

Checklist to help with the transfer of learning

Learning can only be done by the trainee. The trainer's task is to help provide the climate and conditions to foster the learning process. The trainer is often the catalyst that helps this to happen. However, when return on investment is calculated, the actions taken before and after the event are critical in enabling learning to be implemented.

If you send a member of staff on a training event, this checklist will be handy for you.

1. Has a proper needs analysis been completed? Is it a training need, or a different need?
We were asked to deliver a handling difficult callers course – our needs analysis found that the root cause was the wording sent on the email. A change in how the client communicated with their customers meant there was no need for training.
2. Does the learner understand what the 'gap' in performance is?
To be engaged, the learner needs to understand where they are at the moment, and the future vision.
3. Has the learner had the chance to choose the learning 'solution'?
Training is just one option – they may prefer mentoring, coaching, online learning ...
4. What information has the learner had before the event?
Fears can prevent a person getting the most from an event.
5. Has the trainer had the opportunity to connect with the learner before the event?
Let both parties get to know each other, so the relationship isn't starting from cold. Trainers can learn valuable information to tailor events to each learner, and the learner can gain confidence in what to expect. (see point 4).
6. Has the learner's Manager held a pre-event briefing, where they have stated the measurable outcomes they expect from the learner?
Managers play a key part in enabling of transfer of learning back at work – do they know their role in the process?
7. What support will the learner be provided with to implement the learning?
This could be time, mentoring, simulations, social media support...
8. What specific actions the trainee/their manager might need to take after the event, starting with the post event debriefing.
The action plan for implementation of the learning should start from the learner and Manager debrief.

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