

**EMMA WEBER**

# **TURNING LEARNING INTO ACTION**

**A proven methodology for effective  
transfer of learning**

**“A significant contribution to the transfer of  
learning to the job, with a practical approach of  
how real business results can be delivered.”**

***Jack and Patti Phillips,  
founders of the ROI Institute***



# Contents

*About the author* ix  
*Acknowledgements* x

**Introduction** 1

## **PART ONE**

### **THE LEARNING TRANSFER CHALLENGE** 5

---



#### **The evolution of training** 7

Before the training 9  
During the training 11  
After the training 12  
Instructional design checklist 13  
70/20/10 is not the answer either 16  
The missing link 18  
Summary of key points 23



#### **Learning's missing link – why it has been missing for so long** 26

No ownership 27  
Wrong objectives 30  
Obsession with content 34  
Obsession with evaluation 37  
Focus on learning not on change 43  
Summary of key points 53



#### **Learning's missing link: the solutions so far** 56

'Our managers conduct training follow-up' 57  
'We facilitate training follow-up discussion groups' 63  
'We run half-day training refresher/follow-up sessions' 65  
'We have executive coaching' 66

- ‘We use action learning’ 66
- ‘We use blended learning solutions’ 68
- ‘We create a social media community’ 69
- ‘Participants must present their learning back to their  
workgroup’ 69
- ‘We ensure everyone is properly prepared for the  
learning’ 70
- The dangers of a faulty premise 71
- Time for the real solution 73
- Summary of key points 75

## PART TWO

### THE LEARNING TRANSFER SOLUTION 77

---



#### **Turning Learning into Action® 79**

- TLA as a lever for change 82
- The power of reflection 83
- Knowles and TLA 87
- Coaching versus enhanced coaching 88
- The learning transfer road map 92
- Summary of key points 97



#### **Preparation – setting expectations 99**

- Setting the scene for learning transfer 101
- Summary of key points 107



#### **Preparation – creating the TLA plan 109**

- Target 110
- Success 111
- Calibration 112
- Why 114
- Next steps 116
- Summary of key points 119



## **Action – the ACTION Conversation model and how to use it** 121

- Structure – start 123
- Flexibility – middle 129
- Structure – end 132
- Summary of key points 136



## **Action – the ‘must have’ skills for successful TLA delivery** 138

- Asking power questions 138
- Being listening 141
- Using intuition effectively 144
- Summary of key points 151



## **Action – helping others to ‘get in the gap’** 153

- Solution 1: OARBED 156
- Solution 2: off the fence 162
- Solution 3: the management consultant process 165
- Summary of key points 171



## **Action – managing the TLA conversations** 173

- ‘Yes, I’ve done it and I’m excited to share what happened’ 176
- ‘No, I didn’t do it (vague no) – but it wasn’t my fault’ 177
- ‘Yes, I did it but the dog ate it!’ 179
- Summary of key points 182



## **Evaluation – how to measure and report success** 185

- Impact Dashboard 189
- Summary of key points 197

## PART THREE

### MAKING LEARNING TRANSFER HAPPEN AND THE BENEFITS BY STAKEHOLDER 199

---



#### **How to roll out TLA successfully 201**

- Who rolls out TLA 202
- When TLA needs to support training 210
- How to roll out TLA effectively 213
- Summary of key points 216



#### **The benefits of TLA by stakeholder 218**

- CEO 218
- L&D professionals 220
- Commissioning head 222
- Participant 223
- Manager of participant 223
- Trainer or facilitator of the training 225
- TLA specialist 226
- Summary of key points 228

#### **Conclusion 231**

*Appendix 1: Turning Learning into Action<sup>®</sup> learning agreement 235*

*Appendix 2: Sample TLA plan 237*

*Appendix 3: Sample conversation to illustrate the flexible TION part of the ACTION model 238*

*References 244*

*Index 245*

# About the author



**Emma Weber** is the founder of Lever Learning and developer of the Turning Learning into Action<sup>®</sup> methodology.

Born in England, now carrying an Australian passport, in 2002 Emma left a successful corporate career in London to start her own business in Australia, following her passion for coaching and learning.

Emma's firm belief, and the platform on which she has built her successful global business, is that the key aim of learning in the workplace is to create tangible business benefits. She established Lever

Learning to help organizations and their employees convert learning to effective action back on the job.

Under her guidance Lever Learning now delivers Turning Learning into Action<sup>®</sup> programmes throughout 16 countries and in 11 languages.

A recognized authority on the transfer of learning, Emma has been a guest speaker on learning effectiveness at conferences in Australia, New Zealand and the USA.

