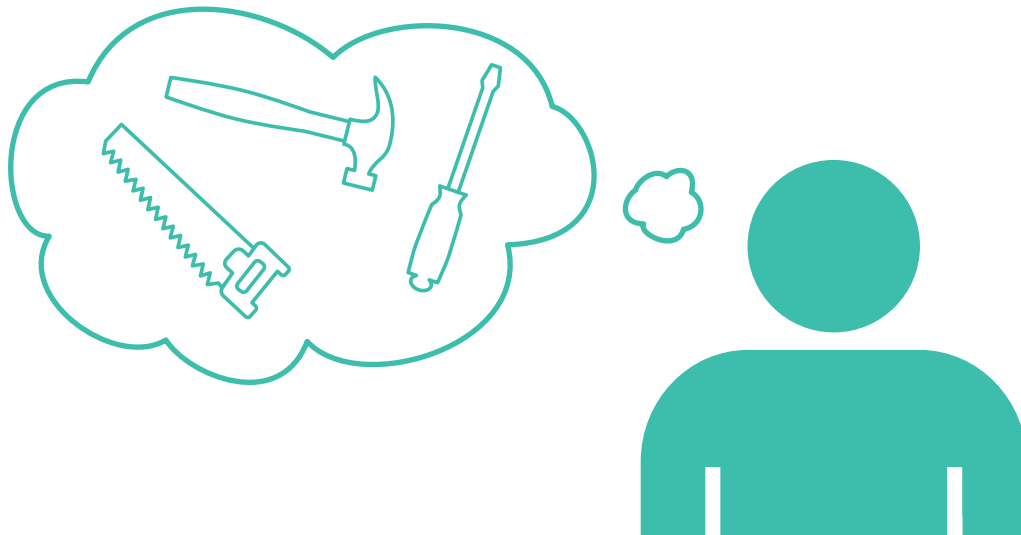


Make Learning Stick

Best Practices to Get the Most out of Leadership Development

By: Diane Reinhold, Tracy Patterson, and Peter Hegel





“Tell me and I forget, teach me and I may remember, involve me and I learn.”

—Chinese Confucian philosopher Xunzi (312-230 BC)

Contents

Introduction	1
Learning Transfer: 3 x 3 x 3	3
Think in 3 Phases	5
Use 3 Strategies (or More)	6
Engage 3 Partners	10
Linking Learning to Business Success	13
Take Action	14
Conclusion	15
References	16
About the Authors	17

Introduction

Are you taking a closer look at “learning transfer”? Are you wondering how to make sure the lessons taught through your leadership training and development efforts stick weeks, months, or years later?

There is no magic bullet to ensure people apply what they learn. But there are steps you can take to create leadership programs, experiences, and supports that improve the likelihood that lessons will be learned and applied. Over time, new skills, perspectives, or behaviors can be reinforced, until they become unconsciously and competently put to use.

We understand that individuals—and organizations—face significant challenges in their efforts to apply and integrate learning and develop the leadership capacity they need. These include:

Challenge: Formal training is just one aspect of learning. Workshops, classes, and leadership initiatives do not guarantee that ideas, practices, or solutions are understood well enough to be put to use. After a program, new learning is fragile. It easily slips away without application, practice, and support.

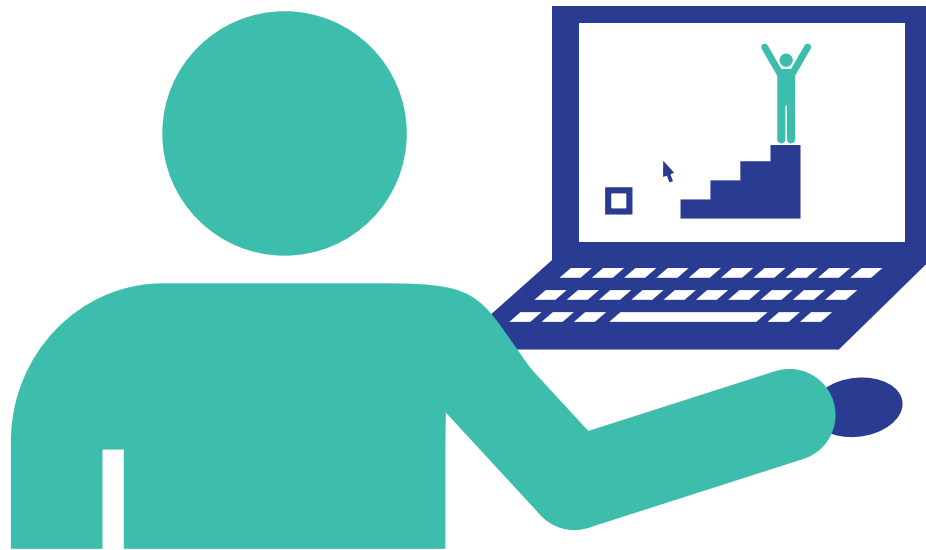
Challenge: Leadership—and its development—is always dependent on the people involved and the context. Leadership development is about learning and applying “soft skills”—skills that require the ability to adapt ideas and guidelines to their environment. These skills require discernment, judgment, and presence of mind—in addition to the willingness and motivation to practice that is required to learn any new skill. In contrast, “hard skills” are more directly replicable in the training environment—which is why computer training or technical skills are easier to simulate during training (Laker & Powell, 2011).

