Transfer Of Training

Authored by

mohammad looti

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1. Core Definition and Relationship to Transfer of Learning

Transfer of Training is a fundamental concept within applied psychology and organizational development, specifically relating to the practical outcomes of educational or instructional interventions. It describes the degree to which knowledge, skills, and attitudes (KSAs) acquired during a formal training program are successfully applied by the learner back in their actual work environment or to a different context requiring similar competencies. Essentially, it addresses the efficacy of training efforts beyond the classroom setting, serving as the critical link between learning and performance improvement. The successful transfer ensures that the significant investment made in training translates into tangible organizational benefits, such as increased productivity, reduced errors, or enhanced adaptability.

The concept of Transfer of Training is inextricably linked to the broader psychological principle of Transfer of Learning. While transfer of learning encompasses any situation where prior learning influences subsequent learning--whether in academic or informal settings--transfer of training focuses specifically on the institutional context where structured training aims to modify on-the-job behavior. A common example illustrating this principle involves expertise transfer: if an individual possesses established skills in **auto mechanics**, those underlying principles of systems diagnosis, spatial reasoning, and tool use are not static. When that person undertakes training in **aircraft mechanics**, a significant portion of their pre-existing knowledge structure is applicable, allowing them to acquire the new, specialized skills much more rapidly and effectively than a novice without any prior mechanical background. This acceleration of learning and application is the direct result of successful positive transfer.

Effective transfer requires more than just memorization of content; it demands the learner's ability to generalize principles and discriminate between relevant and irrelevant details across different contexts. This complexity highlights why transfer is often considered the most challenging phase of the training process. If training is well-designed but the workplace environment is resistant or unsupportive, the potential for transfer diminishes significantly, leading to what is often termed the "training decay problem." Therefore, the ultimate objective of any comprehensive training initiative is not merely the completion of the course, but the robust and sustainable transfer of the learned KSAs into improved job performance, making the study of transfer mechanisms critical for HRD professionals.

2. Historical Context and Theoretical Foundations

The systematic study of how learned skills generalize began in earnest in the early 20th century, largely fueled by debates regarding the efficacy of classical educational curricula. Early theories challenged the notion of "formal discipline," which suggested that rigorous study in subjects like Latin or mathematics developed general mental faculties applicable universally. This idea was scientifically debunked by pioneering psychologists who sought empirical explanations for transfer mechanisms, setting the stage for modern transfer of training research.

One of the most influential foundational theories came from Edward Thorndike, who proposed the **Theory of Identical Elements** in 1901. Thorndike posited that transfer occurs only to the extent that the training situation and the application situation share common or "identical" elements. These identical elements could be specific facts, procedures, or underlying cognitive structures. For instance, training a clerk on a specific type of database software will transfer effectively to a new job using that exact same software (high identical elements). However, if the new job uses entirely different software, transfer is minimal unless the underlying conceptual tasks (e.g., data entry logic, querying) are identical. This theory emphasized the importance of high fidelity--making the training environment as similar as possible to the actual work environment.

Building upon this, Judd introduced the concept of transfer through **General Principles**. Judd demonstrated that if learners are taught the underlying rules or scientific principles behind a task, they are better equipped to apply that knowledge to novel situations, even if the surface details differ dramatically. For example, teaching the physics principles governing hydraulic systems allows a learner to troubleshoot both car brakes and industrial presses, rather than just focusing on the mechanics of one specific machine. Modern training design integrates both Thorndike's focus on fidelity for immediate application (near transfer) and Judd's emphasis on generalized principles for adaptive application (far transfer).

3. Types and Dimensions of Transfer

Transfer of training is not monolithic; it occurs along several distinct dimensions that categorize the nature and breadth of the skill generalization. Understanding these types is crucial for designing training interventions that maximize utility and predict organizational outcomes. The primary distinction is typically made between **Positive Transfer** and **Negative Transfer**. Positive transfer occurs when prior learning facilitates the acquisition or performance of a new task, as seen in the mechanics example. Conversely, negative transfer occurs when prior learning actively interferes with the performance or learning of a new task, often due to ingrained habits that conflict with new required procedures, such as switching from a QWERTY keyboard layout to a DVORAK layout. While negative transfer is usually undesirable, it is important to diagnose its causes during training design.

