

THE TRANSFER OF LEARNING POCKETBOOK

By Paul Donovan and John Townsend

Drawings by Phil Hailstone

"This is an important contribution to the practice of learning and development in organisations. By recognising the importance of an integrated organisation-wide approach to learning, the authors have developed a practical and powerful approach to delivering training that produces quantifiable results."

Kevin Hannigan, Head of Learning and Development, Matheson Ormsby Prentice

CONTENTS



WHAT IS TRANSFER OF LEARNING ALL ABOUT? 5
Definition, cost, how much training is wasted, how much training is **not** wasted, Kirkpatrick's four levels, other research, the 17 factors, how to improve learning transfer, transfer of e-learning



ACTION TIPS 47
Overview, 70 tips divided into the five stages of the training process: the need; the design & development of training; initiation; the delivery; the return to work



THE FACTORS AFFECTING LEARNING TRANSFER 17
Introduction, the 17 factors, the factor cloud



THE LEARNING TRANSFER TEST 95
Explanation, the test



TOP 10 TIPS 39
Executive summary: 10 vital actions to improve learning transfer



FURTHER INFORMATION 107

ACTION TIPS

OVERVIEW



This chapter is a compendium of 70 action tips for improving the transfer of learning in your organisation. We've divided the tips into five groups – aligned to each stage of the training process – and selected the key factors which affect transfer at each of these stages. This is not an exhaustive selection. Use your own judgment and creativity to identify how any of the other factors might also impact each stage.



ACTION TIPS

STAGE 1: THE NEED

KEY FACTORS

There are three factors most relevant to this, the first stage of the training process.



- 1 Organisational support for learning
- 2 **Organisational linkage of training**
- 3 Quality focus of the organisation
- 4 Learner's organisational level
- 5 Learner's job design
- 6 Learner's motivation to attend training
- 7 Clarity of learner's job
- 8 Learner's job autonomy
- 9 **Perceived relevance of training**
- 10 **Training linked to learner's job purpose**
- 11 Career utility of training
- 12 Trainer effectiveness
- 13 Trainer's understanding of context
- 14 Training event climate
- 15 Learning transfer management
- 16 Peer support for training
- 17 Opportunities to use the learning



ACTION TIPS

STAGE 1: THE NEED

EXPLANATION



All the research and experience we've gathered shows that:

- Training is more likely to be transferred if the participants think that their organisation believes in training their staff and that what they have learned will, in some way, help to solve some of the organisation's problems and improve its performance
- Training will transfer well when participants can clearly see the relevance of what they are learning and how they can use it back at work
- People are more likely to use the skills and knowledge they learn when they believe that these are in line with the purpose of their job



ACTION TIPS



STAGE 1: THE NEED

ORGANISATIONAL LINKAGE OF TRAINING

- ✓ If it's not already the case, propose to include training and people development in the organisation's mission and values statement

(This is only a first step. Whether or not an organisation 'believes' in training depends on more than just a mission statement. Above all, it depends on the tangible results provided by the training function...read on!)

- ✓ Regularly take the opportunity to pose the **three key training need questions** to senior management:
 - What are you trying to achieve/ avoid?
 - What must people in the organisation do to help you get there?
 - What must they learn in order to provide this help?

ACTION TIPS

STAGE 1: THE NEED

PERCEIVED RELEVANCE OF TRAINING

- ✓ Based on the answers to the three training need questions, help the organisation create/ implement a rigorous system for determining what training is needed for whom, in order to improve organisational performance
(A detailed example, the **INVESTIGATE** model outline, can be found in the *Training Needs Analysis Pocketbook*, also by Paul Donovan and John Townsend)
- ✓ Assist management in briefing all staff members on how the training needs identified and the resulting training actions are relevant to the goals of the organisation
(For example, during induction training/ on the company website/ at conferences, presentations, etc)



ACTION TIPS



STAGE 1: THE NEED

TRAINING LINKED TO LEARNER'S JOB PURPOSE



Resist the temptation to implement training which:

- Rewards good past performance
- Is not related to on-the-job performance improvement
- Is 'feel good', 'away day' or re-motivational in nature
- Is faddish, flavour-of-the-month or copy-cat training (ie our competitors/someone we know did some of this kind of training – so should we)

NB Learning and development staff who are learning transfer-friendly jealously guard their reputation as serious organisational professionals – refusing to be associated with lightweight '*entertainment*'.

