



# Learning Transfer: WHY AND HOW

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**B**udgets for every aspect of organizational learning—whether on-site training, management development and mentoring programs, or CBT—continue to shrink. >>

Less resources make it essential that human resource leaders guarantee the value, applicability and sustainability of all learning initiatives. Business unit managers demand that we in human resources deliver developmental activities with verifiable worth. They determine that worth by the learning that is transferred and then used in the business unit. These managers could care less about the traditional post-training evaluations; after all, they didn't get nicknamed "smile sheets" for nothing. These evaluations fail to measure how and where the information will be plugged into the operation. This article describes four practical strategies for delivering learning transfer.

## The Rationale

Before moving to the how of learning transfer, it is important to further discuss the why. The first element of the rationale has already been covered, because business unit leaders demand demonstrable results. They cannot afford to send employees to training without certainty that the learning content has been tightly tailored to their business demands. Vague, general information is worthless. The second element of the rationale is purely selfish for those of us in this profession: The more meaningful our outputs, the more importance we have to the organization. When we can identify quantifiable results of our work, we enhance the significance not just for individual practitioner effort, but for the collective efforts of all human resource professionals. Enhanced significance solidifies our role as business partners who contribute to strate-

gic decision-making in the organization. Because all of our learning initiatives are tied to business unit results, we have competitive intelligence that is vital both to ongoing organizational development and to the long-term success of the enterprise.

The final component of the rationale is simply survival. More and more companies are outsourcing not just their education and training, but other human resource functions as well. The thought is that outsourcing is cheaper than keeping a large human resource department and that it offers a greater variety of readily accessible resources. When you use a method such as the one

potential participants, their direct managers and the senior person responsible for strategic intent in that business unit. Interviews work better than surveys because they offer a broader range and depth of information. A word of caution: time is as precious to the interviewees as it is to you, so the interview parameters and questions have to be tightly framed. Rather than only addressing the learning at hand, use this assessment to gather data about the business unit's challenges, its long- and short-term goals and its strategy. You will also have to ask your interviewees to be very specific about the outcomes they anticipate and how they will be measuring those outcomes in the

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described in this article, you can prove that you often offer the best, most customized approach. (Notice the word "often." When we're honest we can admit that some subjects are beyond our depth.) As an internal supplier you provide in-depth knowledge of your company. This expertise, coupled with your enhanced credibility, makes you a reliable source of recommendations when outsourcing is a necessity.

## The Four Steps

On to the how. The first step is, of course, the needs assessment. My personal preference is a threefold process that gathers data from

workplace. Depending on the size of the organization and the business unit, you may consider having a partner in the interview process. This ensures that you get the most information and that your interpretation is not biased.

This information will help you develop an in-depth understanding of your customer. It will also help you in your quest to create partnerships throughout the enterprise. Once the data are gathered, prepare a synopsis and an instructional plan. Share them with your interviewees. This step can either solidify your credibility or it can

tank you. If you haven't done a good job listening and understanding their unique issues, you'll be sunk. But if you have, they'll think you walk on water.

The second step is creating evaluation checkpoints. These are the measures that business unit managers can use to see how well their employees are implementing the specific skills presented in the

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training. These checkpoints can also be used to measure quantifiable things like process time, outputs and quality. Examples of evaluation checkpoints in the financial industry (for tellers who completed a suggestive selling module) include a measurement of how many products each teller sold in a certain time period and the accuracy of the evaluation checkpoint sales transactions. Examples of an evaluation checkpoint in the retail industry (for district loss prevention managers of small, high-end boutiques who had completed computer-based tracking and prevention modules) include a measurement of the use of daily computer-based logs in each store branch, the accuracy of the logs and the reduction of losses on a department-by-department basis. Evaluation checkpoints cannot be created in the isolation of the human resource department. They are designed to be useful tools that

can be easily implemented in the business units. The more input you get from your customers, the more value the checkpoints will have. This customer input increases the likelihood of use of the checkpoints.

The third step is the most obvious, designing learning that uses varied modalities to reflect the intelligence garnered in the initial needs assessment. This used to be one of the

earliest steps some trainers completed. Interjecting the development of evaluation checkpoints before design actually guides the design work. Modules and modalities are built around both the desired outcomes and the checkpoints that will be used in the workplace. This concentrated approach provides a tighter framework for creating learning. It also produces learning that is more likely to have value for participants, their managers and the larger enterprise.

The fourth and final step is evaluation with the same folks you interviewed initially. Return to the customers to discuss their use of the evaluation checkpoints, the results in the workplace and the next learning needs. Because you have already worked on getting to know the business unit, their needs and strategy, you will probably have informed suggestions for next steps. This

allows you to gather meaningful feedback not only about the learning, but about the services that you and your team have provided to date. It creates an internal marketing source for your entire department. This is another way in which we build our credibility and reputation.

### Conclusion

By way of conclusion, understanding the rationale for revising the way that we look at learning requires us to think not just about designing and delivering interesting courses, but more importantly, about how to transfer the learning into our customers' work environment. That rationale guides us to more thorough needs assessment as part of our arsenal for cementing relationships with partners throughout the organization. These partners then serve as our marketing arm when they discuss the value and applicability of the learning that we deliver.

The interview-based assessments are only part of the process, the evaluation checkpoints anchor the learning to the participant's actual work. These checkpoints provide managers with another tool for performance management. This is an added incentive for them to use your services. The checkpoints also guide the development of your learning modules. Again, this is an anchoring tool that keeps the learning grounded in workplace reality.

The final element introduced in this article is following up with clients. Yet another anchor, but this is the anchor that keeps you tied to them. It keeps you on their radar screen as a resource for learning that lasts.