none"> • Procedural • How-to • Step-by-step • Skill based 	When teaching someone how to assemble and use a new piece of equipment, the learners can physically manipulate the device in the learning environment with the same tools they would have on the job. The work environment can be duplicated, and the learner can practice with feedback. Transfer of the skill back on the job is relatively easy because the two environments are nearly the same.	<ul style="list-style-type: none"> • Assembling a new piece of equipment • Completing an employee profile
Far Transfer <i>The situation in the learning environment is dissimilar to the work environment</i>	<ul style="list-style-type: none"> • Complex • Problem Solving • Decision Making 	A learner is presented with the steps needed to respond to vaccine resistance and is given the opportunity to practice that skill. Unlike the learning environment, responding to vaccine resistance in a work environment may be impacted by the political environment, differing cultural norms, and lack of resources. This may affect the learner's ability to complete this task when they are back on the job.	<ul style="list-style-type: none"> • Taking a client's health history • Implementing a new policy • Deciding the best course of action for treatment

Lack of Proper Support

The work environment needs to support the new behaviors by providing the equipment and/or attitude needed to apply the behavior. Aligning the learning objectives with the organizational measurements is a good place to start.

- **Modeling.** Leadership must be involved with and support the new behavior. Creating a supportive environment can be enhanced when leadership is modeling supportive behavior.
- **Materials.** When the challenge involves support materials, consider having the learners create the support material during the learning event. Materials created by the learners help them internalize and personalize the content.
- **Motivation.** Consider the learner's motivation to apply the new behavior back on the job. This is the difference between the learner asking, "Can I do this?" or "Will I do this?" If they are asking, "Can I do this?" consider creating more practice opportunities either during or after the event. When the learner is questioning, "Will I do this?" our challenge is motivation. Establishing why the new behavior is important to each learner's ability to perform back on the job is critical in motivating the learner to change. Be ready with the answers to these questions.

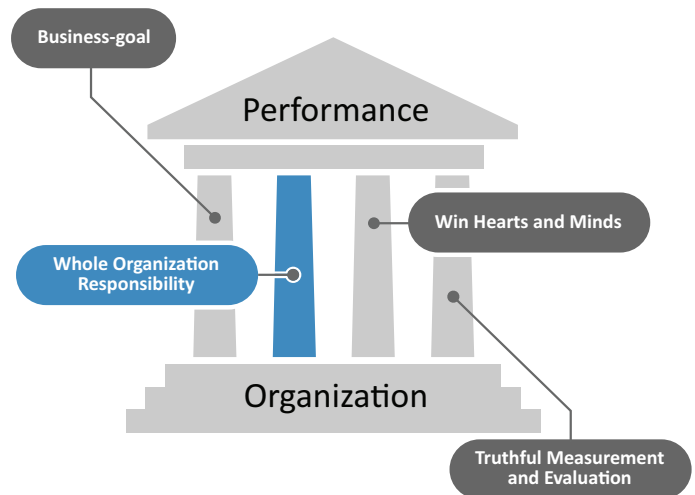
Here are a few questions to consider when trying to determine the best learning transfer strategy.

	Questions to Ask
Work environment	<input type="checkbox"/> Will the work environment support the changed behavior? <input type="checkbox"/> Is the environment ready for a new way? <input type="checkbox"/> Are the organizational measurements going to reinforce the new behavior? <input type="checkbox"/> Is the training experience close to their work environment?
Leadership support	<input type="checkbox"/> Is the manager involved in the learner’s learning? <input type="checkbox"/> Does the manager understand the change that needs to happen?
Support materials	<input type="checkbox"/> Are job aids appropriate for the content? <input type="checkbox"/> Can the learners create their own job aids during the experience?
Learner’s motivation	<input type="checkbox"/> Are the learners motivated to use the new skill or change their behavior?

Who is Responsible for Learning Transfer?

In *Courageous Training: Bold Actions for Business Results*, authors Robert Brinkeroff and Tim Mooney discuss the pillars of courageous training.

One pillar, building whole-organization responsibility for training impact, shifts the success of training from only the trainer or training department to also include others in the organization. In the authors’ view, there needs to be a consistent commitment and expectation of accountability from both the learners and their managers.



When learners leave training, they should feel empowered to make behavior changes. The empowerment comes from the knowledge they gained during the training and the support they will get from their manager.

