WHAT MAKES TRAINING REALLY WORK

12 LEVERS OF TRANSFER EFFECTIVENESS

Dr. Ina Weinbauer-Heidel

With contributions from Masha Ibeschitz-Manderbach

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FOREWORD

by Robert O. Brinkerhoff and Paul Matthews

Robert O. Brinkerhoff

Training without transfer is like a car without an engine; it won't get you anywhere. When performance matters (as it almost always should), learning and development professionals must be able to drive transfer – being sure that training participants actually apply their learning in worthy ways. Ina Weinbauer-Heidel's clear and engaging prescriptions for managing the 12 transfer levers make this good book a must-read for anyone who wants to make sure training investments will pay off.

Robert O. Brinkerhoff, an internationally recognized expert in evaluation and learning effectiveness, is the creator of the Success Case Method; he consults widely on issues of program effectiveness and recently retired as professor, Western Michigan University, where he coordinated graduate programs in human resource development.

Paul Matthews

Apparently, elephants don't like the sound of buzzing bees, and you can stop elephants from trampling your precious crop by setting up speakers to play the chorus from a swarm of bees. A simple solution, yet powerful and effective. I have long described 'learning transfer' as one of the elephants in the room that Learning & Development people habitually ignore, in part because they don't know how to handle the elephant, and so the precious crop they sow with their training gets trampled. After reading this book, this is no longer an excuse. It is full of a buzzing chorus of simple and effective methods to manage the learning-transfer elephant.

Sustainable, competitive advantage is not so much based on what the organisation and its people know, but on what they do with what they know. Sure, training creates potential, but it does not drive performance until it is implemented. Josh Bersin, in a June 2018 article, states that globally, the corporate training market is worth over \$200 billion, but how much of that actually 'lands' and makes a difference? If you are reading this book, you already know the answer: 'Not nearly enough'.

One of the things I welcome most about this book is that it is based on research. It gives you the findings from a meticulous review of the transfer-of-training literature and turns these findings into practical steps, supported by wise advice on the truths and traps of transfer. Building this bridge – between scholarly studies and the 'real' world – is no mean feat, and Dr. Weinbauer-Heidel demystifies the transfer complex deftly and well. In effect, she leaves no room for claims of 'not knowing what to do' and avoiding the issue of learning transfer. After reading this book, you WILL want to make changes to your training courses, and the explanations from the research will give you the credibility you need to enlist others for help along the way. You'll want to give them this book to read as well!

Thomas Edison said, 'The value of an idea lies in the using of it'. So, get people using the ideas they gain in your training courses by using the ideas you gain from this book.

Paul Matthews, People Alchemy's founder and managing director, is also a sought-after speaker and the author of Capability at Work and Informal Learning at Work.

THE ESSENCE OF TRANSFER RESEARCH – AN INTRODUCTION

"Seminars are useless – they're a waste of money." This is, in a rough translation from German, the title of a best-selling business book by Richard Gris. Quite a startling claim he made there. After all, companies in Austria and Germany invest around 30 billion euro each year in training their employees.[1] An enormous investment indeed. Can it really be true that these training efforts don't accomplish anything? That they only waste time and money? Are trainings really pointless?

Take a rough guess – how much of what people learn in trainings is actually put into practice? Many HR developers and trainers – even participants themselves – think it's only 10 to 30 percent. Which is exactly the figure given by transfer researchers, too. Let me run that by you once more: According to transfer research, only 10 to 30 percent of what people learn in training is put to profitable use in the workplace.[2] Not exactly an impressive return on investment, is it?

> Training transfer is the extent to which trainees effectively use the knowledge, skills and attitudes they have acquired in the training context in the work context.[3]

Professor Robert O. Brinkerhoff, one of the leading experts in the field of effectiveness and evaluation, has found that, on average, only two out of twelve trainees manage to transfer what they have learned into everyday life. Another eight try to apply their learnings but fail. And two don't even try.[4] In view of the enormous investments involved, transfer success should definitely be much higher.

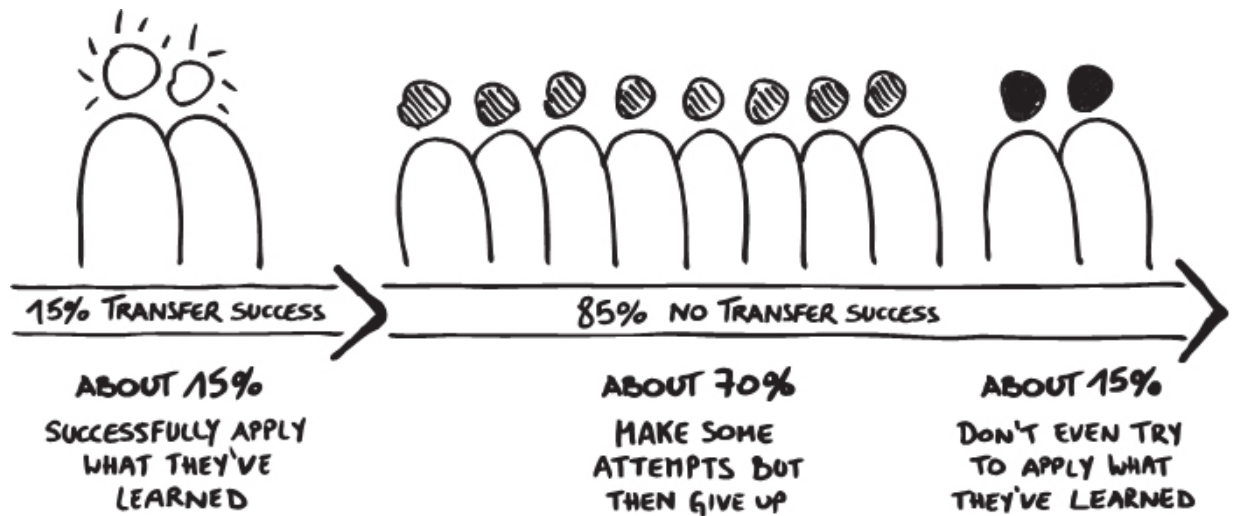| 15% TRANSFER SUCCESS	85% NO TRANSFER SUCCESS	
ABOUT 15% SUCCESSFULLY APPLY WHAT THEY'VE LEARNED	ABOUT 70% MAKE SOME ATTEMPTS BUT THEN GIVE UP	ABOUT 15% DON'T EVEN TRY TO APPLY WHAT THEY'VE LEARNED

