



Learning Transfer Worksheet

Go beyond the training event to ensure all factors are in place to promote the use of training on the job so that participants can develop new capabilities. Create an action plan to address any factors not in place.

Critical Task(s):

Identify the critical task(s) participants will perform using the skills, knowledge, tools in the training. Why is this task(s) critical to achieving our business goals?

On-the-job Resources:

List the tools, resources, equipment, data, information, etc. that will be needed by participants to perform the critical tasks.

Policies & Procedures:

Indicate the work processes, business procedures, policies, rules, etc. that are in place for participants to perform the critical tasks.

Ongoing Reinforcement:

Decide how performance of the critical tasks can be incorporated into ongoing feedback and coaching, as well as regular performance discussions and reviews.

Motivation & Rewards:

Consider how participants will stay motivated and rewarded (both intrinsically and extrinsically) for performing the critical tasks.