Challenge: Leaders are already overloaded. Even with clear goals and the best of intentions, leaders often falter because of the pressure and pace of work. After a few days away to learn and reflect, participants typically return to a dynamic, high-pressure work environment with many issues competing for their attention

(Blume, Ford, Baldwin, & Huang, 2010). In such an environment, leaders feel they don’t have time to pause and consider what they could do differently, despite their best intentions.

Challenge: Learning isn’t always aligned with what matters most. Excellent and interesting leadership lessons and insights may or may not seem relevant to the learner’s real-world challenges. Without alignment between the learner’s challenges, the organization’s priorities, and the leadership development, the opportunities to practice what was learned or to try something new will be limited—or quickly dismissed.

Challenge: The learning culture clashes with the operational culture. Participants in CCL’s leadership development have identified learning transfer barriers such as lack of team support, leadership, and organizational culture. Many aspects of an organization’s culture, policies, and systems can frustrate leaders when they try to apply what they have learned (Leone, Marino, & Richards, 2006). For example, incentives or project metrics may fail to encourage desired behaviors, or senior management may not be good role models for stated cultural or leadership expectations.



As a professional interested in learning and development, you may be in a position to acknowledge and help overcome the challenges to learning in your organizations. You are likely in a position to influence supervisors and executives, as well as potential participants, in leadership development efforts. You may also have a role in creating and supporting a learning environment. With a better understanding of learning transfer, you can help your organization realize multiple benefits, including bigger impact from developmental experiences, more effective leaders, and a stronger organizational ability to learn and adapt.

Read on to learn CCL's perspective on and best practices for learning transfer for leadership development. We share a framework—and specific tactics—that we use in designing leadership development solutions. With this information, you can begin to help leaders and your organization overcome challenges to learning transfer—and earn greater benefit from leadership development investments.



Learning Transfer: The 3 x 3 x 3 Model™

Learning is a process, and works best when it is viewed as more than merely a program. Leadership development can include formal or classroom-based training—but it is just one piece of the learning puzzle that must have corresponding pieces back on the job.

Research supports the value of extending learning into the workplace and connecting the workplace into formal learning. Most executives cite on-the-job experiences as the key events that shaped them as leaders and taught them important skills, behaviors, or mindsets. In fact, research shows that senior executives distribute their sources of key developmental experiences as 70% on-the-job challenges, 20% other people, and 10% formal coursework and training (Lombardo & Eichinger, 1996; Wilson, Van Velsor, Chandrasekar, & Criswell, 2014). We use 70-20-10 as a guideline, not a formula for creating

learning experiences. Yet, we know that experiences that focus on creating learning in all three categories can boost learning transfer and accelerate development.

Learning transfer is also a social process. Learning—and the desired performance that comes from learning—does not take place in isolation. The work context, including the level of support from role models, mentors, peers, coaches, and bosses, has a powerful impact on turning lessons learned into leadership in action (Blume, Ford, Baldwin, & Huang, 2010).

Drawing on our understanding of and experience with adult learners, we’ve created a “3 x 3 x 3 Model for Learning Transfer.” This framework informs our leadership development work—and can be applied to development programs or initiatives within your organization.

Think in 3 Phases	Use 3 Strategies (or More)	Involve 3 Partners
Prepare	Key Leadership Challenge	The Learner
Engage	In-Class Accountability Partners	The Organization
Apply	At-Work Learning Partners	The Training Partner

This 3 x 3 x 3 matrix incorporates many of the best practices cited in the research on learning transfer. The middle column in our matrix—strategies—focuses on the three minimum strategies that CCL usually includes in the design of leadership development initiatives. There are other strategies we’ll address in this paper as well, including another CCL hallmark: coaching.

It is important to remember that learners—and organizations—have different needs. You’ll want to provide a variety of options to help people apply and deepen their learning. Experiment with what works in your organization.



3 x 3 x 3 MODEL™

to drive learning transfer and support participants

Learning is a process, not a program. It should start from the moment participants register until they're unconsciously and competently using their new learnings in their lives.

Think in 3 Phases

beyond the classroom

Use 3 Strategies

the minimum to build into each program

Ensure 3 Partners Take Responsibility

everyone has to take it on



Assessments and ...?

How might you help participants engage in the development process as soon as they register?

Don't just teach.

How might you create opportunities for guided practice and skill development?



ENGAGE

APPLY

Provide support at work.

How might you create opportunities for the participants to use and continue new learning at work (and beyond)?



KEY LEADERSHIP CHALLENGE



How might you get participants applying content to a leadership challenge in prepare, engage, and apply phases?



Create (in "prepare" if possible) and leverage the bonds that form in the engage phase so they can support each other as they "apply" what they learned. How might you create a formal structure for this?



Whether it's their boss, mentor, internal coaches, HR, business partner, or someone else they trust, how might we foster meaningful development through all phases of the program?

www.ccl.org

© 2016 Center for Creative Leadership. All rights reserved. CVD:1112016P



Active, not passive.

