

# THE PTT QUARTERLY REVIEW

A woman with blonde hair, wearing a light blue blazer over a light blue shirt, is smiling and holding up a large, stylized yellow lightbulb graphic. The lightbulb has a grey base and is positioned behind the main title text. The background is a modern office with other people working at desks, some with computers. The lighting is warm and professional.

*The PTT Quarterly Review is a summary of all our activity over the last three months*

*We review interesting developments from our industry*

*We'll also tell you what we're up to this quarter and what to expect from PTT*

*Prepared by:  
November, 2019 Ian Townley & Jason Durkee*

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# Table of Contents

page

**3**

---

*PTT Quarterly Review  
introduction*

---

page

**4**

---

*PTT last quarter  
activities*

---

page

**8**

---

*Interesting things from  
last quarter*

---

page

**11**

---

*What's coming up for  
PTT*

---

page

**12**

---

*PTT Learning Transfer  
Benchmark report*

---

page

**16**

---

*PTT learning Transfer  
Benchmark data*

---

page

**22**

---

*PTT learning Transfer  
Benchmark summary*

---

page

**23**

---

*What is PTT and contact  
Information*

---

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# PTT Quarterly Review introduction

*Welcome to the second edition of the PTT Quarterly Review. These publications highlight our activities and give our followers a summary of where to find all of our latest content.*

There are three parts to the quarterly review. The first is a round up of what we at PTT have been doing for the last three months. You can find that in the **PTT last quarter activities**, and for this edition we'll talk about people we met, conferences we attended, and the articles that were published on major industry websites.

The second part of the review looks at what other people have been doing in our world of learning and performance. We'll tell you what we think of recent publications, courses that we have taken and courses that we are thinking of taking.

So if you want a wider industry view then go to **Interesting things from last quarter**.

Finally, we'll bring you up to speed on what we have planned for PTT activities in the next quarter. We call this **What's coming up for PTT**. So go here if you want to keep on top of interesting events and developments, or to keep an eye open for future articles.

We also have updates to our learning transfer research.

We'll **share the best practices of learning transfer** between designers and HR professionals in our industry. We've gathered the data for this edition that explains the insights in a sample report that can be found in the second half of this quarterly review. So check the **Learning Transfer Benchmark Report**.

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# PTT last quarter activities

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*Exclusive interview with Matt Stone*

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*Conference attending*

*European Innovation Festival by Fast Co. in Milan*

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*PTT official articles*

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We haven't been on the road so much this quarter, but that doesn't mean to say we haven't been busy. There have been quite a few articles published through the **ATD and Training Industry websites**.

We also have our first industry interview for you, and we went to the **European Innovation Festival by Fast Co.**

Here is a brief summary of what to expect in the PTT last quarter activities.

**Matt Stone** is the **CEO of Behavioral OS**, a company that excels in creating extraordinary relationship development, leadership, and team performance. **We spoke to Matt about his perspectives on learning and transfer, and what he thinks the future holds for our industry.**

Learn about Behavioral OS here: <https://www.behavioralos.com/>

We were in **Milan** this summer at the **Gucci Hub** to attend the first **European Innovation festival**. The theme was The dawn of super intelligence. In other words: How can man and machine collaborate to create a new paradigm for society. Have a look at our review and visit the festival site for more information.

The official festival site is here: <https://europeaninnovationfestival.fastcompany.com>

When possible we try to **write articles, blogs, templates, tools, etc.** which we hope will help our fellow designers. We know it's hard to keep track of multiple channels, so we curate all our content in one place. More about that content in the review, but if you want to keep up with latest developments, then why not **sign up for our blog**:

<https://practicaltrainingtransfer.com/what-is-practical-training-transfer/sign-up-for-our-blog/>

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# PTT Interview



**Name:** Matt Stone

**Company:** BehavioralOS

**Role:** CEO

<https://www.behavioralos.com/>

Matt took some time out to talk to us about his experience with learning transfer and getting results. This is what he had to say.

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## **What's your experience transferring learning into performance?**

We've done everything from simple feedback skills to comprehensive leadership training. Usually we focus on how to use data to change behavior and improve relationships.

## **What needs are you seeing these days regarding learning transfer, performance and results?**

The main problem is that everyone busy and under pressure, which makes it difficult to be in the present. Even if you set aside time for just a one-hour coaching session, staying focused during that time and ensuring that preparation and follow up gets done is a challenge.

## **What have you been successful with recently to improve on the job results?**

First, find learners just before they crash, when they're motivated to change behaviour.

