

## Transfer of Learning – Planning Workplace Education Programs (excerpt)

Maurice Taylor, Partnerships in Learning – February 1997

**Table 2: Transfer of Learning Strategies**

Strategy	When to Use Them			Who Could Use Them		
	Before Program	During Program	After Program	Instructor	Supervisor	Trainee
Involve supervisors and trainees in the program development	X			X		
Design instruction systematically	X			X		
Provide practice opportunities	X			X		
Develop trainee readiness	X			X		
Design a peer-coaching component for the program	X			X		
Develop application-oriented objectives		X		X		
Answer the "What's in it for me" question		X		X		
Give individualized feedback		X		X		
Provide job performance aids		X		X		
Provide follow-up support			X	X		
Conduct evaluation surveys and provide feedback			X	X		
Develop recognition strategies			X	X		
Provide refresher sessions			X	X		
Involve supervisors in the needs assessment	X				X	
Provide orientations for supervisor	X				X	
Provide supervisory coaching skills	X				X	
Select trainees carefully	X				X	
Provide a positive training environment	X				X	
Prevent interruptions		X			X	
Transfer work assignments to others		X			X	
Recognize trainee participation		X			X	
Participate in transfer action planning		X			X	
Review information on employees in training		X			X	
Provide opportunities to practice new skills			X		X	
Debrief the trainer			X		X	
Provide role models			X		X	
Give positive reinforcement			X		X	
Celebrate small wins			X		X	X
Provide input into program planning	X					X
Actively explore the training situation	X					X
Participate in advance activities	X					X
Link with a buddy		X				X
Maintain an ideas and application notebook		X				X
Plan for applications		X				X
Anticipate relapse		X				X
Review training content			X			X
Develop a mentoring relationship			X			X
Maintain contact with training buddies			X			X

## **Strategies to Enhance the Transfer of Learning**

As highlighted in the preceding section, there are certain ways and approaches to facilitate learning transfer. In this part of the report over thirty different transfer strategies are discussed. These techniques were taken from some of the key investigations cited earlier in the document and are organized around the three major periods of the training process—before, during and after. As well, the strategies are centred around the different program participants who have an opportunity to strengthen the transfer process the workplace instructor, the trainee and the supervisor. For the purposes of this report, the term supervisor can include the company manager, the first-line supervisor, the team or group leader or anyone in the organization with authority and responsibility over employees. In terms of a format for describing these transfer strategies, the reader will find simple headings of the techniques by training period and program participant. For example, the section starts off with pre-training transfer strategies for the workplace instructor which is followed by transfer strategies for the workplace instructor during training and so on. A summary of all learning techniques discussed in this section appears in Table 2.

### **Pre-training Transfer Strategies for the Workplace Instructor**

1. *Involve supervisors and trainees in the program development.* It is crucial that trainers involve managers and trainees in needs assessment and course design. It is the instructor that is often in the position to initiate the involvement of other partners. Both supervisors and trainees can help determine training methods and materials or even pilot test preliminary course designs to measure effectiveness and gain feedback.
2. *Design instruction systematically.* Trainers can ensure that a program produces effective learning by identifying desirable outcomes, stating trainee-oriented objectives for each session, selecting instructionally appropriate mixes of methods, structure the program into phases, pilot test and evaluate the results. Essential ingredients include the creation of manageable sized units of material, proper sequencing of content and a good mixture of instructional approaches. Trainees should be actively involved in their own learning process at every point in the program.
3. *Provide practice opportunities.* Opportunities for practice of new learning provided during the training give trainees the chance to put newly acquired knowledge to work. They are safe opportunities to experiment with new skills and give instructors the chance to note individual levels of achievement and difficulty. They also give trainees the chance to ask questions, try alternatives and gain confidence. One of the keys to success in this strategy is developing practice opportunities that are relevant to levels of trainee skills and convincing trainees that they can benefit from doing so.
4. *Develop trainee readiness.* Instructors can stimulate trainee readiness for the learning to come by carefully preparing and distributing a number of devices designed to hook training interest in advance of the training session. This could include attractively packaged pre-course materials distributed to trainees before the start of the program. These may include simple descriptions of how the program fits into the mission of the organization, examples of prerequisites needed for the course or simple self-assessment exercises that allow trainees to score themselves and identify areas of potential development.
5. *Design a peer coaching component for the program.* This method assists trainees in coaching each other to apply newly learned behaviors through a carefully structured sequence. Before the training program begins, the instructor creates a method to teach the peer coaching process which consists of observation, data recording, giving and receiving feedback. It is important that participants during this component of the program are voluntary and that management give support to this process.