Role	Timing	Responsibility
<i>Learner</i>	Before	<ul style="list-style-type: none"> • Meet with manager/supervisor • Communicate any roadblocks to learning
	During	<ul style="list-style-type: none"> • Actively participate in the learning event
	After	<ul style="list-style-type: none"> • Meet with manager/supervisor to discuss what was learned, what support is needed from the managers • Apply new skills or behaviors, ask for support if needed • Share learnings with peers/colleagues who may not have attended the training • Self-evaluate performance after the learning event
<i>Manager / Supervisor</i>	Before	<ul style="list-style-type: none"> • Selection of appropriate learner • Meet with learner to discuss expectations around the learning • Remove any roadblocks for the learner
	During	<ul style="list-style-type: none"> • Allow the learner to fully participate in the learning
	After	<ul style="list-style-type: none"> • Meet with learner to discuss their new skills or behaviors • Provide support and reinforcement of the new skills or behaviors • Remove any roadblocks for the learner
<i>Policy Makers</i>	Before	<ul style="list-style-type: none"> • Make sure managers/supervisors and the learners understand the importance placed on learning transfer as a process
	During	<ul style="list-style-type: none"> • Ask managers/supervisors for impressions of the process in real time, whenever possible.
	After	<ul style="list-style-type: none"> • Reiterate to managers/supervisors your commitment to enabling success. Welcome feedback, questions, and requests.

Trainer	Before	<ul style="list-style-type: none"> • Communicate with the manager/supervisors about responsibilities during the learning • Communicate with the learners about any learning expectations • Provide support and pre-event materials
	During	<ul style="list-style-type: none"> • Conduct the learning event • Support the learner in preparing post-training transfer
	After	<ul style="list-style-type: none"> • Provide support for the manager/supervisor • Provide support for the learner as they apply the new skill or behavior • Follow up on post training activities as included in their plans

The Coaching and Mentoring Best Practices guide offers specific lessons for contributing to effective ongoing learning.

Strategies for Learning Transfer

Like the activities during a learning event, learning transfer strategies should be well thought-out and connected to the learning objectives of the experience. Strategy needs to be centered around learners and their needs in the workplace. When learners see a clear connection from classroom learning to their work environment, they feel more motivated to make a change.

Here are a few strategies to consider.

Strategy: Empower Learners to Take Responsibility

Learner empowerment begins with the learner owning and taking responsibility for applying a new skill or changing behavior. Strategies:

- **Create an accountability document and partner:** During or shortly after the learning event, encourage learners to create an accountability document. This document should describe how they will hold themselves accountable for applying what they learned. For example, it might describe the three steps that the learner commits to taking by end of year. Take it a step further by pairing learners during training. The two partners keep each other on track and share ideas for applying new skills or behaviors.
- **Build in reflection time:** Build time into the schedule for learners to process and reflect on information. Provide one or two questions to help them think about how the content can be applied when they are back at work.

- **Create an action plan:** Have learners create an action plan that can be used after the learning event. A basic plan should include what behavior they are going to start or change, how they are going to start or change it, anticipated roadblocks to the change, and additional resources they may need. This action plan should be shared with their managers/supervisors when they return to work.

Strategy: Use Communication to Reinforce

Consider ways to use communication to reinforce learning transfer.

Before the training:

- **Email:** Provide the purpose of the learning event, expectations of the manager, and what the learner can expect. Include any pre-work that may be helpful as learners prepare for training. If the learning is focused on a complex behavior, create a learning contract that the manager can share with the learner.
- **Pre-event conference call:** If possible, schedule a short conference call with learners to review the purpose the learning, how they can best participate, and to answer any questions they have. Holding a conference call to set expectations saves time during the event, which allows for more time to practice applying skills. Calls also puts the learner at ease prior to the event—a great benefit for all involved.

During the training:

- **Welcome message:** Send out a simple welcome message from the trainer or leadership reinforcing how important the event is to the learner and to the organization.

After the training:

- **Email or WhatsApp from trainer as a follow-up:** A follow-up email or electronic message with a summary of the learning event is a helpful reminder of the skills or behaviors that learners should be applying on the job. Additional practice exercises, case studies, or a short quiz can be attached to provide additional support.
- **Recognition:** Publicly recognize the learners who are applying new skills or behaviors during regular meetings. This can be done by the trainer or manager. Such reinforcement does wonders for ongoing motivation.