Second, integrate learning into the work flow. For example, with our relationship assessment tool if we can get an initial commitment to try, learners usually continue independently once they realise it makes their job easier and performance better.

## **What's going on in the learning transfer and performance area that you're excited about?**

As more human jobs are replaced by AI, the future of development will be interpersonal communication. Through better measurement, I think we'll make the shift from it'd be great if people communicated better to 'this is hard business results and our business will die if leaders aren't communicating with each other and have good relationships.

## **What's your best piece of advice to improve results from learning?**

The T&D department should be made up of every single manager in the organization. Recognize that every manager is a trainer and a student at the same time.

# European Innovation Festival by *Fast Co.*



## The dawn of Superintelligence

This was the first year that the Innovation festival from Fast Co. was held in Europe. For those who don't know, Fast Co. is a business magazine focusing on the future of work in areas like design, creativity, work life, and more.

Their main website here is: <https://www.fastcompany.com>

Usually, the innovation festival is held in New York, but this year they trooped over to Milan to hold a series of **talks and presentations about the future relationship between A.I. and human intelligence.**

There were some pretty famous people there, notably Jared Leto who talked about how to plan an investment portfolio and support enterprises to realize their potential and grow in a new market.

For us in the learning and performance industry there were

some interesting concepts about how people might interact with technology in the future.

One of those was about social media and the **shift in trend from broadcast-sharing to greater privacy and genuine connections.** Even though most people want to be connected globally they care more about interacting with local communities.

Another interesting point for future learners using tech will be a **noticeable shift from thinking of mistakes as human problems** 'I can't log onto the WIFI', to more of a system issue 'the tech hasn't taken me through the process to log in the WIFI properly'.

A great two days for anyone interested the cutting edge of business. Let's hope its back next year.

The official festival site is here: <https://europeaninnovationfestival.fastcompany.com>

# PTT official articles



This quarter we had three articles posted over the ATD and Training Industry websites. Here are the highlights and links.

## **Learning Journeys: Next Step in Performance Improvement**

Standalone training events, once the mainstay of the training industry, are increasingly being seen as relics of the 20th century.

This article looks at why application is the new watch word in learning and what you can do about it. Included are recommendations about how to spread learning over time and what the influence of technology should be.

<https://www.td.org/insights/learning-journeys-next-step-in-performance-improvement>

## **My "New Insight 20 Years Into My Career" Moment**

Here are some reflections from Jason, about the need to change how

learning should be designed, based on an inspiring ATD International Conference session with Andy Jefferson.

<https://www.td.org/insights/my-new-insight-20-years-into-my-career-moment>

## **How to Save Time and Money by Diagnosing Learning Transfer Problems Early**

A cautionary tale to all learning designers and senior managers to think about the impact of training in the workplace and how that can be improved through simple investigation.

It definitely is worth knowing how learning might not be applied and thinking about how to overcome application barriers through design.

<https://trainingindustry.com/blog/content-development/how-to-save-time-and-money-by-diagnosing-learning-transfer-problems-early/>

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# Interesting things from last quarter

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*Data Story book review*

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*Certified Professional in Training and Management training course review*

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*altMBA training course review*

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As usual, last quarter there was a lot of things going on that weren't all about PTT. Here is what we saw that other people were doing including books we read and courses we attended.

## **Data Story Book Review**

Big data, data driven decision-making, data visualization. Everyone is talking about data, including Nancy Duarte of Slide:ology and Resonate fame.

Although her latest offering, Data story, isn't as technical as the previous two blockbusters it does offer practical advice about how to tell the story of data to the people who need to make informed decisions but don't have time to delve deeply into the hard numbers themselves.

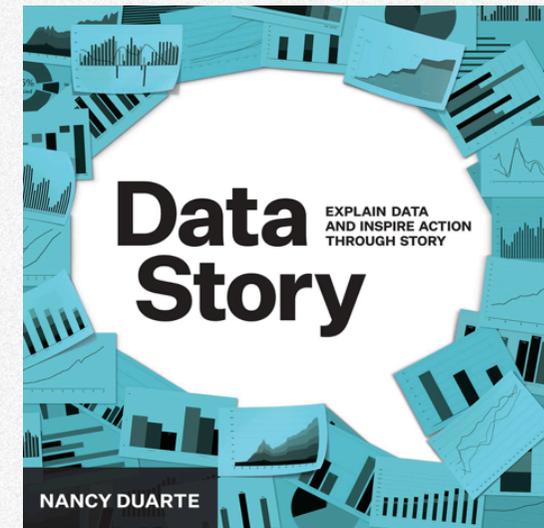
Some of the highlights of Nancy's book include how to take complicated data and turn that into a simplified images that immediately conveys a succinct message.