### **Transfer Strategies for the Workplace Instructor During Training**

1. *Develop application-oriented objectives.* Application-oriented objectives are behavioral statements of what the trainees should do once they return to their jobs. They are more skill directed or performance oriented than other types of objectives. By preparing these types of objectives with trainees, the trainer is cueing the trainees to think beyond the current session. On the job use of the new material is emphasized and trainees can even be encouraged to tailor the objectives to fit their own situation
2. *Answer the "what's in it for me" question.* Many trainees want to know what they will gain for their investment of time and energy in changing their behavior. Instructors should anticipate and answer this question. Will the shop floor be safer? Will it provide me with more job variety? Will increased quality result in personal financial gain? Trainees have a high degree of self-interest at heart and this should not be Mimi
3. *Give individualized feedback.* When an instructor has the opportunity to provide a brief related statement to one or more trainees, here she can shift more towards feed forward guidance (that which explains what to do). In using feed forward guidance the instructor reflects on how the trainee is doing but points all comments towards what the trainee should do and how he or she might integrate this back on the job.
4. *Provide job performance aids.* A key element in helping trainees retain what they learned and use what they know is to provide memory cues. Job performance aids are invaluable tools not only to slow memory loss but also to encourage trainees to keep applying new learning. Job aids are typically printed or visual summary of

key points or steps covered in a training session. They may be kept at the trainee's work station as a daily reminder, posted on a wall or carried in a pocket.

### **Post Training Transfer Strategies for the Workplace Instructor**

1. *Provide follow-up support.* Instructors can take the initiative to contact individual trainees or small groups after they have returned to their jobs. Questions that trainers can ask of individual trainees include: How are things going in your attempt to transfer some skills? Which of the major ideas I discussed in the program have you used so far? What has been the result? What can I do to help you transfer what you have learned successfully?
2. *Conduct evaluation surveys and provide feedback.* Evaluation surveys help to remind trainees of what they learned and the need to apply it. After a short period (30 to 60 days) following the training program, trainers can design and distribute a simple survey questionnaire to each of the participants. The results should be tabulated, interpreted and a summary of the highlights sent to the entire group. The key to successful use of surveys and feedback as transfer strategies lies in their timing and the public recognition given to those with early accomplishments to report.
3. *Develop recognition strategies.* Most trainees are hungry for recognition of their efforts and achievements. Instructors can orchestrate ways to recognize trainee achievement during the training itself, at the end of the training and later in terms of an annual employee recognition event. Instructors may not be able to control such an event but they can play important roles in stimulating their occurrence.
4. *Provide refresher sessions.* Instructors can combat recall/retention/application problems among trainees through the preparation of simple and straightforward refresher courses. The purpose is to provide a brief but coherent summary of the essential concepts and skills learned earlier. A problem-solving session should also be included to allow participants a chance to share tales of their successes and discuss why they have not been able to transfer some of the program ideas.

