CLOSING THE TRANSFER GAP

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by

Adrienne E Taylor

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CLOSING THE TRANSFER GAP

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Department of Psychology
Abstract

of

CLOSING THE TRANSFER GAP

by

Adrienne E Taylor

The training of essential skills to an employee is pertinent to the success of an organization, and yet training is useless if the targeted skills are not transferred to the workplace. The Sacramento Natural Foods Co-op sought assistance in further developing their training program to increase the implementation of training concepts. Grossman & Salas (2011) proposed a model to focus on the most prevalent moderators to training, employee characteristics, training design, and workplace environment. Through the application of this model, the Co-op’s current training design was reviewed. It was found that while the training program touches on each area there are specific recommendations for improvement. Through changes to the interactive components of the training design, and consistent extended follow-up and feedback, the rate of transfer is expected to increase.

_______________________, Committee Chair
Oriel Strickland, Ph.D.

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Date
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Chapter 1

OVERVIEW OF AGENCY

Organizational Background

In 1973, the Sacramento Natural Foods Co-op went from a simple store front to the incorporated business that started the foundation for the company today. With a current staff of 170, the Co-op is at a location of roughly 17,000 sq. ft., of which 11,500 sq. ft. is selling space, with an additional 3,000 sq. ft. in attached units that are used for community classes. There is a two year plan already in motion to move to an even larger location, which will include a parking structure. As a company, they are committed to each other and to the community as a whole. The organization’s vision is, “To provide the benefits of natural foods and products, economic cooperation, and sustainable practices to as many people as possible in the communities we serve” (Merriman, 2013). The Co-op has a strong focus on customer service, and has an established “customer service commitment” that each incoming employee signs. This statement encourages excellent customer service, and creating a welcoming environment for all. Attached to this focus on the customer service, is a focus on becoming knowledgeable on the different type of dietary lifestyles and restrictions so that the employee can better help each customer meet his or her needs. The company is also developing a growing focus on the importance of inter-company relations, and providing employees guidance in their interactions with each other to create a welcoming work environment.
The current project was proposed to provide recommendations towards the established customer service training program at a natural foods co-op in a mid-size Northern California city. The training director had determined that transfer of training was not as persistent as had been hoped and was interested in revising the current method to focus on target training measures that not only facilitates the application of the targeted customer service skills, but engages the trainees as well. The goal of this project was to provide proposed revisions to existing training materials (presentations, handouts, exercises, rewards systems, etc.) that would enhance the training transfer process.

The Customer Service Commitment involves the company standards for the “3 steps to excellent service” and the “5 steps to handling complaints and making it right”, along with a basic description of the standards for being welcoming. The three steps to excellent service include paying attention to the customer, giving or getting help, and going “beyond” to make the customer’s day. The five steps to handling a complaint directly lays out the standards on how to deal with an upset customer, including asking the customer what they feel would make things right. Finally, the direction to “under promise/over deliver” is an example of the atmosphere that the company endorses.

One of the important goals of the training is that clear methods should be established as to the handling of customer dissatisfaction or service issues. It has been shown that even a customer who has a bad experience can be retained as a happy customer if issues are handled in what the customer deems to be a satisfactory manner (Liao, 2007). While it is not always feasible to provide the customer with every aspect
that they want for resolution, there are simple methods for making them feel that their issue has been considered. Particularly in what can be considered a close knit demographic where word of mouth can affect the overall business plan, customer resolution is highly important. Through the use of role playing and discussions, the current training format targets the skills needed to resolve customer issues, and proposed changes center around enhancements to be made.

An additional factor that the Natural Food Co-op must consider is finding the most effective means for promoting customer loyalty within a divergent customer base. One of the main goals of the company is to provide a resource for people with different dietary lifestyles, which can come with different customer expectations and requirements. In fulfilling their goal, the company has focused their supply, staff training and store structure on meeting specialty requests, as well as offering community classes based on the varying dietary requests of their customers. Coelho & Henseler (2012) proposed a customer service base that focuses on customization rather than standardization in order to strengthen and encourage customer loyalty. They found that the present levels of customer perception, specifically trust in the employee and organization, had the most impact on customer loyalty. Having a properly trained and consistent staff is the starting point in fostering trust with clientele. This idea, in conjunction with training research that favors focusing on “far” versus “near” constructs in order to provide the trainee with adaptable tools, would greatly benefit the company. Through the use of role playing and error based training, employees can learn that there are basic methods that can maintain
the organizational standards, and yet be adapted to the customer needs. By providing a unique experience for each customer, the company can foster loyalty in a larger customer base.

The current project was proposed to provide recommendations towards the established customer service training program at a natural foods co-op in a mid-size Northern California city. The training director had determined that transfer of training was not as persistent as had been hoped and was interested in revising the current method to focus on target training measures that not only facilitates the application of the targeted customer service skills, but engages the trainees as well. The goal of this project was to provide proposed revisions to existing training materials (presentations, handouts, exercises, rewards systems, etc.) that would enhance the training transfer process.

**Why Is Transfer Important?**

Training and development are some of the key components to any human resources development (HRD) strategy, in that they provide the basic foundation for all aspects of employee performance. The American Society for Training and Development reports that there was an average of $1,182, per learner, spent on employee development in 2011. When an employee enters a company, when the standards of a targeted behavior or process change, or when there is improvement needed in a given area, a solid training program is essential to facilitate the changes. As companies will forever face a need to improve, revamp, and outperform their competitors, training will remain an often used tool. As defined by Grossman & Salas (2011), training involves obtaining the skills,
knowledge and attitudes that will lead toward a desired performance. While training new skills and standards is the answer to the needs listed above, training itself is not only useless but detrimental to an organization if transfer does not occur. When the skills meant to represent the vision and standards of a company are not transferred to the workplace, an employee can greatly mar the image of an organization by acting in an opposite direction. In addition, the time and money wasted on training can greatly impact the profits and growth of a company. Laker (2011) noted that if training does not transfer it is an extremely costly waste of time, energy and money to the organization; and estimated costs to range up to $200 billion annually across the board.