The book explains how to use words powerfully but with empathy for the listener when telling the story of data, and how to construct the framework of your argument that makes it persuasive and actionable.

This is a good resource for anyone working to convert data into actions, or that has the need to craft business messages in a world flooded with complicated to understand data.

Data Story can be ordered through the Duarte website:

<https://www.duarte.com/datastory/>



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# Certified Professional in Training Management



**Training industry Inc. has created the CPTM for** current and aspiring training managers who want to further their careers, and for consultants who want to understand their client's business roles better.

David Buettner at Idea Development recently took the certification. This is what he had to say about it.

"I went through the CPTM program and got the certification this past summer. I'd like to highlight its implications for learning transfer and how it helps training managers to understand and apply it better in their work.

**First, learning transfer, the learning function, and the training manager's role.** Transfer thinking is essential for the training manager. Based on their research, Training Industry, Inc. identified the eight Process Capabilities that the learning function should engage in and their importance and relation to each other.

Strategic Alignment is at the center as the core process capability that anchors all the others, and is the foundational responsibility of the training manager. The training manager needs to work as a Solutions Architect to ensure that all learning initiatives are aligned strategically with the business goals of the organization.

Therefore, transfer of any learning into real on-the-job application and thus into business results should be at the forefront of the training manager's thinking.

**Second, how the course helps a training manager.** The CPTM provides useful frameworks, such as the Process Capabilities, to help to understand the learning function and training manager role. In addition, the content allows training managers to get a fuller view of their responsibilities and functions. New training managers can get oriented to the full scope of the job, while more experienced hands can confirm what they do and identify areas they should pay more attention to than before. You'll learn about outsourcing processes and considerations and business calculations like ROI, Present Net Value, and Internal Rate of Return, instructional design, the 70-20-10 model, and other learning concepts.

To learn more about the **CPTM**:  
<https://trainingindustry.com/continuing-professional-development/certified-professional-in-training-management/>

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# altMBA



**altMBA was inspired by marketing guru Seth Godin.** It's a four week series of intense projects designed to prepare you to navigate the complex challenges of driving organizational change.

**What the program reinforced about learning transfer.** Here's the top five design elements of altMBA that are worth emulating.

1. Get participants competing to see who can start learning first through smart, emotional marketing and by emphasizing the high price and demanding nature of the course.

2. Use peer collaboration to ensure work gets done. In new groups of highly motivated people each week it's difficult for one person to contribute less without weakening the team – higher commitment than in most classroom environments.

3. Build relationships virtually. The combination of several hours of video meetings a week, open Slack chat channels, Google docs, and asking probing questions to people outside the group combines to create a real sense of community.

4. Maintain action and momentum through course design. This course is a series of small modules nicknamed sprints. Unlike many virtual training programs, everything is time sensitive and followed up by real people. The schedule looks like this:

**Monday:** Get a new assignment.

**Tuesday:** 17:00 Team video conference; Submit work 24:00.

**Wednesday:** Review everyone's submissions and send probing questions.

**Thursday:** Respond to questions and reflect (17:00 the next cycle starts).

5. Integrate thinking, discussion, output and reflection. Each sprint or module has all of these elements in a smooth cycle and that cycle is repeated thirteen times in just a month. Through practice, everyone goes through the steps smoothly.

## **How to use this program effectively**

**1.** Personal transitions: get support and build momentum for a new challenge.

**2.** Teach people to build relationships and influence others virtually.

**3.** Jump start action and jolt energy into someone jaded with their current role.

You can learn more about the altMBA here: [www.altmba.com](http://www.altmba.com)

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# What's coming up for PTT

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*Fast Company Innovation festival in New York*

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*ATD Webcast*

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*Upcoming articles including our first TD magazine article*

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## Fast Company Innovation Festival in New York

Last year, we were blown away by the **Fast Company's Innovation festival** in New York. So, we've been back to meet the makers and innovators from across the globe and the leaders and doers shaping the future.

We were there for the full five days to get what we could, make it relevant to our industry and share it with you in our blog and on the LinkedIn feeds.

You can see what it's all about here: <https://events.fastcompany.com/innovationfestival19>



## ATD Japan Summit

Jason has been invited to speak at the summit on **December 5-6 2019, in Tokyo.**

His topic is **Hi Tech + Hi Touch: Start re-skilling right now.** He will introduce the need for talent development professionals to respond to the rise of AI and go through the skills needed for organizations to stay competitive.

AI and Re-skilling will be a hot topic for the next 10 years, so being ready for the change it brings to our industry sooner rather than later is a must for our industry.

