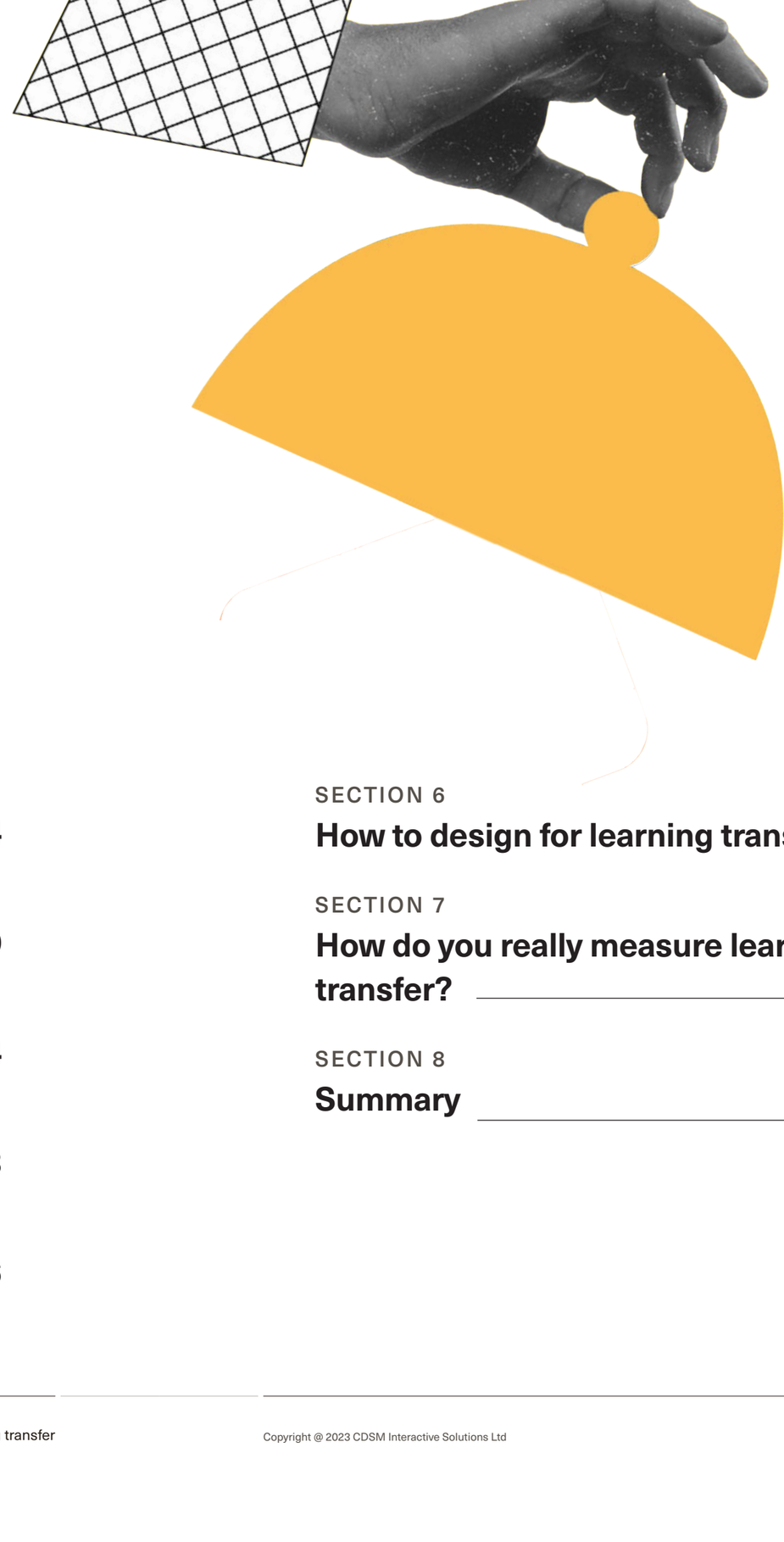
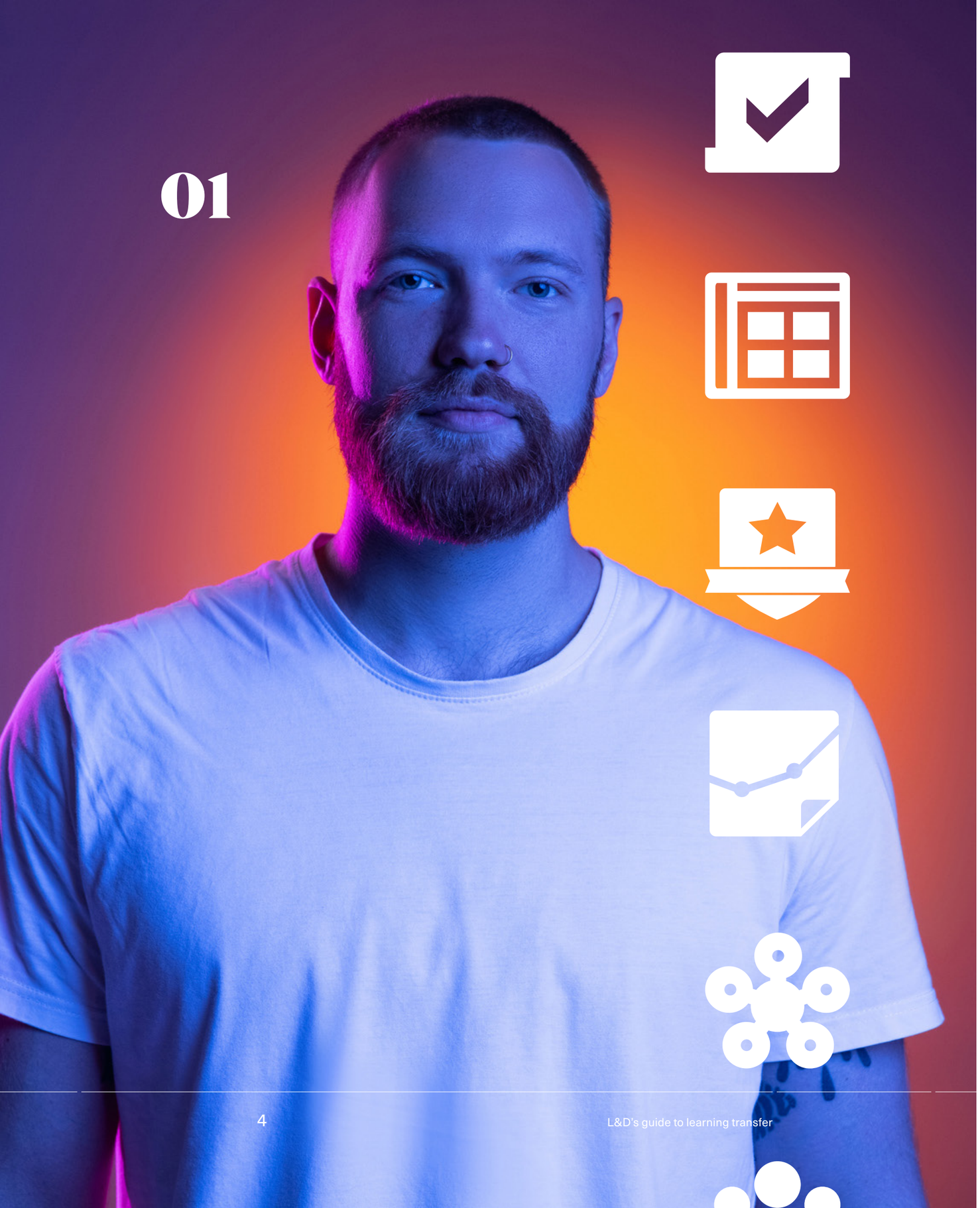
L&D's guide to learning transfer