Fig. 1:   On average, only two out of twelve trainees succeed in transferring what they have learned into practice

Are trainings simply ineffective?

Does it have to be like this? Could it be that the instrument "training" just doesn't work anymore? Should we simply forget about it? Actually, in many cases this is an excellent idea. Like any other instrument, the instrument of training is not a cure-all for all organizational problems and challenges. When sales numbers go down, what is needed in some cases might just be a better product, not training. And when burnout rates skyrocket, the solution often lies in extra staffing, different organizational structures, or less bureaucracy – not stress management training.

And yet they still exist: the challenges for which trainings are an optimal solution (Note that we will come back to the question of when training is the right solution when we deal with the lever "application options," see pages 191 ff.). They do exist: those trainings that are tremendously effective. You've probably experienced this before, as a trainee, an HR developer, or a trainer: an ingenious training program in which you have given or received the key idea that made all the difference. It is an unforgettable experience when, years after a training session, one of the participants comes to you and tells you, "Your training was such a great help! I still use your model XYZ." Yes, these are the

moments that make trainers glow with pride: the experiences that prove that training can definitely be efficient and effective. An observation, by the way, that is corroborated by science: The effect training can have on various criteria such as outcome, behavior, and knowledge varies enormously (from d = 5 to d = 0 or even d = -1.5) – where the numbers mean that training can have a tremendous effect, no effect at all, or even unwanted effects. Why is that so? What influences transfer effectiveness? And how can we make training more effective?

The essence of transfer research

Transfer researchers have been working on this question for more than a hundred years, conducting empirical studies in which they iteratively manipulate various factors, then measure the change in transfer results. There is a broad consensus that three elements are crucial for transfer effectiveness: training participants (trainees), training design, and training organization

TRAINEES

(TRANSFER) EFFECTIVE TRAININGS
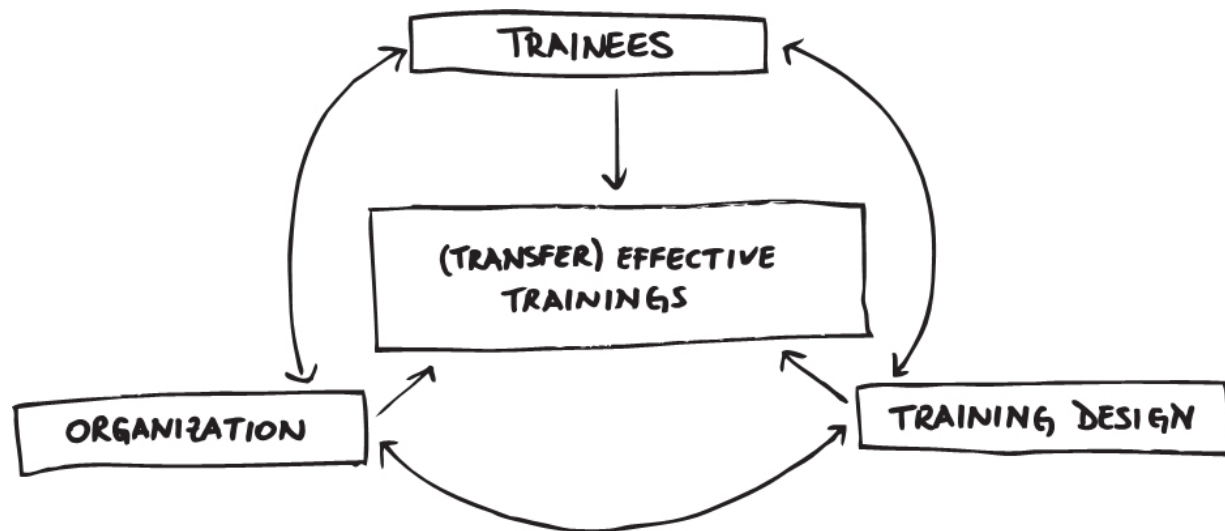
ORGANIZATION

TRAINING DESIGN

Fig. 2:   Three elements need to work together to make training transfer-effective

