

A group of five business professionals are gathered around a wooden conference table in a modern office setting. They are engaged in a collaborative meeting, looking at documents and a laptop. The scene is brightly lit, with a window in the background showing a view of the city. The text is overlaid on a semi-transparent grey rectangle in the center of the image.

A Step-by-Step Guide to Transferring Learning into Performance Practical Training Transfer

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Today's Speakers

Ian Townley and Jason Durkee are the co-founders of Practical Training Transfer. Their mission is to inspire interventions that drive meaningful business results through learning transfer.



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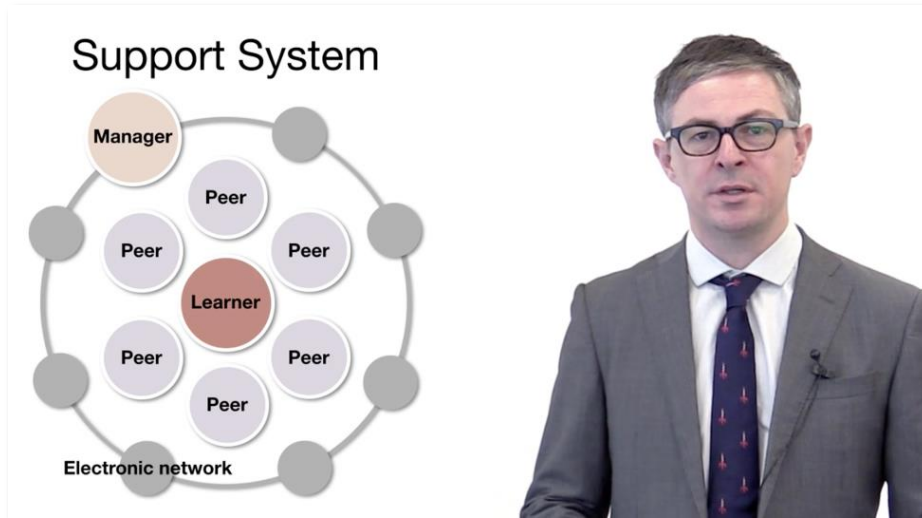
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A Step-by-Step Guide to Transferring Learning into Performance

1. Learning Transfer Basics
2. Knowledge Transfer
3. Skill Transfer
4. Other Content Transfer

Learning Transfer Research Findings in Plain English

<https://practicaltrainingtransfer.com> > Expertise > Background videos



Environmental Factors

Hard	Soft
Policies Rules Compliance Managers	Working Styles Perception Corporate Culture Coworkers

Cromwell, S. E., Kolb, J. A. (2004). [An examination of work-environment support factors affecting transfer of supervisory skills training to the workplace]. Human Resource Development Quarterly, vol 15, no. 4.



Barriers to Learning

Barrier	Percentage
Time	50%
Manager support	35%
My skills	10%
Funds	5%
Rewards	2%
Peers	1%

Participants should perceive support

Cromwell, S. E., Kolb, J. A. (2004). [An examination of work-environment support factors affecting transfer of supervisory skills training to the workplace]. Human Resource Development Quarterly, vol 15, no. 4.



Learning Transfer over time?

Time	Percentage
Immediately	40%
6 Months	25%
12 Months	15%

Newstrom, J.W. (2007). [Leveraging management Development through the Management of Transfer]. Journal of Management Development.