thinqi

Contents

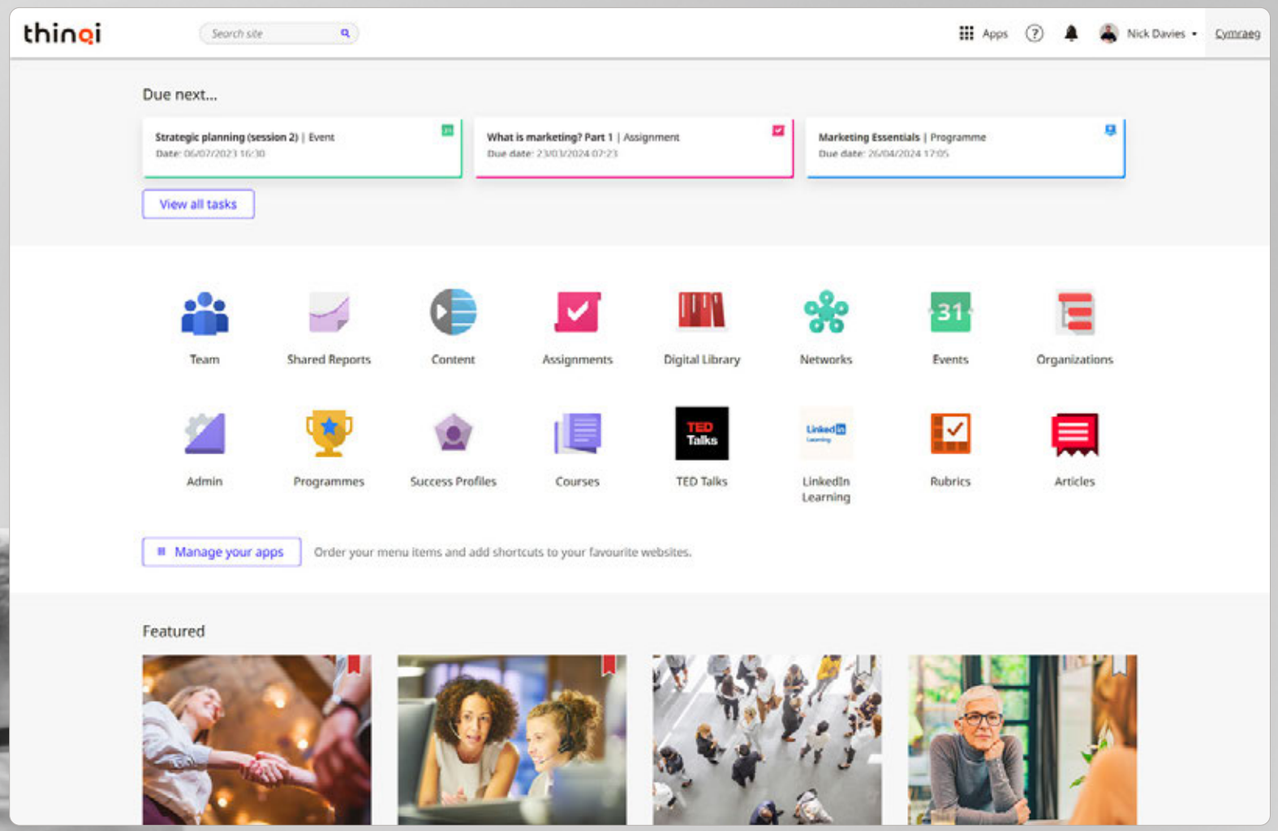




SECTION 1

About Thinqi

Created by educators and trusted by policy makers across the world, Thinqi is an award-winning learning system that transforms the way learners engage with their development, providing a smart and effective way to improve their skills.



Built on proven learning science, Thinqi's learning system comes with a proven track record of success. We work with national and regional governments, large school groups and universities in implementing and, crucially, embedding the technology at the heart of education transformation projects. We provide best-in-class digital educational tools across the public sector in basic and higher education and in a range of multinational companies in the corporate commercial sector.

Built upon a foundation of over 50 collective years of asynchronous, distance and face-to-face teaching, our team of learning experts are passionate about customer success, offering support at every step of the journey towards digital transformation. Tailored to the needs of your business, our experts will:

Support your team and respond to learning needs

Share their expertise in delivering blended learning that gets results

Help design a roadmap for sustainable L&D delivery in your organisation

Our approach has delivered measurable business improvement for customers across the globe including Cambridge University, Oxford University, Honda Motor Europe, Boots, BMW and Allianz Partners UK.

Together, we'll drive engagement for blended learning, helping you to grow a community of happier, more engaged and more capable staff.

02

SECTION 2

Welcome

Picture the scene: you've just delivered what you thought was a great learning program. Learner feedback says that staff loved it, completion rates were through the roof and you're already getting sign-ups for your next course.

However, a post-training evaluation of results reveals that this was in fact one of the least successful training initiatives the company has ever seen. Panicking, you realise that with all the costs invested, the return on investment you expected just hasn't happened. Staff members who attended your course are falling back into their old habits at work, no real behavioural change has happened and the C-suite want to know why.

Where are these new skills? Why aren't staff members able to perform better after completing what they claim to be a brilliant and engaging course?

Where's the real, measurable impact of learning?

It's not enough to help learners identify what skills they need or simply to recall information. Having stacks of positive 'happy sheets' post-training might feel good, but it's simply not enough if staff aren't following this up with the right actions. They need to be applying what they've learned.

L&D, it's time to talk about learning transfer.

03

SECTION 3

Learning outcomes

Any good learning activity should have clear learning objectives. Here's an outline of what you should take away from this guide.

By the end of this guide, you'll be able to:

01 Describe

what learning transfer means in the context of workplace L&D.

02 Identify

methods for measuring transfer of learning.

03 Develop

learning activities optimised for learning transfer.

04 Apply

effective methods within your learning system to help boost learning transfer.