Fostering entrepreneurship is Emma's other keen interest and for the last three years she has co-facilitated training at the Branson Centre of Entrepreneurship in Johannesburg, South Africa. She is also an active supporter of Club Kidpreneur, a foundation that helps children unlock their passion and potential for business.

In her spare time Emma salsas, sings and enjoys the beautiful Sydney coastline. In 2013 she cycled 800km (500 miles) across regional Thailand, raising funds for Hands Across the Water, Australia's fastest growing charity.

Contact Emma on **[emma@leverlearning.com](mailto:emma@leverlearning.com)**

- Follow Emma's blog at **<http://leverlearning.com/blog/>**
- Connect on LinkedIn at **[au.linkedin.com/in/emmaweber/](http://au.linkedin.com/in/emmaweber/)**
- Follow on Twitter **<https://twitter.com/emmaweber>**
- Watch on YouTube **<http://www.youtube.com/user/EmmaWeber1>**

# 04

## Turning Learning into Action®

**T**ransfer of learning is the missing link in effective learning and Turning Learning into Action® (TLA) is a proven learning transfer methodology that solves the problem. TLA is a series of specific, structured and accountable one-on-one conversations that occur at various intervals *after* the training event and it is the step change I referred to earlier.

I delivered the first TLA programme in a 12-person trial in April 2004. By May the results were confirmed and my client, a large premium automotive company, ordered the programme for 120 more people that year. I was onto something.

During 2005 we did an analysis of one group of 15 people who went through the TLA programme after some sales training against another group who did not. We analysed their average sales per month before the programme and analysed their average sales per month after the programme and compared the results to the norm within the business. The norm in this case was annual sales before May and average monthly sales after May. We made this split to take into account seasonal differences in automotive sales.

The average sales consultant had a 16.2 per cent uplift in their average sales per month between the five months prior to the training and the five months following the training and TLA. Everyone we analysed in the group had similar levels of experience and yet those who went through the TLA process had a sales uplift of 43.8 per cent over the same period.

These results confirmed that I *really* was onto something.

By 2007 my coaching team in Australia and I were delivering a year-long programme for another large automotive client for 400 mid-level managers across the organization for an 18-month period. There were four of us on the coaching team and as a business we were extremely busy.

We were then asked to deliver TLA to 240 people in the UK. There were four large training events of about 60 people at a time held over the period of one month. The training was outstanding and our job was to ensure that all 240 people transferred the learning into their workplace. By the end of the year the results were in from the 400-person programme in Australia and the 240-person programme in the UK (see Table 4.1). TLA had been implemented in each case by two completely different teams trained in the same methodology and yet the results were almost identical.

**TABLE 4.1** Two programmes in large automotive companies in the UK and Australia

	UK – 240 people	Australia – 400 people
Sector	Automotive	Automotive
Audience	Sales managers	Sales managers, service managers, regional managers, parts managers
Timescale	Over 4 months	Over 18 months, phased
Number of coaches	10	4
Training	Soft management / leadership skills	Soft management / leadership skills
Net Promoter Score (NPS) for the programme Based on your recent telephone coaching experience how likely would you be to recommend this to a colleague?	78%	73%
To what degree were expectations of coaching as a transfer of training tool met? (Score scale of 1 low and 5 high – scored either 4 or 5)	86%	83%

**TABLE 4.1** Continued

	UK – 240 people	Australia – 400 people
To what degree have the objectives you set at the end of the training programme been met? (Score 1 to 5, 1 not met, 5 fully met – score of either 4 or 5)	88%	87%
Did you see change in particular aspects of your behaviour in response to coaching? If yes, to what extent have these been achieved? (Score 4 or 5 out of a scale of 1–5)	78%	83%
To what degree do you believe the objectives in the action plan would have been met without coaching? (1, not met – 5 fully met)	Score 1 or 2 – 47% Score 3 – 32% Score 4 or 5 – 21%*  * 70% of these respondents in the next question rated it 5 (essential) for helping them follow through on the action plan (as this is a reverse-scored question – 5 is a low score – the assumption could be made that the reversed nature might have been missed if the respondents had, for example, not read the question properly.)	Score 1 or 2 – 49% Score 3 – 38% Score 4 or 5 – 13%
How useful was the coaching in ensuring that you followed through on your action plan (scale 1 – unnecessary; to 5 – essential)	85%	82%

Net Promoter Score (NPS), made popular by Frederick F Reichheld, is a really common and acceptable way to illustrate customer satisfaction. According to Reichheld companies whose customers award them an NPS of 75 per cent to 80 per cent plus have generated world-class loyalty. In other words, the customers of the businesses that are reporting an NPS in excess of 75 per cent are very happy customers – so happy that they will gladly recommend that business to other people. In the UK and Australian

TLA programmes that we tested we achieved an NPS of 78 per cent and 73 per cent respectively.