1. Learning Transfer Basics

Training		Transfer		Result
10	X	1	=	10
5	X	5	=	25
10	X	10	=	100

1. Learning Transfer Basics

Process, not an Event



1. Learning Transfer Basics

Connect Learning to Application



Learning

On job
use

Expected
results

Business
Needs

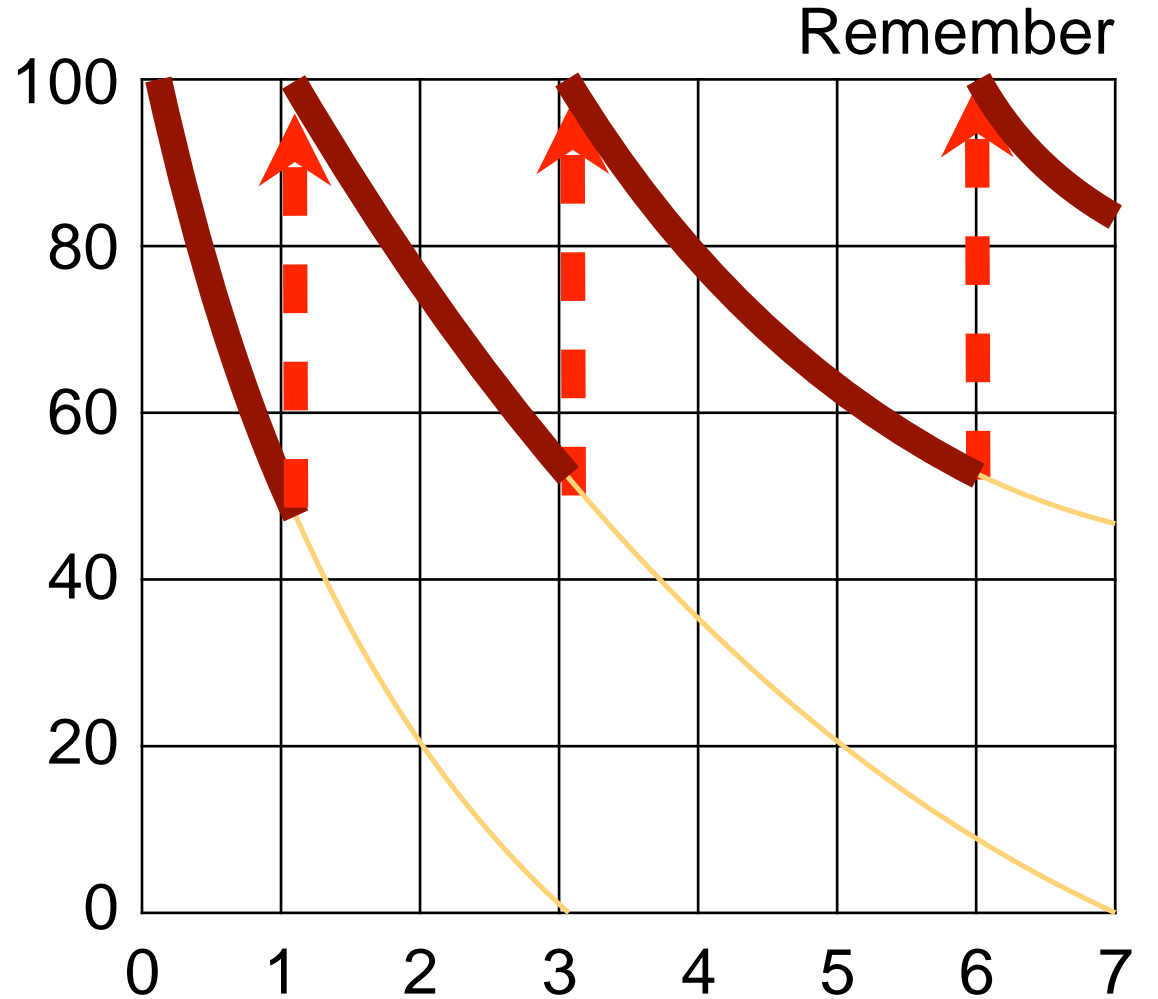
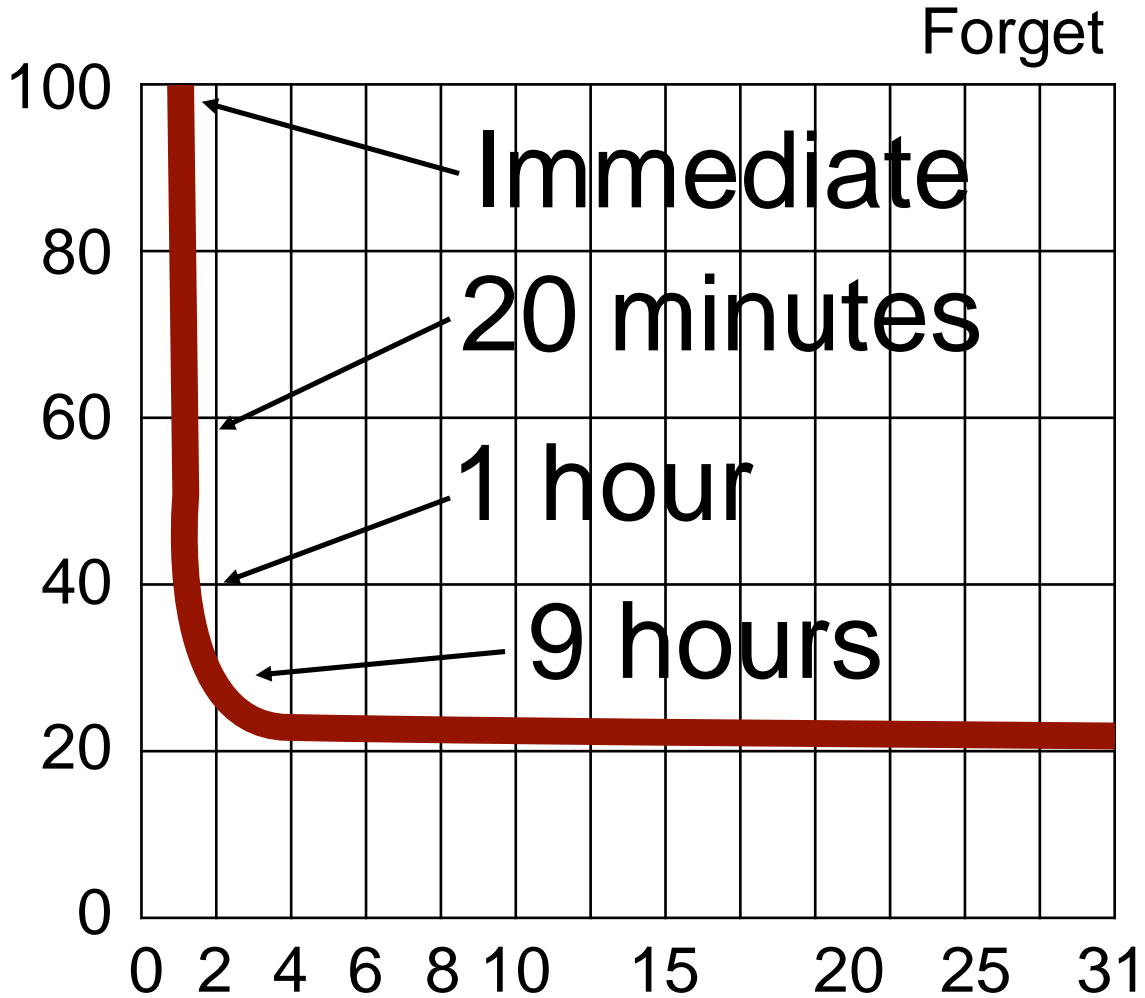
1. Learning Transfer Basics