You can learn more here: <https://japansummit.td.org/>

## Our first TD Print Article

We'll also be publishing our first print article with **ATD** in the **TD magazine.** If you're signed up to our blog, you'll be notified when it gets release. If you're not signed up, then look out for it in LinkedIn.

# Learning Transfer Benchmark Report

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*Benchmark Report  
Introduction*

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*Benchmark Report  
Insights*

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*Benchmark Report Data*

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*Benchmark Report  
Summary*

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# Learning Transfer Benchmark Report

*We believe that sharing information is the quickest way to innovate into new ways to problem solving.*

The learning transfer benchmark report does a few simple things. It collects data from practitioners in our industry, analyzes it, and shares that back to the industry.

To do that we've started a process to find what common training solutions companies provide, what kind of application problems they encounter with their solutions, and what they do to overcome them.

We added to our original survey and increased the response size to **100 clients based in the greater Tokyo area** that assisted us with the report, which you can read here.

In future publications we'll expand the net wider to include all our followers. For everyone who responds we'll send a full report of the findings once they have been analyzed.

In this quarter's report you can see insights into design activity:

- I. What were the required outcomes of the training that our clients purchased
- II. What learning transfer problems had prevented the application of learning on previous designs
- III. Which solutions were employed to overcome the problems

We'll provide the data and firstly some insights. We hope you get something out of this and contribute to making this a useful resource to our community.

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# Benchmark Insights

## One - Company



### Industry

We sampled a **broad range of industries** that are using learning transfer as a solution to learning application issues. It seems that most industries are open to the concept of adapting learning to make it more applicable.

Not all potential industries are included in our report but **64% of all companies** sampled using learning transfer are **Automobile, IT & Telecom services, light industry manufacturing, and Pharma, health and medical services.**



### Size

We noticed that learning transfer initiatives are **not restricted by company size**. It could be that more programs include learning transfer in companies that have larger budgets, but in general that doesn't seem to be a barrier.

Overall, we saw both **small/medium sized companies**, and **large companies** leading the cause for learning transfer.



### People

The initial assumption of most observers would be that high-ticket training items, such as leadership development, would attract more learning transfer activity.

**Our data doesn't reflect that assumption.** As with company size and budget there is no clear delineator that suggests certain groups are provided with more support. We saw that **all levels of employees in companies are given access to learning transfer solutions.**

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# Benchmark Insights

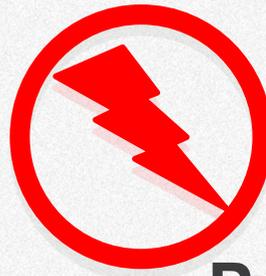
## Two - Projects



### Outcomes

It is generally **perceived that learning transfer is the long tail of training**, and that it doesn't suit fast-paced business.

The outcomes that clients wanted from learning transfer contradict that perception. Most **clients wanted to optimize skills such as agility, interpersonal communication, speedy decision-making, and productivity**. It shows that companies know they need learning transfer when they want real, strong and fast results. .



### Problems

Most training contains large chunks of new or novel information. For this reason **most current learning transfer focuses on retaining information**.

However, we saw that **almost every client indicated that skills implementation was the biggest issue**, followed by changes in mind set towards use of skills in the workplace.

This tells us that learning transfer is currently underutilized as a tool for applying skills, post learning.



