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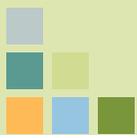
# Transfer of Training

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Exemplar Organizations: Employers Who Support Effective Training Transfer Practices



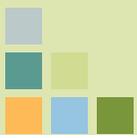
TRAINING AND  
DEVELOPMENT



## **EMPLOYERS WHO SUPPORT EFFECTIVE TRAINING TRANSFER PRACTICES**

Students and teachers often ask for examples of exemplary employers who effectively use transfer strategies such as those discussed in class. In response, we reviewed case study reports and industry surveys to select employers recognized for their support of training transfer. The featured organizations were recognized for their overall alignment between learning and business strategy; however, what we highlight here is the evidence that describes their successful transfer initiatives. We include a SHRM-recognized case study as well as examples from the American Society of Training and Development 2006 BEST companies list.

Instructors can use this information in several ways to support the module’s content. First, they could review these examples and use them during a point in the lecture they find particularly applicable. Second, instructors could ask students what they think is particularly effective in enhancing transfer in certain case examples. Lastly, these case examples could be assigned as part of the required reading students must review before class.



# Transfer of Training— Exemplar Organizations

## SHRM CASE STUDY: TENNESSEE VALLEY AUTHORITY (TVA), KNOXVILLE, TENNESSEE

**Source:** “Assessing and measuring employee knowledge ensures skill retention, increases pride, lowers stress.” SHRM Case Study. <http://www.shrm.org/research/competitive/ChangeandTrainingDev.asp> September 13, 2007.

**Summary:** The average age of the Tennessee Valley Authority (TVA) employee is about 47 years old. When TVA realized that nearly 4,500 employees planned to retire in the next five years—and the potentially devastating loss of employee knowledge and skills—it asked the human resource department to find a solution.

To determine what appropriate training and development programs were needed to retain employee knowledge in the company, HR developed the following plan:

- 1) Identify the knowledge and skills at risk of being lost when employees retire.
- 2) Assess the risk.
- 3) Find ways to decrease the impact of losing key employees.

During their discovery process, they learned that some divisions already had informal systems in place, so they focused on making the assessment process more formal and companywide.

To determine what skills exist in their workforce and who will be retiring, HR now conducts an annual survey of line managers and employees. They emphasize that the survey is to collect data for workforce planning purposes. Today, nearly 75 percent of employees complete the annual survey, which focuses on three specific questions:

- 1) What knowledge will be lost when an employee retires?
- 2) What are the consequences of losing this knowledge?
- 3) What can the organization do to replace or retain this knowledge?

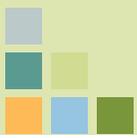
Based on the survey information, HR identifies key employees who plan to retire. Next, HR interviews both the supervisor and the employee to learn more about the employee’s specific work knowledge.

A number of positive outcomes came from the interview process. First, HR immediately learned how much employees care about the company. “They have devoted a good part of their lives to this organization, and many are very concerned that their knowledge of what makes this utility run will be lost or, even worse, just ignored when they retire,” Jerry Landon, senior consultant for assessment and evaluations for TVA, told HR Magazine in July 2003. “We found these workers have quite a bit of pride about what they do, and we had to be sure that we didn’t discount that during the interview process.”

Based on the interviews, the HR staff now uses a five-point scale to grade each employee’s skills and knowledge, with five points indicating a top priority to retain and transfer that particular employee’s knowledge content. Employees rated “five” are asked to take on new roles, such as mentors, instructors and/or consultants. As a result of the assessment process, TVA now critically looks at jobs and functions. Procedures are documented.

Employees have had a very positive reaction to the assessment program. The process has led to stronger teambuilding, more awareness that what people do counts, and a greater sense of employee ownership and pride in their work. “And the program is literally lowering the stress level among our supervisors,” Dick Brabham, SPHR, human resource program initiative manager for TVA told HR Magazine in July 2003. “We are acting on this problem and are doing something to keep the skills and knowledge line managers need to keep their sections going. This program is helping them to sleep at night, and I don’t think that’s an exaggeration.” TVA’s next challenge is to integrate the program into the culture companywide.

This case study demonstrates the importance of knowledge management in supporting the organization’s mission and goals.



# Transfer of Training— Exemplar Organizations

## ASTD 2006 BEST SURVEY: RECOGNIZED ORGANIZATIONS FOR TRANSFER OF TRAINING

**Source:** “BEST Learning Organizations” (2006, April). T+D, 60-77.

### NCR CORPORATION

NCR Corporation is a technology company specializing in solutions for the retail and financial industries. Its main products are point-of-sale terminals, ATMs, barcode scanners, business consumables and high-powered data warehousing systems.

