

The Seven Factors in the Transfer of Learning Process

Is it enough to simply have employees go through a variety of training and professional development opportunities and assume any knowledge they gain will automatically translate into action on the job? The answer is no! If your organization wants to get the most out of its training and learning opportunities, you need to ensure that what is learned, is transferred to the workplace. What is the transfer of learning? It is defined as, “*the degree to which an individual applies new skills and knowledge from training to the job.*”¹ Only with successful transfer of learning can an organization expect training to result in changed employee behaviour that positively impacts service delivery.

According to the National Literacy Secretariat, “*Successful training and its long-term application on the job is possible only when the right people are provided with the right training at the right time and are supported by the right kind of organizational environment.*”

This statement can be further explained by considering the following seven factors in the successful transfer of learning process:

1. The Planning Process

This is perhaps the most important factor in the process, as it lays the foundation for learning to occur. It is up to each organization to strategically choose meaningful learning opportunities for appropriate employees to attend or complete. An organization’s training strategy will be derived from considering the pre-determined competencies required for each position, and then, on a person-by-person basis. Taking the time to complete a knowledge/skills gap analysis, will help you to determine which employees require which training programs. Having a specific organizational training strategy in place indicates that an organization is fostering an environment that supports not just learning, but also the transfer of learning. This means Supervisors need to take the time to talk with staff before they go through training to review course learning objectives or priorities together. Make the connection between the goals of the individual, the organization, and the program, in order to maximize learning. Managers and Supervisors play a pivotal role in inspiring and motivating employees to attend, to be active Learners, and to apply that learning once training is complete.

2. Learner Characteristics and Motivation

The expectations and motivation set by the organization and Supervisors, and the motivation and attitude of the employee who is going through the training, plays a pivotal role in learning and the transfer of knowledge. If the Learner

¹ Malamed, Connie. “Strategies to Enhance Learning Transfer.” Training & Development. 2017.

wants to learn, is motivated to learn, is engaged to develop their learning plan, and understands how this knowledge will positively impact their work, the organization, and the people they support, there is a greater chance of transferring the knowledge learned to practice. Failing to set learning expectations for the Learner usually results in failing to motivate the employee, resulting in a failure to learn. Regardless of how strong a training program is, before a Learner can learn, they must be confident, comfortable, open to learning, and know what is expected of them upon returning. One of the factors in Learner Motivation is the Workplace Environment – refer to Factor #6 for more information.

3. Design and Delivery Method

When looking for training opportunities for employees, look for programs that will meet a wide array of learning preferences and accommodate different cultures and communication styles. You want to look for training that encourages Learners to learn in a variety of different methods (i.e. lectures, videos, PowerPoint presentations, group work, self-reflection, etc.), and encourages Learners to be actively involved. Research shows that when a training uses a variety of instructional methods, there is a greater chance of appealing to all Learners and driving home the information. The bottom line is that the training not only needs to be relevant (i.e. aligns with desired learning objectives), but also engaging in order to be absorbed.

4. Learning Context

When Learners are asked about their preferred learning methods, almost all will fall into one (or more) of the following categories: visual, auditory, kinesthetic (interactive), or repetitive. To provide employees the best chance to learn, find programs that blend all four of these learning methods as this increases the likelihood of learning and being able to transfer that learning. Keep this in mind when employees are back at the organization and expected to transfer their learning – provide a variety of ways for them to demonstrate their knowledge, as the organization’s learning context will set the stage for future learning. If you have employees who have successfully completed Train-the-Trainer programs and are now in-house Trainers, remind them to also incorporate these methods into their programs, to encourage learning and increase the effectiveness of the transfer of learning.

5. Immediate Application

The best way for the transfer of learning to happen, is to set the expectation for the Learner to put their knowledge into action immediately upon returning to the workplace. Research shows that transfer of knowledge will not occur if putting it into practice is delayed. It is also critical for the organization to have some way of confirming that the Learner has disseminated and implemented the training as

intended. For example, if an employee has been registered for SARC's Med Assist online training program, following completion, the organization's policy and procedures should be such that the employee is expected to physically demonstrate competency before being allowed to assist clients with medication alone – this is also considered a form of risk management. Immediate application is supported by the Supervisor in various ways, including follow-up conversations (refer to [Coaching Conversation: Post-Training](#)) and through role-modelling and other types of reinforcement to support employees to apply the training to their jobs (refer to [Ensuring Learning Transfer at Your Organization](#)).

6. Workplace Environment

The environment where the employee works is the single most important influence on knowledge transfer. Employees should be rewarded for demonstrating what they know and wanting to learn – if learning is valued by the organization, show it. Creating a culture of learning and accountability is critical. An organization's leadership must be willing to support and embrace best practices and procedures as outlined in training, even though it may mean doing things differently, as exposure to training can often bring forward new ideas for consideration. They must promote the use of new skills on the job, include co-workers by encouraging the sharing of information learned, and foster peer support for knowledge transfer. Leadership must also be actively committed to the principles that the training is intended to support (i.e. health and safety, Person-Centred culture, etc.).

The effectiveness of Managers and Supervisors plays an essential role in ensuring effective implementation of training course material on the job, and determining whether the employee is demonstrating competency. Managers/Supervisors are the ones responsible for coaching/re-direction, ensuring compliance with policies and procedures, ensuring re-training if necessary, disciplinary action if necessary, etc.

Reinforcing the value of learning comes from leadership.

7. Eliminating Barriers

Many studies cite lack of time, lack of organizational support, training applicability, inadequate equipment/supplies, absence of reinforcement on the job for newly acquired skills/abilities, and workplace issues as the biggest barriers to the implementation of training. It is important for organizations to anticipate and plan ways to eliminate barriers – make the time for immediate application of learning and create an environment where new ideas and concepts are welcome. If there are expectations set for Learners to demonstrate what they have learned upon completion of training, or if a meeting is scheduled for the Learner to speak with their Supervisor about new ideas gained, the

likelihood of putting what they've learned into practice is greatly increased. The end of training doesn't mean the end of learning.

Although each of these seven factors is important in and of themselves, it is the inter-relatedness of them that is essential to achieving the successful transfer of learning. When even one piece is missing, the odds are diminished. There are many moving parts and many different roles – Learners, Trainers, Supervisors, Leaders – necessary to create and sustain a dynamic learning environment within an organization.

Sources:

1. Ratcliff Daffron, Sandra, Shelley Moore, and Tasha Chicovsky. "Transfer of Learning for Health Care Workers." PAACE Journal of Lifelong Learning. 2015.
2. Melamed, Connie. "Strategies to Enhance Learning Transfer." Training & Development. April 2017.
3. Canada. National Literacy Secretariat. Transfer of Learning: Planning Effective Workplace Education Programs. Ottawa, 1997.