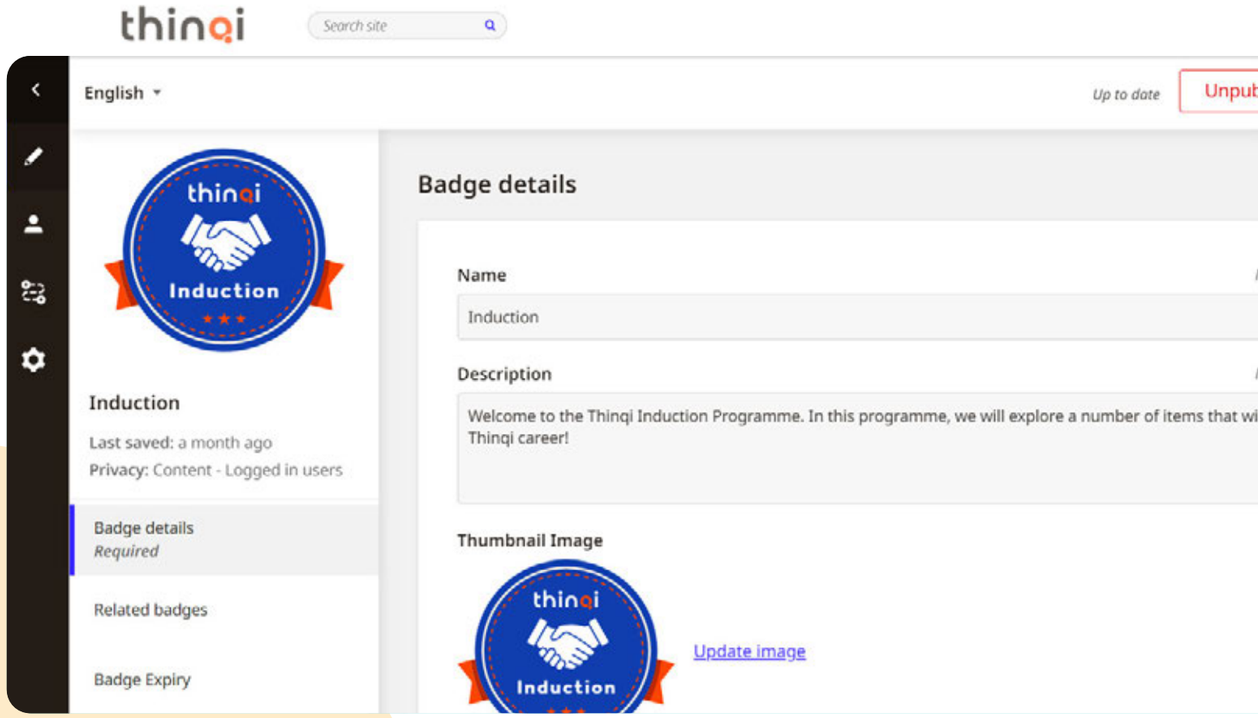
04

SECTION 4

What is learning transfer?

In L&D, you may be tasked with upskilling a particular team or department within your organisation. The ultimate goal might be to drive real behaviour change and boost performance. If you've identified a training issue is indeed the case, you can go ahead and roll out your learning program to your employees.

However...



...can you really guarantee that a learned skill or behaviour is repeated in the workplace?

That all depends on the efficacy of **learning transfer.**

Howard Garner, in his book The Disciplined Mind: What All Students Should Understand, gives this definition:

Learning transfer occurs when "an individual understands a **concept, skill, theory or domain of knowledge** to the extent that he or she can apply it appropriately in a new situation."

In other words, learning transfer occurs when learners take the knowledge from a learning intervention and apply it to their day-to-day jobs. If a member of staff has attended a course that they enjoyed, but can't later apply what they've learned to the workplace, then the learning intervention has essentially failed (sorry to break it to you).

Government statistics reveal that UK employers invested £42 billion in training in 2019, equivalent to a spend of £2,540 per trainee and £1,530 per employee. When we consider that 29% of L&D professionals in a recent survey don't actually know whether their learning interventions are benefitting job performance, can we really afford to overlook learning transfer?

Types of learning transfer

There are various types of learning transfer to consider. Some of the most common are shown below.

POSITIVE TRANSFER

This occurs when learning in one context positively impacts performance in a related context.

Example: *Learning to play the piano helps when learning other musical instruments.*

NEGATIVE TRANSFER

This occurs when learning in one context negatively affects performance in a related context.

Example: *Learning to drive on the left-hand side of the road in the UK will hinder the ability to drive on the right-hand side abroad.*

NEUTRAL TRANSFER

This occurs when learning in one context neither helps not hinders performance in another context.

Example: *Learning to speak another language does not affect someone learning how to swim.*

However, the two you're most likely familiar with are *'near'* and *'far'* transfer.

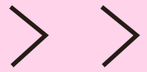
NEAR TRANSFER

This occurs when a person applies a learned skill to a context almost identical to that in which the skill was learned.

Example: *A marketing employee who attended a course on how to use Google Analytics can then directly transfer that learning to use Google Analytics in the workplace.*

FAR TRANSFER

This occurs when the learning context and the new context are dissimilar. Far transfer is more challenging as it involves applying principles and using judgement.



Example: *A customer service employee taking a course on handling difficult customers will need to take the foundational knowledge from the learning situation, then apply it and make a judgement in order to adapt to unpredictable real-life scenarios.*

TOP TIP

You need to go beyond the idea that real-life application assumes exact replicability – a concept that is akin to rote learning. Instead, you should start pushing for critical thinking around the application of skills and knowledge.

Challenge people to use their skills and knowledge when faced with unfamiliar scenarios. The more people are challenged to apply their learning and consider different contexts, the more confident they will be when faced with the unexpected.

SECTION 5

What factors affect learning transfer?

In a study on learning transfer by Sharan B. Merriam and Brendan Leahy, the authors list three variables that affect learning transfer.

01 Participant characteristics

There is strong evidence to suggest that the variables found within individual learners have an effect on learning transfer.

Motivation is one of the variables that is said to affect the transfer of learning. A study revealed a higher level of perceived transfer of training among those participants who reported a great degree of pre-training motivation.

Closely aligned with the motivation to learn is **self-efficacy**, which is the learner's belief that they have the skills and ability to apply the learning.

Other characteristics include the 'big five' personality traits (Broad and Newstrom, 1992):

- Conscientiousness
- Openness to experience
- Extraversion
- Emotional stability
- Agreeableness

However, it's important to remember that these might help the transfer of learning, but that doesn't mean those with different personality traits can't apply their learning either.

02 Design and content of the training program

Evidence suggests that certain design features of a training program have an impact on the transfer of learning.

This includes using **multiple instructional methodologies** and **post-training relapse prevention (RP)**, where learners are asked to devise strategies to combat relapsing into old patterns or behaviours, and instead employ their newly-acquired skills.

There are five variables which "strengthen the transfer process" (Krijer and Pol, 1995) and may prompt you to think about your own learning design:

- Use of simulation games
- Following up three months post-training
- Learning objectives determined by participants
- Varied instructional techniques
- Participant involvement with planning