Today TLA is being delivered in eight languages across the United States, Europe and Asia as well as Australia and New Zealand. It is solving the transfer of learning challenge for businesses across multiple sectors including banking and finance, technology, construction and manufacturing.

There can be little doubt that transfer of learning *is* the missing link in learning and TLA is a proven methodology for solving it. And the really good news is that there is no need to worry about learning countless different strategies, learn TLA, use it and training will genuinely be the lever for change that it always promised to be.

## **TLA as a lever for change**

Businesses buy training because they want to see some sort of improvement in performance. The individuals on the training are there because they have some challenge, or need to improve a certain skill. As such they have a series of obstacles to surmount. Learning is the potential leverage point that will allow them to surmount those challenges and improve performance over the long term.

Imagine this process as a pole vault. At the start of the run-up the athlete's pole is straight and taut. He then plants the pole into the ground; the pole bends and elevates the athlete upwards, over the bar. As the athlete clears the obstacle the pole straightens again and falls back to the ground. It has served its purpose and propelled the athlete over the bar and safely back down on the other side.

Pole vaulting was not originally a sport but a practical way to pass over natural obstacles in marshy places such as provinces of the Netherlands, along the North Sea and the Fens in parts of Britain. To cross these marshy areas without getting wet and without having to walk miles in roundabout journeys over bridges a stack of jumping poles were kept at every house and used for vaulting over the canals. Traditionally vaulting was about distance rather than height and they were used to short-cut travel time and allow people to get to where they were going faster.

TLA does the same thing by utilizing structure and flexibility. Each TLA conversation starts with a structure that acts like the pole vaulter's pole and

provides strength and purpose to the conversation. It allows the learner to use the power inherent in that structure to catapult themselves up and over their particular learning challenge.

As a facilitator of TLA I know the type of questions I will ask before I start the process (structure), but I never know what the answers will be (flexibility). It is this flexibility that prompts additional questions and allows the individual to navigate the obstacle in the same way that the vaulter navigates the bar. It is the questions that really matter because they hold the context of the conversation, allowing for flexibility with the answers without being so flexible that the conversation is just a pleasant daydream.

The conversation is finalized with more structure as we then get the individual's commitment about what they are actually going to do before the next conversation. The individual is accountable for this process and is choosing what to do next. As such he or she is taking responsibility and ownership of the change. This is when the pole vaulter's pole straightens and falls to the ground while the vaulter lands safely on new ground. He or she has used the structure and flexibility to get to where *they* want to go faster.

Without this lever for change the behaviour change or application of learning sought by the training is rarely realized in the business.

As outlined earlier, the ADDIE model on which the vast majority of training is developed brilliantly facilitates the delivery of learning to the participant but misses the transfer of learning from the participant back into the workplace. Archimedes said, 'Give me a lever long enough and a fulcrum on which to place it, and I shall move the world.' Turning Learning into Action® provides that lever to ADDIE's fulcrum and together they can transform training effectiveness.

## **The power of reflection**

Turning Learning into Action® is a practical methodology that puts reflection at the heart of the learning transfer process. The idea that reflection is central to learning is not new. It goes back to Greek philosophers such as Socrates and Plato. The Socratic Method is often referred to as a teaching method that focuses on asking rather than telling. Socrates challenged everyone around him, including Plato, to question their beliefs and reflect on learning to establish how it did or did not make sense to them as individuals. Sophocles also proposed that we learn by observing what we do time and time again.

More recently the English Enlightenment thinker, philosopher and physician John Locke believed that knowing was simply the product of reflection on experience and sensations.

As mentioned in Chapter 1, the importance of reflection in the adult learning process was also acknowledged by David A Kolb in his adult learning model (Figure 1.2, page 10).

The word ‘experience’ derives from the Latin word *experientia*, which means trial, proof or experimentation. In other words, the way someone gets experience and learns effectively is by using information or knowledge in the real world and using the results to fine tune future results. With enough trial and error anyone can learn anything and it is actually this trial and error process that is at the very heart of high performance.

The process of gathering experience therefore follows the Kolb adult learning model. First someone does something or engages in a particular activity or approach and the results of that action are noted. Sometimes the activity will be successful and sometimes it will not be successful but it is the experience and the outcome that drive learning. Ironically people learn the most when the outcome is not as the individual had anticipated. Under those conditions he or she is much more likely to engage in the crucial ingredient for learning and change – reflection. In life we rarely stop and reflect why we’ve been successful or why something worked out. Instead we just take the win and move on. When something doesn’t work, however, we are much more likely to stop and think about why that activity didn’t pan out as we had expected. It is because of that reflection that we are then able to fine tune our approach, see the failings and try again. This trial and error process develops expertise and it is only possible with reflection. Imagine how much progress we could make if we got into the habit of reflecting on our successes as well as our failures?