### **Pretraining Transfer Strategies for the Supervisor**

1. *Involve supervisors in the needs assessment.* Because training is often designed to solve a present or future problem, overcome a gap or deficiency or prepare employees for future specific or general job responsibilities, supervisors should participate in identifying the training needs. This helps ensure that training programs meet high priority needs as perceived by the relevant stakeholders. Surveys, interviews and advisory committees all help to meet this objective.
2. *Provide orientations for supervision.* Supervisors can ask for and participate in advance orientation sessions regarding the training programs to which they will be sending their employees. They can discover the highlights of the training so that they can cue their employees in terms of what to expect, provide a proper role model for them and reinforce the desired behaviors following training. These advance sessions are especially useful when training programs have evolved over time incorporating revisions of content.
3. *Provide supervisory coaching skills.* First line supervisors can play an important role as an on-the-job coach. They can engage in follow-up observation, emotional support and encouragement, discussion to review the highlights of what was learned and how to adapt it to their specific jobs as well as providing frequent praise for progress made. Supervisors represent a potentially powerful influence for most workers and can provide individual coaching contacts which can help training transfer occur.
4. *Select trainees carefully.* Trainees learn best and are more likely to apply their newly learned knowledge and skill when they recognize a current or impending need. Trainees should know the criteria for selection and view the selection as a message of positive regard and contribution and potential. Successful training and its long-term application on the job is possible only when the right people are provided with the right training at the right time and are supported by the right kind of organizational environment.
5. *Provide a positive training environment.* Trainees will be primed for transfer if the timing of the training is right which builds on the concept of the teachable moment. In terms of location, sometimes training embedded in the work itself is most effective while in other cases offsite location protects trainees from work-related interruptions and distracters. As well, the physical surrounding and facilities during training should be comfortable and pleasant. Supervisors who help provide this type of positive learning context create a supportive climate for transfer.

### **Transfer Strategies During Training for the Supervisor**

1. *Prevent interruptions.* Supervisors must establish and follow a policy that no interruptions will be allowed during the training session. Coworkers must be informed in advance that only in true emergencies will messages be delivered. In addition, training programs that involve individual change such as team building and attitude shifts should be held away from the worksite whenever possible. This eliminates casual drop in conversations and trainees returning to the work areas during breaks.

2. *Transfer work assignments to others.* Many trainees are concerned about the amount of work that will confront them upon their return from the training program. This can create a very real barrier to their immediate application of new ideas and skills. The solution to this problem is largely under the control of the direct front line supervisor. The supervisor must take responsibility for arranging for substitutes, job sharing or some arrangement appropriate on the shop floor.
3. *Recognize trainee participation.* As the training program draws to a close, supervisors can distribute certification of attendance to trainees. This formally signifies their satisfactory completion of the training and provides some form of recognition. That desired recognition is often most powerful when it comes from valued sources. This does not require much time and effort or cost but it provides trainees with a trophy to show coworkers and family.
4. *Participate in transfer action planning.* Training programs should include some type of action-planning session for trainees to plan how to transfer their learning to the job. On a group or individual basis, supervisors meet with the trainees at the end of the program but before the trainees have returned to the work site. The supervisor and trainees review the learning objectives, and the trainer describes what was learned to reach each objective. Both discuss how the learning can be applied to the current job, community or home situation.
5. *Review information on employees in training.* While employees are away from the job and being trained supervisors should review background information on each employee. This would include such things as previous work assignments, prior training and significant strengths. This will help supervisors to make better distinctions about the match between what is currently being learned and the opportunity to apply it.

### **Post Training Transfer Strategies for the Supervisor**

1. *Provide opportunities to practice new skills.* Supervisors must ensure that all of the key ingredients for successful transfer are provided. Supervisors can assign trainees to the kinds of job tasks or special projects that will not only give them the chance to use what they learned but actually require them to apply it. In other words, supervisors can give trainees some control of their transfer destiny by assigning them to viable tasks that allow them to experiment with new learning.
2. *Debrief the trainer.* Trainers often accumulate rich data as they watch, teach and interact with trainees. Supervisors can seek out information in a debriefing meeting such as: What went well? What skills were clearly learned? What skills do trainees still need help to master? What didn't go so well? How can I help those who had some difficulty?
3. *Provide role models.* Employees often pattern their behavior after that of those around them. This is called vicarious learning - using observation of others to acquire new experiences and skills. Supervisors can capitalize on this kind of learning by providing positive role models for employees. In many work situations the most powerful role model for the trainee is the supervisor.
4. *Give positive reinforcement.* Reinforcement is the systematic application of a positive consequence to a trainee, contingent on the demonstration of a desired behavior. This requires some knowledge of what the trainee would perceive as positive. Usually a few words of praise given by a respected individual are sufficient. Positive reinforcement can be highly-effective for cementing a pattern of desirable work behavior and stimulating its repetition.
5. *Celebrate small wins.* Individual attempts to transfer new skills to the workplace are important enough to receive some level of recognition. Supervisors can help to publicize the successful transfer of skills by commending worthy employees at shop floor meetings, by providing individual praise in front of employees' peers and writing feature articles for the company newsletter on selected employees.

