

**TABLE 8.2. STEPS TO DEVELOP A TRANSFER STRATEGY**

Training Project/Solution:		Date: _____	
<p><b>A. Transfer Action and Timing</b></p> <p><i>Example 1. Big Sky Medical</i> AMR is the transfer action. Following the training, group managers frequently ask employees questions about action items that were developed during training and recognize employees who are implementing their action plan to end ineffective habits. <i>Time Frame: About two months.</i></p> <p><i>Example 2.</i> <i>All department employees, including supervisors, are attending a training program on resolving complex customer service issues.</i> <i>Group Coaching is the transfer action chosen, with the immediate supervisor acting as coach. (The client is the department manager. All of the participants and supervisors work in her unit.)</i> <i>Time Frame: At least three months.</i></p>	<p><b>B. Supporting Cast</b></p> <p>The CEO; Ronda, the client; the group managers</p>	<p><b>C. Difficulties Envisioned</b></p> <p>Group managers frequently operate in a crisis mode. They are also frequently out of the office doing community work. Competing priorities and crisis management tendencies may mean that the transfer action never happens.</p> <p>(a) Participants may have differing skill levels and some may not benefit from group coaching. (b) Supervisor may not know how to coach and therefore will lack confidence and may find reasons not to do it. (c) Client has a mindset that the classroom training should suffice and may resist additional time-consuming structured coaching by supervisors.</p>	<p><b>D. Transfer Strategy to Overcome Difficulties</b></p> <p>(a) Meet with Ronda and discuss how we can get the CEO to sponsor a key action to influence the group managers. (b) Propose the possibility of a compliance implementation goal on the managers' personal performance plan and tied to their overall annual performance rating.</p> <p>(a) Offer to develop a tool to help the supervisor assess skill levels and divide team into like groups for more effective group coaching. (b) Conduct an online session that highlights the major do's and don'ts of coaching (provide a simple job aid also) and offer follow-up telephone help. (c) Show the client how the classroom alone will not be enough and highlight why (that is, it will take more participant classroom time for additional skill practice). Show her that coaching actually requires fewer resources and will lead to greater success. Explain how supervisors will also develop.</p>

(Continued)

**TABLE 8.2. (Continued)**

Training Project/Solution:		Date: _____	
<p><b>A. Transfer Action and Timing</b></p> <p><i>Example 3:</i>  <i>This training is an open enrollment program on project management with no specific client. It is sponsored by the training department.</i>  <i>Performance Contract Agreement with immediate supervisor is the transfer action chosen.</i>  <i>Time Frame: Determined by supervisor and participant.</i></p>	<p><b>B. Supporting Cast</b></p> <p><i>Participants, immediate supervisor</i></p>	<p><b>C. Difficulties Envisioned</b></p> <p><i>(a) Participant may resist the accountability aspects of a performance agreement.</i>  <i>(b) Immediate supervisor may not see the benefit and may choose not to participate.</i></p>	<p><b>D. Transfer Strategy to Overcome Difficulties</b></p> <p><i>(a) Prior to the training, notify participants about the contract requirement.</i>  <i>(b) Prior to the training, send the contract template to supervisors with an explanation of the benefits to the participants and their work units. Include a couple of examples of a completed contract. Also provide brief but helpful do's and don'ts about the contract agreement discussion with the direct report.</i>  <i>(c) Set up several webinars to provide instruction and helpful hints to supervisors.</i>  <i>(d) Offer personal telephone coaching to supervisors.</i></p>

*Note:* The time frame you select varies with the situation. You must consider the variables present in the work environment and select a reasonable time frame for the strategy to be in place. The strategy should work to influence execution for a period of time so as to influence success and become the new routine.