

Applying Training and Transferring Learning in the Workplace: How to Turn Hope into Reality

Studies and research around the transfer of learning date back to the early 20th century and since then, a plethora of viewpoints, theories and research fields have emerged to analyse how individuals, or trainees, apply the knowledge and skills gained in training to their real-world workplace environment. This aspiration to successfully transfer learning continues to the present day.

In fact, ESI International, through first-hand client experience and self-reported client data, finds that while organisations may take the time to prepare for a learning engagement, attend a learning engagement and even measure the impact of learning, many organisations continue to struggle to support the transfer of learning. Where are the breakdowns in the transfer of learning, and how can organisations address these gaps?

It is clear that organisations are still missing some fundamental steps to ensure the transfer of training; these steps include the development of an overall learning transfer plan, a strategy for reinforcing the application of learning post-training, a clear way to measure if and to what extent learning is applied on the job, and manager involvement during the pre- and post-learning phase.

Most of all, the following study suggests that organisations start out ‘hopeful’ that they are fully committed and engaged in the transfer of learning, but upon further questioning, one finds that hope and reality are two very different things when it comes to the transfer of learning in the workplace.

SURVEY GOALS AND DESIGN

To address this ongoing challenge, ESI International issued a Transfer of Learning Survey in March 2011 designed to assess an organisation’s success or difficulty in fostering a learning transfer climate in the workplace. The goal was to determine if organisations had a system or set of processes that ensures trainees can apply learning on the job — in an immediate way — to improve actual employee performance and generate positive business impact.

The survey was sent to training-related managers and leaders at both government agencies and commercial institutions spanning multiple industries around the globe. With more than 3200 responses, ESI’s Transfer of Learning Study helps us form a picture of how and why organisations are succeeding, or falling short, in the application and transfer of learning, and to learn and share transfer of training best practices.

The survey was developed from ESI International’s client experience and learning transfer expertise, along with a variety of existing research, including basic elements outlined in the Holton, Bates and Ruona Learning Transfer System model.

For organisational purposes, the survey questions asked respondents to assess their transfer of learning climate in three areas:

• How they prepare for and design training,
• How they motivate and incent employees to apply training and
• How they reinforce skills post-training and ensure the application of learning.

KEY FINDINGS

Overall

• The top three strategies indicated as the most important for the transfer of learning are: Trainees have the time, resources and responsibility to apply learning (30 percent), manager support (23.8 percent) and the instruction approach simulates the actual work environment (21.8 percent).

• One-third of respondents (32.8 percent) do not have a formal process or system for ensuring that training is applied successfully within the organisation. Although 67.2 percent indicate that they do have a formal process, subsequent answers cast doubt on that figure.

• Two-thirds (67.6 percent) of those surveyed estimate that they apply more than 25 percent of training knowledge back on the job.

• For the two-thirds above who indicated that they either have a formal process for learning transfer or estimate that more than 25 percent of knowledge is applied back on the job, a full 60 percent say the primary method for proving or measuring this estimate of learning transfer is either informal/anecdotal feedback or ‘simply a guess.’

These self-contradictory responses call into question their certitude about having a formal learning transfer system or the learning transfer success rate.
Pre-Training
- 60 percent of those surveyed indicate that they do not have a systematic approach to preparing a trainee to transfer or apply learning on the job. This answer casts further doubt on the initial responses of how systematic and large the application of learning is within organisations.
- The top programme design strategy to ensure the transfer of learning, as indicated by 60.7 percent of respondents, is to design the training programme around an organisation’s business needs, followed by almost half (49.3 percent) who say they establish specific goals between the trainee and their direct report/manager.

Motivation
- In order to motivate trainees to apply what they have learned, the majority of respondents (75.1 percent) say that they make sure training supports the goals of the organisation, followed by 57.3 percent that make sure that the trainee has the necessary time, tools and investment for the application of learning.
- When asked what specific rewards are used to motivate trainees, almost 60 percent say the ‘possibility of more responsibility,’ followed closely by an impact on the HR/ performance review.

Post-Training
- When it comes to post-learning tools and programmes to help trainees recall and apply what they have learned, survey responses indicate a solid, varied mixture of tactics including: post course discussions with the manager/team leader (39.5 percent), on-the-job aids (37.3 percent), informal support such as social networks or online forums (33 percent) and communities of practice such as peer groups/coaching (29.4 percent).
- The survey was designed to gauge manager involvement and commitment post training.

70.9 percent of those surveyed say the organisation expects managerial support as part of the learning process. Yet, when asked what managers are expected to do for the learning transfer, 63.3 percent say managers formally endorse the programme, while only 23.1 percent hold more formal pre- and post-training discussions.

Conclusions

Formal, Proven Process Lacking for Transfer of Learning

Responses at the beginning of the survey lead one to believe that the majority of organisations have a systematic approach for ensuring learning is applied on the job. Yet, subsequent answers show this assessment is highly anecdotal and ‘simply a guess.’ Organisations must formally assess, evaluate and report on trainees’ success at applying and transferring learning to the workplace.

Need to Motivate Employees the Right Way

Survey responses downplay the role of financial rewards or incentives to motivate employees, noting that the greatest incentive is the ‘possibility of more responsibility.’ Further, many indicate no rewards or negative consequences as the ‘motivation’ for the transfer of learning. Might these incentives be out of line with today’s evolving workforce? Organisations may have to re-examine their strategies for motivating a new, changing workforce.

Manager Engagement Critical

Managers clearly play an important role. In fact, securing manager support was selected as the number two most important strategy for the transfer of learning. However, for a successful learning transfer climate, managers must do more than simply endorse a training programme. Managers must be expected to have concrete responsibilities and provide tactical support every step of the way, including developing a plan for learning transfer, holding formal pre- and post-training discussions and ensuring post-instruction reinforcement.

Post-Training Reinforcement Leveraging New Social, Informal Communities

Organisations and their employees are clearly leveraging an ever expanding array of tactics to recall information learned during training and increasing their use of ‘just-in-time’ tools to apply knowledge and skills directly to the job. At the same time as one sees a steady, continued reliance on traditional post course reports, assignments, discussions and on-the-job aids, there is more flexible, community-based support coming to the fore, such as communities of practice, peer coaching and social networks.