They must own their learning and use it. How might they demonstrate that?

PARTICIPANT

Paying the bill isn't enough.

What might the organization do to support participants and ensure opportunities to apply?



CLIENT ORGANIZATION

Learning, not just training.



What might CCL do to maximize the likelihood of transfer of learning (faculty, client services, coaches, program support, learning products, etc.)?

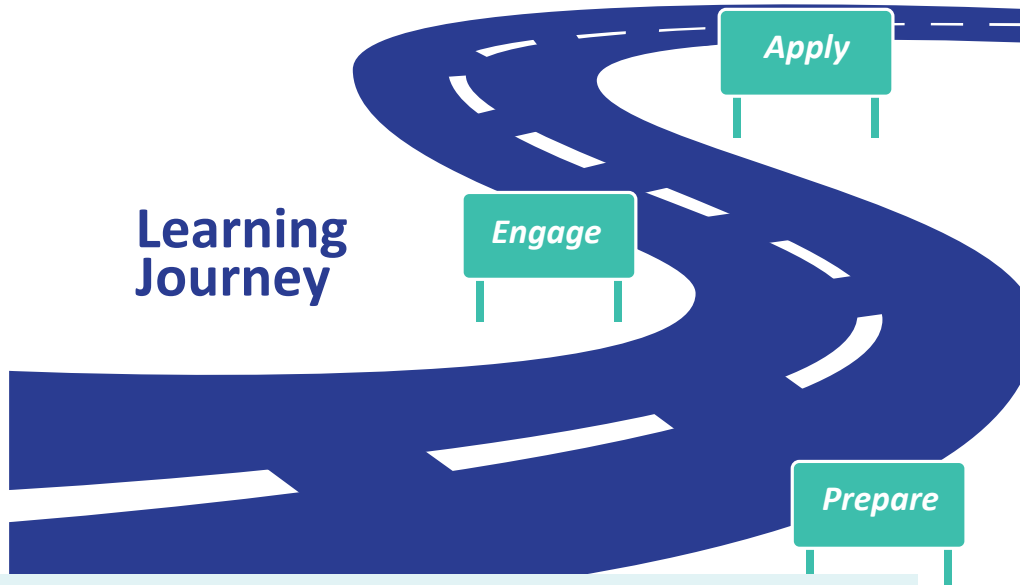


Center for Creative Leadership

Think in 3 Phases

What happens before and after the formal part of a program or development effort is just as important as the content and delivery. This is true whether the initiative is long or short, in-person or virtual, ongoing or one-time. CCL takes the “Prepare, Engage, Apply” approach to helping individuals and organizations get the most out of leadership development.

Learning Journey



Prepare. As soon as a person is tapped for or has chosen to participate in a formal leadership effort, the development process begins. How might you help participants start learning right away? How do you get them thinking about their leadership experiences, challenges, and needs? How do you help them connect to the purpose, content, and value of their development experience?

The *prepare* phase involves good communication about logistics and expectations—but also begins to build an emotional connection to personalize the learning experience. It is a chance to engage and excite the learner—rather than approaching the process as another item on their calendar (Stewart, Palmer, Wilkin, & Kerrin, 2008). Research shows that participants begin to engage in a development experience when they are able to make plans with a boss, mentor, or coach and discuss the support they will need (Brown & McCracken, 2010; Lancaster, Milia, & Cameron, 2013). In addition, learners need information and activities to help them understand how the program will benefit them (Katzell & Thompson, 1990).

CCL prepares learners for their experience by providing guidelines for interviewing key stakeholders, selecting challenges to apply course learning, providing brief e-learning segments, and asking the learners and their colleagues to complete assessments of their leadership skills and style. Other activities could include reading assignments, videos from past participants describing their experience, or welcome videos or webinars from the faculty.

Engage. The content of a learning experience is important, but so is the way it is presented. Listening to speakers and reading information is a passive learning process—and information is less likely to stick than processes that connect and engage each person through applied practice. How might you create opportunities for guided practice and skill development throughout the program?

Whether you are working in a live, face-to-face setting or a virtual classroom, consider a mix of activities such as skill-building, action-learning, reflection, simulations, experiential activities, goal-setting, and coaching.

Apply. Reinforcement and support at work—away from the learning environment and over time—is essential for learning transfer. How might you create opportunities for the participants to use and continue new learning at work and beyond?

Most people need structures that foster the application of new concepts and practice of new skills to achieve behavior change. Participants need support and encouragement to get past the initial awkward phase that accompanies the application of new skills. Some options include action-learning projects tied to real work issues, conversations to help connect new learning to an existing business challenge, follow-up lessons through reading, discussion, eLearning assignments, toolkits or job aids, and coaching focused on making progress on goals.

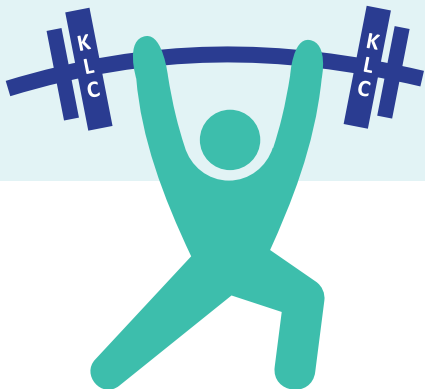
Use 3 Strategies (or More)

CCL designs at least three learning transfer strategies into leadership development: Key Leadership Challenge, In-Class Accountability Partners, and At-Work Learning Partners.