Each of these three areas comprises a variety of factors. Lots of factors! Transfer researchers are truly hard-working people. As many as 100 factors have been identified that are believed to influence transfer effectiveness.[5] Are you now

tempted to put this book down, thinking, "What am I supposed to do with 100 factors?!" You are absolutely right: 100 factors are hardly convenient to work with, let alone work effectively. And you don't have to. Many of these factors are nice to know but offer no practical help in controlling transfer effectiveness. Let me give you an example. Take one of the factors from the area of training participants. Numerous studies have revealed a significant correlation between intelligence and transfer success.[6] But what are we to do with this information? Are we supposed to make participants take an intelligence test before each training session, and admit only those whose IQ promises significant transfer success? Probably not. As you can see, some of the factors transfer researchers have looked into are interesting but no great help when it comes to making training transfer-effective NOW – simply because we can't influence those factors at all, or not enough, or not fast enough. For practical purposes, what we need are only those factors that we can influence, and only a handful of them: only the most important ones to keep things manageable. – Well, here they are: the 12 levers of transfer effectiveness:

TRAINEES
- TRANSFER MOTIVATION
- SELF-EFFICACY
- TRANSFER VOLITION

12 LEVERS OF TRANSFER EFFECTIVENESS

TRAINING DESIGN
- CLARITY OF EXPECTATIONS
- CONTENT RELEVANCE
- ACTIVE PRACTICE
- TRANSFER PLANNING

ORGANIZATION
- OPPORTUNITIES FOR APPLICATION
- PERSONAL TRANSFER CAPACITY
- SUPPORT FROM SUPERVISORS
- SUPPORT FROM PEERS
- TRANSFER EXPECTATIONS IN THE ORGANIZATION
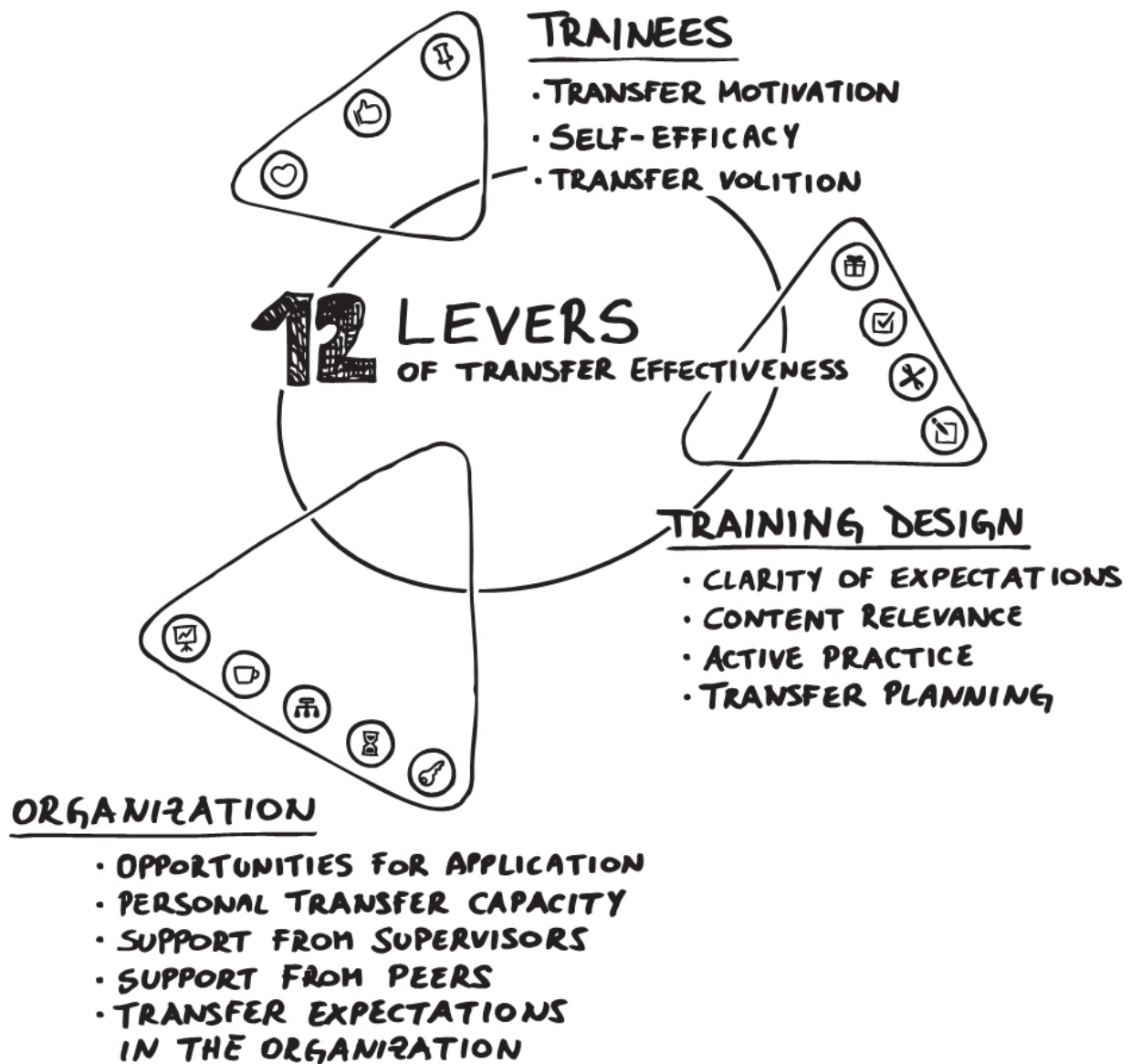
Fig. 3:   The 12 levers of transfer effectiveness

Who pulls the levers?