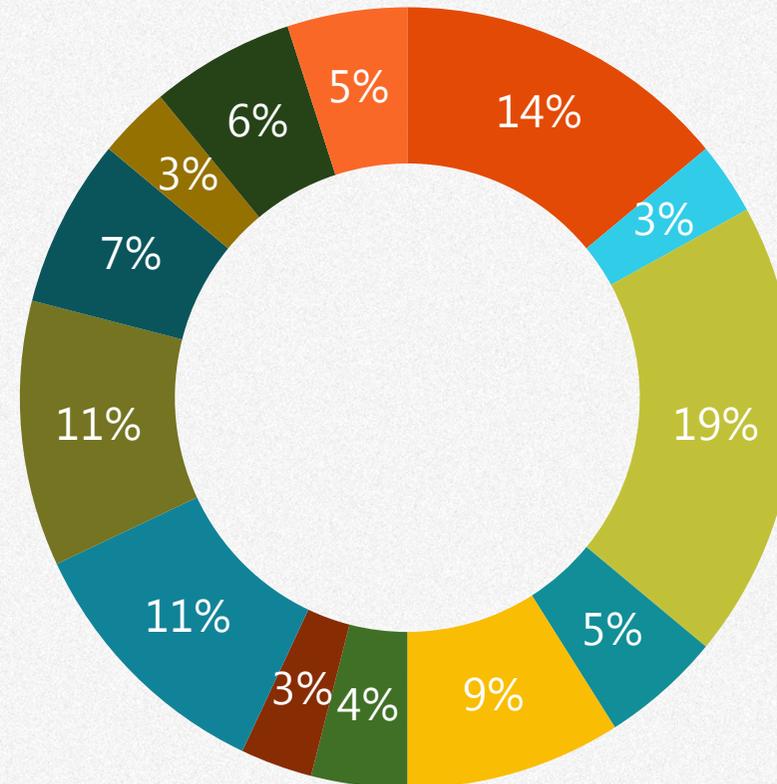
### Solutions

For some time, companies have focused on single initiatives to solve learning transfer problems. These include things like coaching or reminders.

Our data tells us that **no stand-out solution counters most learning transfer problems**. Instead, clients that are most successful in transferring learning into application see that **a blend of solutions is important** depending on which type of learning is being used to solve a business need.

# Company Industry

- Automobile manufacturing
- Professional services/Law/Accountancy
- IT services
- Finance/Banking/Insurance
- Telecom services
- Heavy Industry manufacturing
- Factory automation
- Light industry manufacturing
- Pharmaceutical/Health/Medical Services
- Electronics manufacturing
- Printing manufacturing and services
- Food and beverage production
- Other