Blume (2010) noted that providing training does not guarantee change in an organization, but that it is the application of training in the workplace that will truly define the success of a training program. The issue of training transfer has long been researched to determine the most effective ways to facilitate application of training constructs on the job. By utilizing a model proposed by Grossman and Salas (2011), a more effective training plan can be established for use in the Sacramento Natural Foods Co-op. This model has resulted from a consolidation of the current literature on transfer of training, and focuses on the most relevant areas that effect transfer.
Chapter 2
REVIEWING THE LITERATURE

Training Transfer

Blume, Ford, Baldwin, and Huang (2010, p 1067) define transfer as “the extent to which learning of a response in one task or situation influence the response in another task or situation.” While there are a number of factors that can affect transfer, at the base of the issue is the targeted training construct itself. Research shows that tasks which can be defined as “near”, or similar, to the training target will be more likely to show adjustment based on the training. Tasks which are “far” from the construct will show less adjustment post-training. Transfer theory then, is an assessment of how well the trained construct becomes a useable tool for the trainee to use both to adjust the specific task trained, and other aspects of the organizational structure. Lee (2010) described the concept of “transfer distance” as the block between learning training constructs and applying them to the job setting. Laker and Powell (2011) defined transfer as two components, including the trainee’s efforts to initially apply training, and his or her persistence in maintaining this application for the long term.

As an example, if customer service training is based on phone interactions, one might expect it to translate (to some degree) to face to face interactions with customers to ensure that organizational standards are maintained. In addition, the use of the trained customer service phone skills should remain in place over time and not dwindle. The
generalizing and maintenance of the training are target goals, specifically with skills that are not based on step by step processes.

To clarify further, Lee (2010) referenced the transfer distance conceptual model to clearly identify the steps of transfer. First a skill or knowledge must be acquired through training, and then ultimately deemed by the trainee to be useful in application. This will be dependent on both employee characteristics, and the training climate of the organization, and can have a large impact on the effectiveness of training to transfer. Next, the learned skill or knowledge must be practiced in order for the trainee to build self-efficacy. In other words, the trainees need to have the chance to utilize the knowledge learned while it is salient in their minds. It allows for a deeper processing that will stabilize the training as a permanent resource tool. Once the trainee has had the opportunity to practice the skill or knowledge in close to real-life settings, the knowledge must be applied to the job tasks as intended. It is at this point that the idea of practice might need to be revisited, as the initial scenarios could have deviated from real-life to some degree. Once the knowledge is applied to the job, transfer would be measured such that the knowledge continues to be prevalent in the actions towards job tasks, and does not fade over time. Finally, as noted above, the knowledge must be generalized to tasks other than those specifically targeted in the program.

Another area which can greatly influence the occurrence of transfer is the design of the training program; whether it is appropriate for the training construct and whether it engages the trainee. Keith, Richter & Numann (2010) explored the differences between
guided and active/exploratory training on transfer. Active training approaches differ from guided training in that they focus on self-directed exploration. Guided training is geared towards providing direct step by step instruction, and consistent feedback and guidance during training to maintain structure. An example of guided training would be modeling, where the trainees are shown the steps required for a task. Active learning provides the trainees with minimal training on how to do a task, along with time to explore different ways to complete it on their own. Findings have shown that one benefit of active/exploratory training is that it can reduce the impact of factors that impede transfer, such as cognitive ability and perceived utility (Keith, 2010). As noted by Grossman and Salas (2011), cognitive ability and perceived utility (which is influenced by motivation) are some of the strongest employee factors influencing the transfer of training. Together, these findings support the use of an active training model to enhance transfer on a generalized scale.

There is also a growing idea of generating transfer by providing trainees with an understanding of the base reasoning behind a construct, how it applies to the organization’s end goals, and their place in achieving them. By focusing the training on more than a single specific task, the trainees are provided with both the required details of the targeted behavior as well as given a deeper sense of the reasons behind the training. This concept of “line of sight” will facilitate the generalization of the trained skills and a greater likelihood that the cost effectiveness of the training will be high.
Models of Training Transfer

In 1988, Baldwin & Ford proposed a model of training transfer, targeting the main areas that influence training. The emphasis fell onto the characteristics of the trainee, the training design, and the workplace environment in relation to transfer climate. The initial model proposed has since been the topic of much discussion in relation to the application of training, as researchers have modified the model to narrow down the specific variables that influence transfer. It is hoped that by following the model, organizations will be able to streamline their training to target the most effective factors to encourage transfer, and thereby increase the utility of training programs, both in time and expense.