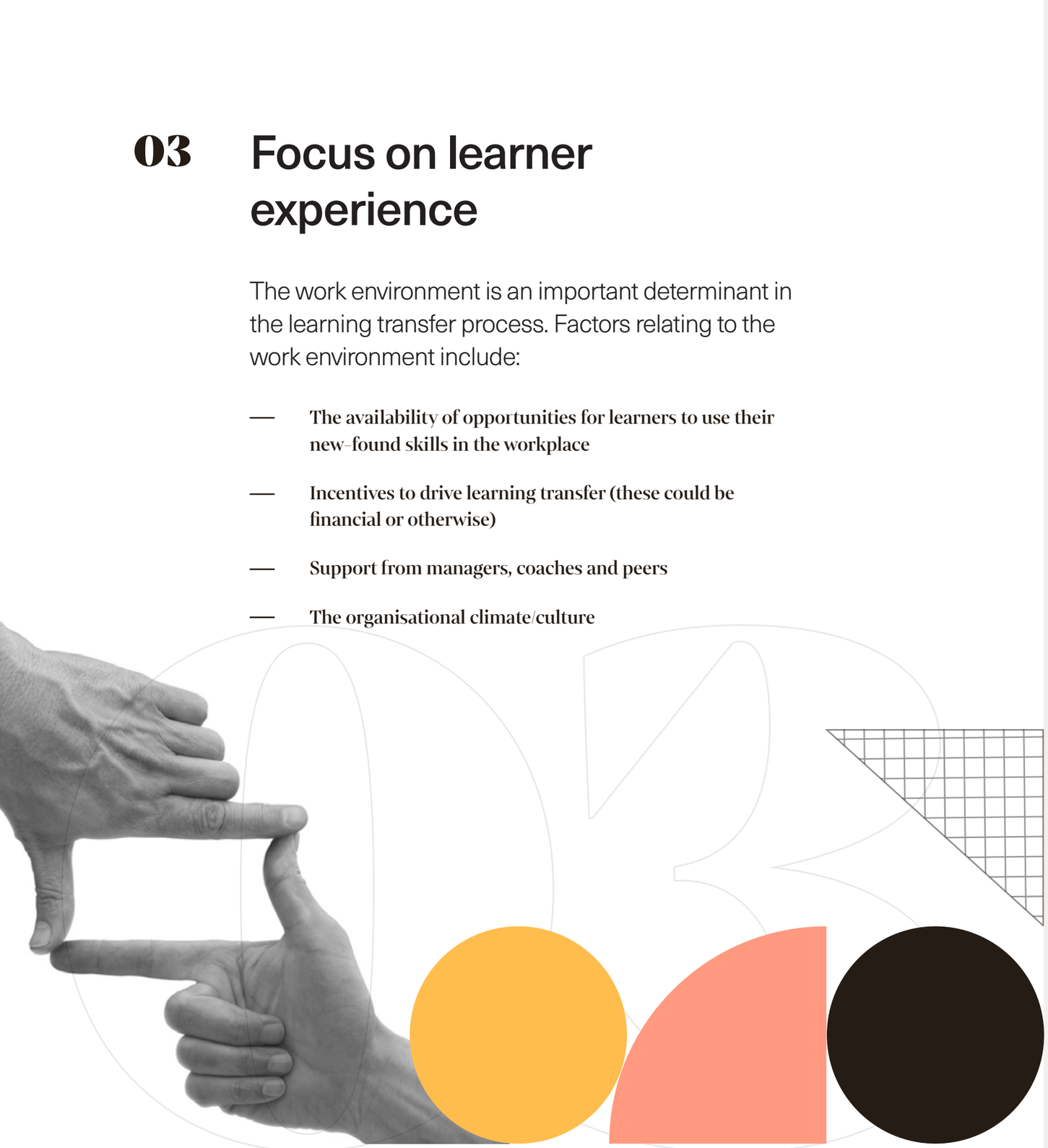
If you fail to design for learning transfer (which we'll explore in more detail later) and learners are not given sufficient opportunities to put their newly acquired knowledge and/or skills into practice, then the training program will fail to achieve real behavioural change.

Now let's take a look at the final variable that affects learning transfer.

03 Focus on learner experience

The work environment is an important determinant in the learning transfer process. Factors relating to the work environment include:

- **The availability of opportunities for learners to use their new-found skills in the workplace**
- **Incentives to drive learning transfer (these could be financial or otherwise)**
- **Support from managers, coaches and peers**
- **The organisational climate/culture**



‘The Great Training Robbery’

In the Harvard Business School paper ‘The Great Training Robbery’ (2016), a study by Mike Beer and his colleagues found that corporate organisations that began their transformation with the education of hundreds – sometimes even thousands – of employees lagged in their transformations compared to companies that never employed training and education as a strategy for change.

The main cause of the issue?

The organisational and management system; in other words, the pattern of roles, responsibilities and relationships shaped by the organisation’s design and leadership that motivates and sustains attitude and behaviour.

According to the authors, ***“the seeds of new individual skills, knowledge and attitudes can only thrive in fertile ground – a changed pattern of roles, responsibilities and relationships that typically emerge from a new organisation design led by the senior team.”***

This should encourage new behaviours post-learning.

Aim to support a ‘falling forward’ approach, one whereby learners are not afraid to fail because these failures are not perceived as destructive. This enables them to apply the learning, receive feedback, and then re-apply the skills and knowledge acquired.

06

SECTION 6

How to design for learning transfer

We now know that just rolling out courses and learning programs isn't a guarantee that anything covered will be translated into application in the workplace. So, what steps can you take to ensure effective learning transfer in your learning design?

1. Set clear objectives

The way in which we guide or instruct learners is a key consideration when helping to shape behaviours that enable learning.

One of the most effective ways to guide learners is to tell them explicitly where they should be heading, why training is relevant to their progress and how to reach their learning goals.

Patti Shank, an internationally-renowned instructional designer and author, says that **it's helpful to think about the outcomes of instruction in terms of objectives set when designing for effective transfer.** These can fall into one of two categories:

PROCEDURAL OBJECTIVES

These involve a sequence of steps and are more likely to involve near transfer.

Example: *By the end of the module, the learner will be able to import, assign and segment contacts within the CRM software.*

DECLARATIVE OBJECTIVES

These require the learner to use reasoning to apply their knowledge to new contexts and usually involve far transfer.

Example: *By the end of the module, the learner will be able to decide on the right course of action when dealing with different customer complaints.*

TOP TIP

The learning outcomes you create should inform and direct. Regardless of how you want your learners to achieve them, it's useful to set out what you want them to be able to do using active verbs that relate to cognitive skills, not tasks (e.g. "analyse"). You might want to consider working with learners collaboratively to determine outcomes, which can also strengthen the transfer process (Krijer and Pol, 1995).

The learning outcomes you set should be assessed upon completion of the learning program. They should inform the design of ongoing and final assessment activities that are critical to checking learners' understanding and progress, and they should be used to help shape the feedback you provide.

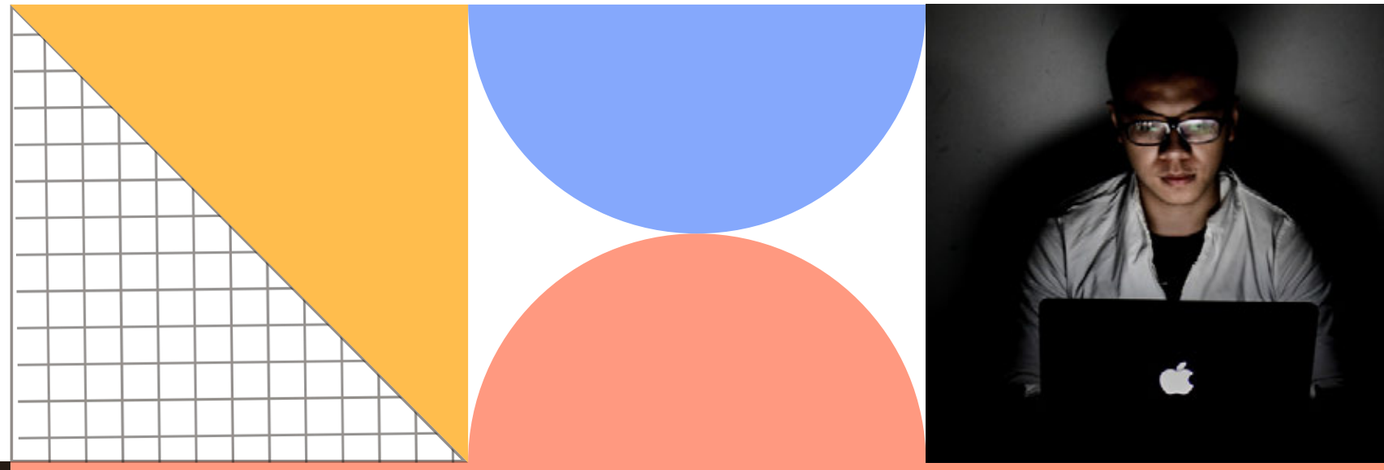
Without opportunities to apply knowledge and skills in different contexts, learners have no way to modify existing schema (theoretical network-like mental structures for organising information).