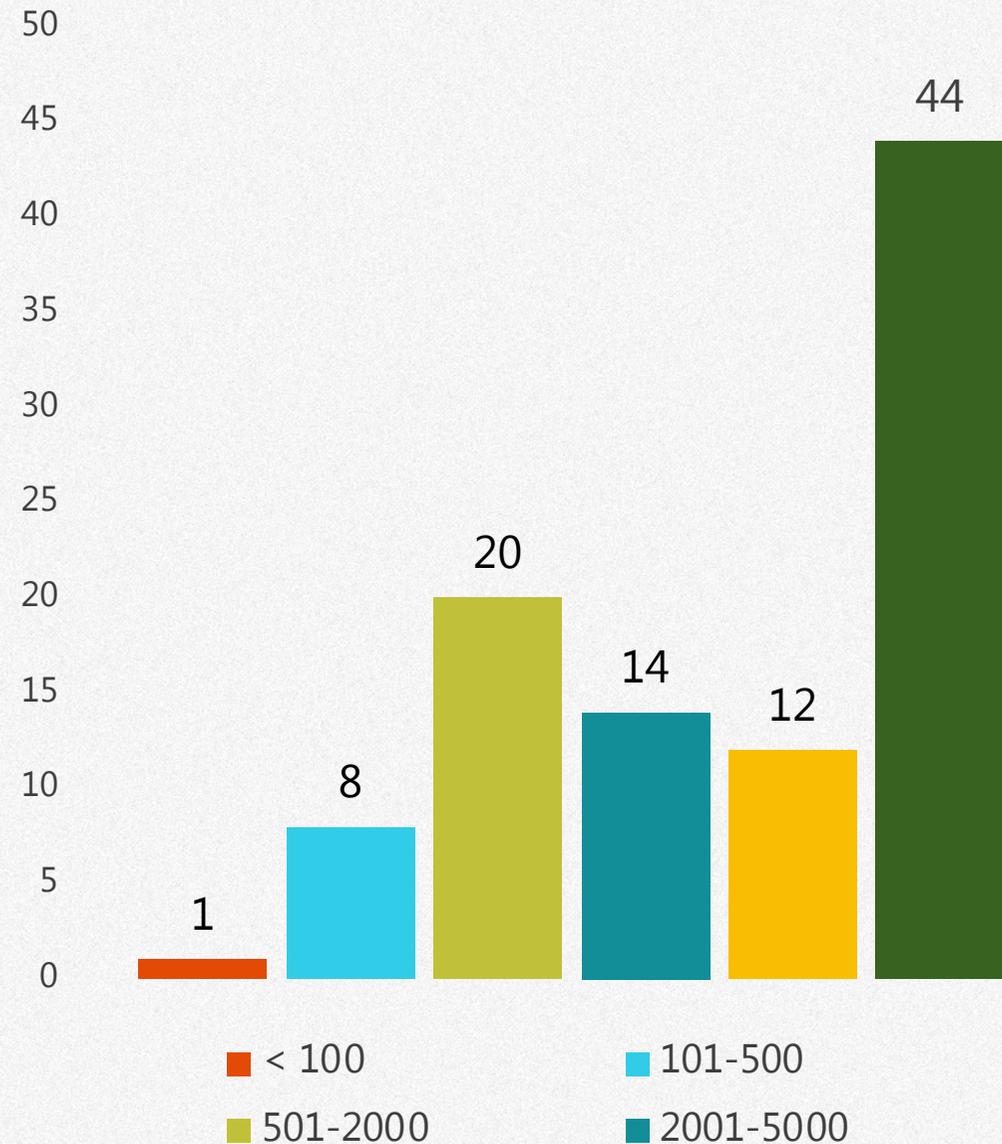


All companies were sampled because they requested guidance and support to transfer learning into results. In other words they had attempted to get application through traditional means using comparative training, with unsatisfying outcomes. We tried to include as many industries as possible, and found that of the whole client base, we were able to increase it to a sample of 100 respondents. Of the respondents, 64% are in the area of Automobile manufacturing, IT, Telecom, Light industry, and Pharma, health and medical services. Meaning that high-tech and medical industries requested learning transfer and were able to see an improvement in application.

# Company Size

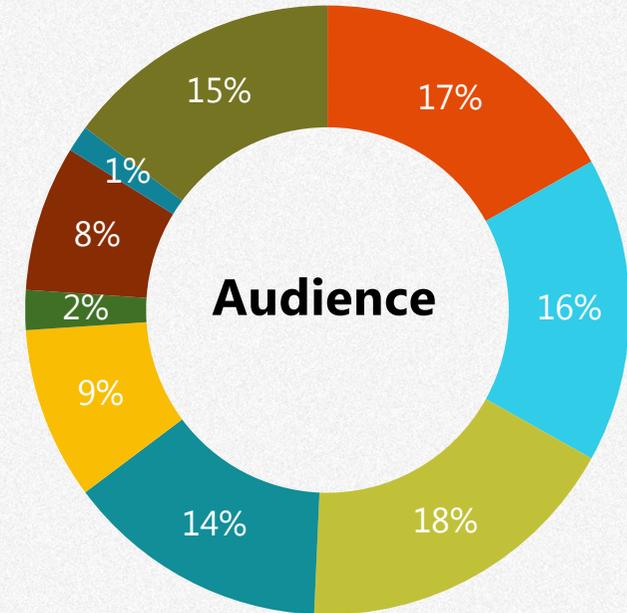
Size of company usually indicates budget strength and ability to scale. Meaning reach of learning and access to learning transfer should increase with size.

Although the largest group is of the > 10,000 size, as we expected, smaller companies, especially in the range of 501-2000 employees, seem to have the agility to implement learning transfer and have the speed of decision-making to get learning transfer happening to begin with.



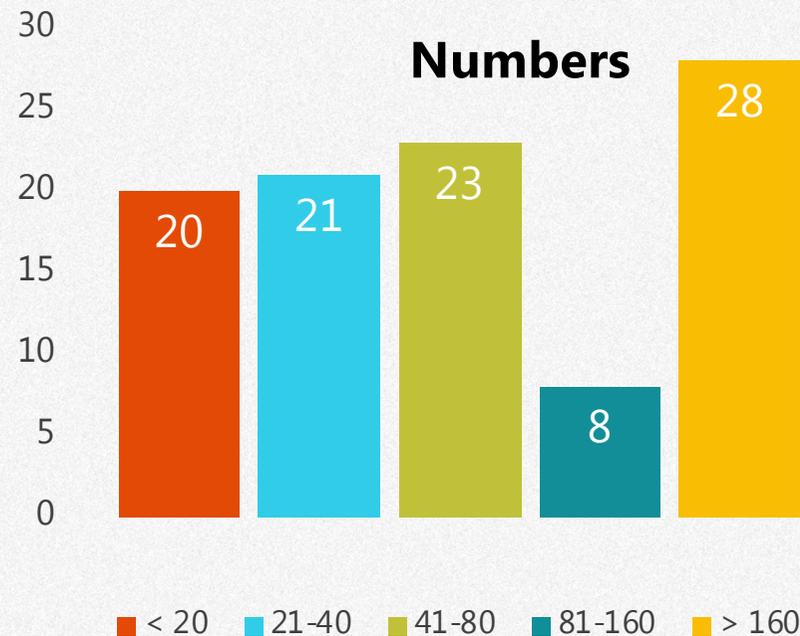
# Course Audience & Participant numbers

- New hires
- Junior/Team members
- Team supervisors
- Junior managers
- Senior managers
- Sales people
- Engineers
- Project managers
- Open sign up course



The course audience data clearly shows that there is a broad spread between levels of organizational hierarchy in terms of who gets access to learning transfer. Big ticket training for senior management therefore, isn't the sole recipient of learning transfer budget.