Involve Manager

	Before	During	After
Manager	1	8	3
Trainer	2	4	9
Participant	7	5	6

1. Learning Transfer Basics

Forgetting Curve

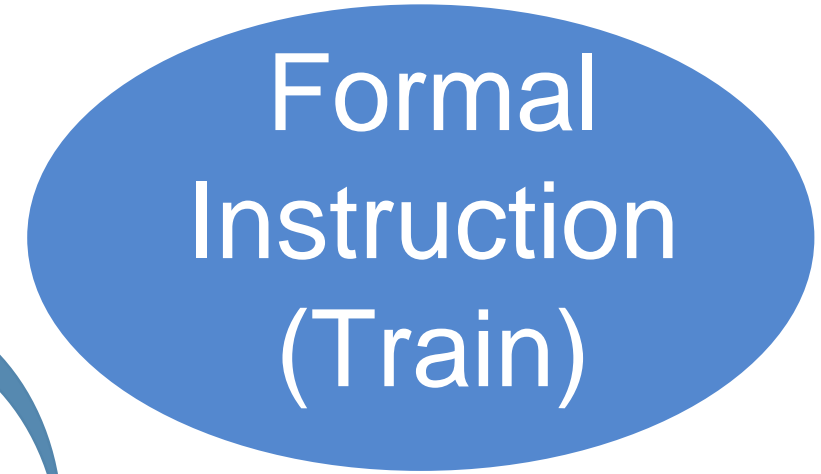


1. Learning Transfer Basics

Use Performance Support

1. When learning for the 1st time
2. When wanting to learn more

-
3. When trying to apply and/or remember
 4. When something goes wrong
 5. When something changes