Key Leadership Challenge. A Key Leadership Challenge is an existing project that aligns with the organization's strategy and requires new approaches to be successful. This challenge enhances learning by providing a direct link from the workplace to what is being taught in the development process. This ensures that the learner, the manager, and the organization all see this leadership development work as important to the organization as well as the leader. It also provides opportunities for learners to practice new skills and encourages them to identify specific ways that they will apply new behaviors and processes.

At CCL, we ask learners to select a Key Leadership Challenge before engaging in development. Examples include:

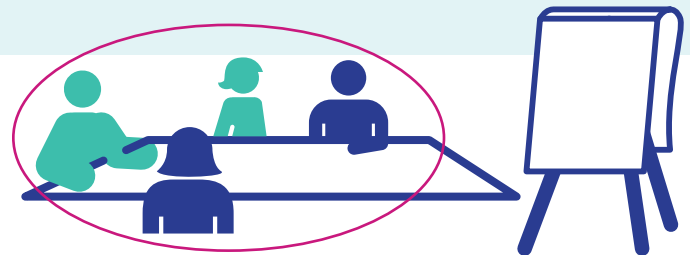
- How might I manage the complexity of multiple requests, different types of tasks, and complaints from above, below and sideways?
- How might I get multiple stakeholders (internal and external) to share resources and partner better?
- How might I become more strategic after years of success as a tactical leader?



In-Class Accountability Partners. A transformative developmental experience will connect peers who learn together, share experiences, and discuss challenges and goals. This tends to create a bond between participants that creates an interest in helping each other succeed. Development processes that tap into these ties build accountability, ensuring that the best intentions of participants at a moment in time continue into the future. In-Class Accountability Partners become sounding boards as they struggle through similar challenges. They can encourage, support, and push each other.

Ways to use In-Class Accountability Partners effectively as part of leadership development include:

- Build in time for activities that help groups and partners get to know each other, both early on in the development process and on an ongoing basis.
- Create opportunities for peer-coaching to help participants get new ideas, approaches, and feedback from their In-Class Accountability Partners in support of their work and development.
- Create mechanisms for people to benefit from accountability partners, including setting expectations, guidelines for how often learners and their partner should meet, and structures for accountability to each other and to the organization.



At-Work Learning Partners. People apply what they learn more effectively when they have a developmental relationship with someone who understands the organizational context and is committed to helping them be successful. An At-Work Learning Partner may be a boss, mentor, coach, HR business partner, peer, or other trusted person. The role of the At-Work Learning Partner is to provide support for learning, help learners reflect on ideas and insights from the development experience, and assist them as they apply it in their context (Cromwell and Kolb, 2004). These mentors observe new behaviors, provide feedback, and reward progress.

Both learners and the At-Work Learning Partners should be educated about the purpose of the relationship—and provided with specific ways to work together, such as:

- Have learners identify a few items (assessment data, goals, insights, or key ideas) to share with their At-Work Learning Partners and add to their action or development plan.
- Ensure that At-Work Learning Partners connect with participants and have a plan for how often they will meet going forward.
- Provide conversation guides, expectations, and checklists for learners and At-Work Learning Partners.

Keep in mind, managers must be involved in the learning process of their direct reports. They may be a learner's At-Work Learning Partner—but if not, they need to learn how to have coaching conversations, understand the learner's leadership challenge, support goals and new behaviors, and hold learners accountable for applying learning.



Other practices or strategies that should be considered include:

Protect against overload. When asked about barriers that prevented leadership development participants from acting on what they had learned, the most common was a lack of time to actually change their work routines (Stewart, Palmer, Wilkin, & Kerrin, 2008). One common but unintended consequence of leadership development programs or events is a backlog of work and too many demands (Cromwell & Kolb, 2004; Hooijberg & Lane, 2009). The learner's manager or HR business partner can work with the learner to create the needed time to reflect, practice, plan, and implement change during the development process.

Get the team involved. A lack of opportunity and support is another roadblock to learning. When a team or work group sees the benefit of supporting a participant's efforts to learn, this barrier can be removed. If a person involves the entire team in what he or she is working on—lessons learned, goals set, tactics to apply, behaviors to develop—the team may help fuel learning. Team members can keep learners focused, accountable, and on track—and point out opportunities for putting learning into action and give feedback on progress.

Use coaching. One-on-one or group coaching can provide high-touch support for participants throughout all three stages of the development process, and can be a valuable long-term support as well. Internal and external coaches can create continuity, provide perspective, and help learners stay on track with their goals. A few sessions in the weeks and months following an intensive program can keep momentum going at the time when learning is new. A coach engages the learner in reflection, helps clarify and focus the learner on goals, challenges assumptions, and hypothesizes about the outcome of future challenges.