Another critical dimension is the distinction between **Near Transfer** and **Far Transfer**. Near transfer involves applying learned skills immediately and directly to tasks that are highly similar to those practiced during training. This is typically observed when specific, procedural skills are learned, such as operating a new piece of machinery or executing a standardized customer service script. Far transfer, however, involves applying abstract knowledge, general principles, and problem-solving strategies to tasks that are structurally similar but contextually distant or novel. Far transfer is much more demanding cognitively and relies heavily on the learner's ability to recognize underlying structure--a key objective in developing creative or leadership competencies.

Furthermore, transfer can be classified as **Horizontal Transfer**, which refers to the application of skills to similar complexity tasks across different settings or subjects (e.g., applying critical thinking skills learned in history to analyzing business cases), or **Vertical Transfer**. Vertical transfer involves building upon foundational knowledge to master more advanced, complex skills (e.g., mastering arithmetic principles before tackling algebra). Finally, the temporal dimension defines whether transfer is **Initial Transfer** (application immediately after training) or **Maintenance Transfer** (sustained application over time), the latter being the ultimate goal for organizational ROI.

4. Mechanisms of Transfer: High-Road and Low-Road

Psychologists Perkins and Salomon introduced a useful model differentiating the mechanisms by which transfer occurs, classifying them into "low-road" and "high-road" transfer. These categories describe the cognitive effort and time frame associated with the transfer process, offering insights into how trainers should structure learning experiences. **Low-Road Transfer** is characterized by fast, automatic, and largely unconscious generalization, occurring primarily through extensive practice and highly similar contexts (high fidelity). It requires little conscious effort and is typically associated with Near Transfer, relying on the automatic triggering of behaviors due to strong stimulus similarity between the training setting and the performance setting. For example, a trained cashier automatically applies cash handling skills in a new store with a similar register layout.

In contrast, **High-Road Transfer** is deliberate, effortful, and strategic. It involves the conscious abstraction of principles from one context and the subsequent search and application of those principles in a new, often dissimilar context. This mechanism is crucial for achieving Far Transfer and requires metacognitive skills--the ability to think about one's own thinking. High-road transfer can be further divided into two types: forward-acting and backward-acting. Forward-acting transfer involves anticipating future use during the training phase (e.g., "How will I use this negotiation skill next month?"). Backward-acting transfer involves recognizing a prior skill or principle that is relevant to a current problem (e.g., "This new engineering problem reminds me of the physics principle we learned last year").

Effective training programs often utilize instructional strategies designed to facilitate both

mechanisms. For low-road transfer, the focus is on overlearning, repetition, and high physical fidelity to ensure procedural fluency and automaticity. For high-road transfer, the training emphasizes pattern recognition, reflective practice, complex case studies, and structured opportunities for abstraction and generalization, thereby training the learner not just on the skill, but on **how** to identify when and where the skill is applicable.

5. Measurement and Evaluation of Training Transfer

Measuring the effectiveness of training--the degree of successful transfer--is essential for justifying investment and ensuring accountability. The most widely adopted framework for this evaluation is Kirkpatrick's Four Levels of Training Evaluation, which systematically assesses outcomes from immediate reaction through organizational results. Level 1 (Reaction) and Level 2 (Learning) assess immediate attitudes and knowledge acquisition within the training room, but true transfer is measured at the subsequent levels.

Level 3: Behavior (Transfer) is the stage dedicated explicitly to measuring transfer. This level assesses whether the participants are actually applying the learned KSAs on the job. Measurement methods here are crucial and must be reliable, often involving direct observation by supervisors, 360-degree feedback from peers and subordinates, behavioral checklist assessments, and performance appraisals specifically tracking the trained behaviors. Crucially, these measurements must take place weeks or months after the training concludes to assess maintenance transfer, not just initial enthusiasm. The data collected must clearly distinguish between pre-training and post-training performance related to the specific skills taught.

The highest level of evaluation is **Level 4: Results**, which assesses the ultimate organizational impact stemming from the behavioral changes (Level 3). This includes hard metrics such as Return on Investment (ROI), reduction in safety incidents, improvement in customer satisfaction scores, or increased sales volume. Linking Level 3 (behavior change) directly to Level 4 (organizational results) provides the empirical evidence necessary to demonstrate the strategic value of the training program. Without robust measurement at Level 3, it is impossible to attribute positive Level 4 results definitively to the training intervention, highlighting the centrality of transfer evaluation in the overall HRD strategy.