Whose job is it to set the levers to "transfer effectiveness"? As an HR developer, you may say, "What do I care about things like training design? That's up to the trainers." As a trainer, you may think, "I don't have any leverage over organizational issues, so why bother?" So, could it be an option for you, depending on your role, not to get to know all the levers and focus on those

within your area of responsibility? Let me tell you straight out: No, this is not an option.

Why? Because this is one of the main reasons for poor transfer success: a lack of clear responsibilities. Effective transfer is always the outcome of a joint effort. Several people need to work together, each making his or her specific contribution – an effort that needs to be organized and managed. Yet there's also a risk when several stakeholders are responsible for overall transfer success: Whenever many people are jointly responsible for something, often none of them really feels responsible. Everyone assumes that someone else will make sure that everything is done properly – especially when tasks are not clearly defined and/or clearly assigned to individual people or roles. Which is exactly what happens with transfer improvement. Who is responsible for defining and selecting the right training content? Who develops and implements measures to ensure that participants' supervisors will support the transfer? Who can – and should – make sure participants are motivated to implement what they've learned, and to keep pursuing their plans in everyday work? If you ask different people, you'll get a range of answers. As a result, these questions remain unsolved and responsibilities unclear, and often they are not addressed or even considered at all. The transfer process remains unmanaged – and transfer success fails to materialize.

After having read this book, this won't happen to you. You'll be familiar with the levers of transfer effectiveness and raise the questions that are essential. You'll have an overview of what is important, and a toolbox full of ideas on how to drive and promote transfer.

If you are an HR developer, you will benefit from knowing the levers of transfer effectiveness in that you'll be able to look very specifically for trainers that meet your transfer requirements. In addition, with this model in mind you will find it easier to make executives in your organization aware of their importance for transfer success and to request their participation. Last but not least, the levers of transfer effectiveness will enable you to get the necessary

commitment in your organization and convince decision makers to budget the necessary funds for training and, in particular, for transfer activities and interventions.

If you are a trainer, you'll find that knowing the levers of transfer effectiveness will help you become a strong sparring partner and conceptual adviser to your clients. You'll be able to point out to them what needs to be done and who needs to be involved in order to achieve transfer success. By doing that, you will make them aware that successful transfer is not your sole responsibility but that the organization must do its share. Not only will this gradually strengthen your reputation as a trainer with very special transfer abilities and results – it will also help you secure additional business as, in your role as a consultant and partner for creating transfer-effective development programs, of course you can also provide your clients with the appropriate tools, activities, and interventions.

Ultimately, the question of which levers are relevant for you depends on your perspective on your own role and positioning: As an HR developer, do you see yourself as an organizer of seminars – or as a business partner that contributes to a company's success? The latter implies, of course, that you are also responsible for transfer management, the coordination of transfer success, and, consequently, all of the levers. And in your role as a trainer or training provider, do you want to be someone who conveys content in a methodically-didactically appealing way – or do you see yourself as someone guiding and facilitating development, someone determined to help training participants and organizations make progress in their respective fields? In that case you'll need all levers, not just some of them.

In a nutshell, whenever you ask yourself this question: "Is this lever really relevant for me as a trainer, as a training provider, or as an HR developer?" it may be a signal to revisit your own (possibly narrow) perspective on your role.

The first step towards transfer-effective training

So, let's get down to business. What's the first step to increase transfer effectiveness? The answer is: setting goals. If you are now tempted to skip the next pages, stop right here. Of course, we start with goals. In fact, it's something so obvious we often don't devote enough care and attention to this step.

How do we define goals so they will be transfer-effective? Let's take a brief look at the definition of transfer. Training transfer means putting acquired knowledge, skills, and attitudes into practice. So, acquiring new knowledge as such is not considered "transfer" and is therefore not the goal of training. As Goethe once put it succinctly: "Knowing is not enough; we must apply. Willing is not enough; we must do." A transfer-effectiveness goal (or transfer goal, for short) describes exactly this "doing." A transfer goal describes an action that leads to the desired business success – a critical behavior, as Kirkpatrick, the grandmaster of evaluation, calls it.

When we describe transfer goals in this way – as actions, that is –, they automatically become clearer. Here's an example. In descriptions of sales trainings, we often find goals such as: "Improve your sales skills" or "Gain confidence in dealing with customers." Are these goals clearly defined? Are they phrased clearly enough to allow everyone involved in the transfer (training participants, trainers, executives, etc.) to understand them the same way? Are they measurable? Not really. So, let's give this another try. Let's find wording for a tangible critical behavior; a transfer goal. In the case of our sales training, it could be this: "Participants will increase their closure rates by 20% by using closing techniques in their sales talks." This wording makes it very clear what the outcome – the benefit for the organization and participants themselves will be (+20% – awesome!) and what concrete behavior will achieve it (applying closing techniques). Transfer goals ensure that everyone involved knows where they are headed and what's in it for them. And that is the starting point of transfer-effective training.

## Time for transfer! How to increase your personal transfer success

What holds true for participants in training is also true for your own personal transfer success with this book. Knowing is not enough; you need to apply what you learn. Reading is not enough; you need to act. You will achieve maximum transfer effectiveness if you immediately put what you have learned to the test and into practice. Not in an abstract way, but by applying it to exemplary cases from your own practice. This way, you'll get the most out of your precious time (using it for both reading and conceptualization) and can immediately check whether what you've read really works for you.

Specifically, I recommend you take a real-life training session or program that you're planning or developing at the moment and write a transfer concept for it, lever by lever. Which training session or training program are you going to choose?