Offer reinforcements. Participants may want to go back and review a topic from the program, reinforce a key lesson, or dig deeper into a challenge. Provide learners with related or targeted courses, workshops, coaching, webinars, lunch-and-learns, assessments or online learning. Supporting videos, articles, and books also have value. Add-ons are helpful to HR staff. Internal coaches, mentors, and managers, too, as they help support learners. Plus, these resources can often be used by a broad group of employees, not just those involved in a leadership program.

Build a community of practice. Communities of Practice are learning groups with a common interest that share knowledge around that topic. Communities of practice can encourage accountability and maintain a focus on the learning process throughout the “apply” phase. Some organizations build networks where “graduates” of specific leadership development programs can maintain connections, share tips, exchange learnings, and discuss challenges.

Create or tap into social networks. Keep learners connected through social media. Connect to peers and others via social networking to share successes, ask for feedback or suggestions, or track progress. Through moderated or direct participation, learners, peers, subject-matter experts, and others can ask questions, share learnings, offer suggestions, and address issues.

Make the most of technology. Technology makes it easy to extend the learning into the workplace and often provides opportunities for information right when it is needed. Take advantage of apps and mobile learning, e-courses, short instructional videos, virtual technologies, podcasts, and online toolkits that support application. CCL clients have used systems that allow developing leaders to collaborate with each other, track and share progress toward goals, and access knowledge resources. There is a wide range of supporting products in the market that help continue the learning and encourage accountability.

Get creative about tracking—and rewarding—progress. It can be helpful to learners to receive support directly related to setting and achieving developmental goals. For some, it is also motivating to be rewarded or recognized when goals are achieved. Workplace recognition of progress can range from written or verbal praise or acknowledgement, small rewards, even a graduation ceremony to mark completion of key goals. Online dashboards to track program accomplishments or milestones may be motivating and fun for some participants. Offer guidelines and templates to help participants share goals and accomplishments with peers or their manager, so they are supported in appropriately showcasing their successes.

Provide Guidance to Learners. Find ways to help learners choose development programs—and to navigate through them. Program faculty or in-house leadership development experts can host call-in times or address questions via online chat or learning portals. Or, establish a “learning concierge,” consistent through all three phases of a program, to assist with additional support, such as:

- Helping learners identify appropriate Key Leadership Challenges with real business impact in the prepare phase.
- Building progress toward the Key Leadership Challenge into performance evaluations.
- Facilitating conversations with At-Work Learning Partners.
- Supporting or facilitating periodic check-ins with the manager.

Evaluate Program Impact. Connecting with learners (and their teams) after a formal development process can do three things: give you information about the impact of the development experience and how it can be improved, encourage people to reflect on the impact of development, and remind employees that a specific initiative is important to the organization. This means that every attempt to measure impact can also be an opportunity to reinforce development lessons and motivate participants to apply what they have learned (Saks & Belcourt, 2006; Saks & Burke, 2012). Of course, evaluation should be built on sound research principles and evaluation best practices.

Engage 3 Partners

Learning transfer is a challenge because it is complex. The learner, the organization, and the training provider have responsibility for learning outcomes. Without commitment and engagement from all three, application of learning is likely to be limited.

The Learner. Learning is not a passive activity. The best learners are those who are motivated and actively involved in their development (Chiaburu & Lindsay, 2008; Noe & Schmitt, 1986). A lack of motivation will stall any endeavor before it starts. You can help build motivation by helping employees see the benefits they can gain from development—which can outweigh the struggles, risks, or inconvenience.

Of course, not all employees will be ready and interested in learning at the same rate or at the same level. You can encourage learners to take responsibility for their learning by asking them to:



- Consider the question “What’s in it for me?” Asking learners to consider what’s at stake and the potential benefits of the development process can cause the learner to more favorably view the experience and engage more fully.
- Do the pre-work for formal programs or events. Complete paperwork and assessments on time. Set aside enough time for reading, online work, thinking, and reflection. And give colleagues sufficient time to complete 360 assessments and encourage their honest participation.
- Show up. Be on time for program days, coaching sessions, and other learning-related sessions. But also be mentally present, ready to focus, and looking to get the most out of the experience. Commit to the process and the other people.
- Make connections. Apply ideas and learning to workplace challenges and your specific situation. Don’t expect everything to be directly relevant—but with a little effort, you can make connections that count.
- Be open-minded. Participants who walk in looking to receive confirmation that they are already perfect miss learning opportunities. Creating a humble mindset is critical to the learning process.
- Create a next-step plan and be accountable. Set goals and work on small, manageable steps to accomplish them. Find ways to stay on track and accountable to yourself and to others.
- Share with others. Let other people you work with know what you are working on, what you hope to change, and why. Talk about why it is important for you, but also for team and organizational success. Be clear about ways they can support and push you to meet your learning goals.