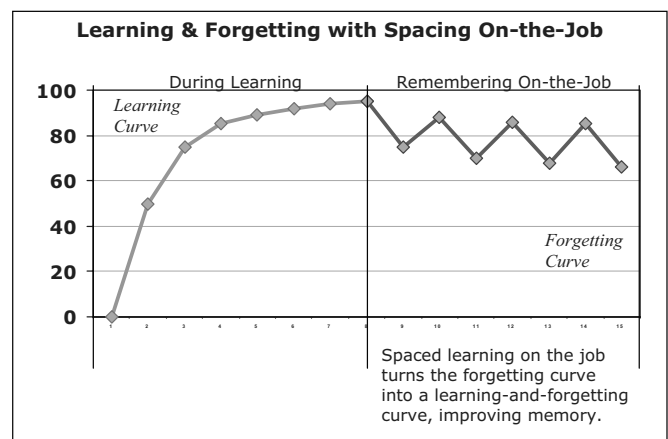
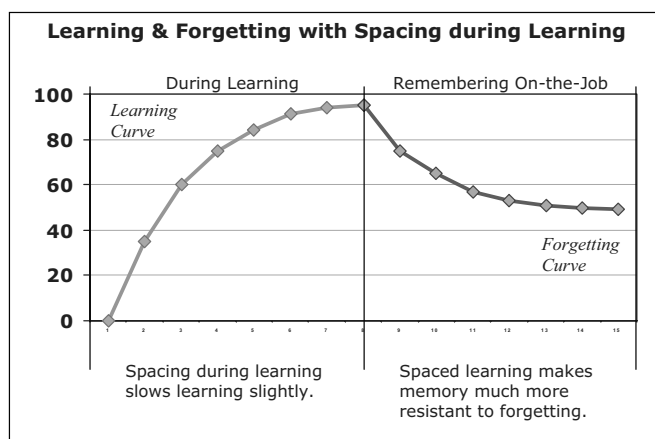
Strategy: Gain Leadership Support

The type of practice a learner gets and the feedback given to learners are important factors in promoting learning transfer. So, be sure that leadership is prepared.

- Provide managers with what they need:** Some managers may have a difficult time coaching someone who has recently attended a learning event because they may not be familiar with the content themselves. Providing managers/supervisors with a summary of the content will be helpful as they coach learners on the job and discuss their role in learning transfer. List the enabling factors for learning transfer.
- Describe leadership’s role in a learning contract:** A learning contract lists the skills or behaviors that should change, how the manager will help support change on the job, and what the learners will do once they are back in the work environment. The trainer can develop the contract and send it to managers.

Strategy: Introduce Spaced Practice and Support

In *Spacing Learning Events Over Time – What the Research Says*, Dr. Will Thalheimer discusses research on spacing learning over time. During a learning event, the learning curve will ramp up quickly and peak toward the end of the event. If reinforcement after the event is not provided, the learning curve will take an immediate downturn and over time will be equal to where the learner started before the event. This is known as the “Forgetting Curve.” By introducing spaced practice and support after a learning event, the learner can reverse the downturn and maintain the level achieved at the end of the learning event. Repetition will help to maintain learning levels.



Thalheimer, W. (2006, February). *Spacing Learning Events Over Time: What the Research Says*. Retrieved June 1, 2018, from <http://www.work-learning.com/catalog/>

Strategy: Provide On-the-Job Support Materials

On-the-job support materials can include job aids, content summaries, or additional practice exercises. If the training is focused on a system or software, the support should be built into the software, allowing the learner to access the support while they are performing the task. According to Bob Mosher, on-the-job support can reduce the time required in the classroom by half.

Here are a few practical examples. Many of these could be used during supportive supervision or during review meetings, in order to reinforce learning transfer:

- Job aids:** Job aids are a good way for learners to take learning back to the job. Many times, these aids are created by a subject matter expert who already knows the information and has synthesized it for the learner. Job aids can include images, process flows, diagrams and other visuals that allow learners to process information in a different way. Aids are not a transcript of what was said in class, but rather a succinct summary of key points that will support the learner when they are back on the job. During the training event, allow learners time to create and share their own job aids. This allows them to synthesize the information and gives a trainer the opportunity to evaluate learners' understanding.
- Practice activities:** Provide learners with activities that can be done in the work environment to apply and reinforce new knowledge. These activities should be meaningful applications of the content and not a recall of terms or content. Learners may personalize the activity to make it relevant to their work. Managers will play an important role in guiding the employee through the activity.
- Behavior checklist:** Providing the learner and manager/supervisor with a list of new behaviors can help guide a conversation between the two as the learner begins to apply the learning. Behaviors can be in the form of a rubric where different degrees of performance are described. This type of list gives learners and managers a way to identify what the new behavior should look like.
- Multiple opportunities for practice:** As information is being presented, it gets stored in the brain. Creating opportunities for the learner to recall that information allows them to create a "path" to the information. The more often learners are given opportunities to practice recalling the information, the stronger the path becomes. Once a path is established, the practice activities can include slight variations on the original practice. Word of caution: Varying the practice too much before the learner has a chance to master it can cause the learner to become confused. Any prior learning is at risk of being lost. This is especially true if the skill is so new they have no reference points.
- Varying modalities:** Present information in varying modalities or forms to ensure learners understand the information. This is critical when the transfer of learning is furthest from the work environment. Like building a "path" with multiple opportunities for practice, varying the modality or how the information is presented allows the learner to create an alternative path to the information.
- Use relevant graphics or images:** The learners will find it easier to put themselves in a particular situation

if the images being used look like their environment. For example, if you are talking about providing immunization in a rural clinic, avoid images of a city hospital that looks nothing like a typical clinic. Use images in which the learners might see themselves performing the new behavior. When using graphics, keep the text to a minimum. Allow the learner to use the graphic to form a meaning that is personal and easier to recall on the job.