> As I read this book, I will develop a transfer concept for this training or development program:
>
> _____

Let's start with the first key step: setting transfer goals. What should this training accomplish in practice? What will participants do differently or better, based on the training? What behavior will be key to success and what should be the result? Write down whatever ideas and cue words come to mind.

> Transfer goal(s) of my training:
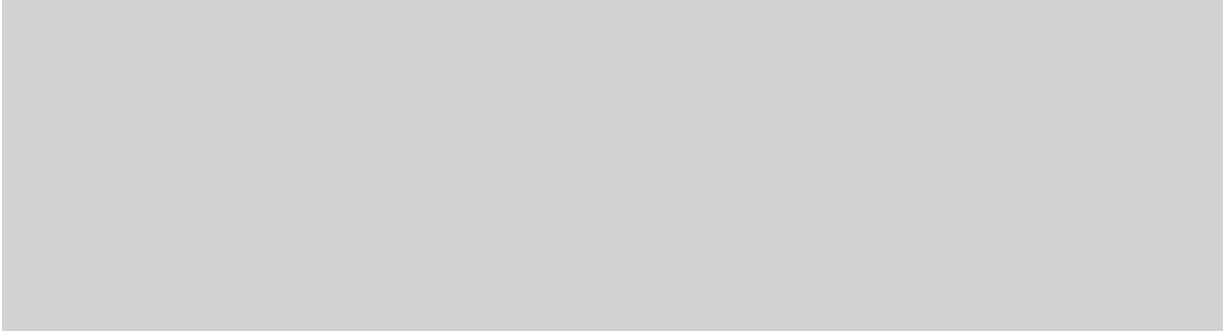
If you've just realized that your transfer goals are not as clear and unambiguous as they should be, this is an important insight, too. In the course of the book you will learn about various tools and interventions to sharpen your goals (for example, the Transfer Goals Workshop or the Needs Assessment, see pages 196 ff.). If your goals are clearcut and tangible already, so much the better.

So, let's get started. Let's look at what levers affect transfer effectiveness, and what tools and interventions will help you increase the transfer success of your training.

[1] In Germany, around €27 billion is invested annually in in-company training, according to Gris and Gutbrod, who use a biting title in German: "Keep on training, keep on lying? Why, despite all the findings, a large share of consulting and training work is still a waste of time." Gris, R., & Gutbrod, A., "Weiter bilden, weiter lügen? Warum entgegen aller Erkenntnisse ein Großteil der Beratungs- und Trainingsarbeit immer noch Verschwendung ist" in: Organisationsentwicklung, 2009, 28(3), pp. 52 – 57. Note: Richard Gris also writes in German as Axel Koch on his "transfer-strength method": In Austria, investments amount to around €1.4 billion. For details and comparisons of EU Member States, see the regular Eurostat survey (Vocational Education and Training Statistics – CVTS) and also the national reports from the Federal Statistical Office in Germany and Statistics Austria.

[2] For estimates of transfer success, see, for example, Baldwin, T. T., & Ford, J. K., "Transfer of Training – A Review and Directions for Future Research" in Personnel psychology, 41(1), 1988, pp.63 – 105 or Kauffeld: S., Nachhaltige Weiterbildung. Betriebliche Seminare und Trainings entwickeln, Erfolge messen, Transfer sichern, Springer, 2010, p.4.

[3] This, the most common definition employed in the transfer research debate, comes from Baldwin, T. T., & Ford, J. K., "Transfer of Training: A Review and Directions for Future Research" in: Personnel psychology, 41(1), 1988, pp.63 – 105.

[4] Brinkerhoff, R. O., What If Training Really Had to Work? 2006, http://www.iap-association. org/getattachment/Conferences/Annual-Conferences/Annual-Conference-2014/Conference-Documentation/19AC_P3_Discussion_Note_Pauline_Popp_Madsen.pdf.aspx (1. 12.2016). The values are based on Prof. Robert Brinkerhoff's many years of personal evaluation experience. More information on his work can be found at www.brinkerhoffevaluationinstitute.com

[5] For a fully comprehensive description of the transfer determinants, see, for example, Meißner, A., Lerntransfer in der betrieblichen Weiterbildung: Theoretische und empirische Exploration der Lerntransferdeterminanten im Rahmen des Training off-the-job, Josef Eul Verlag GmbH, 2012, pp. 96 ff.

[6] For intelligence (cognitive abilities) as a determinant of transfer, see, for example, the meta-analyses of Colquitt, J. A., LePine, J. A., & Noe, R. A., "Towards an integrative theory of training motivation: A meta-analytic path analysis of 20 years of research" in Journal of Applied Psychology, 85(5), 2000, pp. 678 – 707, and also the meta-analysis of Blume, B. D., Ford, J. K., Baldwin, T. T., & Huang, J. L., "Transfer of Training: A Meta-Analytic Review" in Journal of Management, 36(4), 2020, pp. 1065 – 1105.

LEVERS FOR TRAINEES

I want – I can – I will
In the end, transfer is a trainee's decision

Lever 1
Transfer Motivation

Lever 2
Self-Efficacy

Lever 3
Transfer Volition

In this section, you will learn:

- How to increase training participants' transfer motivation,
- What the magical four-minute mile has to do with transfer,
- How our "willpower muscle" works,
- What you can do to set the three trainee levers to "transfer-effective."