Grossman and Salas (2011) propose a model of training design to facilitate transfer that focuses on the mediating factors that have been found to have the largest impact on the transfer process. Specifically, they utilized the training model proposed by Baldwin & Ford (1988) as a basis and modified it to create a more narrowed version that targets just those factors that have been shown to have a greater impact on transfer (See Figure 1, from Grossman and Salas, 2011, p 106). The goal of the study is not to ignore or negate the need to monitor the full range of factors found in literature that influence transfer, but merely to provide a more targeted tool for application. There is an inference that both time and money can be saved by building a structure around the most essential variables.
Figure 1: Grossman and Salas’ (2011) proposed model of transfer

The three inputs that are focused on in the research are trainee characteristics, training design, and work environment. Trainee characteristics that have been found to have the strongest impact on the transfer of training are the trainee’s cognitive ability, self-efficacy, motivation, and perceived utility of training. Cognitive ability has been shown to be a crucial indicator of training outcomes, as it can enhance the processing required for learning and retention. Self-efficacy has been found to be an indicator of transfer, in that believing in one’s ability to perform a task enhances the likelihood that it will be implemented (Velada, Caetano, Michel, & Lyons, 2007; Yamkovenko & Holton, 2010). It has also been noted that high levels of self-efficacy have been shown to have the opposite effect on transfer, so there are some contingencies (Vancouver & Kendall, 2006). (Specifically, their study found that subjects with higher levels of self-efficacy
tended to allocate fewer resources towards the study and application of new skills and concepts, which resulted in lowered performance score. The high belief in one’s ability to perform a task actually resulted in less preparation to do so, and inhibited learning and development of skills.) Grossman and Salas reference Robbins & Judge (2009) to define motivation as the trainee’s individual persistence of effort, and driving force, towards meeting the desired goal. Motivation will determine whether the trainee believes that they are able to learn the task, apply the task, and that there are benefits to doing so (Weissbein, Huang, Ford & Schmidt, 2011). This ties in directly to the characteristic of perceived utility, which defines whether the trainees view the targeted task or behavior to be relevant to their job. A trainee’s perception of the utility of a task can directly affect motivation towards transfer, with those with higher levels of self-efficacy towards a training construct leading to the development of learning and mastery goals (Yamkovenko & Holton, 2010).

The training design models proposed to have the broadest range of effectiveness towards transfer are behavioral modeling, error management, and realistic training environments. Behavior modeling provides the trainee with clear definition as to the behaviors being discussed, modeling the desired responses or actions to implement behaviors, and opportunities for the trainees to practice the modeled behavior. Error management takes a different focus by allowing trainees to make errors during training and using the situation to provide error feedback and discussion of ways to correct the behavior. Error based training has been shown to provide a basis for anticipating
situations outside of the expected, and better preparation for how to respond. Realistic training environments within the training session have been shown to be instrumental in the facilitation of transfer. On the job shadowing, as an example, provides the trainee with a situation that is realistic enough to be applied during their normal work day thereby facilitating transfer.

Finally, the post-training work environment has been found to be one of the leading factors in determining whether training will transfer from the session to application in the work place (Velada, et al., 2007). The transfer climate, overall support, opportunity to perform the trained task, and follow-up are designated within the model. The transfer climate of an organization is the general perception as to whether the trainee feels inhibited or facilitated in implementing the training task. Support, from peers and supervisors, will add to the likelihood of transfer as the trainee will feel that the task or behavior is encouraged. In some cases, the trainees might feel that the training does not correlate with any settings in which they usually perform, and that they do not have the opportunity to utilize new information. This can track back to their perception of the utility of a training task, and directly affect whether they are able to transfer their training to the work place. One of the easiest ways to facilitate training, and one of the most forgotten, is to ensure that training does not end during the session itself. By continuing the education on the targeted task or behavior, and providing resources for the trainees to reference if they want to re-investigate requirements or reasoning for a task or behavior transfer can be greatly enhanced.
These three factors work in tandem with the target information being delivered to produce the training outputs. “Learning and retention”, as it is defined, is the goal of the training process such that the information is taken in, retained, and used to adapt behaviors. Once the information is attained and implemented, the final contingent in the model deals with the conditions of the transfer – whether the trainee learns to generalize the training to be used in a global context, and whether conditions are maintained to facilitate the continuation of the trained constructs. This final step, transfer, is greatly influenced by trainee characteristics, work environment, and whether the training design provided a solid basis for learning the targeted construct.

In 2010, Blume, Ford, Baldwin & Huang performed a meta-analytic review to examine the relationship between predictive factors and transfer, under different contexts and varying tasks. One finding from the research regarded the impact of “open” vs. “closed” skills, similar to the defined near and far skills posed previously. Closed skills (near) are defined as training objectives linked to learning a clearly defined set of tasks to complete a goal, which will be replicated in the same manner in the learning environment. An example of these might be a paperwork process that is in place for if there is a customer complaint at the Co-op. Open skills (far) are training objectives which are focused on learning principles, rather than tasks. These might be a general overview of communication skills in a business setting (as applied to a customer). Lessons that target a base level target can be generalized into many settings, while those that are specifically designed to be repeated in the same manner each time are not as universally
useable. Researchers find that while there is a need for closed skill training, the use of open skill training allowed trainees a freedom to perform that facilitated transfer. At the same time, the organizational standards can be maintained by focusing the open skills on these target goals.

By using the model by Grossman and Salas as a base point, and incorporating the findings regarding the content of training, a comprehensive analysis of the existing program design is possible. Through an assessment of current tools for tracking trainee characteristics, the training design, and the workplace climate, I will be able to provide the training director with recommendations for changes that are targeted towards the specific goal of increasing transfer. By including the research regarding the effects of the training content on transfer (e.g. open vs. closed skills), I can further refine the recommendations and maximize the utility of the training program.
Chapter 3
APPLYING THE THEORY

The following review will provide a description of the Sacramento Natural Foods Co-op’s current training program, along with relevant research that targets the important moderators that have been focused on in the training model. By focusing first on the current program, I was able then relate it to the research to determine if there is a stringent need for adjustment to improve transfer. Evaluating in this method allows for the organization to have a reference as to what is already in place that will encourage the transfer of training, as well as how the specific recommendations might benefit the training program.