1. Learning Transfer Basics (Summary)

- Training x Transfer = Results
- Process not event
- Link learning to business needs
- Involve managers
- Beat the forgetting curve
- Use performance support

Program

1. Learning Transfer Basics
- 2. Knowledge Transfer**
3. Skill Transfer
4. Other Content Transfer

2. Knowledge Transfer

Topic: New Product Information

The company

A global pharmaceutical company with a revolutionary new cancer drug with the potential to change the entire health landscape.

The challenge

The company had to increase its sales staff and train on all aspects of the drug's efficacy in order to reach as many customers as possible.

The solution

Due to industry regulations, the company designed a thorough blended learning program with all the information sales reps would need to explain about the drug to all of the customers, from prescribing clinicians to pharmacists. It featured over 100 hours of videos including doctor interviews, 2000 pages of text about in-depth trial results and an intensive three-day classroom training.

The result

Three months after completing the training, many sales reps weren't competent in their territories and couldn't answer doctors' questions adequately. The problem was obvious – **What were the problems?**

2. Knowledge Transfer

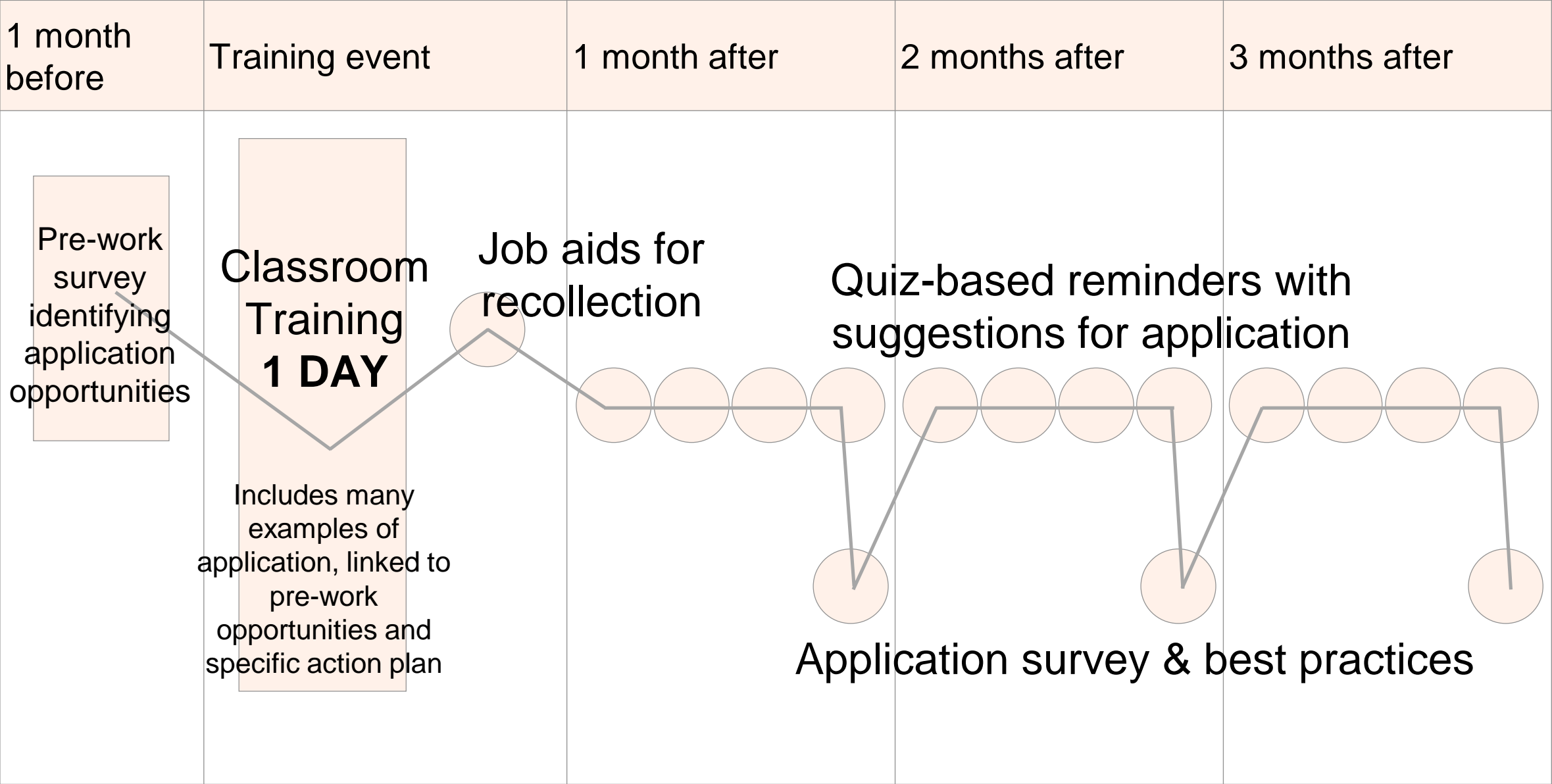
Topic: New Product Information – Poll

<p>Poll 1 Choose the best answer</p> <p>Which problem best applies to the company's situation?</p> <p>A. The reps forgot the information from the course B. The team managers hadn't provided relevant support or feedback C. The reps weren't motivated enough to do the work correctly</p>	<p>Poll 1 Correct Answer</p> <p>A. The reps forgot the information from the course</p> <p>Dense information is hard to remember. This is a classic forgetting curve issue.</p>
<p>Poll 2 Choose the best answer</p> <p>Which problem best applies to the company's situation?</p> <p>A. The reps hadn't habituated their communication skills B. The company's sales team was disorganized C. The reps were not sure which information was relevant to do their job</p>	<p>Poll 2 Correct Answer</p> <p>C. The reps were not sure which information was relevant to do their job</p> <p>Due to so much information, the reps were not sure which was relevant to them in their specific territory – they assumed some information wasn't needed.</p>
<p>Poll 3 Choose the best answer</p> <p>Which problem best applies to the company's situation?</p> <p>A. The reps hadn't practiced explaining the details in role plays B. The reps couldn't adapt the information to suit various audiences C. The training team hadn't given enough coaching to the reps</p>	<p>Poll 3 Correct Answer</p> <p>B. The reps couldn't adapt the information to suit various audiences</p> <p>Due to having to convey the information to various people the messages was lost when the reps couldn't decide which information to use and when.</p>

2. Knowledge Transfer

Application Symptoms	Ideas to Improve Transfer
<p>Learners are not sure how information learned on the course should be applied to actual work and is relevant to them</p>	<p>Identify opportunities to use information in pre-work survey Show examples of application throughout training Make specific action plans during training</p>
<p>Learners forget how to use knowledge in moments of high pressure or when time is constrained</p>	<p>Give job aids for easy recollection at point of need Send reminders and follow up to maintain awareness</p>
<p>Learners don't seem to be considering how to adapt broad skills/knowledge to specific skills to suit their various situations</p>	<p>Share success stories of other participants with details of how adapted and used on the job</p>

2. Knowledge Transfer



Program

1. Learning Transfer Basics
2. Knowledge Transfer
- 3. Skill Transfer**
4. Other Content Transfer

3. Skill Transfer

Topic: Presentation skills

The company

A global automobile manufacturer with a very large and complex organization producing vehicles in various locations.

The challenge

The company had difficulty staying agile in a competitive market. It pushed reporting down to regional managers who struggled to meaningfully present information back up to HQ

The solution


The company rolled out a presentation training course to all local managers. They submitted presentations that were previously used in real meetings, ahead of time. The presentations were used to illustrate good and weaker examples in each group and were used as learning tools along with standard presentation essentials. The participants refined the presentations they had submitted step by step throughout a two-day course to end up with an improved version that they could take away and use in their work.

The result

Several months later, HR sent out a survey to find out about application levels and what results the participants had achieved. Surprisingly, the participants reported much less application and worse results than had been expected. – **How can we improve?**

3. Skill Transfer

Topic: Presentation skills

Application Symptoms	Ideas to Improve Transfer
Learners are not receiving or finding opportunities to practice skills in the workplace before real application	
Managers don't seem to have a clear understanding of the program content and how to support the learner	
Learners are falling back on old processes when focusing on work content	
Relevant feedback isn't being provided and scheduling of feedback isn't being considered for the learners	