LEVER 1 – TRANSFER MOTIVATION

TWO REAL-LIFE EXAMPLES

A week ago, Christina and Martin each completed an in-house Leadership Excellence program. From reading their accounts, what do you think: who is more likely to have greater transfer success?

Martin, 38, manager in the automotive industry

When my boss nominated me for the Leadership Excellence program, I was proud. I had heard from my colleagues that the program would really help me get ahead. The top management team was even present at kick-off to tell us about the purpose of the program, and how it benefits both me and the business. Our company spends quite a bit of money to ensure we'll be able to put into practice what we learn. During the program, I felt I was in the right place. The issues I raised were addressed, the coaches treated us all as equals, no one patronized us. We, the trainees, were actively involved most of the time, not just sitting and listening. With each exercise, we talked about benefits and possible applications. At the end of the program, I had very straightforward plans for how to implement what I have learned. I discussed them with my boss, who gave me some valuable advice. It's so great to see how she takes an interest in my issues. Her appreciation is a real motivator. Plus, by achieving my own goals, I contribute to her success. I look forward to implementing more, to seeing the outcome – and, of course, to my next training!

Christina, 36, manager in the public sector

After three years, I could no longer avoid it. I had to sign up for our so-called "Leadership Excellence" program. I already knew that it wouldn't help me get ahead – a waste of time, like most of our trainings. All that happens there is that people from outside tell you how management works. As if they knew how the wind blows or what I am dealing with. A big presentation and some run-of-the-mill group exercises. What they were good for, I still don't know. What will I implement from the program? Well, nothing. But, of course, I can't tell that to my boss when I get back. At first, I had hoped he'd forget about it, like all the other times – but no. This time there was an actual debrief because HR insisted on getting a report. I felt like a little kid during this conversation: "Do this, but don't do that, it doesn't work anyway!" – That's my boss for you. Well, I sat through it all, then jotted down something for the record. I hope they'll leave me alone now for the next few years with all that training hassle!

Well, what's your take on transfer success? Who do you think will implement more? What's the key difference between the two?

Christina considers training programs to be useless, a waste of time. Ditto for the Leadership Excellence program. The benefits of the overall program, its individual modules, and the exercises were not evident to her and did not seem relevant or applicable. As a result, she has zero motivation to apply what she's learned. Unlike Martin. He feels honored to be nominated for the Leadership Excellence program ad appreciates the opportunity. The benefit of the program was clear to him, both personally and for his organization. There is no question he wants to implement what he has learned. Researchers refer to this strong desire to actively use and implement what one has learned in one's everyday work as "transfer motivation."[1] Participants with a pronounced transfer motivation will leave their training with a strong feeling of commitment: "Yes, I want to put this into practice." As we will discuss later, training design and organizational elements are additional key factors for transfer success. Here, I'm focusing on the "I want" of transfer motivation,

which, as we will see in the next chapters, has to be reinforced by "I can" (self-efficacy) and "I will" (transfer volition).

For transfer effectiveness as a whole, it is the participants themselves who make a very crucial decision: whether they want to apply what they have learned or not. Quite obviously, this decision – this transfer motivation – plays a key role. If participants have no interest in applying what they have learned, transfer success is virtually impossible. If they are determined to put their new knowledge into practice, a great deal has been achieved. Not surprisingly, this is confirmed by empirical studies in transfer research: High transfer motivation is a key factor for successful training transfer.[2]

TRANSFER MOTIVATION – YES, I WANT IT!

	Transfer motivation in a nutshell
Trainees say	"Yes, I want this!"
Definition	Transfer motivation is defined as the desire to implement what has been learned.
Guiding question	How can you ensure that trainees have a strong desire to put into practice what they have learned?

So, being motivated means wanting something very strongly. But when or why do we want something strongly? Generations of researchers have been looking into this question. Motivation research is a vast field with virtually inexhaustible amounts of publications, studies, and theories. I assume you've come across names such as Herzberg, Maslow, Murray, or Alderfer, as well as technical terms from motivational psychology such as motives, drives, need pyramids, motivators, hygiene factors, and extrinsic and intrinsic motivation.

If someone decided to write just an overview of the theories and insights in the field of motivational research, the resulting book would probably run to 500 pages or more. Here, we will therefore focus on just a few motivational theories that provide a particularly good basis for developing measures to drive transfer.

Second-class motivation?

If you ask your three-year-old if and why she wants to play in the afternoon, she will probably answer, "Because I want to. Because it's fun!" If you ask your twelve-year-old why he plans to study chemistry in the afternoon, he will give you the same answer – in an ideal world, mind you. It is much more likely that you will get very different replies, such as, "because I have a test on Monday" or "because you said I could play on my PlayStation if I do."

So, it seems there's a fundamental difference here. Your three-year-old is willing because the activity in itself is fun; your twelve-year-old is willing because he is hoping for a reward, something other than the activity itself. This difference even occurred to none other than Aristotle – perhaps because he, too, had two children. Much later, it was re-discovered, and, in 1918, Robert S. Woodworth, a renowned American psychologist, described this difference as intrinsic and extrinsic motivation.[3] Intrinsic means "on the inside" and describes the motivation to do something for its own sake (as your three-year-old wants to play). Extrinsic means "from the outside," referring to the kind of motivation that occurs when people expect something desirable when the task is completed successfully (PlayStation as a reward for studying – yay!!).

