

ANALYSIS OF THE LEARNING TRANSFER SITUATION

Trainees are not sick! Training is often equated with medical treatment. The executive discovers something lacking in the employee and then sends them off for training; from where they come back cured. But the employee will tend to go on suffering because success is determined to a great extent by the superior and not by the quality of the training.

Industry: Financial services – training concept

The customer's problem

The customer was dissatisfied with the effect of its personnel development measures. The high cost of training was disproportionate to the lessons learned that staff could apply in their working lives. The customer wanted to know how they could optimize the transfer situation. In particular, they were interested in arguments for improving executive buy-in for training measures.

Theoretical principles

Between 60 and 90 % of investments in training do not achieve the desired effect.¹ This means that the transfer of lessons learned into working life is very meager. Practical research reveals that learning transfer does not only depend on the quality of the training. The success of training is determined in particular by the participant's willingness to learn and the work environment in each case.² Despite this, collaboration between personnel developers and executives only rarely plays a role in enterprise life.

Against the background briefly described here, effex was commissioned with analyzing the transfer situation and developing a concept for optimizing learning transfer.

¹ **Bergmann, B. (1999).** *Training für den Arbeitsprozess: Entwicklung und Evaluation aufgaben- und zielgruppenspezifischer Trainingsprogramme.* Zürich: vdf Hochschulverlag; **Werbunat, K. (2003).** *Deutsche Topmanager sehen ungenutzte Potenziale in der betrieblichen Aus- und Weiterbildung.* Abgerufen am 27.04.2012 unter: <http://www.presseportal.de/pm/14454/421327/deutsche-topmanager-sehen-ungenutzte-potenziale-in-der-betrieblichen-aus-und-weiterbildung>.

² **Bransford, J. D., Brown, A. L., & Cocking, R. (Eds.) (2001).** *How people learn: brain, mind, experience, and school.* expanded edition. Washington D.C.: National Academy Press; **Holton, E. F., Chen, H.- C., & Naquin, S. S. (2003).** An examination of learning transfer system characteristics across organizational settings. *Human Resource Development Quarterly*, 14, 459-482.

Practical implementation

The basic facts were provided by acquiring data for the characteristics of the three influencing factors, willingness to learn, training quality and work environment from superiors and staff. In addition to this, the learning transfer was measured. The evaluations were broken down to the individual team level. Additional reference values were provided by earlier surveys effex had performed for comparable financial service providers.

Impact

Training quality only contributes about one third of learning transfer. The remaining two thirds are defined by the willingness of the course participants to learn, and the support they are given in their work environment. This gives rise to assumption that approaches to optimizing the transfer situation could be found here. Detailed investigation also reveals unused potentials, especially at team level. In a previous long-term study, effex demonstrated that the work environment and willingness to learn can be influenced by suitable measures.

Building on the existing results, tangible measures were recommended for designing the planning, performance and implementation of training measures. They provided the basis for a mix of tangible learning transfer promotion measures developed in collaboration with the employer. One focus was measures tailored to the situation of the individual teams. One year later, a significant improvement in transfer of learning from training measures was ascertained.