The learning should be designed in a way that allows learners to practice in non-repetitive and unpredictable scenarios.

2. Use scenarios

To encourage learners to apply their knowledge and make judgements within different contexts, consider using scenarios. These can be accompanied by questions that can prompt learners to participate and engage meaningfully with the scenario being described.

The following questions are some examples that can be used to engage and elicit appropriate responses from learners:



Would you agree or disagree and what are your reasons?

What next steps would you take and why?

If this happened, describe how you would respond.

Do you have an alternative solution? If so, please describe it.

TOP TIP

Provide questions that encourage reflection and self-explanation to allow learners to expand upon what they've learned and identify where they need to address any gaps in their knowledge. As they approach different contexts, using metacognitive strategies increases awareness of their own thinking and reasoning.

3. Facilitate social and collaborative learning

"To succeed now, we have to continually refresh our stocks of knowledge by participating in relevant 'flows' of knowledge – interactions that create knowledge or transfer it across individuals. These flows occur in any social, fluid environment that allows forms and individuals to get better and faster by working with others."

— Hagel, Seely Brown and Davison (2010)

Although **constructivism** places an emphasis on learner autonomy, or 'learner-led' experiences, this doesn't mean that learners should simply be left to their own devices.

Bruner (1976) emphasised the impact of others on learners as they develop their knowledge and skills, which means he's often associated with a branch of constructivism known as **social constructivism**.

Social constructivism =

A variety of cognitive constructivism that emphasises the collaborative nature of much learning.

Bruner referred to support from others as

'scaffolding'

Scaffolding learning – for example, providing useful supporting information or encouraging learners to work in groups rather than alone – helps guide learners when necessary while still giving them the freedom to create understanding for themselves.

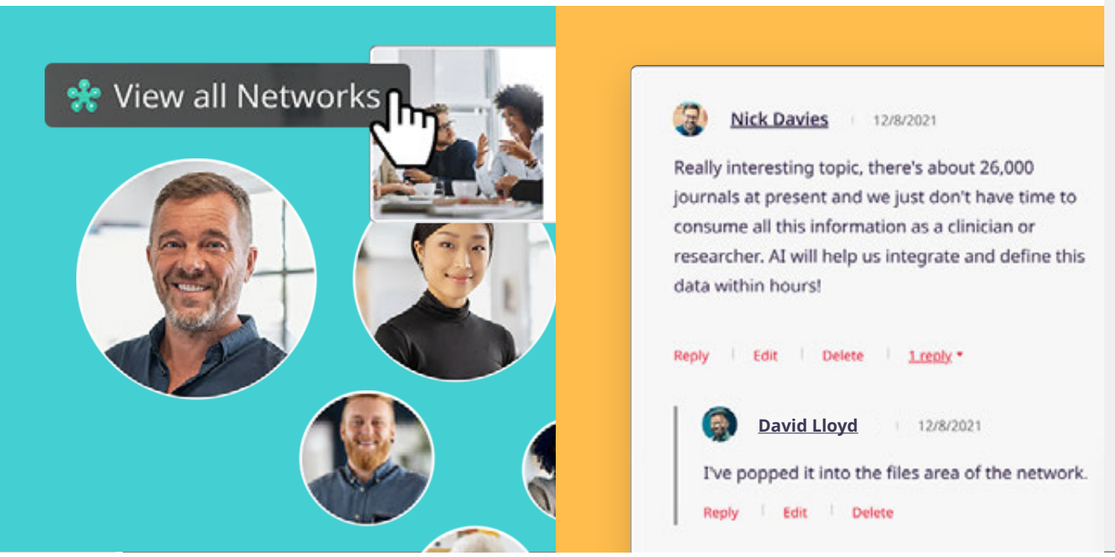
For more effective learning transfer, we must refresh learners' knowledge by encouraging them to participate in interactions that transfer knowledge across individuals (what Hagel, Seely Brown and Davison refer to as a ***'flow' of knowledge***).

As learners discuss problems collectively, they are learning from shared practice as well as from the previous experiences or mistakes of their peers.

How we encourage social and collaborative learning in our Thinqi learning system…

How do we facilitate social and collaborative learning in an online environment, particularly now we've seen a shift to increased remote and hybrid learning?

Thankfully, today's learning systems come equipped with communication tools such as forums, comment threads and real-time chat facilities.



CREATE NATURAL SOCIAL LEARNING

The Networks feature in Thinqi provides a range of tools to support social and collaborative learning, with valuable discussion spaces for key topics and best practice. With 1:1 and group messaging options, you can create and manage learner cohorts as well as facilitate coaching environments.