6. Factors Influencing Successful Transfer

The effectiveness of training transfer is rarely solely dependent on the quality of instruction; it is a complex outcome influenced by a tripartite relationship between the trainee, the training design, and the organizational environment. Understanding these mitigating factors allows organizations to implement comprehensive transfer strategies rather than relying solely on classroom delivery. **Trainee Characteristics** play a significant role. Individuals with higher levels of cognitive ability,

self-efficacy (belief in their ability to perform the new skill), motivation to learn, and high conscientiousness are generally more likely to attempt and sustain transfer. Trainees must also have realistic expectations about the challenges of application and possess the necessary prerequisite skills.

The **Training Design and Delivery** must be intentionally structured to promote transfer. This involves using instructional methods that maximize fidelity for near transfer (simulations, role-playing), providing opportunities for conceptual mastery (case studies, guided discovery) for far transfer, and teaching explicit strategies for generalization. Techniques such as relapse prevention training, where trainees anticipate and plan for common barriers in the workplace, and ensuring that content is meaningful and relevant to the job, dramatically increase the likelihood of application. Furthermore, incorporating diverse practice examples encourages pattern recognition and abstraction.

Perhaps the most powerful factor is the **Work Environment Support**, often referred to as the transfer climate. Even the best-trained employees will revert to old habits if the organizational culture, supervisory expectations, and available resources do not support the new behaviors. A strong transfer climate is characterized by management reinforcement (e.g., managers explicitly asking trainees to use new skills), peer support, access to necessary tools and time, and organizational reward systems that recognize and incentivize the application of learned skills. If a manager fails to provide coaching or removes resources necessary for the new skills, transfer will inevitably fail, regardless of the trainee's motivation.

7. Practical Applications in Organizational Development

The principles of transfer of training are central to strategic organizational development (OD) and human capital management. In OD, successful transfer ensures continuous improvement, adaptability to market changes, and the maximization of human potential. For example, organizations implementing large-scale culture change initiatives (such as adopting agile methodologies or shifting to a customer-centric focus) must ensure that the training on new procedures and values transfers effectively into daily interactions and decision-making processes, requiring intensive post-training support and alignment of reward structures.

One key application involves the design of **Integrated Learning Systems**. Instead of viewing training as a standalone event, contemporary HRD practice integrates learning into the workflow itself. This may involve micro-learning modules accessible on demand, job aids embedded in operational software, or structured mentoring programs that pair trained individuals with experienced practitioners to coach transfer directly on the job. These methods minimize the distance between the learning context and the application context, thereby boosting near transfer automatically.

Furthermore, transfer principles guide the selection and development of **High-Potential Employees**. Training aimed at leadership development often focuses heavily on high-road, far transfer, teaching complex decision-making, ethical reasoning, and strategic thinking rather than just procedural tasks. Success in these programs is contingent upon creating challenging, novel assignments post-training that force the application and adaptation of the learned principles, rather than allowing the employee to return to routine tasks. Thus, the effective management of transfer is synonymous with the strategic management of talent development within an organization.

8. Debates and Criticisms

Despite its crucial role, the concept and measurement of transfer of training face several ongoing academic and practical criticisms. A persistent challenge lies in the difficulty of isolating the impact of training from other confounding variables. When performance improves in the workplace, it is often hard to definitively attribute that improvement solely to the training intervention versus other factors like managerial changes, economic shifts, or general experience accumulation. This issue complicates Level 4 ROI calculations and leads to debates about the true validity of training evaluations.

Another major debate centers on the **Generality of Transfer**. Critics argue that true far transfer--the ability to apply complex skills to radically new domains--is exceedingly rare and difficult to engineer through formal training. They suggest that most observed transfer is actually highly specific, low-road transfer disguised by minor contextual differences. This skepticism has led some theorists to advocate for radical workplace learning models that minimize formal training entirely, favoring learning strictly through situated, authentic work experience where transfer is naturally high because the context is identical.

Finally, the issue of **Maintenance Decay** remains a practical hurdle. Numerous studies show that even when initial transfer (Level 3) is successful immediately after training, the new behaviors often decay rapidly unless continuously reinforced by the work environment. Critics point out that many organizations invest heavily in the training event but fail to invest adequately in the post-training climate, thus ensuring poor long-term transfer. This highlights that transfer of training is ultimately a systemic organizational problem, not merely an individual learning deficiency.

Further Reading

Transfer of Learning (Wikipedia)
Kirkpatrick's Four Levels of Training Evaluation (Wikipedia)
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