### **Pretraining Transfer Strategies for the Trainee**

Little has been written about transfer strategies that trainees can take prior to their involvement in training. A paucity of information in this area may reflect the failure to consider the prime role of trainees.

1. *Provide input into program planning.* Much can be gained by having trainees participate in the planning process. This input can be into the program design, participation in the needs assessment or motivationally through trainee "buy in" to the process. Specifically, trainees can take the initiative to request training, identify potential development areas, clarify cultural differences and participate in a pilot run of the program.
2. *Actively explore the training situation.* In a case where the individual has been chosen by the supervisor, the trainee can ask some very important questions of the trainer or supervisor. Why was I chosen for the program? What can I expect to learn relevant to my job? What support can I expect for using the material when I return to my job? What opportunities will there be to begin using my new skills immediately? Whom can I use as a role model?
3. *Participate in advance activities.* A third strategy for trainees is to commit themselves to use all advance materials available to them. If these materials are not being used, trainees might take the initiative to request them from the organization or instructor. This strategy will encourage a greater degree of trainee commitment

to the program success.

### **Transfer Strategies for Trainees During Training**

1. *Link with a "Buddy"*. One easy strategy is for trainees to identify one or more other trainees with whom a supportive linkage can be established. This often occurs naturally during the training, either as a product of seat selection, task assignment or employees from the same work unit. The buddy process is straightforward. It is based on the psychological process of making a commitment to another person to change some type of behavior.
2. *Maintain an ideas and application notebook*. One way of doing this is by converting general principles into specific practices through such a notebook. For each session trainees can, on a sheet of paper in this notebook, record on the left-hand side the idea, concept or principle (what I heard or learned) and on the right-hand side the application of it (how I intend to use it). This notebook provides a self-discipline mechanism encouraging trainees to look for useful ideas throughout the training program instead of relying on their recall abilities.
3. *Plan for applications*. Goal setting is a strong motivational tool. Trainees can build goal setting into any training by committing themselves to sit down for a few moments at the end of the session to answer the question "What will I do with what I have learned?" Application planning builds on the concept of self-management—the idea that adults are capable of managing their own work performance.
4. *Anticipate relapse*. Despite the best of intentions, most trainees will find once they return to their job, they occasionally revert back into previous patterns of behavior. Since slips are predictable the most effective preventative strategy is to anticipate relapses. In this procedure the trainee engages in an internal dialogue or self-talk. Relapse anticipation can also be supplemented by trainees' brainstorming of the kinds of problems they expect to encounter as they try to transfer the training.

### **Post Training Transfer Strategies for the Trainee**

1. *Review training content*. Trainees should establish a regular time for periodically reviewing their course materials following the training program. Research studies of memory following learning strongly indicate a sharp drop-off in recall capabilities following initial input. This decline is even worse when other factors interfere with immediate and regular application of the knowledge or when significant time passes before the individual reviews the materials. In short, everything points in the direction of the desirability of early and frequent review.
2. *Develop a mentoring relationship*. In general, mentors are a rich potential source of useful information and guidance. Mentors from the same cultural background as trainees can provide particularly valuable assistance. Trainees can use the mentor as a source of feedback, bouncing new ideas off the mentor and asking for constructive criticism on the application of the new skill. This kind of feedback can supplement that obtained from the supervisor.
3. *Maintain contact with training buddies*. The entire purpose of the buddy relationship is to increase the likelihood of transfer through the use of interpersonal commitment, mutual support and goal setting. The buddies must agree in advance that they will not allow meetings to become merely an opportunity to complain to each other about how much work they have. The key lies in the strength of the two parties' commitment to maintaining mutual contact for an extended period.