All in all, both types of motivation seem useful and meaningful when it comes to motivating people to do something specific or act a certain way. It's just that in the second case, we have the problem that the desired behavior quickly stops once the rewards are no longer there or can no longer be controlled. Consequently, there seems to be a "genuine, better, more sustainable" kind of motivation – the intrinsic one – and second-class kind that is "false, not quite so good, and less sustainable": the extrinsic kind. Which comes back to the advice often found in guides to a happier life: Do what you enjoy doing! Meaning: only things for which you are intrinsically motivated. But let's be

honest – how realistic is it to expect that you can only do the things you enjoy doing every minute of your (working) life, and stop doing them when you stop enjoying them? And how realistic is that in terms of training transfer? Is it really false, second-class motivation when trainees apply what they've learned because they hope for good results, achievements, or rewards (extrinsic motivation), rather than simply enjoying the activity itself (intrinsic motivation)? Also, the solution can hardly be to offer rewards every time (for example, a promotion or salary increase) to motivate participants for training transfer. Or to have bosses threaten them with consequences if people don't apply what they've learned. Somehow it seems this distinction between intrinsic and extrinsic isn't quite enough …

What follows after extrinsic and intrinsic

Intrinsic and extrinsic motivation were long regarded as a pair of opposing, incompatible concepts. A common undertone in motivational literature has been that intrinsic motivation (doing what you enjoy doing) is better than extrinsic motivation. However, within the field of extrinsic motivation, there are important differences. For instance, while studying or tidying up the garage isn't always fun, the result (passing an exam, looking at a clean and tidy garage) gives you a deeply satisfying feeling that makes the commitment worthwhile. It's quite a different story when parents "force" their children to study, or your partner "tells you" to clean out of the garage. Instant reluctance sets in, an uneasy feeling. So, what makes the difference in motivation quality? It's self-determination, according to Deci and Ryan, who have developed this into a proper theory.[4] Their self-determination theory of motivation became popular through Daniel Pink, along with his TED talk and his bestseller.[5] According to him, the self-determination theory is the treasure chest of motivational research; he claims that in forty years we will consider Deci and Ryan to be the most influential social scientists of our time. Have I kindled your curiosity? Then let's take a closer look at the self-determination theory.

As the name implies, the lynchpin of their motivation theory is self-determination. At its core, the question "Is the act in itself fun or not?" is replaced by "Do I want it for myself, or do others want it?" This theory assumes that humans have an innate basic need for autonomy and self-determination. Like Maslow's theory, which places self-realization at the top of the hierarchy of needs, this theory also holds that we humans pursue what we ourselves want to do; that it is conducive – but not essential – to this pursuit if the activity itself gives us pleasure (intrinsic motivation); and that we tend to tackle things with great (and sustainable) motivation if they have positive and desirable consequences for us.

Why are we discussing all of this? What are the benefits of this theory with regard to transfer motivation? The answer is: It increases our options for action and motivation. Let's take, for example, a training in telephone marketing. One of the targets could be for participants to call five potential customers per week. So how could we promote transfer motivation? Or, put differently: How could we get the trainees to say, "Yes, I want to do that!"? Here are three possible approaches:

Promote extrinsic controlled motivation	Promote extrinsic autonomous motivation	Promote intrinsic autonomous motivation
Show **that others want this to be done**	Show **how desirable the results and consequences will be**	Show **how much fun it is to do this**
Trainees will say: I'll call five customers a week because that's what my boss wants me to do	Trainees will say: I'll call five customers a week because I'll sell more – which I think is great	Trainees will say: I'll call five customers a week because I enjoy making phone calls

We know from empirical studies that all three versions of both autonomous and controlled transfer motivation increase transfer success.[6] In other words, transfer success also increases when external pressure is exerted (e.g., by supervisors, by the organization, by the coach, etc.). However, gut instincts

and common sense tell us – and so does the self-determination theory – that controlled motivation is not necessarily optimal, appropriate for adults, and sustainable. Which is why I recommend placing greater emphasis on the autonomous forms of motivation.

> Motivate trainees by offering clear, tangible benefits. Even if it isn't always fun to apply what has been learned, this approach will enable them to develop sustainable transfer motivation. Make sure you keep stressing the benefits and desired outcome of putting things into practice.

What does this mean in practice? How can you promote and enhance autonomous motivation? Here are some examples you might want to explore further.

You promote autonomous transfer motivation by …	Examples
Giving reasons for decisions instead of making them without explanation	• Discuss with people why they were chosen to undergo a training
Communicating benefits and purposes rather than taking them for granted	• Communicate the benefits of the training to trainees (e.g., in the training description, during kick-off, in the pre-training talk, etc.) • In the training itself, communicate the benefits of each topic and each exercise
Letting people choose instead of imposing things on them	• Before the training, let participants have a say in determining the content and methods • During the training, give people options (e.g., offer a choice of thematic areas from which they can choose what to work on)
Promoting explorative/ discovery learning instead of passive receptive learning	• During the training, focus on active, problembased learning methods rather than "lecturing" people classroom-style (also see Lever 6 – Active Practice)
Using language that implies	• Before, during and after the training, make sure you

autonomy rather than control	replace control-related phrases ("You must …" or "It has been decided that…" or "It's not done that way!") with wording that expresses autonomy ("I encourage you to …" or "It's been my experience that …" or "Another option would be to …" etc.). • As a trainer and supervisor, support people by expressing your recognition, giving positive feedback, and assuming a coaching attitude, rather than acting as an authority who exerts control (for more on this, see Lever 10 – Support from Supervisors).
Strengthening people's sense of responsibility instead of making others responsible for transfer	• Point out before, during, and after training that trainees – not trainers or other people – are responsible for their learning and transfer success.