ACTION TIPS

STAGE 1: THE NEED



SUMMARY

Conduct a methodical identification of training needs within your organisation, ensuring at every step that the needs are always linked to organisational performance improvement and individual job purpose.

Communicate the results of the analysis, and secure the commitment of targeted learners and their managers.
For further help on this topic, see *Training Needs Analysis Pocketbook*.

ACTION TIPS

STAGE 2: THE DESIGN & DEVELOPMENT OF TRAINING

KEY FACTORS

Again, three factors are particularly relevant to the design and development stage.



- 1 Organisational support for learning
- 2 Organisational linkage of training
- 3 Quality focus of the organisation
- 4 Learner's organisational level
- 5 Learner's job design
- 6 Learner's motivation to attend training
- 7 Clarity of learner's job
- 8 Learner's job autonomy
- 9 Perceived relevance of training
- 10 Training linked to learner's job purpose
- 11 Career utility of training
- 12 Trainer effectiveness
- 13 Trainer's understanding of context
- 14 Training event climate
- 15 Learning transfer management
- 16 Peer support for training
- 17 Opportunities to use the learning

STAGE 1

The Need

STAGE 2

Design & Development of Training

STAGE 3

Initiation

STAGE 4

The Delivery

STAGE 5

The Return to Work

ACTION TIPS

STAGE 2: THE DESIGN & DEVELOPMENT OF TRAINING

EXPLANATION

These factors have been selected to prompt actions at this stage of the training process because:

- 'Off-the-shelf' training courses or branded, 'one-size-fits-all' products are less likely to provide transferable learning than courses designed with specific, home-grown issues in mind
- Courses with written learning outcomes relevant to participants' jobs have higher transfer scores than those without
- Fellow trainees also contribute to learning on training courses
- Course designs which allow time for 'show and tell' sessions favour learning transfer



ACTION TIPS



STAGE 2: THE DESIGN & DEVELOPMENT OF TRAINING

PERCEIVED RELEVANCE OF TRAINING TRAINING LINKED TO LEARNER'S JOB PURPOSE

- ✓ Ensure that the course title and content reflect specific job issues
- ✓ Design and develop course exercises and activities that simulate the actual job situation of the majority of the participants
(Sometimes, especially in public courses, this may be difficult. If this Action Tip cannot be achieved it doesn't mean that the course is bad – only that it may not be as transferable as it could be!)
- ✓ Tools, tips and especially handouts given on training programmes must be obviously transferable and usable for each participant's job

ACTION TIPS



STAGE 2: THE DESIGN & DEVELOPMENT OF TRAINING

TRAINING LINKED TO LEARNER'S JOB PURPOSE TRAINING EVENT CLIMATE

- ✓ Always provide physical space at course venues to allow people to mix and share ideas
- ✓ In all training courses build in opportunities for planning the application of the learning to specific job situations
- ✓ Create exercises which allow for sharing of existing best practice
- ✓ Build 'case conferences' into all courses where participants provide their own problems/ issues for the group to work on
- ✓ Design into all courses 15 minute coffee/ tea breaks at least every 90 minutes. Allow at least one hour for lunch to allow for participant exchange, chatter and camaraderie

ACTION TIPS

STAGE 2: THE DESIGN & DEVELOPMENT OF TRAINING



SUMMARY

Real transfer happens when training is designed **solely** with the user in mind. User-friendly training is transfer-friendly training!

About the Authors

Dr Paul Donovan

Paul is School Director of Teaching and Learning at the School of Business, National University of Ireland Maynooth. He has extensive management experience and has conducted a wide range of HRD assignments in Western Europe and Asia.

Paul's professional interests include researching evaluation of training and development interventions where he has identified easy-to-use surrogate measures as effective replacements for time-consuming and expensive evaluation initiatives. He has edited seven books in a series of management texts.

Contact

To contact Paul, email paul.donovan@nuim.ie or phone 00 353 1 7086627



John Townsend, BA MA MCIPD

John has built a reputation internationally as a leading trainer of trainers. He is the founder of the highly-regarded Master Trainer Institute, a total learning facility located just outside Geneva which draws trainers and facilitators from around the world. He set up the Institute after 30 years' experience in international consulting and human resource management positions in the UK, France, the United States and Switzerland – notably as European Director of Executive Development with GTE in Geneva where he had training responsibility for over 800 managers in 15 countries. John has published a number of management and professional guides and regularly contributes articles to leading management and training journals.