The problem with reflection is that it can look like we’re not doing anything – and that’s not ideal for employees. In modern business it is action that is king. Assessing the training needs of an organization can easily be classed as action, so everyone is happy with that activity. Designing, developing or sourcing training is also classed as action so everyone is happy with that. The implementation stage is also action-focused so everyone is happy with that. Even the evaluation stage can be suitably complex and interesting so that people can assure themselves that they are *doing* something to solve the issue. In modern business it is *doing* that gets us promoted not necessarily thinking and reflecting. Management guru Henry Mintzberg wrote in the

*Harvard Business Review* 20 years ago: ‘Study after study has shown that managers work at an unrelenting pace, that their activities are characterized by brevity, variety, and discontinuity and that they are strongly orientated to action and dislike reflective activities.’ This pace has only quickened – the drive for short-term results and maximizing shareholder value has hampered reflection and exacerbated the transfer of learning shortfall.

For reflection to really deliver the results that it is capable of delivering it must, however, be specific, structured and accountable (Figure 4.1). The word reflection has a very ethereal feel to it. It conjures up images of resting by a babbling brook, lying on the grass and gazing up at the clear blue sky. That, however, is daydreaming and whilst pleasant it is a world away from the type of reflection that can transform learning and facilitate change.

**FIGURE 4.1** The principles of effective reflection

---



Turning Learning into Action® facilitates specific, structured and accountable reflection through a series of one-on-one conversations after the training event. When people take a training programme they will have time during the training, if it has been well executed, to reflect on how the new

information or skill may help them in their daily life. If the trainer has not run over time they will have completed some sort of action plan that is supposed to help participants follow through on the commitments they make as a result of the training. Typically, without structured follow-up, nothing actually happens with that plan and it ends up stuffed in the back of the training folder and dumped in the office on Monday morning never to be opened again.

If on the other hand there is specialized follow-up after the training event and participants are made aware of this from the start of the programme then the action plan becomes a living document. The follow-up conversation becomes specific and deals with the first issue on that plan, the structure of the conversation means that it is focused on moving the individual along and creating a framework where he or she must keep their agreements with *themselves*, or explain why they have not done so. When the individual has made commitments and reflects on how he or she is progressing, and is held accountable, then real change is not only possible but almost inevitable. And that is the power of TLA.

TLA is not complicated. It is an enhanced coaching process that facilitates transfer of learning through a series of specific, structured and accountable one-on-one conversations that occur at various intervals *after* the training event.

When we consider that one of the most influential transfer of learning models (Broad and Newstrom) tells us that the critical time for transfer of learning is *before* the training then it is easy to see why learning transfer has so far been so ineffective. It certainly helps if the people on the training are enthusiastic and prepared but it is not indicative of success. In my view, what determines success or failure is whether or not there is a strategy for transfer of learning *after* the event.

We already know the statistics regarding failed training. We already know that we are wasting huge sums of money on training that never transfers back to the working environment. We know that people attend training and within weeks of the training event they are back at work doing exactly what they used to do prior to the training. It makes sense, therefore, to consider reallocating our training budget slightly to invest in training *and* learning transfer.

This shift will not alter the budget but it will radically alter results. One of the initial concerns I hear about TLA is the fear that one-on-one coaching

will blow the training budget, but that's not the case and I hope the results at the start of this chapter will provide reassurance that rolling out this methodology is extremely doable – even with large numbers of training participants. By combining training *and* TLA at the same time we may end up doing less training, but if we get the results we seek in the first place then we won't need to keep buying training in the hope that the next programme will be different. TLA transforms training success and drives behaviour change into business. It is a cost-effective enhanced coaching methodology that when executed well will transform transfer of learning effectiveness.

## Knowles and TLA

Knowles identified four principles for effective adult learning, which have become as good as law in the world of learning and development. As discussed in Chapter 2 the principles are:

- Adults need to be involved in the planning and evaluation of their instruction.
- Experience (including mistakes) provides the basis for learning activities.
- Adults are most interested in learning subjects that have immediate relevance to their job or personal life.
- Adult learning is problem-centred rather than content-oriented.

Like Kolb, Knowles too points to the importance of reflection – helping the individual to reflect on their own experiences and how they can make the learning relevant to them. In TLA, the TLA Plan puts the individual in charge of the learning transfer process and allows them to plan what they want to action following the training programme.