This approach to interacting with learners, promoting their self-determination, has become quite common. It is a basic attitude that is also a key factor for successful transfer.

"Hands up or I'll shoot!" – Transfer under pressure

"Basic attitude" is a key word that has gotten us to a very intriguing and basic issue of transfer promotion. Let's summarize what we've said so far. Transfer motivation exists when trainees say, "I want to do this." After having talked about controlled and autonomous motivation, we can get more precise now. What we want is trainees who say, "I want to do this (apply what I've learned) because it is my will" rather than "I want to do this because others want me to." This insight illustrates something fundamental and important. Transfer interventions should never be controlling or coercive, but always take the form of offering support and fostering self-determined learners. In other words, promoting transfer doesn't mean making people apply what they've learned, but enabling them and making it as easy as possible for them to apply it. The purpose of every transfer intervention is to pave the way for transfer success and remove barriers wherever possible. This way, we enable both the organization and the trainees themselves to get the most out of the training

investment (money, time, commitment, etc.) and benefit sustainably. This is in the interest of both the organization and the trainees.

What follows from this basic attitude is that all other levers in this book, and the ideas to promote transfer that are derived from them, support not only transfer success but transfer motivation as well. It's a natural consequence. Transfer interventions are offers of support and enablement, not pressure. Offers of support and enablement require and ensure that self-determined learners want both the offer (the intervention) and the result (the transfer success). Transfer successes and all transfer interventions are always based on a high degree of transfer motivation, of "I want to apply this." Unfortunately, the reverse doesn't work: Transfer motivation is not a guarantee for transfer success.

> Transfer motivation - the individual will – is necessary but not sufficient – a key requirement but not a guarantee for transfer success.

Wanting to do something is not enough to really do it. We will discuss this in more detail when we talk about the other levers. The key message here is that transfer interventions are always offers of support and enablement, paving the way for transfer success – and that we should keep that in mind when designing our transfer interventions and finding the right words.

> Transfer-promoting measures make the development and application of what is learned easy, attractive, and barrier-free for trainees. Such steps are offers of support and enablement for self-determined, benefit-oriented adult learners.

So, are only volunteers motivated?

What about self-determination and the pressure to participate in a training? Following the logic of autonomous motivation, should training always be offered on a voluntary basis? After all, it is quite a common phenomenon for trainers and HR developers to be faced with participants who've been "sent" to a training and clearly appear bored. Even worse, some openly vent their frustration, which sometimes affects the mood of the whole group. So, are trainees who've been sent to or "nominated" for a training generally less motivated? A good question that is well worth discussing, in particular as research confirms that transfer motivation is significantly influenced by the level of motivation before and during training.[7] So, should there only be voluntary training from now on? Several studies have shown that voluntary participation results in higher motivation[8] – but there have also been other studies that failed to confirm this point,[9] and even proved the opposite: trainees who were obliged to attend were the most motivated.[10] So, which of the findings are true? What's the explanation for these contradictory results?

As a matter of fact, the two factors that make the difference are (1) participants' subjective assessment of the importance and significance of the training and (2) their previous training experiences. Let's explore this in a thought experiment: Imagine a trainee who's had very positive experiences with past training programs in your organization. The training programs he has attended so far have been extremely meaningful and useful, applying what he learned has helped him advance in his career. How will this person react to the news that he is to attend yet another training? Obviously, he'll view this as yet another opportunity, and tend to feel chosen or "nominated" rather than obligated or "pressured" to attend. Rather than an obligation, it will be an opportunity, a reward, an honor to him. So, in this case, the nomination will tend to increase motivation. If, on the other hand, someone is nominated (and thus obliged) whose past experiences have made her feel that training was ineffective and meaningless – a waste of time, the opposite will be true: Upon being nominated, that person's motivation will decrease further. In short, our motivation strongly depends upon our past experiences.

Another key factor is the importance we attach to the training. Imagine you're a member of the HR development team in an organization. Every three years there's this major conference in Washington, D.C., where the world's most renowned experts present the latest insights from employee research. Everyone in your team wants to go, because every time someone returns from that conference, they bring back innovative ideas that are very valuable for the HR teams' work. The boss is deeply interested in these ideas and highly committed to supporting their introduction and implementation. Then, at the next jour-fixe, the announcement: This year, the boss is going to send you to that conference! You will go to Washington, you will learn exciting new things, and come back with brilliant new ideas. What do you think that will do to your motivation? How high will it be? Pretty high, right? Although – or because – you were nominated to go. Well, the same is true for the attendees of a training: If they consider that training to be significant and important, being "sent" will increase their motivation. If it is just another one of those trainings that they need to attend because that is the rule, being sent is likely to lower their motivation. Past experiences and perceived importance make all the difference.

Even trainees who've been selected or nominated for training can be highly motivated for transfer. Key factors are (1) what previous experience participants have had with training, and (2) how significant and valuable they consider the training to be ("honor and opportunity" versus "onerous duty").

Imagine at the next human resource development conference you meet a colleague who's struggling with the issue of voluntary attendance. "Our executive development program is mandatory," she says. "Everyone has to attend. But that's demotivating! So, what am I supposed to do? I'd like people to be motivated for this, but my boss insists that all managers must attend that training." What advice would you give her? Correct: Asking "How can I push