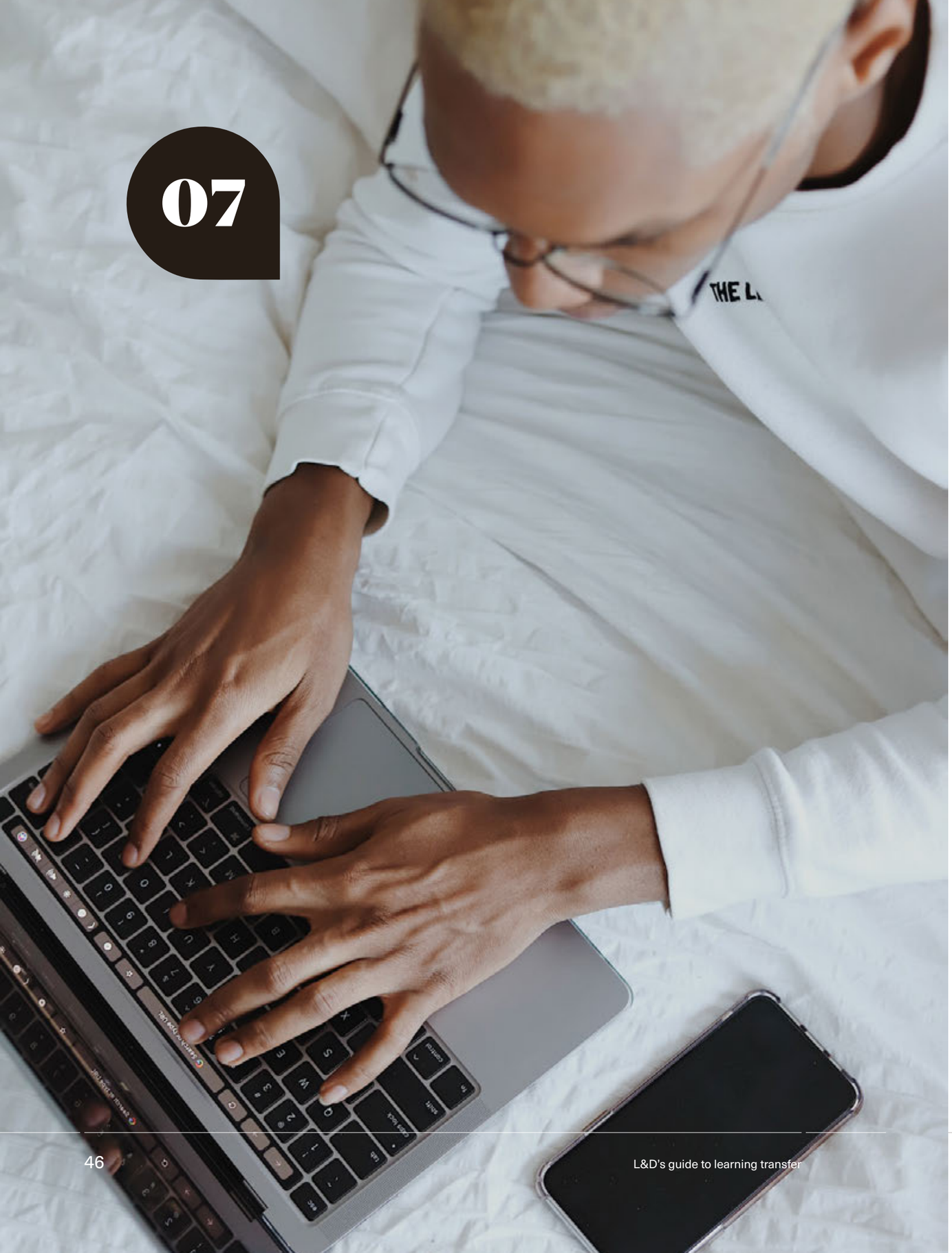
ENCOURAGE CREATIVITY AND INNOVATION

Sharing resources, ideas and opinions with peers and specific user groups is easy with Thinqi. Find inspiration beyond formal learning content with tips, ideas resources recommended and shared by peers – make everyday conversation a valuable learning opportunity.

24/7 ACCESS TO IN-HOUSE EXPERTISE

Got a burning question you want to be answered by in-house experts? No problem – with Thinqi, learners can post questions to their networks whenever they like and receive answers from their professional networks and peers at any time.

- Create a space for collaborative learning built on social constructivism
- Encourage knowledge-sharing within the organisation
- Inspire and engage with peer-recommended learning content



SECTION 7

How do you really measure learning transfer?

So, you've taken steps to improve your learning design to increase the transfer of learning in your workplace. Now you're faced with another challenge...

... how exactly do you measure learning transfer after the training has finished?

Learning transfer is one challenge, but data analysis can often feel like yet another barrier to effective L&D (but don't worry – we've got another free guide to help you with that too).

Ensuring your data successfully joins the dots between training initiatives and performance is vital if you're going to prove that learning transfer has occurred.

Let's take a look at how to do it.

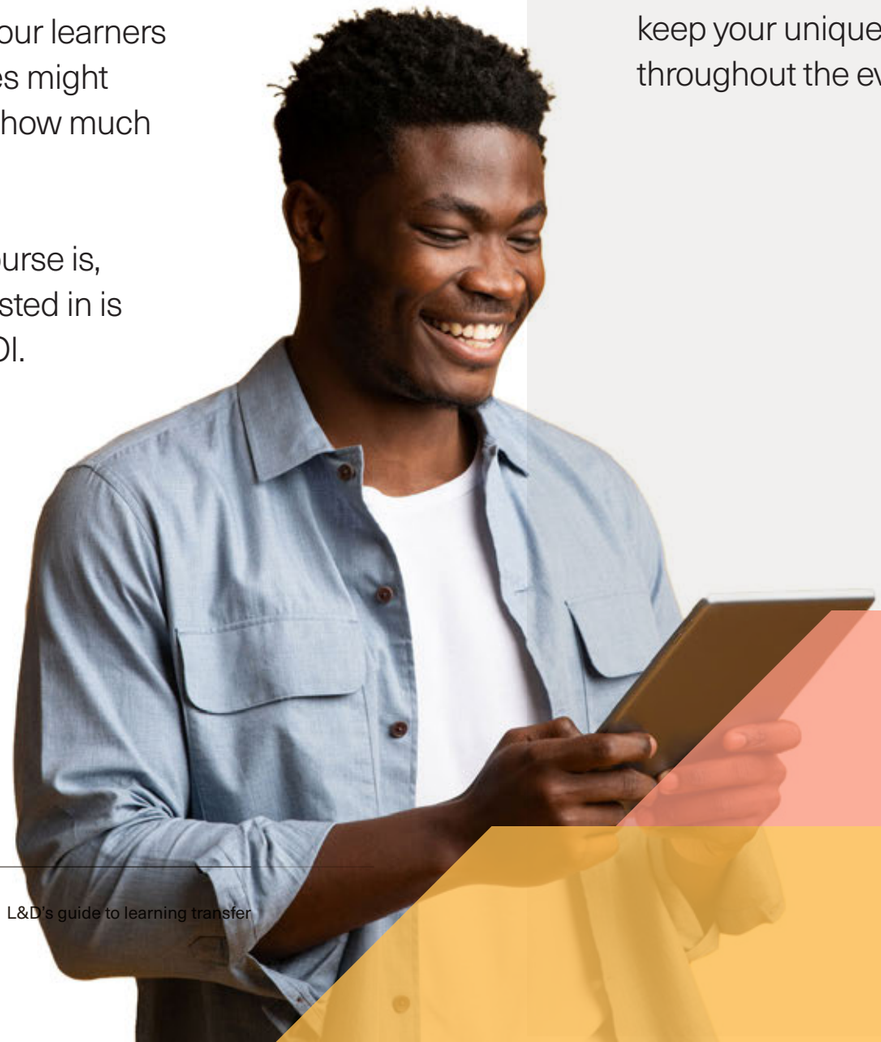
Use learning evaluation models

According to the CIPD Learning and Skills at Work Survey, "measuring the impact, transfer and engagement of L&D activities can't simply be done by an end-of-course questionnaire of post-training survey."

However, **only a small minority of L&D professionals are assessing the behaviour change of participants by measuring the transfer of learning in the workplace.**

A quick questionnaire or survey might tell you that your learners loved your course. And those enthusiastic responses might look great on paper. However, they do little to reveal how much people have actually learned or applied in practice.

The C-suite aren't interested in how exciting your course is, but they do care about how the training they've invested in is affecting workplace performance and, ultimately, ROI.



This is where learning evaluation models can help. We explore five common learning evaluation models in this blog post, but here's a selection of some of the models you can choose from:

- Kirkpatrick's Four Levels
- The Kirkpatrick–Phillips Model
- Anderson's Value of Learning Model
- Brinkerhoff's Success Case Method
- The Learning Transfer Evaluation Model (LTEM)

The choice of model is up to you, but make sure you keep your unique business aims and objectives in mind throughout the evaluation process.