The Organization. Finding training providers, creating programs, tapping participants, and paying the bill do not guarantee learning. Organizational support is essential. This may include:

- Enforcing requirements of a leadership development effort. (For example, ensuring that prework is a requirement for attendance.)
- Allowing (or requiring!) employees to disengage from day-to-day work during a program and for follow-on efforts.
- Holding employees accountable for applying what they learned by providing them opportunities to share their progress with the organization, or including learning goals in their performance reviews.
- Asking supervisors to encourage and provide one-on-one support for training and creating policies that make this part of their job. This can involve giving suggestions on how to connect learning to the work, providing feedback, engaging in coaching conversations, and rewarding progress.
- Allowing for practice of new skills or approaches—knowing this will involve time, trial-and-error, and discomfort.
- Aligning development initiatives with a broader leadership strategy that is tied to the organization’s business strategy (see [Bridging the Strategy/Performance Gap](#), a CCL white paper). This could include ensuring that HR practices like performance reviews and succession planning reward successful application of the learning. This helps create an organizational culture open to and supportive of learning and change, which research shows is associated with effective training outcomes. (Stewart, Palmer, Wilkin, & Kerrin, 2008).



The Training Provider. A leadership development provider should design programs, initiatives, and ongoing learning systems in ways that align with the company’s strategic business challenges, long-term employee development plans, and the culture of the organization.

In fact, a recent internal CCL program analysis found that matching development to the participants’ needs is one of the greatest predictors of application of learning on the job. Matching development to need is about both content and “feel”—the information must be relevant to the role and the experience should reflect the reality of the learner. For example, the most effective role-playing and simulation sessions are usually the ones that most closely match the participant’s work environment in some important way (Moskaliuk, Bertram, & Cress, 2013).

Training providers should be able to:

- Understand the business and leadership development goals and culture of the organization.
- Offer solutions to connect organizational needs to individual learning and development.
- Build networks of learners through tools, tips, and techniques that build relationships over shared challenges and interests.
- Make training days and learning activities relevant and engaging.
- Use proven methods, like effective goal-setting and feedback.
- Encourage application of the content in varied and multiple ways, over time.
- Provide support and follow-up to learners beyond the scheduled live contact.

CCL’s 3x3x3 Model of Learning Transfer provides a solid framework for discussing learning transfer as leadership development initiatives are designed.

Linking Learning to Business Success

When Credicorp, the leading banking institution in Peru, set its sights on becoming a leading financial group across Latin America, a key to success was a leadership development initiative just as ambitious and robust as its business strategy. The goal was to create a leadership solution that would evolve in unison with the changing nature of the strategic challenges faced by the organization's leaders.

CCL began working with Credicorp on an initial leadership development program for senior managers in 2009. Seeing an opportunity to create strong links between their business strategy and leadership needs, the two organizations constructed a comprehensive leadership development architecture including strong supports for learning transfer. Their developmental approach—focused on individual competency and collective capability—became the foundation of a broad and deep leadership strategy.

Every person in the leadership pool of 500 people worked with an executive coach in order to tailor an individual development plan aimed at strengthening the competencies most important for their success at Credicorp. In addition, each leader is a member of a learning and developmental support network in which they share their developmental challenges and action plans. These accountability partners both challenge and support each other.

The concept of leadership development shifted from delivering stand-alone training programs to

ongoing learning experiences which stretch over a year and consist of face-to-face training modules, executive coaching, follow-on practice sessions, applied research activities, and strategic thought sessions with the Senior Leadership Team.

With the new strategy and new approach to leadership development in place, Credicorp Group's revenue has grown exponentially and the strategic plan calls for even more aggressive growth and international expansion over upcoming years. In March 2013, Credicorp was named by *Euromoney* magazine as:

#1 Best Managed Company in the Banking and Finance Sector in Latin America

#1 Best for Shareholder Value in Latin America

#1 Best Managed Company in Peru

According to *The Wall Street Journal* Market Watch, the foundation of Credicorp's success can be found to a large extent in the organizational commitment to high-caliber talent, the quality of its senior management, its ongoing commitment to corporate governance and sustainability, and the professional quality of its employees.

Take Action

The 3x3x3 Model provides a strong foundation for learning transfer. As a person interested in learning and development, there are many additional steps you can take to boost the effectiveness of your leadership development efforts. You can become the bridge that connects the learner, the organization, and the training provider. Here are the steps critical to increasing the impact of your leadership development initiative.

Build faith in the process and the people.

Participant perception of the quality of the program and their chance of success is a significant predictor of motivation to work hard during development (Hooijberg & Lane, 2009; Switzer, Nagy, & Mullins, 2005). While there is no “one-size-fits-all” solution, credibility matters, and participants will work harder if they have faith in the process. Build credibility by explaining the full process at the onset; answer questions and clarify expectations; and bring in alumni or key leaders to vouch for the development’s effectiveness (Leone, Marino, & Richards, 2006). Build rapport and trust among the people involved, too. Encourage providers, facilitators, and coaches to connect with participants during the prepare and engage phases of development. Rapport between the developmental provider and the learner can enhance both individual learning and ultimate organizational outcomes.

Create a learning environment. A learning environment is created through a combination of concrete policies and a culture that prioritizes learning in the workplace. Supervisor, peer, and team support—and an array of developmental relationships—are part of the mix. Learners need the opportunity to apply new knowledge and practice new behaviors. Some employers establish development peer mentoring groups across divisions and have former participants serve as in-house coaches or facilitators. Members of peer mentoring groups tend to play a supportive role for one another, and they learn from others in similar roles going through a similar experience.