Employee Characteristics

The existing program at the Co-op incorporates the use of a “Customer Service Assessment – Self Rating Questionnaire” that the employees fill out at the end of each training session. While the information from these surveys has been analyzed to determine the means and standard deviations, it has not been fully utilized as a tool for assessment. The assessment tools used for evaluation have been modified twice, with each revision angling towards streamlining the measure. The initial version directed assessment questions towards a specific internal review for the employee, such as “I personally exceed customer expectations on a regular basis,” or, “I know what to say during awkward and challenging customer situations.” The measure had also included
information regarding feelings towards the Co-ops success in meeting goals, “The co-op provides excellent customer service,” as well as perceived managerial compliance, “My manager supports excellent customer services.” The possible responses ranged from Not At All (1) to Extremely Well (5) on a 5-point Likert scale. These questions, over 13 sessions of data collection, resulted in a mean of 4.03 with a standard deviation of 0.92.

The next revision focused on targeting the assessment more towards the training constructs by removing the Co-op assessment and narrowing on the impact of training. “I understand, commit to, and am able to follow the 3 steps to providing excellent customer service to customers,” for example, targets the trainee’s perception and learning on the topic discussed. At the same time, this new scale continued to maintain the manager assessment, which can act as an indicator of transfer environment. “I have improved my skills at providing excellent customer service from support I have received from my manager.” While this was an improvement in regards to assessing the effects of training, the questions were, in some cases, triple barreled. This updated version was assessed using a 5-point Likert scale ranging from No Opinion (0) to Strongly Agree (5). The mean of these assessments, across sessions, was 4.39 with a standard deviation of 0.83.

The most recent revision is being used currently, and is the target of the assessment for recommendations. Issues have already been addressed with the wording of the measure to remove the triple barreled questions, as well as to incorporate an assessment of the trainee’s perception of the training and his or her skills. As an example, “I would like to receive additional support and training to improve my skills at customer
"service” can be responded to on a 5-point Likert scale from “Strongly Agree” to “No Opinion”. This provides an assessment of the trainee’s self-efficacy towards customer interactions. Other questions, such as “I feel my customer service skills will improve as a result of the customer service training I received in NET” serve to assess the trainee’s motivation towards the training. “My manager demonstrates and supports excellent internal customer service,” provides both a subordinate evaluation of the managers, but also ties into the trainee’s estimation of overall support for transfer in the work environment.

Following the proposed model standard, the recommendations would be targeted towards altering and/or expanding the evaluation as needed to incorporate coverage of three of the four trainee characteristics that were found to have the strongest impact on transfer; self-efficacy, motivation, and perceived utility of training. While cognitive ability is listed as one of the strongest moderators to transfer, it has also been noted as a characteristic that is not malleable to training. It is expected that during the selection process employees are required to meet a minimum needs requirement on the cognitive level, and that this will provide the baseline. Research does show that those with higher cognitive abilities tend to have higher self-efficacy towards tasks, and also tend to show higher rates of transfer. As we cannot control for cognitive ability beyond the baseline requirements, it is not a necessary area for assessment with the evaluation form.

The characteristics of self-efficacy, motivation and perception of utility are ultimately linked together. Sookhai & Budworth (2010, p 258) found that self-efficacy is
directly related to the trainee’s motivation towards utilizing trained skills, and reflective of the likelihood of transfer to the job. The authors also note that self-efficacy is an indicator of how a trainee will generalize the training, and their ability to adapt to unexpected situations. Bandura contends that all behavioral change is dependent on self-efficacy, such that our beliefs in our ability to perform will drive our motivation to achieve a task (Laker & Powell, 2011). It has been shown that utilizing efforts to target and enhance an individual’s perceptions of self-efficacy leads to an increase in performance. Specifically, higher self-efficacy will increase the likelihood of adaptation, as well as create higher expectations from the supervisor (Sookhai & Budworth, 2010). Higher confidence in self and from the supervisor should foster an increase in the employee’s perception of the utility of the training by creating an environment that encourages transfer. In order to counteract the possible negative effects of high self-esteem on the outcome of training, as previously referenced by Vancouver & Kendall (2006), practice during the training sessions and a workplace environment that encourages the implementation of training practices should be well defined.

Laker & Powell (2011) discussed whether the training of what they referred to as soft skills (those that take a wider scope in training, compared to those skills that need specific step by step instruction) will transfer without additional support to increase self-efficacy, motivation, and perceived utility. They posed that, unlike with hard skills such as the steps needed to run a new price labeling machine, soft skills that deal with a base set of general instructions to be applied to a variety of situations trainee’s will often have
their own “baggage” that influences their response. Previous experience, resistance to change or perception that the work climate does not foster change, vagueness in the training that leaves the constructs undefined, etc. were listed as some of the moderating factors. While this might seem as a “doomed” outlook, the authors presented the facts in a warning tone to emphasize the need for a proper training design (that also focuses on adjusting employee characteristics as it can) and a work climate that fosters the implementation of the trained skills. This is supported by Yamkovenko & Holton (2010, p 385) who noted that previous personal experience will definitively shape the trainee’s intention to behave in a specific manner post training. This personal experience can include the perceptions of the training design, or the expected level of support in the work environment.

The current method used to assess employee characteristics centers on the self-reporting form used post training. The training design (described below) includes the opportunity for trainees to bolster their confidence in skills by applying their training to theoretical situations as posed during the training. Finally, the rewards program (described in “workplace environment”) would apply to foster a supportive transfer environment for the trainee. While the existing materials promote a strong transfer atmosphere, there are still some components that can be added to the training program in order to take full advantage the employee characteristics component of the proposed model for training.
Training Model

The current training model consists of a variety of training methodologies which are spread across three training sessions per year. These include interactive PowerPoint lectures, handouts, and organizational policy information (e.g. Customer Service Commitment). Each training session is targeted towards a specific goal, while also circling back to revisit the customer service standards. The three topics covered are labeled “Giving Excellent Service”, “What Do You Say”, and “Making It Right.”

