

## VERIFYING TRANSFER

Do you still just train people, or are you already effective at doing so? Between 60 and 90 % of investments in training do not show the required effect. Despite this, the focus of trainers and enterprises on ensuring transfer of learning remains insufficient.

**Industry:** Financial services – customer advisor training

### The customer's problem

The customer's staff had taken part in behavior-oriented sales training. The customer wanted to ensure that trained content would also be applied in daily business.

### Theoretical principles

Whether or not the content of training is transferred to daily business life depends to a greater extent on management work than on training quality. Successful transfer is influenced to a greater extent by the willingness of the participants to learn, and by support in the work environment.<sup>1</sup> Both are factors of success which the superior can influence directly.

Against the background briefly described here, effex's task was to implement a transfer concept that supported a transfer of learning as well as the management.

### Practical implementation

Willingness to learn was promoted by systematic, guided preparation of the participants by their superiors. Additionally, effex contacted each participant in the course by phone to clarify their individual expectations. An online tool was set up to support the work environment. In this way, the implementation of the training content by the participants was systematically recorded, evaluated and reported back to superiors and staff in a timely manner. effex contacted management regularly to verify progress and provide support in case of difficulties.

### Impact

All participants in the course implemented the learned content in their daily work. In the case of some 70 % of the participants, these efforts were reflected in improved performance, and/or in improved figures. The increase was many factors higher than that of a control

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<sup>1</sup> Bransford, J. D., Brown, A. L., & Cooking, 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.

CASE STUDY  
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group which had not taken part in training in the period under observation.