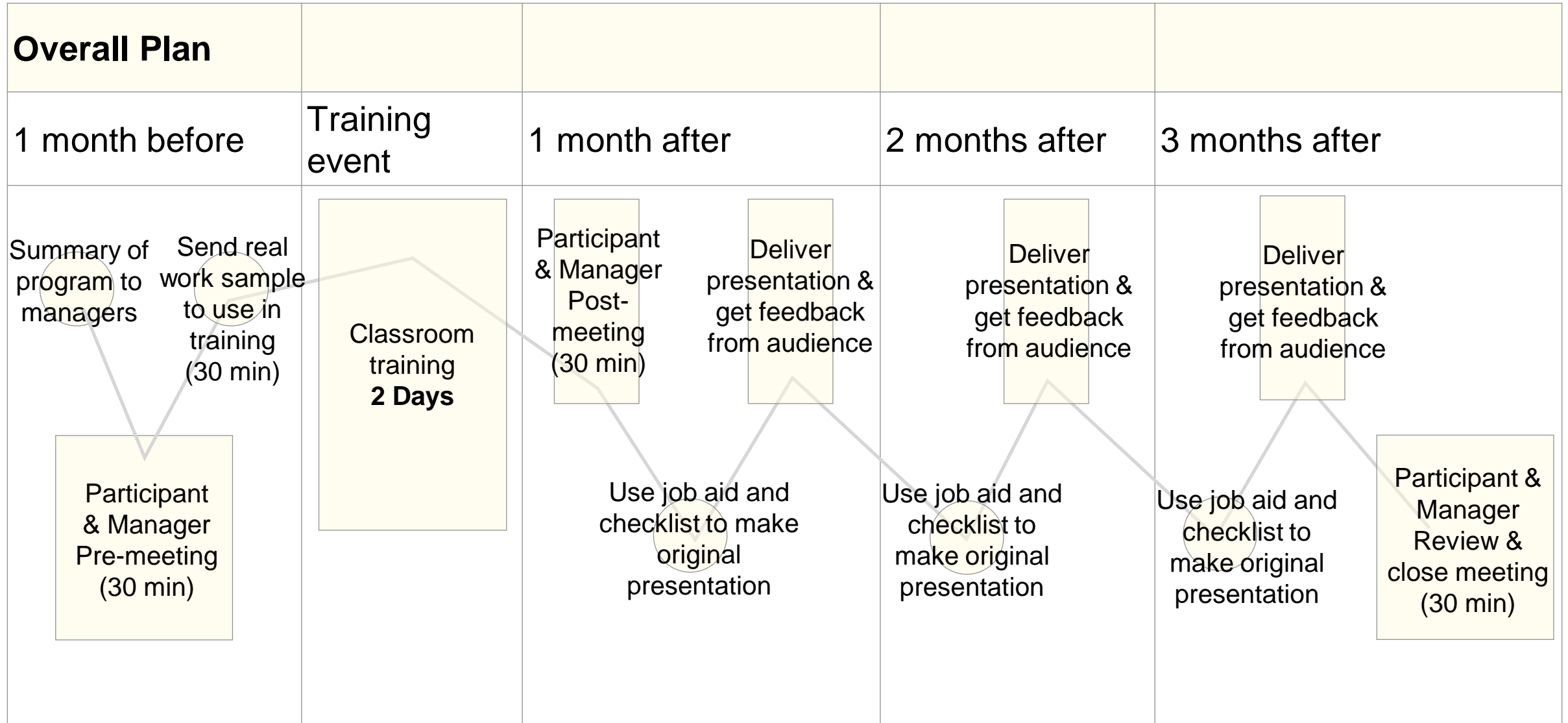
3. Skill Transfer

Topic: Presentation skills

Application Symptoms	Ideas to Improve Transfer
Learners are not receiving or finding opportunities to practice skills in the workplace before real application	Schedule Pre/Post manager planning and application meetings; create specific opportunities to try skills and get feedback
Managers don't seem to have a clear understanding of the program content and how to support the learner	Send a summary of program content for manager including how to support through advice and feedback
Learners are falling back on old processes when focusing on work content	Create job aids and checklist to use when applying skills in real time
Relevant feedback isn't being provided and scheduling of feedback isn't being considered for the learners	Create a checklist and feedback guide for manager and listeners; diary plan included

3. Skill Transfer

Example: Presentation Skills



Program

1. Learning Transfer Basics
2. Knowledge Transfer
3. Perception Change Transfer
4. **Other Content Transfer**

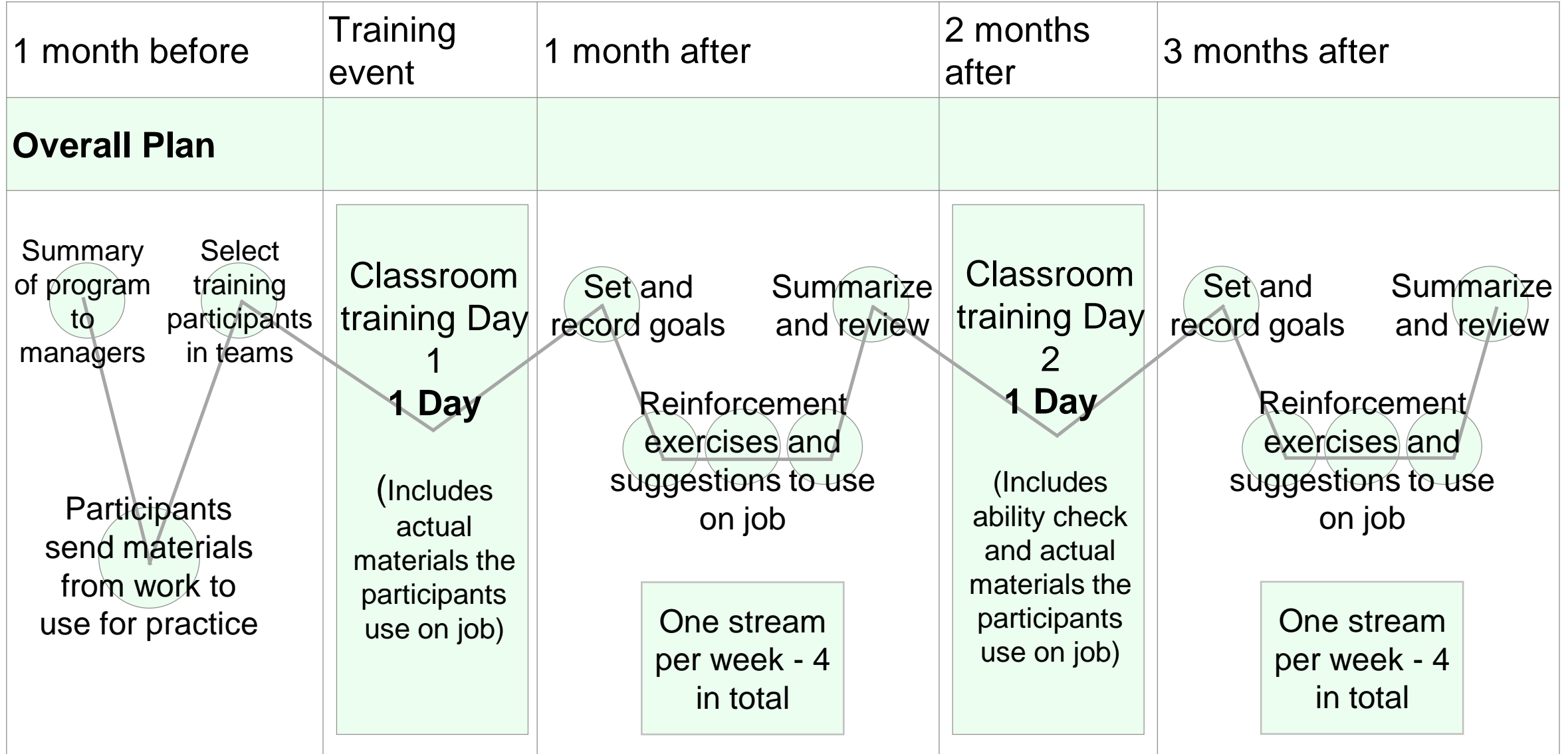
4. Other Content Transfer

Habit Application

Transfer Issues	Ideas to Improve Transfer
Learners seem to revert to type when habits are difficult to maintain	Make action plan of situations to use skills Send regular reminders to maintain mind-share in participants
Learners are seldom observed to go through extended practice and reinforcement to internalize skills	Follow up with reinforcement practice exercises Follow up with suggestions about how to use on job
Feedback to refine a learned style to specific situations and work content doesn't seem to be provided	Share content with colleagues and manager Train in teams & Give simple feedback tools