The first training session, “Giving Excellent Services”, begins by reviewing the goals of the session, the company’s mission statement, and a reminder that customer service can only be enhanced by remembering to view the store through the customer’s eyes. This is followed by presenting the customer service commitment statement, which is later signed by each trainee. As the training is designed around the basic standards foundation of customer service, the three tiers to which the customer service standards are directed are discussed. Specifically, it is made clear that customer service is not only delivered to the customer, but to co-workers and vendors as well.

The next stage of the training session implements the use of a training video that reviews methods on how to work together while providing great customer service. This is followed by an introduction to the steps that the company has deemed strategic for great customer service, the five steps that are to be used to resolve complaints, and the “customer service spirit”. There is also a discussion on how to maintain a positive environment, and set the tone, even during difficult encounters. During the training, there
are consistent reminders that these methods should also be used internally as a way to treat each other well.

The training is rounded out with a practice session, with the trainees working in pairs. They are provided with a worksheet and given time to come up statements they can use to respond to customer interactions and conflicts. Following the practice session, the customer service commitment statement is reviewed and signed. Finally, the session is completed with a series of positive images of employees showing their “customer service spirit”.

The second training session, “What Do You Say”, is targeted towards discussing what can be said to resolve or even turn around the customer’s experience. The session starts by reminding the trainees that there are a lot of positives in the organization, but that the training sessions are designed to allow for continued growth. As the organization is looking to change its location, this specific session focuses on the needs that the company will need to complete its growth, and how the trainee can affect its success.

This section of training consists of a video that describes a variety of issues where it can be hard to know how to handle a customer, and what do to. For example, it reviews what should not be said, how do deal with a customer that becomes too personal, and how to maintain professional (vs. personal) speak with the customers. There is a strong emphasis on remaining positive and offering suggestions on what can be accomplished, and the trainees are given the opportunity to work together to practice. In pairs, the trainees respond to posed statements such as, “A customer drove a long distance and
makes a special trip to our store to buy a quarter ham. We were shorted this week on our order from this artisan vendor.” This section is finished with a review of positive images of employees showing the “customer service spirit”.

The third training session, “Making It Right”, is targeted towards providing the trainees conflict resolution skills. There is a three part training worksheet used in conjunction with PowerPoint training to provide an interactive component and a second layer to processing the information. The session begins by focusing again on the company Customer Service Commitment, the three defined steps for giving excellent customer service, and the 5 steps towards resolving customer complaints. This is complete with scenarios on how to use the steps with customers, co-workers, and at external events.

The second portion of the training reviews the return policy, along with the company focus statement regarding returns. It also guides the trainee through the steps to identify and resolve the issue, and how to document customer complaints. The session is ended with a practice session in teams, reviewing the methods that were learned in the “What to Say” training session regarding how to deal with a customer that you might not be able to say yes to; such as when their request for a return falls outside of the allowable parameters.

Laker (2011, p 120) postulated that soft skills are less likely to transfer than hard skills, even with an effective training program. This would suggest that the content of the training is essentially important to what design is used. While methods used in training
“hard” skills are found to be easier by design, with the “soft” skills it is important to provide a variety of exploratory and practice opportunities for the trainee.

Line of sight training (Buller, 2011) suggests that focusing on the employee’s understanding of how to achieve organizational goals is more important than understanding the goals themselves. While it is important to explain the overall goals to the employee, by focusing on the steps the employee must take to meet them the trainee is provided with a clear cut process by which they need to meet their goals, even if the goal is a “soft” skill such as customer service. If the setting or implications vary, the trainees still know what steps to follow and will feel confident in meeting their goals as well as understanding why it is important for them to do so.

Boswell (2006, p 1489) explained the “line of sight” focus as developing a strategy that will provide an employee with a clear perspective as to the organizational goals and how to contribute to accomplish them. This ideal promotes a dynamic in which the employee will be more likely to align their behaviors to those presented, as they will understand their place and responsibility in helping the organization succeed. This links directly to the “group think” research that posits the benefits of working towards the good of the whole, and how it is enhanced once one understands how their position is needed. This can also help with adaptations to new job specifications as roles change such that employees who were settled in their job description are alerted to the specific need/reasoning behind their changed duties.
It has been shown that real-life situations have more details and complex information than what is often provided with soft skills training, which is why it is important to try and incorporate real world setting into training as often as possible (Laker & Powell, 2011). Also important is the use of team member exchange, such that it not only develops a feeling of unity between employees, but it also provides the opportunity to hear and exchange ideas with others (Cromwell & Kolb, 2004). “…in addition to how much trainees learn in training, the organizational transfer climate of the work situation affects the degree to which learned behavior would be transferred onto the actual job” (Cromwell & Kolb, 2004, p 452).

**Work Environment**

The Sacramento Natural Foods Co-op has established a commitment to providing positive and helpful customer service, and has proposed programs to encourage employees to utilize their training to support this. One method was described as a “quiet rewards” by which the department managers and store managers can acknowledge employees for following the customer service commitment training standards. The goal of this format is to provide positive feedback through acknowledgement, rather than with awards, creating an additional feedback loop between the employee and the management team. The first tier in the rewards system would give the department manager the opportunity to quietly acknowledge an employee who he/she witnesses upholding the training standards (e.g., helped customer find an answer even though they did not know the answer) by giving them a recognition card. The second tier provides the employee
with a recognition card, as well as a choice of a $5 gift card for actions beyond the normal standard (e.g., mystery shopper 100% individual). Finally, the third tier steps outside of the “quiet” recognition standards and allows for the employee to be commended at the company level, with a statement mentioned in the newsletter.

