

IN THIS ARTICLE

Transfer of Training

Too often,
participants think
the training was good,
but they know
they won't use it.
Here's how to
improve learning
transfer.



The aftermath of a training course can be wonderful. Participants ask questions, discuss the topic, practice what they learned, do well on tests, promise to keep in touch with each other, and so forth. Sometimes, they even applaud.

But a few years ago, I had a sobering experience. While waiting for an elevator after having just conducted a course, I overheard something that silenced the applause still ringing in my ears. One participant said to another, "That was a great class, but I won't get to use it." The other participant nodded in agreement, "Yeah, great. But there's no time for it where I work."

Two aberrations? I don't think so. Since then, I have kept an eye peeled for post-class dismay. In fact, I have discussed that phenomenon with hundreds of training professionals in the United States, Canada, and Europe. I found that it's important to read between the lines of evaluations and to query participants about the likely outcome of the training.

The phrase, "Great class, but..." could become a mantra for our business.

But what?

Why do many participants leave a training course and shrug?

One likely reason is that they think they are returning to an obstructionist manager who either doesn't understand or favor the training. A painful example that I have some responsibility for involves a professional development program for course developers. For a little more than a year in the 1980s, 24 developers traveled to attend workshops in instructional design and technologies. Never, ever, did their direct supervisors choose to attend—even when beseeched by me and the other trainer. The results shouldn't have surprised anyone. In the best cases, returning participants were ignored. And in one instance, some were greeted by a manager who smirked and said, "Get back to the real work."

The trainer's lament

Sue Reynolds, from California Housing Partnership, expresses the typical trainer's lament. She trains project managers of affordable rental housing in a variety of skills, including scheduling their complex project tasks. Some of the participants never implement the systems they learn because when they return to their community agencies, they report to executives who have other priorities and aren't convinced of the value of the systems.

That Was a Great Class, But...

BY ALLISON ROSSETT

FROM TRAINING TO PERFORMANCE

Training

Learning outcomes

A focus on individuals

Measured by how many butts in the seats

Events

Classes

Habit- and precedent-driven

Training edifice, classrooms

Performance

Learning and performance outcomes

A focus on individuals and the organization

Measured by business results

Systems

Solution-type systems that involve training and such related interventions as job redesign and incentives

Driven by needs assessment and a customer focus

Support is available everywhere, including in classrooms and from human and automated coaching

But it doesn't have to be that dismal. Recently, a group of training professionals from Harris Bank in Chicago were delighted because their manager and her manager joined the group to take a two-day needs assessment class.

Motorola Worldwide Learning Services has demonstrated that same type of commitment to alignment, but a little differently. At the close of a two-day class for Motorola, I asked participants what obstacles they anticipated and how their managers could move them forward in the areas covered in the training. Their comments served as grist for a subsequent meeting of the managers.

A mighty training class

Through incentive policies and actions, an organization tells its people what it cares about. For example, a company that evaluates call-center employees by the number of calls answered per hour will have a difficult time convincing them that customer satisfaction is a top priority.

Sears's experience in its auto-parts division is a classic example. Sears trained employees on ethics and customer service, but it also tacked financial incentives to parts sales. Not surprisingly, Sears got what it put its money behind—and unfavorable

press coverage. Determined to correct the situation, Sears altered the incentives, thereby sending a consistent message.

A few years back, I was involved with a company that successfully shifted its sales employees to a quality movement via executive sponsorship, training, and incentives. Later, the company wanted to use similar quality processes in its manufacturing settings and asked for my help. But when I presented the opportunity to pair incentives with quality outcomes, the company's leaders balked. They were unwilling to link performance and pay, even for valued outcomes. That had never been done before in manufacturing. What they wanted was a mighty training class.

Another problem is a flawed work environment. Nothing causes more agitation among computer training and support professionals than a discussion on how screwed-up tools and conditions hinder technical training. They tell tales of training software installed on machines with insufficient memory, software with great features that goes buggy, and training on software that people are "going to love when they get it."

A colleague in sales training describes her experience beating her

head against a wall during a course on a new high-technology product. During the class, she dazzled salespeople with the features, comparative benefits, and compatibility with the existing product line. For a while, they were enthusiastic. But that soon faded. They said, "We like it, but when will the sales offices get demonstrators? Last time, it took months. Even when they were available, we didn't have the budget to get our hands on them."

Another example of the affect of a flawed work environment involves a county office of education. Hundreds of teachers attended classes on the Internet. The training was chock full of uses and practices applicable for public school teachers. Unfortunately, most of them walked out of the training and said, "The Internet is wonderful, and the class was great. But I can't use any of this." Why? Several of the teachers didn't have computers. Some didn't have modems. And nearly all of them didn't have telephone connections in their classrooms.