LEARNING TRANSFER AND KIRKPATRICK'S FOUR LEVELS

As an example, let's take a look at the one most are likely familiar with: Kirkpatrick's Four Levels. This consists of the following:

04

RESULTS

This involves measuring the impact of the learner's behaviour on the organisation.

03

IMPACT

This involves measuring the behaviour change of the learner to ensure they are now able to apply what they've learned in the workplace.

02

LEARNING

This involves measuring the learning outcome. Has the learning successfully been retained and embedded?

01

SATISFACTION

This describes the learner's immediate reaction to the learning program.

The Kirkpatrick-Phillips model

The Kirkpatrick–Phillips model is an updated version of Kirkpatrick but with a **fifth level added: ROI.** While ROI is often seen as a necessity for proving the business case of L&D to leaders, we need to bear in mind that ROI tends to be applied only **after** the learning intervention has taken place.

Too many L&D professionals are still ‘evaluating’ at **Level 1: Learner satisfaction.** While it can provide an early warning about what’s not working, it still only looks at learning effectiveness at a superficial level and is no guarantee that learners have acquired any knowledge.

Levels 3 and 4 of the model, however, enable you to determine the impact of behavioural change on the learner and the effect this has had on organisational performance.

You’ll find xAPI capability in learning systems such as Thinqi, which enables you to consider more widely what you want to track and how you want to track it.

Previous e-learning standards (such as SCORM) largely just facilitated data capture at **Level 2: Learning.** Using xAPI, we are able to consider impact across all five of the Kirkpatrick-Phillips levels, capturing data on a range of behaviours—and help you prove the efficacy of learning transfer.

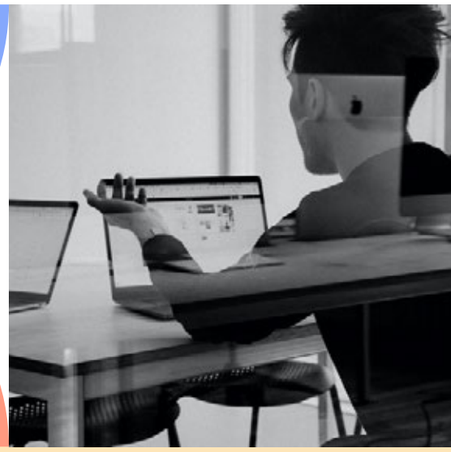
Say hello to **xAPI**

xAPI (aka Experience API) is a software specification used in e-learning and can be helpful in the evaluation process. It allows learning content and learning systems to ‘speak’ to each other in a way that records and tracks learning experiences.

For L&D professionals, xAPI offers the opportunity to track more than just progress and scores. We are finally able to consider the bigger picture – from **learners’ initial thoughts about the learning**, through to the **impact it has on their everyday working life.**

The Learning-Transfer Evaluation Model (LTEM)

We can't talk about learning transfer without mentioning Will Thalheimer's Learning-Transfer Evaluation Model (LTEM), a relatively newer and arguably more sophisticated model developed in 2018.



"The Learning-Transfer Evaluation Model provides more appropriate guideposts, enabling us as learning professionals to create virtuous cycles of continuous improvement."

— Will Thalheimer

The 8 levels of LTEM

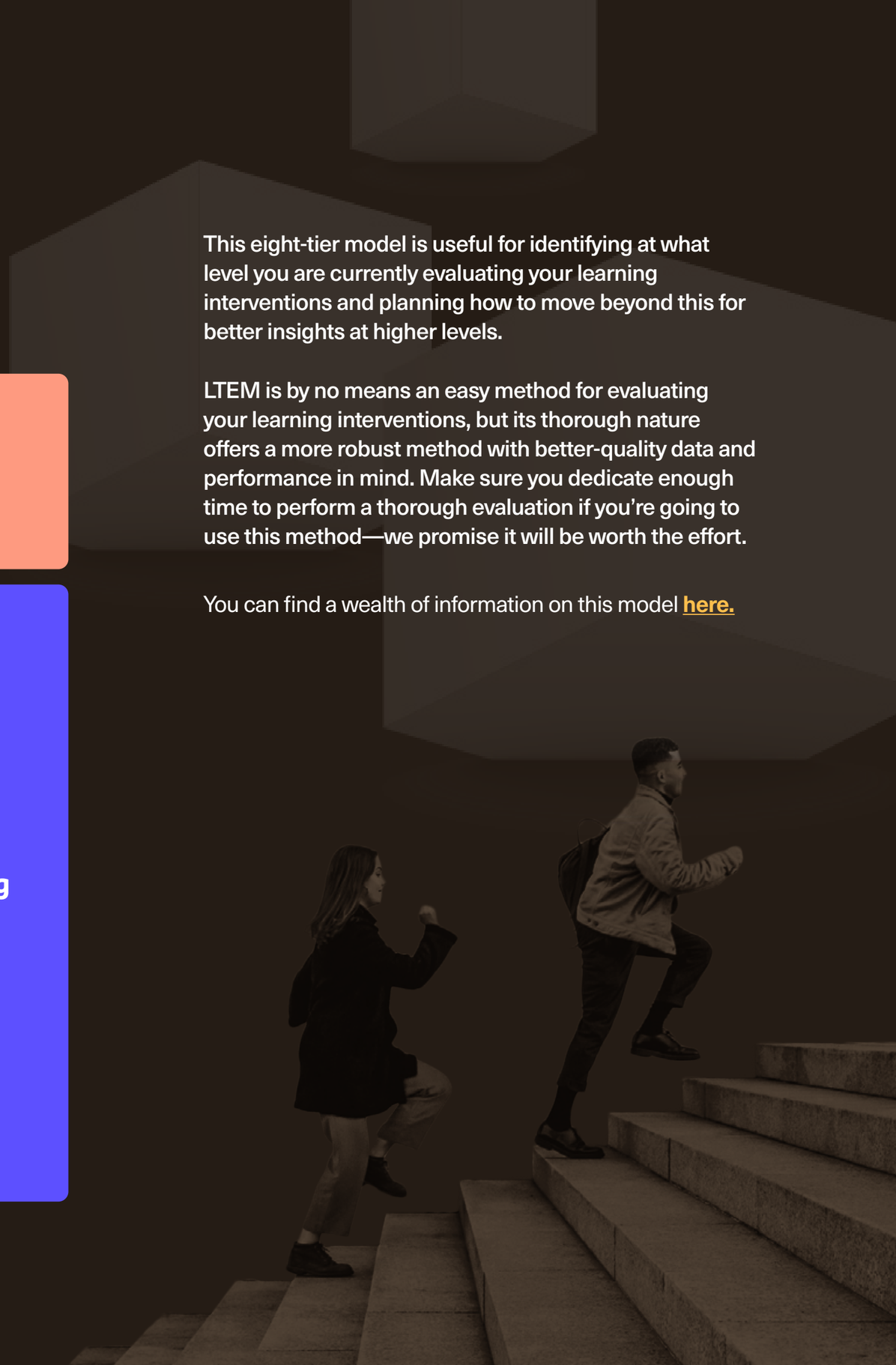
LTEM comprises eight levels – the first six of which focus on **learning** and the top two demonstrating where learning becomes **application and integration at work**.

