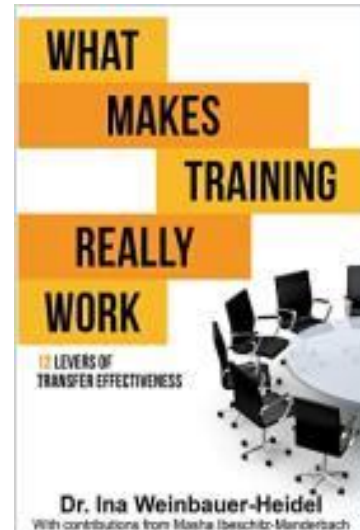


What Makes Training Really Work

12 Levers Of Transfer Effectiveness

Ina Weinbauer-Heidel and Masha Ibeschitz-Manderbach



Recommendation

Wondering how to get the most from employee training? In this helpful text, training expert Dr. Ina Weinbauer-Heidel delivers a no-nonsense take on what workplace learning should produce: a measurable and meaningful transfer of learned skills and knowledge to the job. To that end, she provides helpful, workable advice for boosting on-the-job skills application and knowledge gained in formal training. Her detailed, practical guide Offers tips, tools, templates and ideas for exercises.

Take-Aways

- To maximize employee training, apply 12 levers for training transfer success.
- Transfer motivation – Ensure participants want the training, so they will engage with it.
- Self-efficacy – Employees must believe they can do what they learn in training.
- Transfer volition – Every participant should have a documented transfer plan detailing how he or she will apply what they learn to the job.
- Clarity of expectations – Set clear trainee expectations for your course or workshop.
- Content relevance – Design your program for maximum realism.
- Active practice – People learn best by doing.
- Transfer planning – Goal-setting should start before training, in consultation with a supervisor or manager.
- Opportunities for application – Grant trainees opportunities to put their new learning to use.
- Personal transfer capacity – Create free time in trainees' schedules for practicing what they learn.
- Support from supervisor – Convince supervisors of the importance of learning transfer.

- Support from peers – Belonging is universal and fundamental.
- Transfer expectations in the organization – Your organization – senior leaders and the board – must visibly endorse training and its applications.

Summary

To maximize employee training, apply 12 levers for training transfer success.

Organizations invest in training to build skills, change behaviours or impart knowledge. Training's prime objective is to convert learning into doing. The ultimate measure of the value of any training is whether participants apply what they learn – in a course, seminar or workshop – to their work.

“Only two out of every twelve trainees manage to transfer what they have learned into everyday life.”

Unfortunately, HR and learning professionals estimate that learners only apply between 10% and 30% of what they take away from training. Participants themselves offer roughly the same estimates. Thus, organizations waste billions annually on training that goes nowhere. The exercise wastes time and fails to benefit the firm or the learners in tangible ways.

If sales fall or engagement levels drop, turnover increases or customers defect, firms often send people to workshops. Other interventions might prove more effective than training for any of these issues. Conduct a training needs assessment to evaluate the appropriateness of training for a given problem or opportunity.

Use the following 12 levers to ensure learning travels from the classroom into daily work. Depending on your level of comfort, you can start using all the levers in a single training program or use a single lever across all training. Alternatively, use several levers and accompanying tools at once, in single or multiple programs.

Transfer motivation – Ensure participants want the training, so they will engage with it.

Ideally, trainees want to learn. In reality, most learner motivation comes from both intrinsic and extrinsic sources. For example, an employee may want to learn in order to get a raise or promotion, or because their leaders regard the course or workshop as important.

“Researchers refer to this strong desire to actively use and implement what one has learned in one's everyday work as transfer motivation.”

Communicate the importance of any program. When trainees must apply to get into a course, their motivation probably exceeds that of any person compelled to attend the course. Emphasize the relevance, meaningfulness, effectiveness and usefulness of your material, and explain what the learner can gain. Include endorsements from senior leaders and past participants.

Self-efficacy – Employees must believe they can do what they learn in training.

Trainees must have or develop self-efficacy surrounding the skills, tasks or behaviours you expect them to learn. If they feel the training exceeds their abilities, they will disengage and not apply anything afterward. Design your training so participants enjoy early successes. Gradually increase the difficulty of the material and exercises. Demonstrate the right and wrong ways to do things. Talk about how others applied the skill or completed the task, including stories from past students. Ask more advanced participants to demonstrate a skill or demonstrate it yourself.

Transfer volition – Every participant should have a documented transfer plan detailing how he or she will apply what they learned to the job.

Trainees need willpower to turn training lessons, activities and practice into work habits. People can muster only so much willpower. Build transfer plans into your courses. Ensure you and your trainees retain copies. During training, refer to trainee transfer plans often.

“Without volition, participants will hardly be able to achieve their transfer goals and implement their plans.”

Have participants share their plans with the class to build social commitment. At intervals after training, remind participants of their commitment and ask how they applied the learning to their work. Share success stories.

Clarity of expectations – Set clear trainee expectations for your course or workshop.

Trainees should know before the training what to expect and whether the material and objectives fit their needs. Market your training description and its goals, emphasizing its value to the learner and the firm. When learners know what to expect during and after training, transfer success increases.

“For transfer success it is crucial that the participants have a clear picture of what to expect before, during and after a training.”

Don't waste time asking people for their expectations at the start of the course. Ask them well before training starts, so you can factor their feedback into your course design. Avoid trying to make training all things for all people. Align it with organizational needs. Send participants materials before the course that prepare them and pique their interest.