Beads on a string

Another common comment among training participants is, "It was a great class, but I don't see how it fits with that other class." Or, "I liked that class, but it's just like the one we had on market-focused-strategic-seamless selling." The lesson: Learning must be part of a consistent, clear message. Often, it isn't.

A colleague at a computer company describes its sales and marketing training as "beads on a string." The beads are the individual classes; the string is the curriculum associated with a job position or product line. As new courses are created, they're snapped onto the end of the string. The relationship between the beads and the string is negligible. Breaking that pattern of distinct offerings is a hefty challenge.

Universities provide another example. Typically, professors "own" their courses, focusing on them rather than on the relationship between them. Most times, different departments don't integrate courses and programs. That's also true in corporate and government training.

The way some jobs are perceived can also be a barrier to training transfer. In such cases, participants may

TABLE 1: PREQUALIFYING MANAGERS AND SUPERVISORS FOR TRAINING

A negative response to any of these statements raises a red flag that the respondent might not understand or favor the training.

Write "agree" or "disagree."

	Agree	Disagree
I have a good sense of what the class is about.		
I know how the training matches what I need for employees to do.		
There are tangible ways that the training will help employees.		
There are tangible ways that the training will help our unit.		
I can see why the organization is interested in providing the training.		
In performance appraisals, I can evaluate employees on what they learn in the class.		
I know enough about the training to support employees when they return to work.		
We have the tools and technologies that will be discussed in the class.		
I'm glad employees are attending the class.		
I've discussed the topic and the class with the employees who will participate.		
They know that I care about what will be taught in the class.		

TABLE 2: PREQUALIFYING PARTICIPANTS FOR TRAINING

A negative response to any these statements raises a red flag that the respondent (or the organization) might not be sufficiently prepared for the training.

Write "agree" or "disagree."

	Agree	Disagree
I have a pretty good sense of what the class is about.		
I can see how I might use what I'll learn in the class.		
There are ways that the training could help me perform my job better.		
There are ways that the training could help my unit.		
What I learn in class is likely to count on my performance appraisals.		
My manager knows about the training topic.		
The class appears to focus on problems and opportunities that matter to me.		
I'm glad to have the chance to learn more about the training topic.		
My manager seems to care about my acquiring some skills and knowledge in the area covered by the training.		
When I return to work, I'll have the tools I need to use what I learned in the class.		

say, "A lot of good ideas in the class, but that's not my job." I've heard that from people who train bank tellers, managers, and many others.

With tellers, the problem is a dichotomy between service and sales. Financial institutions have a long history of selecting tellers for their ability to provide direct, able, and responsive customer service. But cataclysmic changes are occurring in banking. More customer service and support are handled electronically and via telephone. In California, bank branches are vanishing. Tellers that remain in retail banking are increasingly expected to deal directly with customers, but with an emphasis on sales.

Managers in all kinds of businesses

are also experiencing changing roles, as leadership paradigms shift from a command-and-control approach to nurturing and coaching knowledge workers. There are thousands of courses for managers about empowering employees, working in teams, and so forth, but production and appraisal expectations haven't caught up. Managers sit in such classes, but during their breaks, they pick up their e-mails and voice mails exhorting them to achieve production targets.

Hell-o!

Here's a typical scenario, in which an executive from a large company calls a training consultant for help in shifting training and HRD professionals

toward new roles and directions.

Consultant: "Glad you called. What do you have in mind?"

Caller: "It's our annual educators' conference, and our theme is *Performance in the 21st Century*. I heard you speak in Atlanta last year and thought you could rally our troops. It would be a 90-minute slot."

Consultant: "Can you give me a sense of what direction you're trying to rally them?"

Caller: "Sure. A new strategy to link more closely with business results. That means shifting from training to performance, getting our people involved with needs assessment and evaluation, and focusing on what's involved in helping employees perform

UNEARTHING THE BARRIERS

Here's a needs assessment with questions designed to identify potential barriers to training transfer and improved performance.

- ▶ Do the participants and their managers know what the training will contribute?
- ▶ Did participants and managers help define the direction of the training?
- ▶ Do participants want to take the training?
- ▶ Do managers want to send their people to the training?
- ▶ Are there already changed expectations about work that will press participants to use what they will learn in the training?
- ▶ Have those expectations been communicated to participants?
- ▶ Do managers know enough about the training to discuss it with participants? To coach afterwards?
- ▶ Are the appropriate support tools and technologies available at participants' work sites?
- ▶ Will the training present a parallel message with other courses?
- ▶ Have similar courses in the past been supported by the organization?
- ▶ Have senior-level managers done anything to show that they support the training and its desired outcomes?
- ▶ Does the organization's culture encourage participants to use what they learn in training? If not, what might get in the way?

better. No doubt you know where I'm heading."

