Learning Transfer Best Practices:
Comments from Previous Conference Participants

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The following are real-world examples of learning transfer best practices shared by session participants at previous conferences.

Participant Best Practices in Action:

- Make application tools and reinforcement job aids (such as a PDF of a coaching model) available as attachments on Salesforce.com, an LMS, Intranet, or other existing knowledge management system to increase ease of access.

- After designing a new course, conduct a final beta test with managers and high performers. Following the beta, ask for participant feedback on what needs to be revised to maximize learning effectiveness and ease of skill application. Once the course is finalized, invite managers to participate so they can see that their suggestions were incorporated and to increase management buy-in.

- For sales training, include in-session role-plays in which salespeople practice new sales skills with someone playing the role of customer. Following the session, conduct webcast role-plays for additional skill practice. Use a community of practice approach in which peers provide constructive feedback.

- When using e-learning and technology-enabled learning, it is important to not leave out the emotional aspects of learning and applying new skills. Look for ways to increase awareness of the real-life feelings and emotions of those being served (e.g., customers, patients, coworkers, direct reports, etc.). By learning more about the feelings and emotions of others, participants will have a heightened motivation to apply new skills while respecting the other person's situation. Suggest ways to show empathy to others even when the learning modality leverages technology.

- In the spirit of continuous improvement in learning design and learning transfer, send out a three-question survey one month following training. Ask questions about the value of the training, what skills are being used, and what needs to be improved to make the learning more closely linked with real-world application. Keep the survey very short to increase response rates.

- Use a leaderboard, visible to all, to display participants' names and points earned for completing reinforcement and application activities. Have participants complete a weekly quiz for 28 weeks following the training program. Make quiz results visible to participants, managers, and training and development leaders.

- Have managers lead post-training calls with participants to discuss: "What has changed as a result of training?" "What are we doing well?" and "Where can we improve?"

- Before implementing training, send videos to participants as a way to communicate the "Why, what, when, and where?" Managers should help create the video. This will increase motivation to learn.

- Ask managers to let participants know in advance to expect a post-training conversation in which participants will explain what was learned and how they will apply it on the job.

- Send managers an executive summary prior to the training workshop to give them an overview of what their direct reports will learn and how these skills are linked with company strategy.

- Send coaching tips to managers post-training to make it easy for them to coach to the skills learned during training.

- Encourage use of mobile devices, such as smartphones and tablets, in the classroom to keep participants engaged. Encourage participants to use their devices to look up key terms, find social media examples that support the learning objectives, or provide examples of real-world application. Give a prize to the first participant to find a specific definition online.

- For product training, use a blended approach to include e-learning as pre-work before the gathering for classroom learning. Open the classroom session with a review of the e-learning pre-work and offer recognition to those with the most correct answers. To further energize this process, divide participants into teams and create a competition to see which team gets the most correct answers when asked questions from the pre-work content.

- Engage managers in learning by recording a podcast that provides an overview of the training their direct reports will be completing.

- Use technology for pre-/post-measurement of knowledge to determine learning retention.

- Have managers work with participants to set learning goals prior to training to increase participant motivation to learn.

- Use gamification in e-learning to increase completion rates. Encourage managers to offer real-world recognition for badges earned. Real-world recognition could include: congratulations in a team meeting, mention in a company newsletter, mention on a conference call, gift card to the first person to earn a badge, etc.

- Use a marketing e-mail automation software system such as Constant Contact to send reinforcement and application messages to participants. For best results, make sure the software offers tracking results and include video links in each message.

- Use webcast technology to conduct a virtual manager meeting for pre-implementation planning and alignment.

- Use a social media platform such as Yammer to create an online community of learners. This encourages peer support.

- Use both a "push" and a "pull" approach to push out manager coaching tools while simultaneously offering the same tools via an online portal so they are available for managers to pull 24/7 when they are needed.

- Use an online survey sent to participants and managers 3–6 months after learning to measure Level 3 and 4 evaluation outcomes. Leverage behavior change and business results with senior leaders to justify investment of time and funding for learning. Leverage these results with managers to earn their buy-in for coaching and supporting learning.

- As a follow-up to leadership training, ask leaders to enter draft coaching comments on an iPad, upload to a cloud-based database, and then have virtual coaches review the planned coaching comments and actions, providing virtual feedback to managers prior to implementing those actions or making those statements to direct reports. Some have said this approach to offering virtual coaching, encouragement, and support is now called "Granny on a Cloud" since it is comforting to receive helpful virtual feedback prior to taking action.

- Record podcasts of high performers discussing how they use skills from the workshop to achieve successful results. Send links to participants so they see examples of how to apply skills following training.

- Following any type of training, learning transfer is improved if a series of online meetings (webcasts) are conducted for managers and senior leaders to provide reinforcement to direct reports. The group discusses what was learned during the workshop, how those skills are linked with company strategy, and what barriers need to be removed to make it easier to apply the new skills on the job.

- Ask participants to complete robust pre-work in the form of e-learning short mini-modules. Use the pre-work mini modules to teach key terms and concepts so the live session can focus on skill practice and application.

- Direct managers to set goals with direct reports prior to the session and ask the participant to answer the question: "What will change in your behavior and results following training?"

- Ask managers to explain to direct reports "What's in it for me (the direct report)?" prior to training to increase motivation to learn.

- Identify an executive sponsor for each training program. Ask that executive to send out pre-course communication linking the training with the company's mission, vision, values, and/or strategy.

- Create coaching guides for managers to use with individuals for pre- and post-training.

- Ensure that regional managers are involved in every training session—this senior leader involvement led to a 204% increase in achieving objectives.

- Connect and involve managers with pre-work meetings with learners—two post-training meetings, designed to debrief what they learned, and a second meeting to discuss how they are applying what they learned.

- Managers are overtaxed; provide managers with time-saving help, such as automated coaching tips or sample messages they can copy and paste into e-mails to direct reports to set up a coaching conversation.

- It may be too time-consuming for training and development staff to create unique coaching guides for each course. If so, create a more general coaching guide that works for multiple courses, or create specific guides only for core programs.

- Show managers the data that when managers are trained in coaching skills, learning transfer increases by 18%. When those same managers also actively engage in the session with their direct reports, learning transfer soars to 42%. Recruit one manager to attend each session.

- Ask managers to complete the training first. Then have at least two managers join each training session in which employees are trained. Ask managers to serve as observers and give feedback during role-plays and application exercises. Ask managers to serve as table discussion leaders to ensure each small group stays on task and is focused on relevant real-world application examples.

- If managers can't attend training, ask them to participate in an executive overview, e-learning overview, or podcast that links learning objectives with company strategy, mission, vision, and/or values.

- Create career paths so employees see a clear progression for the courses and skills they need to equip themselves for higher-level positions. This could be in the format of a spreadsheet listing, a series of PowerPoint arrows, or even an artist-generated drawing of a visual roadmap.

- Create a "Passport to Excellence" in which each participant receives a learning passport and stickers to place in it once each course is completed.

- Ask participants to indicate to the facilitator when they have a clear understanding of each new concept and when they are ready to move on to new content. By encouraging learners to set the pace for learning, you ensure they don't miss key concepts and empower them to take control and responsibility for their own learning.

- During content reviews, generate excitement through "gamification." By dividing participants into teams and having them answer questions in a style like Jeopardy, you appeal to their competitive side and increase their motivation to learn.

- Send participants follow-up e-mails with links to reinforcement such as podcasts, e-learning modules, quizzes, videos, and application tools.

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