4. Other Content Transfer: Habit

Example: Logical Communication



4. Other Content Transfer

Change Application

Application Symptoms	Ideas to Improve Transfer
The learner has a mental block on applying new skills and knowledge	Assist to overcome all rational fears and support extensively
The learner questions whether skills will work in his or her specific context	Use real work issues throughout program to reinforce need to change Share ample examples of application in similar contexts
The learner seems to lack the confidence to involve others in the application of new skills due to a perception that ideas will be rejected	Provide support tools to eliminate risk of failure and increase ability to communicate the need for new skills and knowledge
The learner actively de-prioritizes applying new skills when other work appears more important	Create concrete action plans, schedule and accountability to action Involve manager, peers and coaches to ensure follow through
The learner perceives that adopting new skills in place of trusted practices will lead to failure	Share success stories from others who have successfully applied new skills Create conditions for success; clear the path; create goals

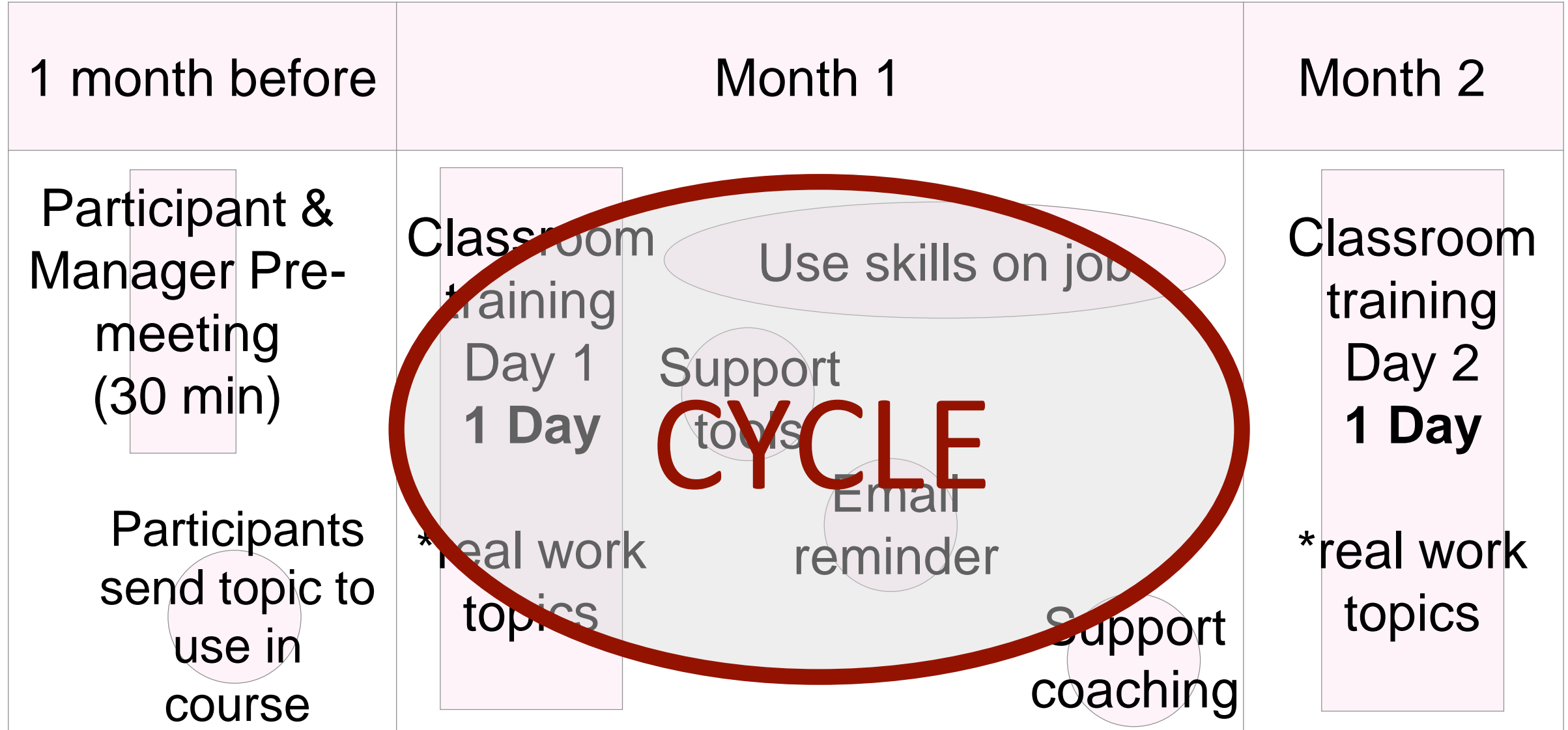
4. Other Content Transfer: Change

Example: Creative Thinking

Overall Plan	Action	Ideas	Needs	
1 month before	Month 1	Month 2	Month 3	Month 4
<p>Participant & Manager Pre-meeting (30 min)</p> <p>Participants send topic to use in course</p>	<p>Classroom training Day 1 1 Day</p> <p>*real work topics</p> <p>Use skills on job</p> <p>Support tools</p> <p>Email reminder</p> <p>Support coaching</p>	<p>Classroom training Day 2 1 Day</p> <p>*real work topics</p> <p>Use skills on job</p> <p>Support tools</p> <p>Email reminder</p> <p>Support coaching</p>	<p>Classroom training Day 3 1 Day</p> <p>*real work topics</p> <p>Use skills on job</p> <p>Support tools</p> <p>Video input for pres.</p> <p>reminder to submit slides</p> <p>Support coaching & Pres. feedback</p>	<p>Present Results to Manager 2 Days</p> <p>(Includes presentation skills help)</p> <p>Submit slides</p>

