

Old Dogs, New Tricks

How to tackle the age-old transfer problem.



By Jennifer J. Salopek

TRAINERS HAVE STRUGGLED for decades to solve the transfer problem: getting people who've demonstrated that they understand learning to actually apply what they have learned on the job. As Utah-based VitalSmarts debuted the third edition of its *Crucial Conversations* course in August, T+D wondered what corporate trainers could learn from the maker of an off-the-shelf product.

T+D talked with Kerry Patterson, chief development officer at Vital Smarts, about how to apply new skills to the workplace.

T+D: In creating the third edition of this course, what was your goal?

Patterson: We were trying to create a method that allows people to deliver the training that maintains the integrity of the training as well as their personal credibility.

You see, this course was originally designed to be taught over several

weeks, with a week in between sessions. However, training courses, despite their design, are often tailored to meet the demands of the institution and, as such, are vulnerable to changes that reduce—even negate—the course's impact. This is because companies are bringing people in from different locations, but also because it's often the corporate leaders who are delivering the training. We are dealing with a training culture—the corporate university—that still separates learning from leadership.

T+D: You have referred to the transfer problem. What is that?

Patterson: Teaching people leadership, influence, and interpersonal skills is fraught with challenges. As recently as two decades ago, research revealed that most efforts failed. People generally gave training good reviews. They returned to their work settings with a sincere commitment to change their behavior, and then went back to their

old habits. Training scores were high, but change scores sat at zero.

T+D: How did you seek solutions to the transfer problem?

Patterson: VitalSmarts researchers conducted studies during several large client engagements. Much of our own learning has been through trial and error. We tried giving people credible feedback; delivering behavior-based training organized around problem types; developing cuing methods or entry conditions; and—finally—learning and proving the value of practice. All of those elements have now been combined into this latest edition of *Crucial Conversations*.

T+D: What have you learned about the components, or stages, of learning transfer?

Patterson: If you want to change behavior, you have to influence cognitive, behavioral, and motivational factors. You must provide appropriate cues; and you must provide—and require—ample opportunities for practice.

T+D: Please describe the three types of factors that must be influenced.

Patterson: The first are cognitive factors. Once you identify a best practice, participants have to understand it. They must demonstrate that they understand, through a written test, what they are supposed to do, along with when and why. They must also be able to create a script of the interpersonal interaction—they must be able to generate the actual words.

Second, behavioral factors must be taken into account. Trainees must be able to demonstrate that they can act out the new behaviors. We have found

that three-person rehearsal groups work well for this step. And, after a mere handful of practices, most participants demonstrate a near-perfect mastery of each skill.

Third, training needs to satisfy motivational factors. Trainees must feel that the new skills are replicable and appropriate. If the skills are too vague or too complicated, learners will switch off. And, if they don't believe that adopting those skills will bring positive results, they won't be motivated to learn them.

As you identify best practices that you want to teach, you have to break them down into component pieces that people view as learnable, then make them complex enough to deal with genuinely difficult challenges to show that they're workable.

T+D: Isn't designing learning to these three factors sufficient?

Patterson: Unfortunately, no—which we learned the hard way. To test our three-part theory, we created tests to examine the cognitive, behavioral, and motivational domains. Then, we had an opportunity to observe our group of 30 leaders in action. As they left the room where they had been tested, many of them were met at the door by employees who had encountered problems while their bosses were away. As we watched the leaders in action, we were disappointed to see that most of them failed to use the skills in which they had just demonstrated mastery.

T+D: Why didn't the leaders apply their new skills?

Patterson: We asked them that question directly. After thinking about it for a few seconds, they said that they hadn't thought to use the new skills. The people with whom they had worked for years had brought them problems they had faced for years, and those leaders stepped right back onto the treadmill of habit.

T+D: What did you learn from that failed experience?

Patterson: We needed to find a way to cue people to use their new skills; that was the missing link. In addition to knowing, doing, and wanting, people have to recognize when it is time to put new skills into action. They have to learn to recognize, and then respond to, a cue or entry condition. If trainers don't provide those cues, then learners will still score high on their tests, but will fail to actually implement the skills back on the job.

T+D: So, after adding behavioral cues, you had a foolproof product. Right?

Patterson: Not exactly. Another thing we learned was that, for most people, the exigencies and demands of their ordinary workday are so strong that they need extraordinary practice in order to really incorporate new behaviors. In the best cases, practice would occur over eight to ten weeks, and their managers would support them and follow up.

However, in our close work with our consulting clients, we found that people want to train as quickly as possible. About 80 to 90 percent of our clients choose to deliver the content in two full-day, back-to-back sessions. They wanted to provide practice, but were having trouble overcoming the deluge of daily demands. They had tried reminder postcards, posters, and coaching, but what they really needed was something that will fly in today's training culture.

T+D: What else did your clients tell you?

Patterson: They said, "We need refreshers or something." They wanted to extend the learning. There's lots of material in the course, and many learners suffered from cognitive overload. They would get some of it, but not all of it.

T+D: So what's the solution?

Patterson: Technology-enabled practice. We needed tools for self-paced, follow-on learning. We knew it 15 years ago, but we had to wait for technology to catch up. Finally, the portals have opened, and we can provide a personal

coaching experience that transcends the classroom.

For the *Crucial Conversations* training, it's called the Mastery Mission, and it allows each learner to practice the new skills in a special web-based environment.

T+D: Did you learn anything in designing the Mastery Mission that's applicable to other interpersonal skills training?

Patterson: We designed it so that learners repeatedly follow six steps through three separate levels of accomplishment. Those six steps are target, review, plan, practice, apply, and report and celebrate.

T+D: What does "report and celebrate" mean?

Patterson: After practicing a crucial conversation (the apply step), learners return to the computer to report on what worked and what didn't. As they complete each level, a notification can be sent to a person of their choice—usually their supervisor or HR manager. That person can then award the learner with a certificate of accomplishment.

T+D: Why is it important to have three levels of accomplishment?

Patterson: In moving through the three levels of mastery, learners practice the new skills, teach them to others, and participate in short surveys. Teaching others helps solidify the concepts in the learner's mind as well as disseminating the ideas more widely.

After completing level three, participants will have held seven real crucial conversations, taught six concepts, and taken part in two surveys. They're able to apply their insights to on-the-job changes in behavior, not only practicing and honing their skills, but also improving key corporate outcomes.

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