Consultant: "I do, and I agree. Can you tell me what else you're doing to accomplish that change, besides my presentation? Are there things already in place that reflect the new priorities?"

Caller: "Not yet. Maybe I'll put together a committee to work on that. I think a great place to start is your presentation and then maybe a workshop on needs assessment. What's your fax

number so that we can get this squared away?"

For that mission, the caller (and his or her organization) needs a strategy that uses a solution-type system in which effective training is a pivotal, but not solitary, element and in which presentations and training are preceded by new incentives, recognition programs, job descriptions, and work processes. The irony is the caller's attempt to move forward with an isolated training event to motivate professionals to stop doing isolated training events.

There are many costs associated with tossing training at people without regard to the larger contexts in which they work. Some obvious ones are the failure to influence business results and frittered-away opportunities and resources. When even the federal government is measuring and demanding financial results, does training dare to lag behind?

What is unaligned training causing in people? The answer: Cynicism. Because most participants try to connect what they're taught with what they have experienced and expect to experience at work, many of them become cynical. In such cases, they scoff, in covert and overt ways, at training as nothing more than a public display—without the organizational commitment that should be manifested in supervisory support, incentives, tools, and job design. They give credit for a great class, a fine event, and a good show. But when given time to stew, they become annoyed.

Participants' cynicism has three targets: the topic, the organization, and the training. Cynicism about the topic sounds like this: "Flavor of the month." I recall a friend in government who described a numbing array of mandated classes on hazardous materials, teamwork, and so forth. I nodded sympathetically as he poked fun at the topics. But consider the topics. Should we skip safety training? He dismissed the topics because the training wasn't reinforced.

Cynicism about the wisdom of organizations is rampant. A training specialist for a large computer company says, "Every spring, it's the same thing. Some new initiative. Market-driven quality. Teams. Empowerment.

Virtual officing. Whatever. We're told to prepare a course, a really potent course. And that's it. Like a course is going to change the company's culture. Are they living in a dream world at headquarters?"

A training coordinator told a gathering of her training peers about being called into the plant manager's office. He asked, "When can you get a diversity class scheduled? I want something on the books right away." When she pressed for his reasons for wanting the class and what he would do to support it, he directed her attention to finding a supplier, and fast. What amazed me wasn't the tale, but her willingness to share it, considering that many people in the room knew her manager. She said that her experience wasn't remarkable. She and her associates expected the company and its leaders to behave for public consumption, not performance. Their cynicism fueled hers.

Training departments are also the recipients of cynicism. People deride training because, as their memory of classes fade, they recall only that they were a waste of time. When training is superfluous, a quick fix, or an afterthought, participants will tell others. Their perceptions are contagious.

Years of unsupported training have caused a new spin on our profession. A friend of mine works at a company with hundreds of training professionals associated with many business units. The current growth industry in her training community is marketing. Training marketeers are trying to fight years of accumulated cynicism and resistance with electronic ad campaigns, lotteries, and giveaways. "Come to class and get a free T-shirt," they say. "What about a free daily organizer?" Still not enough response? "Well, how about an *electronic* organizer?"

What to do

What's a training professional to do? Marketing or mandating courses may keep up enrollment, but they also tend to keep up the cynicism and the need for ever-escalating lures. It's better to use an approach that aims to strengthen the link between training and the contexts in which people work—and between training and

performance. Here are some ways to link those elements.

Screening. Ask participants and their managers to screen their work environments and themselves prior to training. Managers should be aware of any obstacles, including their own understanding of the training, before sending people to class. Ask managers to reflect on employees' readiness and predispositions, and whether they have been prepared for the training.

A negative response to any statement in Table 1 on page 21 suggests that the respondent doesn't understand or favor the training.

Participants should also reflect on how primed they and their organizations are for the training. A negative response to any statement in Table 2 (see page 21) suggests that the respondent may not be sufficiently prepared for the training.

You can also conduct a needs assessment with questions designed to identify potential barriers to training transfer and improved performance. The box, *Unearthing Barriers*, suggests some questions to which negative responses would raise red flags. The purpose is to get beyond a blanket statement about "problems in the organization" to a finer understanding and disaggregation of the reasons for a possible lack of support for training.

Ann Leon of IBM Skills Planning describes some barriers for its salespeople. Though many factors contribute to critical goals—such as, sharing knowledge and leveraging capabilities—salespeople often point to the absence of team incentives and automated databases as obstacles. Leon and her associates are acknowledging those barriers and augmenting training with support tools and other interventions. Unearthing barriers enables training professionals to use targeted solutions. That's not easy to sell in an organization, but it can and does happen, as the IBM initiative illustrates.

Even more challenging is when companies with far-flung customers and suppliers enter unknown situations in which they can't assess or address the barriers. The people who show up for training may come from everywhere, with vastly different barriers and support. Generally, external trainers feel less able than internal

ones to overcome a company's obstacles. Though any trainer might be able to deal with diverse skill levels and interests, no one's arms are long enough to reach into all of the units and organizations to which participants may return.

