A guide to creating learning transfer for learning that takes people through a change process

Use this template as a basis to inform your training and transfer design
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Introduction

*Change training is most commonly associated with the use of persuasive techniques that get learning applied in the workplace.*

Some types learning most usually associated with soft skills like collaboration, creativity, time management, and communication can be daunting to implement if the learner harbors negative perceptions about how their efforts will be received.

They might also go through something of a confidence crisis once they are separated from the learning environment and the trainer, and asked to use their skills live in the workplace.

These negative perceptions are usually referred to as application barriers and are mainly associated with change, and can surface in situations where the actual skills are quite straightforward and relevant to work.

In order to break down these application barriers and allow learners to change, raise their confidence levels, and the perception that they will fail, we should employ some effort to persuade the immediate application of skills.

One way to do that is to embed application into the learning cycle. We can use a number of methods but the best usually involves learning how to solve specific work issues, then applying methods to overcome them with ongoing support.

That ongoing support should take various forms such as guides to application, information about how to replicate what seemed easy to do in the learning environment, offering coaching at specific times, and sharing success stories among the peer group.

This way people are supported and feel like they can achieve something significant.
How to use this template

The diagram on the following page illustrates a fictional training program. It is mocked up to demonstrate how learning transfer can facilitate the use of knowledge in the workplace.

Use this diagram as a reference when looking at the more detailed program elements page to see where in time each of the elements sit.

Each of the program elements pages describes what the element is and how it should be used.

There are also images of what a sample of each element could look like. These samples are for illustrative use, and can be your launchpad to creating your own elements.

Take time to understand the program overview and each of the elements in order to adapt what is in this template to suit your own programs that rely on instigating a change of perception.
Design Overview
Transfer for change training

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<td>Manager meeting (end)</td>
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This diagram represents a simplified version of a learning program that requires participants to change their mindset about application of new skills before they can be applied in the workplace. The elements play out from left to right over time.

There are two critical elements in this picture that make or break the success of the concept. The first is manager involvement. When participants acquire the perception that managers offer support, that perception alone can be enough to generate motivation to transfer and use skills.

The second is applying skills to a real work issue and having participants work through those issues using their new skills, while at the same time receiving encouragement through coaching and by reading application success stories from their cohort.

Remember to use this design overview as a time frame for designing your solutions. The descriptions on the following pages gives more detail about each element.
Managers are often touted as the panacea for all learning transfer problems. In this particular learning transfer strategy though they do have an important role to play.

Firstly, they are the people who need to be ‘won over’ in terms of deciding whether to support implementation of new skills in the workplace. To do that we need to get them involved in some way and up to speed about what the training is, how it is vital for the manager and team, and how it is used and applied. The best way is to give them course materials outlining all those points and specific tasks to complete during the transfer process.

Secondly, they need specific assistance doing their tasks. We advocate managers hold short meetings of about 15 minutes with their team members who will attend training to make sure they are prepared, learned something, and will apply something. So, supporting those meetings with relevant templates and explanations is essential to get the most out of them.
When participants have a hard time getting over the psychological barriers that prevent application of learning they need to be shown that learning is possible and relevant to their work.

So, during the training event it is important that the participants complete a detailed action plan. The plan template itself can be quite a simple design, as you can see here, but the content should be detailed and specific.

The reason is because completing even small work tasks using new skills gets people thinking positively about the skills they have learned. So encourage participants to reflect on the meeting they had with their manager before the event about what outcomes they needed from training, and then to write how these outcomes will be turned into actions now that the training has been done. The participants can then make a final application plan with their managers in the ‘after training’ manager meeting, and get to applying their new skills immediately.
Even when there is real work to apply skills to and a concrete action plan decided between a manager and a participant, there can still be difficulties using new skills on the job.

This will likely be due to things such as separation from the learning environment and apprehension about being able to use the skills in a particular context or with other coworkers.

To combat this problem it’s a good idea to create supporting materials. You can use many different media or channels to do this, but typically informative job aids, check lists, and videos are the best.

Use videos to remind participants how they did various tasks in the learning environment and to give them tips about how to replicate that environment in the workplace. Refer to the job aids and checklists when you explain or demonstrate those situations so that participants know where to look for supporting information.
Program Elements
Coaching

The set up for coaching should also be done in the learning environment to make sure that everyone has enough dates in their calendars, and that they are spaced at the right intervals to make the appropriate impact. The spacing will depend on whether there are any other learning sessions in the cycle and the complexity of the skills being applied.

Coaching should also be very prescribed. Coaches need explicit guidance about what to ask and suggest during calls. They also need to have templates for recording all the comments they hear and make.

Coaching has an obvious motivational impact for the participants, but can also serve as a useful information gathering exercise for the course designers – it’s important to know how and if learning is being applied and what issues the participants are having and how they are overcoming them.
A further motivational element that should be added is that of sharing success stories. When participants are feeling the pressure of applying skills in the workplace, what they need is encouragement that other people in the same position as them have been able to apply what they learned.

The effect you need to generate is “Ah, if they can do it, then so can I.” One way to achieve this is to get people to complete a simple questionnaire about what they have attempted to apply, what success they had doing it, and if there were problems then how did they overcome those problems.

Once all the questionnaires are in, you can compile a brief report that reminds people why they signed up for training in the first place, summarises what successes have been achieved and highlights specific actions that stood out during that round. The you can share the report in an email. Other uses of technology such as social media are relevant too, but less effective than email.
Summary

The key to changing attitudes to the application of learning is use of motivational strategies and direct relevant to real work.

If you are designing programs that will need some aspect of attitude change on the part of the learners or will need to assist in breaking through psychological barriers that inhibit application of learning then remember to follow these steps to achieve a good change transfer design.

First, involve the managers at an appropriate level. This means to provide all the necessary information to get them on side and advocating application of the learning. And, to support managers in the task or having structured meetings about the training and how to apply it.

Second, make sure that the manager meetings, the learning content, and the participant's real work are converted into a concrete action plan than can be monitored during the application phases.

Third, provide all tools, including job aids, checklists, and motivation or demonstration videos to participants before they leave the learning event, and make sure they know how and when to use them to their advantage.

Fourth, provide periodical coaching calls that have been pre-arranged and confirmed. Those calls should provide motivational support to the participants. It should also serve as an information gathering exercise to gauge how well or if at all participants are applying what they learned.

Lastly, create a mechanism for sharing success stories. This can be done through social media or a website, but rather that encroaching on people’s personal lives or investing in a dedicated site, consider sending simple questionnaires and follow-up reports.