The Best Practices document on On-the-Job Training offers guidance on how and when to design on-the-job training. For more examples of how scenario-based activities and role-play can provide effective evaluation methods, again the Coaching and Mentoring Best Practices is recommended. It offers a variety of opportunities to practice sample training activities.

Monitoring and Measuring Learning Transfer

Behavior checklists, learner contracts, client satisfaction, and meetings with the managers are all effective methods for monitoring whether learning transfer is happening.

Another way to measure learning transfer is by measuring organizational outcomes when there is a strong connection between the learning objective and the desired organizational outcome. When the objective is not related to an organizational outcome, you may be training the wrong behavior. Remember, health workers do what they are being measured to do. Make sure you are measuring the performances that are most crucial to the achieving the outcomes your organization desires.

Evaluation

As always, keep in mind that all performance management must be ongoing and cyclical. The first step in maintaining the gains of training is quantifying what the training has accomplished. In the case of learning transfer, consider using the following methods at the close of training sessions, then returning at regular intervals with these same questions. Compare responses with your learners and supervisors/managers.

- Allow the learner to self-assess, either narratively or using a standardized feedback sheet.
- Allow learners to privately evaluate the training session. Their anonymous feedback can be especially helpful.
- Use a standardized feedback form to provide consistent and objective feedback to the new trainers.

Be sure to read the Evaluation Best Practices guide for more ideas on how, when, and why to evaluate effectively. And, because this idea is so important, we will end with the key point we began with:



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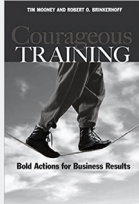
Annex 1: Learning Transfer Strategies

Tool	Transfer Type	Strategy	Challenge Addressed
<i>Before the learning event</i>	Near	<ul style="list-style-type: none"> • Email to manager • Email to learner • Pre-event conference call • Welcome message 	Leadership involvement Learner motivation
	Far	<ul style="list-style-type: none"> • Learning contract • Course materials available • Email to manager • Email to learner • Pre-event conference call • Welcome message 	Leadership involvement Learner motivation
<i>During the learning event</i>	Near	<ul style="list-style-type: none"> • Multiple opportunities to practice • Varying modalities • Relevant graphics or images • Job aids 	Support materials
	Far	<ul style="list-style-type: none"> • Reflection time • Action plan • Multiple opportunities to practice • Varying modalities • Relevant graphics or images • Job aids 	Leadership involvement Work environment Learner motivation
<i>After the learning event</i>	Near	<ul style="list-style-type: none"> • Meeting with manager • Follow up email to learner • Follow up email to manager • Practice activities/exercises • Provide ongoing recognition 	Leadership involvement Work environment

Tool	Transfer Type	Strategy	Challenge Addressed
<p><i>After the learning event (continued)</i></p>	<p>Far</p>	<ul style="list-style-type: none"> • Accountability document/partner • On the job support • Behavior checklist • Meeting with manager • Follow up email to learner • Follow up email to manager • Practice activities/exercises • Recognition 	<p>Leadership involvement Work environment Learner motivation</p>

Annex 2: Resources

Explore these resources for more information about learning transfer.



Courageous Training: Bold Actions for Business Results

Bold Actions for Business Results, by Tim Mooney and Robert Brinkerhoff



High Impact Learning

Strategies for Leveraging Performance and Business Results from Training Investments

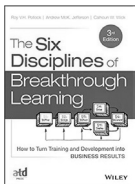
by Robert O. Brinkerhoff and Anne M. Apking



“We’re Lost, But We’re Making Good Time”: Performance Support to the Rescue

Learning Solutions Magazine, by Conrad Gottfredson and Bob Mosher

<https://www.learningsolutionsmag.com/articles/934/were-lost-but-were-making-good-time-performance-support-to-the-rescue>



The Six Disciplines of Breakthrough Learning

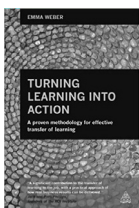
How to Turn Training and Development into Business Results, by Andres Jefferson, Roy Pollock, and Calhoun Wick



Ten Ways to Measure Learning Impact

ATD Insight Website, by Ron Cowan and Carolyn Hansen

<https://www.td.org/newsletters/atd-links/ten-ways-to-measure-learning-impact>



Turning Learning into Action

A Proven Methodology for Effective Transfer of Learning, by Emma Weber

Lever Learning: Transfer of Learning Blogs

<https://transferoflearning.com/blog/>



Can They Do it in the Real World? Designing for Transfer of Learning

Learning Solutions Magazine, by Patti Shank

<https://www.learningsolutionsmag.com/articles/288/can-they-do-it-in-the-real-world-designing-for-transfer-of-learning>