Moreover, the amount of participants doesn't impact the need for learning transfer. 28 companies sent 2 more than 160 participants to training, but training with fewer people also received some transfer support.



# Project Outcomes

Generally it is expected that slower to implement learning gets more learning transfer support. You would expect 'working across cultures', 'product knowledge', or 'compliance' to get the most assistance.

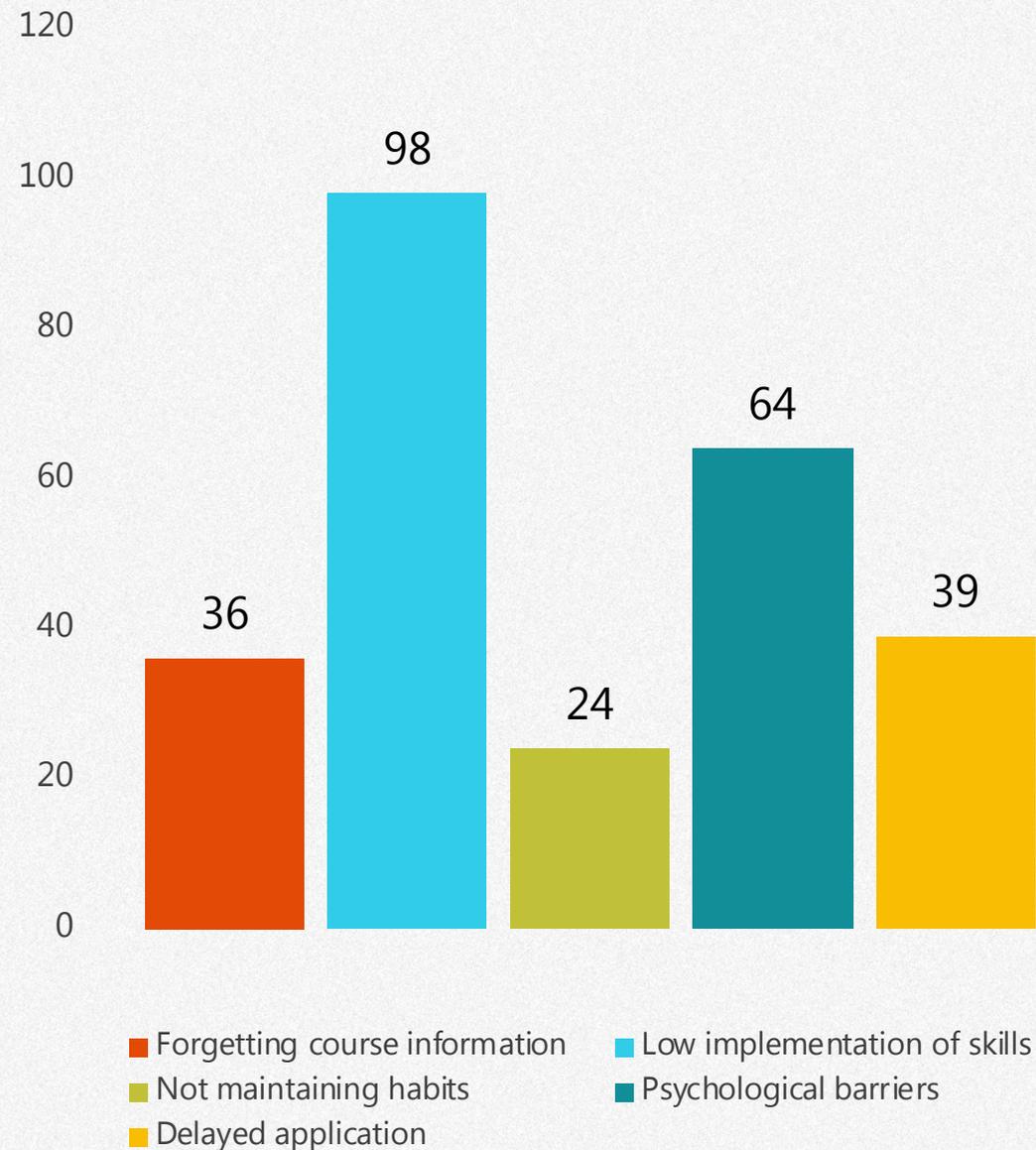
We found that faster to application outcomes such as 'ability to move quickly', 'productivity', 'interpersonal communication', and 'speedy decision-making' attracted a high need for learning transfer. Indicating that on-trend training benefits most from learning transfer support. .