Create a feedback-rich workplace by teaching everyone how to give (and ask for) honest, helpful feedback. Policy changes can include systems and culture changes such as aligning personal development plans and succession planning with development initiatives, to less formal practices such as expecting employees to give seminars on what they learned.

Leverage the executive team. Executive team support for development initiatives can help foster a culture of learning and accountability. For example:

- Executives can set an example by engaging in their own leadership development agendas.
- CEOs can explain leadership development expectations for the learners and their managers and how learning ties directly to organizational strategy.
- Senior executives can be “champions” associated with specific leadership development programs or paths, which allows direct communication with the learners while demonstrating support and importance.
- Senior executives can share stories of their learning experiences, and help to create a culture of learning that allows participants to “let down their guard” and open their minds to the learning experience.
- Learners can engage with executives, showcasing the results of their key leadership challenges or ways their new skills and experiences have been valuable.



Conclusion

CCL has long held the view that development is a process, not an event. We continue to adapt the programs and development experiences we design and deliver. Increasingly, client organizations are asking to partner with us to look at organizational change and leadership development in ways that are both large-scale and deeply personalized. Our 3x3x3 Model for learning transfer is one way we meet this need by helping our partners get the most impact from their investment in leadership development. And it outlines the critical steps that are required of the leadership development sponsor in the organization.

References

- Blume, B. D., Ford, J. K., Baldwin, T. T., & Huang, J. L. (2010). Transfer of training: A meta-analytic review. *Journal of Management*, 36(4), 1065-1105. DOI: 10.1177/0149206309352880
- Brown, T. C., & McCracken, M. (2010). Which goals should participants set to enhance the transfer of learning from management development programmes? *Journal of General Management*, 35(4), 27-44. Retrieved from: <http://www.braybrooke.co.uk/JournalofGeneralManagement/tabid/56/Default.aspx>
- Chiaburu, D. S., & Lindsay, D. R. (2008). Can do or will do? the importance of self-efficacy and instrumentality for training transfer. *Human Resource Development International*, 11(2), 199-206. DOI: 10.1080/13678860801933004
- Cromwell, S. E., & Kolb, J. A. (2004). An examination of work-environment support factors affecting transfer of supervisory skills training to the workplace. *Human Resource Development Quarterly*, 15(4), 449-471. DOI: <http://www3.interscience.wiley.com/cgi-bin/jhome/74000165>
- Eichinger, R. W., & Lombardo, M. M. (2004). Patterns of rater accuracy in 360-degree feedback. *Human Resource Planning*, 27(4), 23-27. Retrieved from: <http://www.kornferryinstitute.com/reports-insights/patterns-rater-accuracy-360-degree-feedback>
- Hooijberg, R., & Lane, N. (2009). Using multisource feedback coaching effectively in executive education. *Academy of Management Learning & Education*, 8(4), 483-493. DOI: <http://dx.doi.org/10.5465/AMLE.2009.47785468>
- Katzell, R., & Thompson, D. (1990). Work motivation theory and practice. *American Psychologist*, 45(2), 144-153. DOI: <http://dx.doi.org/10.1037//0003-066X.45.2.144>
- Kirkpatrick, D. L. (1959). Techniques for evaluating training programs. *Journal of American Society of Training Directors*, 13(3), 21-26. Retrieved from: <http://www.astd.org>.
- Laker, D. R., & Powell, J. L. (2011). The differences between hard and soft skills and their relative impact on training transfer. *Human Resource Development Quarterly*, 22(1), 111-122. Retrieved from: <http://www3.interscience.wiley.com/cgi-bin/jhome/74000165>
- Lancaster, S., Milià, L. D., & Cameron, R. (2013). Supervisor behaviours that facilitate training transfer. *Journal of Workplace Learning*, 25(1), 6-22. DOI: 10.1108/13665621311288458
- Leone, P., Marino, M., & Richards, R. (2006). How American Express created an effective leadership development climate. *The Ariel Group's Client Conference 2006*, 1-9. Retrieved from: <http://www.arielgroup.com/resources/>.
- Lombardo, M.M., & Eichinger, R.W. (1996) *Career-architect development planner*. Minneapolis, MN: Lominger.
- Moskaliuk, J., Bertram, J., & Cress, U. (2013). Impact of virtual training environments on the acquisition and transfer of knowledge. *Cyberpsychology, Behavior and Social Networking*, 16(3), 210-214. doi: 10.1089/cyber.2012.0416
- Noe, R. A., & Schmitt, N. (1986). The influence of trainee attitudes on training effectiveness: Test of a model. *Personnel Psychology*, 39(3), 497-523. Retrieved from: <http://www.hogrefe.com/periodicals/journal-of-personnel-psychology/>
- Saks, A. M., & Belcourt, M. (2006). An investigation of training activities and transfer of training in organizations. *Human Resource Management*, 45, 629-648. DOI: <http://dx.doi.org/10.1002/hrm.20135>
- Saks, A. M., & Burke, L. A. (2012). An investigation into the relationship between training evaluation and the transfer of training. *International Journal of Training and Development*, 16, 118-127. DOI: 10.1111/j.1468-2419.2011.00397.x
- Stewart, L. J., Palmer, S., Wilkin, H., & Kerrin, M. (2008). Towards a model of coaching transfer: Operationalising coaching success and the facilitators and barriers to transfer. *International Coaching Psychology Review*, 3(2), 87-109. Retrieved from: http://www.sgcp.org.uk/sgcp/publications/publications_home.cfm
- Switzer, K. C., Nagy, M. S., & Mullins, M. E. (2005). The influence of training reputation, managerial support, and self-efficacy on pre-training motivation and perceived training transfer. *Applied H.R.M. Research*, 10(1), 21-34. Retrieved from: <http://www.xavier.edu/appliedhrmresearch/>
- Wilson, M. S., Van Velsor, E., Chandrasekar, A., & Criswell, C. (2014). *Grooming Top Leaders: Cultural Perspectives from China, India, Singapore, and the United States* [White paper]. Retrieved November 1, 2014, from Center for Creative Leadership, Greensboro, NC: <http://www.ccl.org/leadership/pdf/research/GroomingTopLeaders.pdf>