The Co-op has also established the practice of rewarding initiative and continued education through the use of non-mandatory knowledge sets, which include a quiz to assess completion. These tests are general worksheet formats that require the employee to read up on the standard handouts in the store for each section, and learn more about the items within that area, or even about another specialty group. Once they have completed the reading, they take a short quiz to ensure comprehension and to complete the chosen task. Each quiz offers a different reward, and a basis for tracking the knowledge level of the employee. This method of allowing the employee to make the choice to take on additional work also provides a general assessment of an employee’s motivation to improve, and level of initiative. By obtaining skilled knowledge in the different areas of the store, as well as the differing dietary styles, the employee is also building a foundation to better meet the organizational mission to provide specialized services to their customers.

Research shows that by facilitating the importance of utilizing the tools and knowledge obtained in training, an organization can greatly influence the level of training transfer. Martin (2010) noted the components of a workplace climate that can directly impact transfer, such as adequate resources, opportunities to apply the learned skills, and
consequences for applying training on the job. Peer support, or encouragement received from on the job peers, can also directly impact the transfer of training.

Sookhai & Budworth (2010) targeted the importance of transfer climate to the completion of transfer, citing specifically the impact of supervisor support, where supervisors reinforce and support the application of training to the workplace. Van der Bossche, Segers, & Jansen (2010) noted that there is a differing focus between support from peers and support from supervisors. Peer support is shown to focus on supporting the use of learning on the job, either by modeling behavior or simply encouraging the use of new skills. Supervisor support deals more with reinforcement for applying skills learned to the job setting. Laker and Powell (2010) found that this connection is especially prevalent with “soft skills” training, where the trainee is likely looking for a role model or coach, or even for further encouragement to apply the skills in the job setting. While there has been some debate as to whether support from one group or another has more of an impact, there is much research to support the importance of both suggesting that a combined approach is needed. Research supports the importance of remembering that feedback from one source can impact another. It is important to acknowledge that negative feedback from a superior will often override positive feedback from a peer, showing that there is a subtle hierarchy in the effectiveness of feedback. Therefore, while feedback from both sources have been shown to have an impact on transfer, it is essential that superiors are involved in the feedback process (Martin, 2010). Feedback has been shown to be a strong moderator to transfer (Judge, Jackson, Shaw,
Saks & Burke (2012, p 119) defined feedback as the process of examining the effectiveness of a training program. The authors cited Kirkpatrick’s 1994 model of training evaluation criteria to provide a definition of what is needed for clear and accurate feedback for the trainee. First, the trainee’s attitude towards the training program should be notated and assessed. If the trainee was excited and appeared motivated, but it is not showing in their actions, it can create a positive path dialog for determining what had changed. Second, there should be specific learning criteria to base the trainee’s learned knowledge against. Even with “soft-skills” there are target variable that can stand to represent learning, such as what the trainee should be filling out when there is a customer complaint (e.g., the Make It Right forms). Third, the trainee’s actions towards applying the training to the job should have a clear standard to base against, the first assessment of transfer itself. Particularly with a construct such as customer service, there need to be specific measures in place to determine whether the skills are being applied as intended, so that all evaluations are equitable across the board. Finally, there should also be an assessment as to how the training has improved the organization or, rather, how the trainee’s actions played a role in the betterment of the company. This lends back to the line of sight theory for training, and the importance of reminding the trainee of the role that they play within the organization.
There are two reasons to expect evaluation to influence transfer, the first being that simple accountability can reinforce the transfer of skills. The secondary reason is that organizations that use evaluations have also been alerted to issues within the training programs and modified them to produce the highest level of transfer. Saks and Burke (2012) completed a study of 150 members of a training and development association in Canada. Surveys were submitted assessing training evaluations, transfer of training measures, and control variables. It was found that organizations are more likely to evaluate employee reactions to training and least likely to evaluate long term behavior or how changes from the training effected the organization as a whole. Those that do evaluate these additional factors have a higher rate of transfer, because the application of the skills is essential to determine whether training will transfer. They also found that transfer was strongest immediately after training than subsequent assessments.

Van der Bossche et al., (2010) focused their study on the importance of feedback and it’s relation to transfer. They suggest that feedback from multiple sources is more effective than from just one, again promoting the use of both peers and supervisors to assess training application. They noted five sources of feedback that fell into three categories, all of which can have a positive (or negative) impact on transfer. Firstly, people who work with the trainees and have seen their actions and if they have been able to apply the training to the workplace, such as peers, co-workers or supervisors. “It may be that peer support enhances learning transfer through the feedback, encouragement, problem solving assistance, supplemental information, and coaching assistance provided
to trainees” (Martin, 2010, p 90). Secondly, we can look to the task itself, and the environment. For example, if customer complaints towards a given employee increase post training, there is the likelihood that the training was not transferred, or at least not as intended. Finally, we can look to the trainee themselves for self-reporting and self-assessment feedback.