Tier 8	Effects of transfer	**Work**
Tier 7	Transfer	
Tier 6	Task competence	**Learning**
Tier 5	Decision-making competence	
Tier 4	Knowledge	
Tier 3	Learner perceptions	
Tier 2	Activity	
Tier 1	Attendance	

This eight-tier model is useful for identifying at what level you are currently evaluating your learning interventions and planning how to move beyond this for better insights at higher levels.

LTEM is by no means an easy method for evaluating your learning interventions, but its thorough nature offers a more robust method with better-quality data and performance in mind. Make sure you dedicate enough time to perform a thorough evaluation if you're going to use this method—we promise it will be worth the effort.

You can find a wealth of information on this model **here.**



Visualise what successful learning transfer looks like

To start measuring your results, you need to have a clear vision of what success looks like to you and the organisation.

Here are some simple questions you can ask yourself to get there:

- **“WHERE ARE WE NOW AND WHERE DO WE NEED TO BE?”**
- **“WHAT CHANGE AM I TRYING TO MAKE HAPPEN IN THE ORGANISATION?”**
- **“WHAT OBSERVABLE BEHAVIOUR CHANGES WILL I BE ABLE TO SEE?”**
- **“HOW WILL THIS BE MEASURED?”**
- **“WHO NEEDS TO BE INVOLVED?”**
- **“HOW OFTEN DOES THIS MEASUREMENT NEED TO HAPPEN?”**
- **“WHAT ARE THE CONSEQUENCES OF ‘DOING’ VERSUS ‘NOT DOING’?”**

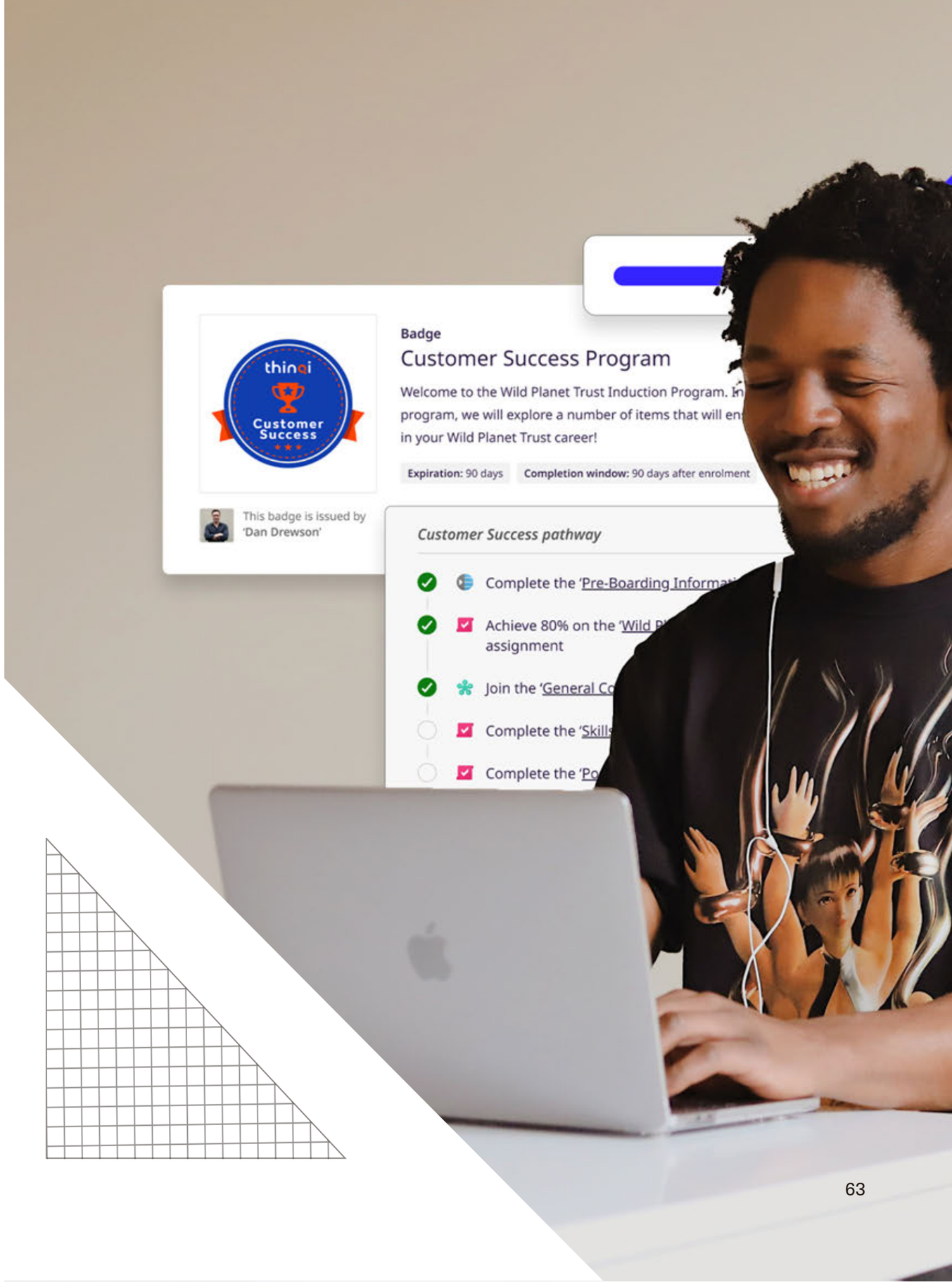
Using learning technologies to support learning transfer

Imagine your new hires in the customer success team have completed their induction training. In Thinqi, a digital badge could be automatically awarded upon **successful completion of a module.**

A second badge can then be awarded for **real-world application** – for example, successfully resolving five customer service queries and demonstrating the processes taught in the induction module. This can be awarded by a line manager or peer after observing successful on-the-job application.

Finally, a 'parent' badge is awarded upon **successful completion of both the learning and application badges.**

Once this badge is earned, congratulations! The introductory customer success training is complete. Detailed reporting then allows you to see the impact of learning on real-life application.



How to determine the impact of learning transfer using learning technologies

If things aren't working...

Perhaps you can see a 90% completion rate of the theory badge, but only 10% of these learners have successfully completed the application badge. This is a big indication that there's an issue with learning transfer. Time to review and refine.

If things are working well...

Later, you might see that 95% of your learners have achieved the learning badge, with 85% of those also gaining an application. Congratulations! Your customer success team has successfully applied the learning to their daily work and it's showing in their performance. Your customers have never been more delighted with the service they're receiving.

Your choice of learning technology should provide you with the data you need to see what's working and what isn't, so you can refine your strategy for learning transfer success.

08

SECTION 8

Summary

We hope you're feeling more clued up and confident when it comes to improving learning transfer after reading this guide. Here's a reminder of what's been covered:

01

Learning transfer occurs when learners take the knowledge from a learning intervention and apply it to their day-to-day jobs.

02

There are various types of learning transfer to consider. The most commonly known forms of learning transfer are 'near' and 'far' transfer.

03

Participant characteristics, design and content of the training program, and work environment are three factors that affect learning transfer.

04

Designing for effective learning transfer involves setting clear objectives, using scenarios and facilitating social learning opportunities.

05

A combination of learning evaluation models and technology can help you measure learning transfer to see what's working (and what's not).

thinqi

It's time to prove great L&D works.

#NEVERSTOPLEARNING

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