Content relevance – Design your program for maximum realism.

Use words, tools, case studies and exercises taken directly from learner work and experience. Ensure you teach exactly what trainees will use in their work. Avoid theory; use practical examples, problems and case studies, and allow participants to pull the abstract from the concrete. Rather than lay out statistics and dry facts, incorporate them into stories

about real people. Leverage the principles of storytelling to make your points more relevant and poignant to learners. Don't stop at ah-ha moments. Show trainees exactly how they can use those ah-ha moments on the job.

Active practice – People learn best by doing.

Build learner activity into your training – not only discussions and presentations, but action, in the form of the exact work you want them to do after the training. Create realistic skits, simulations, and templates or tools. Bring customers and other stakeholders in to run scenarios and participate in skits, when possible. Make your courses 30%-50% active practice. That doesn't mean you should throw out all lecture and trainer presentation materials. Intersperse your lectures and presentation material with quizzes and interactive exercises. Ask learners how they might apply what they hear or see to their work.

Transfer planning – Goal-setting should start before training, in consultation with a supervisor or manager.

Devote about 10% of course time to transfer planning and application goals. Follow up to ensure that transfer plans and goals don't slide after the training. Distribute transfer journals and cards to all learners so they can work on their plans throughout the training by jotting down key takeaways and concrete ideas they intend to try at work.

“If we want transfer success – if we want trainees to apply their newly learned skills at work – they need to have opportunities for application.”

Psychologically, people move from abstract notions of what they might do, but probably won't, to the actual intent to do something when they feel confident they can do it. They commit to taking action because they have goals and a path forward. Without an implementation plan, your trainees will likely let other priorities push their good intentions aside.

Opportunities for application – Grant trainees opportunities to put their new learning to use.

Remarkably, many organizations send people to skills training and spend significant sums only to drop the ball when it comes to the application of those skills. Ensure each learner has regular opportunities to practice his or her new skills. Ask trainees to bring real cases and projects to the class so they can apply what they learn during training. Without an opportunity to put new skills into practice, trainees quickly forget what they learn.

“It is the responsibility of HR development to ensure that training is used as an intervention only when the root cause of a problem is a lack of skill.”

When training makes a positive impression, learners are eager to apply their new knowledge. When you frustrate that enthusiasm, you risk disengaging workers or losing them to a competitor. Don't send people to training if you lack clear, meaningful

ways for them to apply their learning after the training. If people lack a skill the organization needs, training makes sense; otherwise, it doesn't.

Personal transfer capacity – Free time in trainees' schedules for practicing what they learned.

Don't leave it to chance or trainees might fall into the "planning fallacy trap" in which the hundreds of things they have to manage daily take up all their time, leaving no space to practice what they learned. Divide long training courses into shorter segments, with scheduled time for practice in between.

"Transfer capacity describes the extent to which individuals can muster the time, energy and headspace in their working lives to incorporate what they have learned into their daily work routine."

Throughout your course, remind learners that the training supports the practice, and is not an end in itself. Design learning as a process – preparation, planning, application and practice – not as a one-off event. Behaviour change, skills application and mastery are the ultimate objectives.

Support from supervisors – Convince supervisors of the importance of learning transfer.

Explain the organization's need for their involvement and buy-in to supervisors. Show them what's in it for them, and give them tools to use in transfer planning and coaching. Encourage supervisors to meet with trainees before training courses begin to go over learning objectives and transfer plans. Involve supervisors in training design to incorporate their ideas and needs and to give them a sense of ownership. Find ways to incorporate supervisors into the training – perhaps to instruct modules or lead case study discussions. Encourage team leaders to meet with trainees after the course to discuss what they learned, how to apply it and what support they may need. Supervisors should recognize and reward learners – especially those who apply what they learn – to inspire others.

Support from peers – Belonging is universal and fundamental to human survival.

Co-workers exert enormous influence on their colleagues. Co-workers' support and approval of learners' choices and actions – from the decision to go to training through support for learning transfer – can determine learner success. Trainers can exploit this social pressure by having learners declare their transfer goals and plans publicly. When people announce their intentions, they tend to stick to their plans to a greater degree than when they keep their goals private.

"Groups and group situations affect individuals in incredibly powerful ways...we observe this or experience it in our own everyday lives."

Conduct training in peer groups – people who work together – so learners share the same frames of reference and can support each other in transfer. Encourage supervisors to emphasize the importance of the training and the need for group support, as learners take time to practice what they learned. Establish peer groups of trainees who, if they don't work together, can meet post-training to discuss their transfer progress, share ideas and tips and encourage one another.

Transfer expectations in the organization – Your organization – senior leaders and the board – must visibly endorse training and its applications.

Recognize and appreciate learners who use what they learned. Avoid sending mixed signals, such as when leadership talks about the importance of learning and development, but only measures and recognizes results, sales and the bottom line.

“It’s about the question of whether their organization notices and pays attention to their success or failure in transfer.”

Measure training outcomes as well, including learner satisfaction; the degree to which learners utilized training on the job; and how their learning transfer impacted corporate effectiveness and objectives. Don't evaluate the effectiveness of an instructor based on how happy he or she makes the learners. Evaluate them on learning transfer success.

About the Authors

Leader of the Institute of Transfer Effectiveness in Austria, **Dr. Ina Weinbauer-Heidel** helps organizations derive value from training by achieving greater learning transfer. **Masha Ibeschitz-Manderbach** is an executive coach and founder of the Think Beyond Group.