NCR Corporation uses a classroom training component that allows participants to practice consulting skills, obtain feedback, and exchange ideas with peers and facilitators. Participants bring an existing consulting challenge to class which simulates an actual working experience, and role-playing exercises provide a practical solution.

There is also a self-paced, interactive online test which simulates an actual consulting assignment that participants use to assess their newly acquired skills. If learner performance is poor in the test, participants begin the process again.

### CATERPILLAR

Caterpillar is the world’s leading manufacturer of construction and mining equipment, diesel and natural gas engines, and industrial gas turbines.

Caterpillar Corporation used a strategy called “leaders as teachers”. In this experience, the CEO and five top executives taught 600 leaders over two days in six locations around the world. The 600 leaders then taught other leaders who, in turn, taught their employees, thereby spreading the learning throughout the organization.

### MERCK & COMPANY—MERCK MANUFACTURING DIVISION

Merck Manufacturing Division is a worldwide organization created by Merck & Co. Inc., a global research-driven pharmaceutical company that brings together chemical, pharmaceutical and biological manufacturing with corporate engineering, safety and environmental operations.

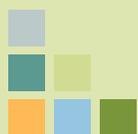
The company designed five web-based courses on lean manufacturing with the goal to streamline operations and reduce overall costs and inventory. Each course lasted between 60 and 90 minutes. To ensure that the material is absorbed by the learner, knowledge verification processes were integrated into each course. Interactive knowledge tests were used for theoretical applications, while case studies were used for applications and proficiency tasks. Results for and benefits of the programs are sent to every level of the organization through flash messages, targeted e-mails and senior management endorsements.

### NEMOURS

Nemours is one of the largest providers of children’s health care. The company initiated a learning program called the Super User Program with the aim to provide timely information, coaching and feedback to different target groups with varying skills and in multiple locations. The company also created 25 new job aids, just-in-time learning documents, and other support documents. This program increased end-user proficiency and decreased support requests. “Super users” were able to demonstrate new workplace procedures to their colleagues, resulting in streamlined business processes, increased customer and patient satisfaction, and improved communication throughout the organization.

### QUALCOMM

Qualcomm is a wireless telecommunications research and development company based in San Diego, California. Qualcomm places a premium on continuous and effective development and education. The learning team first conducts a thorough needs assessment, and each program is evaluated to enhance development opportunities. The executive team then conducts tests to monitor the participants’ knowledge gain. Feedback gathered from climate surveys is also used to recognize the program’s effect on the organization.



# Transfer of Training— Exemplar Organizations

## THE SCHWAN FOOD COMPANY

The Schwan Food Company is a multibillion-dollar, privately-owned company that sells fine frozen foods in home-delivery trucks, grocery-store freezers, online and in the foodservice industry.

Schwan offers a blended-training program for new customer service managers in its home delivery business which includes structured on-the-job training and certification and culminates with a three and a half day classroom experience. Weekly reports focus on program results, and management bonuses are affected by the weekly report card scores.

## JOHNSON CONTROLS

Johnson Controls, Inc. specializes in the design, manufacturing and installation of automotive systems, automotive batteries and climate control systems.

The company combined virtual instructor-led distance learning with local, manager-led activities to help salespeople learn to deliver new marketing messages. To help technicians acquire new skills, a series of instructor-led webinars and local hands-on lab practices are used. Designers also incorporated discussion topics to guide troubleshooting scenarios and created an interactive learning map to guide learners, coaches and managers. In addition, a computerized virtual host helps participants locate information on the web site. Evaluations showed that 91 percent of sales training participants implemented the sales behaviors and 53 percent implemented the tools within four weeks of their training.

## CHECKFREE SERVICES

CheckFree is a provider of financial electronic commerce services and products. The company created a supervisor academy which allows trainees who are future supervisors to learn the role from experienced managers and certified coaches. The trainees are given an opportunity to lead a team and are held accountable for the team's performance. At the end of the program, participants are evaluated and are moved into the supervisor position only if they have successfully completed the program.

## EQUIFAX

Equifax, Inc. is a U.S.-based consumer credit reporting agency. It is considered one of the “big three” American credit agencies, along with Experian and TransUnion. The company created an online program to enhance individual and organizational performance. Managers create annual objectives in strategy, operations, people and finances. These objectives are weighted with needed competencies for daily workplace duties. A mid-year evaluation is conducted to see if managers are meeting their objectives and if the objectives need to be modified. At the end of the year, a final review is made by two supervisory levels. Participants must also have a learning objective which is applied to their specific job or as a part of their career development plan. This counts for 10 percent of the evaluation.