# Learning Transfer Problems

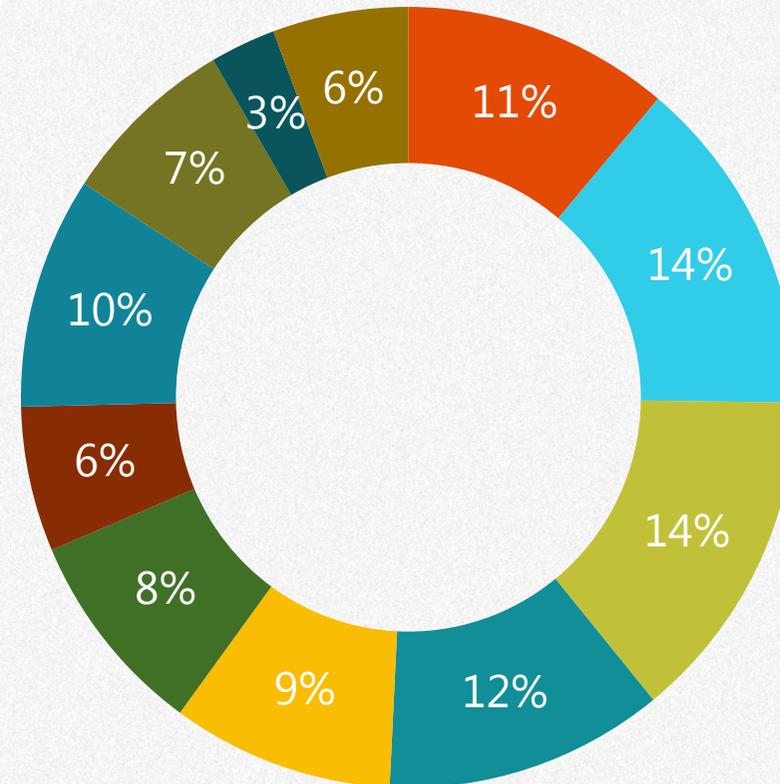
Most of the thinking around learning transfer problems is about the retention and use of knowledge. While this is very important, the data shows us that clients perceive problems not as memory degradation but as application of skills. In this case close to 100% of clients agree with that statement.

This data tells us two significant results. First, that skills training requires strong transfer effort. Second, that mind set barriers need breaking through learning transfer.



# Learning Transfer Solutions

- Identification needs before training
- Modify training content inc. spacing
- Message application in training
- Make specific action plan
- Schedule action plan and create accountability
- Provide manager support tools
- Provide coaching support tools
- Schedule practice of new skills
- Schedule application feedback and reflection
- Send reminders
- Give formal presentation of results



A blend of application problems can exist on any given training program. For example, problems could include low implementation of skills, and low maintenance of habits. It is because of the blended problem phenomenon that a blended learning transfer solution usually presents itself. That is why no single solution on this list stands out. No respondents put their trust in a single strategy to solve most learning application problems. The clients with the best return on their investments invariably see the need for a blended approach.

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# Quarterly Benchmark Summary

The expanded analysis of the use of learning transfer reinforced some surprising insights from our first survey.

Initially, we assumed that certain truths would bear out. Namely that larger companies with bigger training budgets would include more learning transfer in their solutions. We thought we would find that smaller training courses focusing on managers and above would receive most funding for learning transfer, and that such learners would be employed in economy-driving industries such as insurance or banking.

It was quite refreshing to see that those assumptions were not true. Smaller, more agile companies have the flexibility and speed to implement learning transfer design decisions. Most companies spread their learning transfer budget across the organization, with high-tech and medical industries most interested in applying learning transfer solutions.

There were some data that we think reinforces the concept that learning transfer is a design initiative. Meaning that some investigation into the problems of learning application, and creative thinking about how to construct a blended approach to overcoming learning transfer problems are the essential new skills for learning designers.

**We saw that fast-moving business requires the use of 21<sup>st</sup> century skills, but that such skills are rarely applied. This is the biggest concern for business leaders who are looking for blended learning transfer solutions to overcome their concerns.**

This is the story so far. Our intention is to expand this research to include a wider sent of respondents over a larger geographical area. So look out for further notices and please contribute to the cause.

Thank you to all those who contributed.

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# About PTT



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. PTT offers thought leadership, and helps your business grow through training and consulting in the learning strategy, design, and transfer field.

## Where to find more about PTT and learning transfer:

**Practical Training Transfer:** <http://practicaltrainingtransfer.com/>

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