The authors do warn that there can be too much of a good thing, and that balance is needed in order to not overwhelm the employee. Providing too much feedback is a certain possibility, especially when the feedback is adverse or complex, and care must be taken to prevent overloading the trainee (Van der Bossche, et al., 2010). Laker & Powell (2011) also posed that soft skills training can often teach more than is needed, which can overwhelm the trainee and inhibit transfer. Van der Bossche, et al., used assessment forms from 37 academic staff members to evaluate what feedback source had more impact towards improving transfer. Feedback was assessed in a post hoc manner with a report from the trainees for name and station of the people who had provided them with feedback, along with frequency and perceived helpfulness. It was found that while there was no significant difference between the impact of feedback from peers or supervisors, the more sources for feedback as well as the utility of the feedback increased the effectiveness.

There has been study into the utility of peer evaluation as a learning tool, due to the impact that interpersonal relations can have on peer responses. While peer appraisals have been shown to improve productivity, commitment and participation there are some
specific limitations that should be addressed and considered. Our innate tendency to respond to feedback with an affective basis can be enhanced when the feedback is from a peer. While praise can often leave us feeling validated in our own work, and gracious in our ratings of others, negative feedback, no matter how constructive, can trigger our defensive mechanisms. When this occurs, rather than building a unified work environment where our co-workers drive us to succeed, feelings of distrust may break down even a supportive nature provided by management. This same emotional tie that is prevalent when being evaluated by a peer is likely why peer feedback can influence the impact of management feedback as well. Taggar and Brown (2006) found that peer ratings would affect subsequent ratings by an employee, such that positive ratings led the employee to be more positive in evaluating others, and that criticism led to more harsh ratings. While addressing research on the possible hindrances that can occur with peer review, the authors did note that by training employees in the standards of peer review, there has been equal research showing that peer review can be a valuable source for feedback information.

There was an additional hypothesis that showed that trainee post-training motivation impacts transfer, which would validate the proposed suggestion to monitor the employee motivation through the self-reporting survey post-training. Martin (2010) touts the usefulness of peer support, and specifies how it can impact post-training motivation. Motivation is needed to apply skills to the job, and low motivation can be tied to a lack of support, such as peer support. Many of us have experienced that person who after training
complains about impending changes, and it can spur a blockage to the application of training. Change can be hard, implementing steps in a difficult situation can be difficult, and sometimes it’s easier to listen to the negative huffing than follow through with the changes. It is important that signs of low motivation in one trainee be taken seriously as it can impact the other trainees from the session. The lack of a unified front can effect transfer through fostering a lack of motivation, perceived uselessness of feedback (from an unreliable peer), or the general lack of transfer climate.

Both Sookhai & Budworth (2010) and Martin (2010) promoted the idea that managers should be trained on their evaluation techniques at the same time of training. Findings from a study by Sookhai and Budworth (2010) found that when supervisors attended a 1.5-hour workshop on how to effectively evaluate their trainees, their employees reported a better transfer climate. Laker and Powell (2011) noted that feedback on training can range and be unclear to the trainee, which supports the necessity of training managers on evaluation criteria prior to, or during, the employee skill training. This will not only narrow the scope of the evaluation but provide a baseline for clarity and consistency.

Martin (2010) also noted that the transfer “step” that allows the trainee the opportunity to use the learned skills was found to be the highest form of support for employees [referencing Lim and Johnson, 2002]. Without this opportunity the training can get lost and when faced with an applicable situation in the future, trainees are likely to resort to their previously used methods, rather than the newer ones. As was noted
previously, the “soft-skills” often come with an existing manner of response, and the ability to work with newer methods needs to be tried and repeated in order to make it a standard resource. It is also important that the practice or use of the skills come without a delay, or before the training can begin to fade. By keeping the knowledge salient we prevent the decay of the learning, as well as foster a supporting work climate towards the used of the trained knowledge.

It is important that the three concepts focused on in the proposed model are not looked at as a single piece, but as part of the whole design and built on a basis that incorporates the design as a whole. Through modifications to the existing training program, the focus on facilitating transfer can be implemented. The employee characteristics can be tracked, and enhanced (e.g. improved self-efficacy through positive and clear feedback), by establishing a strong work environment that supports the implementation of training practices. The training design should be structured so that it allows the trainee an opportunity to accurately develop the skills needed to transfer the skills to the real world job setting, while providing an understanding of why it is important to the organization. By uniting the three constructs, a solid basis is created that should enhance the employee’s motivation and intention to transfer.
Chapter 4
RECOMMENDATIONS

Utilizing the model proposed by Grossman and Salas (2011) focusing on the effects of trainee characteristics (notably cognitive ability, self-efficacy, motivation, and perceived importance of the training target), training design, and the work environment, the current training program was assessed as a whole to determine the most useful training program adjustments, or enhancements. As the training director for the Co-op has specified an interest in focusing on the work environment of the model, the major recommendations have been targeted to this area. The remaining sections will review how the current training program components support the model, as well as offer some recommendations that would invariably enhance the existing structure. The overall goal of this process is to provide an analysis of the existing training program that will enhance the current structures, and to provide recommendations that will assist with transfer as well as provide traceable data for the training manager to utilize for program assessment.

Employee Characteristics

The model directs a focus towards the employee characteristics of cognitive ability, motivation, self-efficacy and perceived utility. The current self-assessment survey that is used as a post-training measure assesses for the malleable characteristics self-efficacy, motivation, and perceived utility. The employees are asked on the survey if they are willing to commit to each of the standards that have been discussed in the training,
and whether they think they have learned the skills to do so. While the surveys are completed during the training session, in the presence of the training director and other trainees, each trainee fills out their survey on their own. By comparing the responses after each training session, the organization will be able to assess significant changes as a result of the training. Also, if compared to the responses of the trainee to proposed follow up evaluation responses, the Co-op will be able to determine if there is any significant change, in the intended direction, from the training sessions.