About the Authors

Diane Reinhold is Design Faculty at the Center for Creative Leadership (CCL®). Her work focuses on developing, designing, and packaging the Center's new content into services, programs and tools that engage the user. Diane is a client-focused designer with extensive experience launching training products, programs, and large-scale development initiatives. She is able to clarify individual and organizational development needs and creatively package the content in a way that helps the learner absorb and apply the information. Diane focuses on creating blended initiatives, supporting learning transfer and application toolkits. She has used multiple delivery channels including many online media to deliver content in the workplace when it is most needed. Through design and facilitation, Diane has worked with and supported multiple CCL clients representing universities, nonprofits, and corporations.

Tracy Patterson serves as Director of CCL's Evaluation Center, which supports CCL and the field through the development of new knowledge, methods, and approaches to the evaluation of leadership development. In this role, Tracy partners with CCL staff, clients, and external evaluators to identify organizational and leader needs, articulate program outcomes, and evaluate initiatives for improvement and impact. Tracy's evaluation work includes CCL's custom initiatives, open-enrollment programs, executive coaching, new product development, and external evaluations of leadership development programs.

Peter Hegel entered the graduate program for industrial/organizational psychology at North Carolina State University in 2012 after a career in nonprofit management and program development, as well as a multi-year stint as captain of several sailing vessels in the Bahamas and the Mediterranean. He currently teaches Introduction to Psychology at NCSU. Peter's research interests include leadership development, perceptions of discrimination, and work culture. He received a BA in psychology and anthropology from Washington University in St. Louis, MO in 2002.

Acknowledgements: The conception and design of 3 x 3 x 3 framework reflects the work of CCL's learning transfer team—including Allison Chiles, Kim Palmisano, Ron Rabin, Laura Santana, and Jonathan Vehar. The authors also would like to acknowledge Jonathan Vehar, Florence Plessier, and Michael Sikes, former CCL Senior Faculty, for their work on this paper.



Center for Creative Leadership®

The Center for Creative Leadership (CCL®) is a top-ranked, global provider of leadership development. By leveraging the power of leadership to drive results that matter most to clients, CCL transforms individual leaders, teams, organizations and society. Our array of cutting-edge solutions is steeped in extensive research and experience gained from working with hundreds of thousands of leaders at all levels. Ranked among the world's Top 5 providers of executive education by the *Financial Times* and in the Top 10 by *Bloomberg Businessweek*, CCL has offices in Greensboro, NC; Colorado Springs, CO; San Diego, CA; Brussels, Belgium; Moscow, Russia; Addis Ababa, Ethiopia; Johannesburg, South Africa; Singapore; Gurgaon, India; and Shanghai, China.

CCL - Americas

www.ccl.org

+1 800 780 1031 (US or Canada)

+1 336 545 2810 (Worldwide)

info@ccl.org

Greensboro, North Carolina

+1 336 545 2810

Colorado Springs, Colorado

+1 719 633 3891

San Diego, California

+1 858 638 8000

CCL - Europe, Middle East, Africa

www.ccl.org/emea

Brussels, Belgium

+32 (0) 2 679 09 10

ccl.emea@ccl.org

Addis Ababa, Ethiopia

+251 118 957086

LBB.Africa@ccl.org

Johannesburg, South Africa

+27 (11) 783 4963

southafrica.office@ccl.org

Moscow, Russia

+7 495 662 31 39

ccl.cis@ccl.org

CCL - Asia Pacific

www.ccl.org/apac

Singapore

+65 6854 6000

ccl.apac@ccl.org

Gurgaon, India

+91 124 676 9200

cclindia@ccl.org

Shanghai, China

+86 21 5168 8002, ext. 801

ccl.china@ccl.org

Affiliate Locations: Seattle, Washington • Seoul, Korea • College Park, Maryland • Ottawa, Ontario, Canada
Ft. Belvoir, Virginia • Kettering, Ohio • Huntsville, Alabama • San Diego, California • St. Petersburg, Florida
Peoria, Illinois • Omaha, Nebraska • Minato-ku, Tokyo, Japan • Mt. Eliza, Victoria, Australia