The statements in Tables 1 and 2 serve as a way to prequalify participants and help them get the most from training.

Establishing collaborative relationships. It's important to "partner" with management developers, human resource and organizational development professionals, and internal and external trainers to get different entities in an organization to coordinate with non-training collaborators. How can empowerment, diversity appreciation, or virtual ways of working succeed without the cooperation of human resources, organizational effectiveness, and information technology?—just to name a few likely partners. People who manage the allocation of technology resources, job definition and selection, management development, or recognition and incentive programs know some of what is needed to align training with organizational goals.

Efforts to facilitate that type of collaboration are underway in many organizations. The United States Coast Guard, for example, has established a performance technology unit. Its purpose is to assess barriers and ensure that a cross-functional approach produces results. Amoco's Organizational Capability Group is another example. At Amoco, education and training make up one of the units, or capabilities, that collaborate to serve line outcomes.

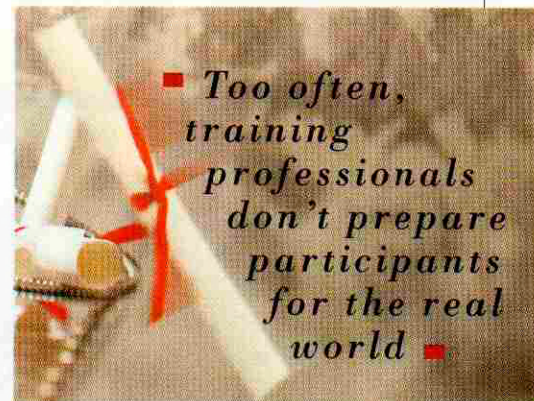
During training, it's important to include some discussion of barriers and training transfer. Too often, training professionals don't prepare participants for the real world in which they will attempt to use what they learned in class. Trainers should work on performance barriers in the domain they can control, their classrooms. They can share data from the needs assessment on unearthing barriers and offer ways to overcome them.

Trainers can also discuss with participants their managers' or co-workers' possible objections. The participants can practice their responses. In

other words, trainers can inoculate participants against the thoughts, words, and deeds of resistance. They can share suggestions from participants who were able to transfer what they learned in training and who came up with successful approaches to get more computer resources, supervisory support, and so forth.

I have used an audiotape of a fictional scenario with hundreds of training professionals to show what should *not* be done. It goes like this:

An executive calls a training manager into his office. The exec has just returned from a conference and is eager to roll out a new idea to 175 managers and supervisors. He is certain that his idea, herbal leadership, has much to offer his people. He'd like to "cycle his folks" through an herbal



leadership class during the next few months and wants "something powerful that will take advantage of adult learning exercises in which they can get involved with the concepts." The trainer asks when he'd like to start the training and notes that because a recent diversity class pulled people off work, the exec might encounter some resistance. He is willing to postpone briefly, but urges the trainer to schedule the class. She agrees.

People tend to chuckle while listening to the tape. They say that the trainer is motivated to set up the herbal leadership class without asking enough questions. They also note that she isn't doing the right thing, saying that the perfunctory scheduling of training is more likely to annoy managers and supervisors than make them adopt a more participatory style. They say that

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the herbal leadership class, in and of itself, can't bring about a culture change of that magnitude.

But what stuns me is that no one has ever said that the example is unrealistic. They usually say, "That's typical. We don't push back. We don't sell the importance of solution-type systems or convey the costs of ignoring organizational barriers. She should admit that a class won't get it done." When I ask whether she should refuse to offer the class if the executive opposes a needs assessment and an integrated solution system, they say, "She should, but she won't."

In this article, I have argued for permeable class boundaries, for a larger role for trainers, for the prequalification of participants and their managers, and for the extension of our ken beyond classroom walls to anticipating and removing obstacles to performance. I have also pressed for in-class approaches to help participants deal with the obstructions they may confront after training is completed.

You can probably remember other people or even yourself thinking, "That was a great class, but...." Does a course that evokes only that sentiment deserve to be called great? Is it ethical to be satisfied with delivering "great" workshops and courses or to be immune to organizational realities that affect performance? Will technology bust classroom boundaries and obliterate our comfort in conventional roles within four walls?

As I was writing this article, the telephone rang. A friend in the local training community told me about a recent conversation with a manager at a utility company. The manager agonized over the jolt of deregulation on the employees. She wanted my friend to conduct a class to improve their morale. My friend was skeptical, but she was going to try.

Instead of just raising my eyebrows, I sent my friend a draft of this article, and I'm waiting for her reaction. Perhaps I have also become cynical, but I sort of expect her to call and say, "Great article, but...." ■

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