4. Other Content Transfer: Change

Example: Creative Thinking



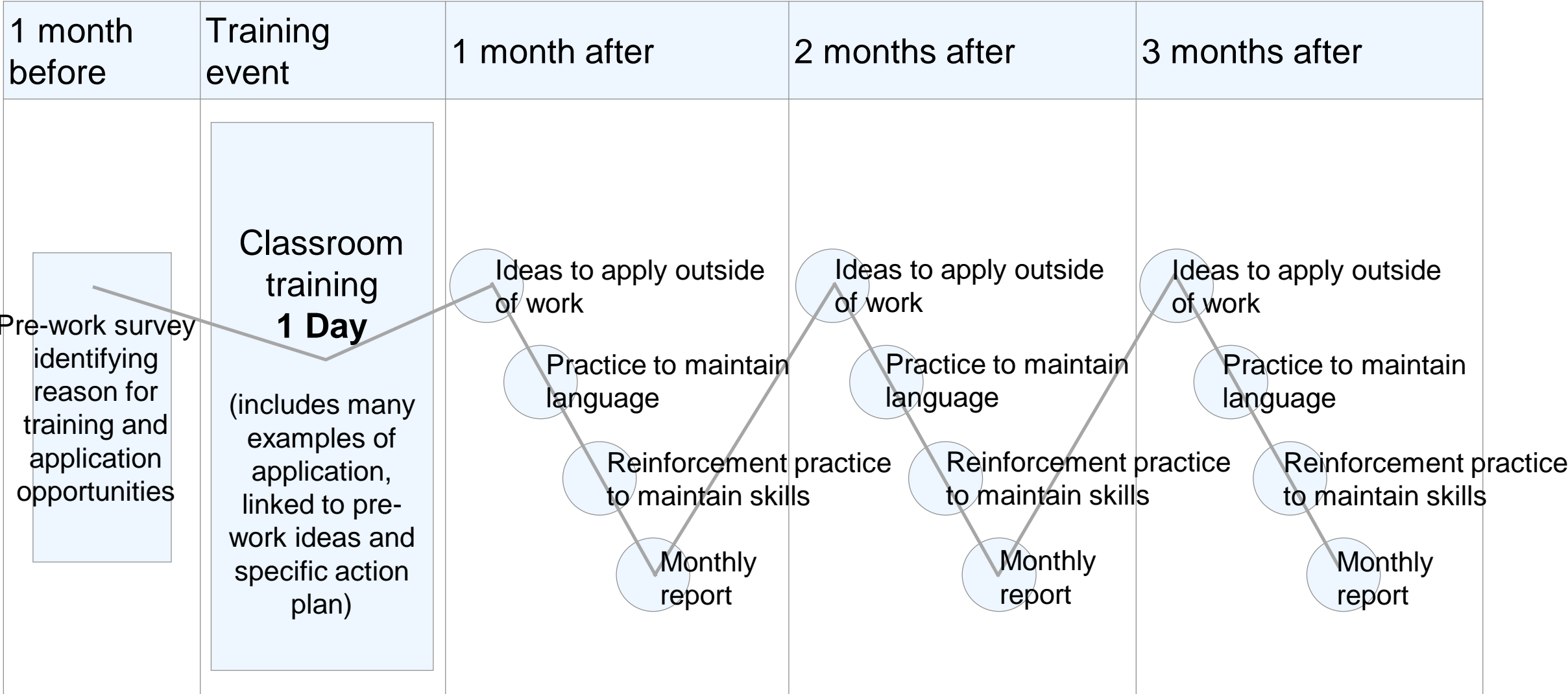
4. Other Topic Transfer

Maintenance Support

Application Symptoms	Ideas to Improve Transfer
There appears to be no opportunity for learners to use skills on the job in near future	Generate ideas to apply partially in current situation Generate ideas to apply outside of work
Skills are observed to become lost before being used	Provide spaced reinforcement practice to maintain skills

4. Other Content Transfer: Maintenance

Example: English Communication Skills



Appendix: Application Problems and Solutions

Types of learning	Learning type description and application label	Typical training examples	Application problems	General application solutions
Information based learning	Knowledge application Training where the main emphasis is learning new information that can be applied to current work practices using existing skills sets. There might be some adaptation of how to pass on or use the information in the workflow but not to an extent that it requires a completely new skill.	New product information	New information isn't used in work situations without learners referring to documents, training texts, manuals, or by seeking assistance from other people.	Identify opportunities to use information in work; make specific actions plans; give performance support to remember information; share application success stories
		Onboarding new employees		
		Ethics and company values		
Skills based learning	Situational application The type of skills training where a large, important, infrequent composite skills set is used in specific work situations. All of the skills on the training course would need to be applied for the work task to be adequately used in the workplace. The skills are not used in more than one type of scenario are are not transferrable to other areas of the user's work flow. The main emphasis is to create a large single skill set to be used only in specific situations.	Presentation	Skills are not being used in the workplace when learners agree that they are essential but have stated a lack of confidence in their ability to use the skills when not being observed or supported.	Create manager support materials; Involve the manager in meetings with participants, practice sessions and giving feedback; create job aids for both managers and participants
		Sales processes		
		Customer services		
	Habits application The type of skills that are granular in the individual types but when used together form a general competency level to elevate things like efficiency, fluency, speed, collaboration, time management etc. The main emphasis is to put all the skills together and adapt them into general work.	Effective communication skills for sales people	Habits are not adopted for use in the workflow because the learner quickly drops new habits or forgets the sequences that enable the habits to be used smoothly.	Design specific reinforcement practice sessions and materials; give clear suggestions about where and when to use the skills in work; train participants in teams and build in peer feedback tools
		Time management and efficient working habits		
		Coaching and giving feedback		
Mind Set learning	Change application The type of skills that require a shift of mind set or breaking of convention to be applied. They need to overcome an historical process and usually involve at least change management on an individual basis. The main emphasis is to get people to use a new way of thinking using relatively easy to comprehend and apply skills.	Innovation	Learners don't use their new skills because of a resistance to the use of skills which are perceived by the learners as less valuable or as carrying higher risks than the previously used skills.	Assist to overcome rational fears; use samples of real work in training; provide coaching and ongoing support; create support tools for application of novel ideas in work
		Meeting facilitation		
		Strategic thinking / planning		
Scaled learning	Maintenance support This includes all types of training from the above four categories where the application of the the skills or knowledge is purposefully delayed.	Interviewing new hires	Training isn't getting used when leaners have attended scaled learning events or timetable events which have been scheduled far from the intended time of application.	Generate ideas to apply skills in and outside of the workplace; aim for a zero budget solution; create reinforcement practice tools
		Writing proposals		
		Holding performance reviews		

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4. Other Content Transfer

Free PTT resources: Click “Expertise”

<https://practicaltrainingtransfer.com/>



BACKGROUND VIDEOS

Videos that summarise learning transfer research.