In the TLA conversations the specialist is always encouraging the individual to use their own experience, whether it is a success or a failure, to make the training relevant. Because they are in charge of the process and the learning they can choose what is the most immediately relevant to their job or personal life. It is *their* choice. And finally they are free and indeed encouraged to focus on how to rectify problems rather than get lost in the content.

It is important to realize that transfer of learning is not fully assisted or explained by the various learning theories but that effective transfer is also

pulling the very best from change theory. Learning is just one part, once the learning is on board it is then important that we support individuals to change their behaviour over the long term. Learning has only really been effective when the person is using that learning on a regular basis and their behaviour has changed. Anything else is irrelevant.

At some point we have to accept that successful training and learning is actually less about the learning and more about change. The most effective change methodology is one-on-one personal coaching. When conducted over a period of time coaching allows the individual to identify what it is they want to change and then helps them to hold *themselves* accountable to follow through on what they want to do. Self-administered individual accountability is critical for change and I believe the very best way to achieve that is through enhanced coaching.

## Coaching versus enhanced coaching

When I first explain TLA to people they often say something like, ‘Oh so it’s just one-on-one coaching then.’ Everyone in L&D knows about coaching; managers are commonly trained in coaching methodologies so they can coach their staff. I have met hundreds, possibly even thousands of managers who have been taught a basic coaching model or methodology for that exact purpose. But as we already know, learning something and effectively using it are two very different things.

One of the biggest challenges facing coaching in business today is the versatility of the process. While it can be used in many ways it is often a proverbial ‘jack of all trades’ and master of none and is too broadly offered as a solution to all sorts of management problems. Ironically it is this broad application that is often touted as the reason that managers should learn it. So the manager attends a half-day coaching course or a module that is part of a broader management skills programme. But back in the workplace, as soon as the individual being coached reacts or answers the manager’s questions in a way that is not familiar to the manager, perhaps in a way that was not adequately covered on their short training programme, they don’t know how to get the coaching session back on track. Coaching is a conversation and as such it is very easy to assume ‘everyone can do it’. Everyone *can* coach but it is not an automatic or easy skill to learn and it is certainly not something that can be perfected in a few hours.

Coaching, as most people recognize the term, is too fluid and flexible. As a result it works sometimes, for some people and not for others, and the people involved don't really understand why. The basic coaching that is so often taught to managers therefore becomes too generic to be useful, especially for a time-poor manager. It is very difficult to work out the actual skills we need to be a good coach when those skills are applicable to so many different scenarios, and it is much easier to learn a skill when there are very definite parameters around what we are trying to achieve.

TLA is a very specific application of an *enhanced* coaching methodology that removes all the guesswork and creates a structure that identifies very definite parameters around effective learning transfer. The TLA specialist, by adding much needed structure, puts the individual in charge of their own transfer of learning and holds them accountable for the commitments they make at the end of the training event.

Enhanced coaching takes the flexibility of traditional coaching and adds structure to the coaching process to facilitate learning transfer effectively. With enhanced coaching there is a fine balance between flexibility and structure. It is this balance that creates the results and removes the ambiguity from the coaching process, which allows us to deliver effective results consistently regardless of the training or the participant.

I remember watching Steve Jobs's 2005 Stanford Commencement speech on YouTube. He was talking about connecting the dots of his life and how seemingly obscure and unconnected parts of his life came together in the creation of Apple. It is not often I feel justified in comparing myself to Steve Jobs but listening to his speech I looked back on my life and could see the same connection of dots and how seemingly diverse experiences and choices led me to the development of enhanced coaching and TLA.

In school in the UK I studied maths, art and English to A level. It was a combination that was frowned upon by many of my teachers because the subjects didn't really belong together. At university I studied textile design, specializing in woven structure. What this course did for me was help me to appreciate fully the juxtaposition between structure and flexibility that is central to the success of enhanced coaching and, specifically, its application in training effectiveness through the TLA process. It was these two converging ideologies working together that created beautiful designs. The textile design part tapped into my love of art and it was very creative. It was all about colour, dyes, fabrics and textures. It was fun, exciting and vibrant. The woven structure part of the course tapped into my interest in maths,

## Thank You for previewing this eBook

You can read the full version of this eBook in different formats:

- HTML (Free /Available to everyone)
- PDF / TXT (Available to V.I.P. members. Free Standard members can access up to 5 PDF/TXT eBooks per month each month)
- Epub & Mobipocket (Exclusive to V.I.P. members)

To download this full book, simply select the format you desire below