ARTICLES

Articles that explore the themes of learning transfer and Practical Training Transfer.



QUIZZES & TOOLS

Quizzes and assessments to benchmark where you are on the learning transfer scale.



APPLICATION VIDEOS

Videos that demonstrate how learning transfer can be applied in learning projects.



WHITE PAPERS

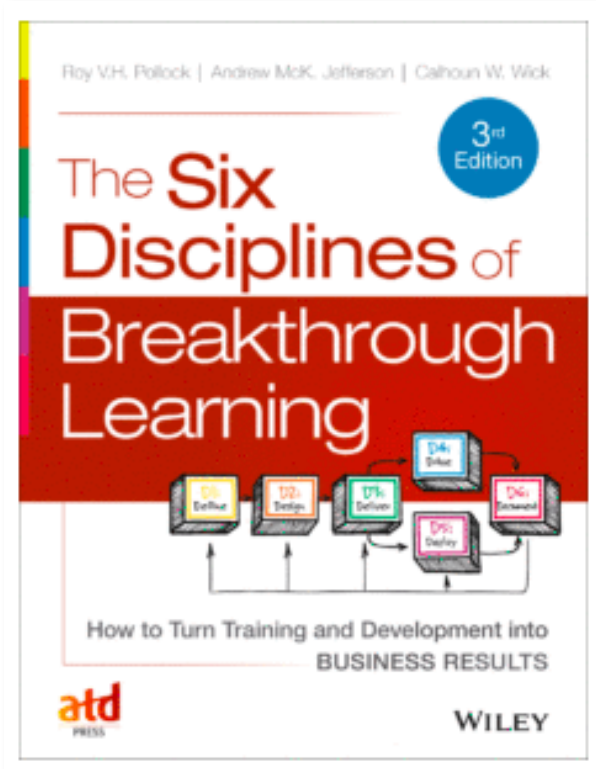
PDFs that describe Practical Training Transfer in more detail.



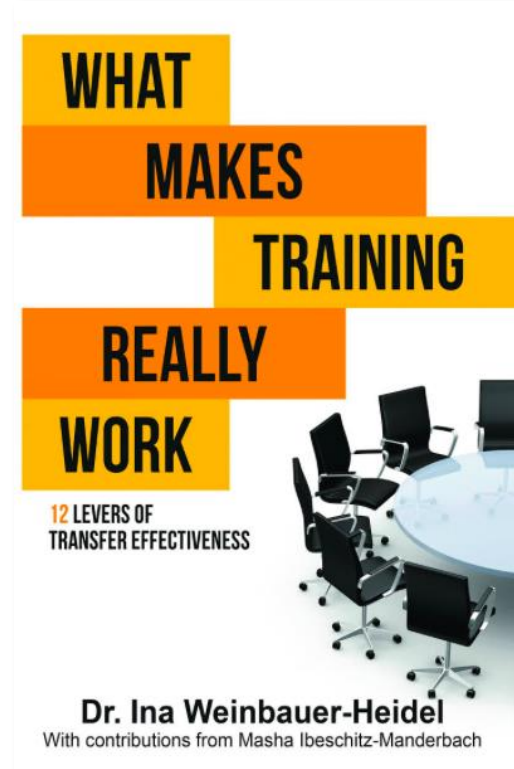
DESIGN TEMPLATES

Templates to use in the design of your learning transfer projects.

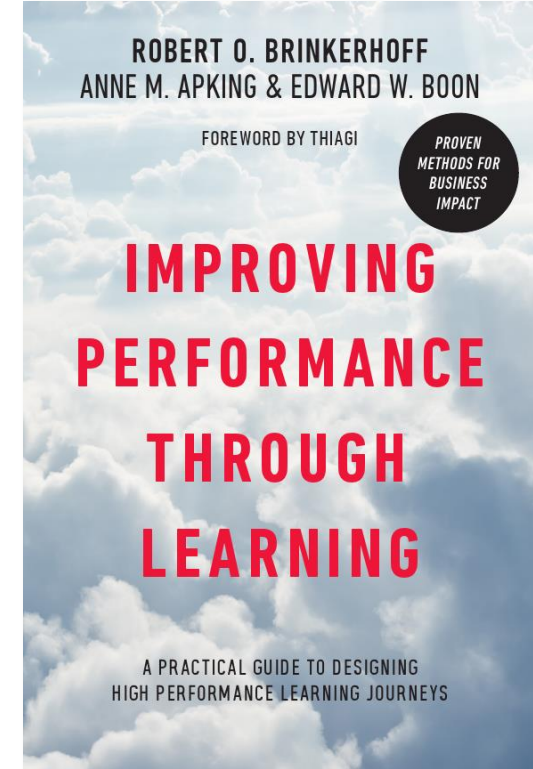
Recommended resources



The 6 D's of breakthrough learning is a milestone book on the road to creating meaningful organisational control and accountability through learning transfer strategies



Dr. Ina Weinbauer Heidel is the founder of the Institute for Transfer Effectiveness. Her book, What makes training really work, is a great read and an essential tool for all learning transfer practitioners.



Rob Brinkerhoff's latest book concentrates four decades of Brinkerhoff wisdom into 11 chapters. It's the best fundamental guide to design effective training programs around.

A group of business professionals in a meeting, with a semi-transparent text overlay. The background shows a woman standing and pointing at a document held by a man sitting at a table. Other people are seated around the table, engaged in discussion.

THANK YOU

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