As a possible means of expanding on this current measure, the survey could be modified to assess for long term evaluation, and then be distributed not just on a post-test basis, but at one and three month intervals to provide a self-reporting measure to determine if the employee is retaining and utilizing the specific training. More importantly, it can target the employee’s self-efficacy and provide useful data as to if the training is building a stable resource base. To specifically address these issues, the first recommendation would be to provide a form of tracking the trainee’s while remaining anonymous. This will allow for the comparison of their tests over time, and can be accomplished with something as simple as having the trainee’s draw a number out of a hat and requesting that they remember it for the future and always label it on their assessments. Previously, there has not been a way to clearly measure the responses of a single participant; only to compare the overall scores of each session. While this does rely heavily on the trainee’s remembering their “code”, it will provide a method for tracking the progress of the training at the individual level.
An alternative to this suggestion, which would provide more data towards the validity of the testing measure, would be to implement a method of training versus control group assessment. By randomly assigning half of the employees to be trained in a particular area initially, and maintaining self-assessment evaluations across all employees, a baseline will be established for the effects of training versus a control group. As topics such as customer service are essential to train across the board, the control group will need to be trained in the same skills at a later time. This will provide a measure as to the effectiveness of the survey itself, through comparison of training versus control group responses, as well as provide data to compare the effects of training methods. By using survey responses, and feedback evaluations, as measures of improvement, the training manager will be able to assess areas that will need to be adjusted in the training program. It will, however, need to be determined if the split training sessions will be feasible in both time and financial aspects.

The second recommendation relates to the wording used currently in the assessment. The first three questions review the trainee’s commitment to using the skills learned in the training session (e.g., “I commit to the following three steps to providing excellent service to customers”) and is more relatable to a yes/no response than a scaled perspective. It is recommended that these three questions be adjusted to assess the trainee’s perceived understanding of the skills learned. For example, adjusting the above question to “I understand how to apply the three steps to providing excellent customer service” will provide insight to the training effectiveness, as well as to the trainee’s
perceptions and self-efficacy. Along with a minor phrasing adjustment to keep the notations positively worded, the remaining recommendations are in regards to the questions that remain about the trainee’s impressions of their manager’s support and customer service. “My manager demonstrates and supports excellent customer service,” remains as a double barreled question and should be adjusted. The recommended changes, therefore, target the phrasing/question layout rather than the context itself.

**Training Model**

The current training model in use by the Co-op covers many of the suggestions made by recent research as to the best ways to increase the likelihood of transfer. Researchers have found that interactive training is more engaging for employees (Keith, et al., 2010), and the program provides such methods. The trainees are asked to interact during the session to provide suggestions as to how to resolve issues, or to respond to a customer request. They are also engaged in team practice segments, working to provide the best response to a request. Both of these interactive methods allow the trainee to build a base response for when they are later confronted with a situation on the job.

The training sessions also include video segments which model the correct behavior or resolution process that should be followed, as do the “customer service spirit” photos that are presented. While creating a real world setting for customer service training is not ever going to be fully plausible, as a customer interaction is never static across the scale, the behavioral models provide a basis for the trainee to reference as a resource. Finally, by starting each session with a reminder of the trainee’s role in the
betterment of the organization, the training is creating a sense of inclusion and unity for
the trainee. As Line of Sight research has shown, there are benefits to providing
employees with an understanding of their role in the organization and, more importantly,

To extend the training, the use of error training methodology might be considered
as a means of replacing or supplementing the practice portions of the training program.
While there is much use in practicing a new skill, the application of error training
enhances a real-world aspect to the training while letting the trainees immediately
evaluate their response with feedback from others. It has been shown that the use of these
methods can provide a deeper level of intake because the trainees not only have to
initially apply what they have learned, but then reevaluate their choices to determine if
there are other ways to respond. It is this experience with correcting based on the
situation that can provide the trainee with a more useful resource set and the confidence
to respond in changing situations.

In a customer service setting, real world situations that would allow for such error
based training are harder to create. One suggestion to implement this style of training
would be to have the trainees take turns dealing with an “upset customer.” The training
manager can stand in the role of the customer, and provide the trainee the chance to work
through the scenario. The key is to allow for chances to try different alternatives. Once
the resolution is reached, the trainees can then review the ways in which they feel that
they could have responded better, listen to suggestions from their fellow trainees, as well
as have feedback from the training manager.

An alternative would be to maintain the questions that are currently used between
pairs of employees to review, and alter the interaction towards an error management
format. For example, rather than having the employees work together to think of a
response to the already established questions (e.g., “A customer drove a long distance and
makes a special trip to our store to buy a quarter ham. We were shorted this week on our
order from this artisan vendor”), they can work in pair or teams to act out the scenario.
Each member can take a turn being a customer and a turn acting out the role of the
employee. After each scenario they can then work together to think of alternatives to how
the situation was handled. This secondary suggestion does, however, remove the
supervisor input, which is valuable as a modeling dynamic.

**Work Environment**

While the Co-op has a strong program in place to help encourage the use of the
customer service commitment standards there are further recommendations that can be
made. Motivation is needed to apply skills to the job, and low motivation can be tied to a
lack of support, such as peer support (Martin 2010) or managerial support. It has been
shown that feedback from multiple sources can lead to increased transfer, and it can also
increase a sense of workplace support (transfer climate). Motivation has a high impact on
many employee characteristics and, in turn, effects the application of training on the job.
However, by bolstering up a supportive work environment, and showing appreciation for
tasks that achieve the target goal, motivation can be enhanced. At the same time, motivation has been shown to waiver across time and setting, so it is important to remember that maintaining a baseline of support and expectation.

The first recommendation is to implement a manager/peer review system that will occur every other month around the training sessions, so that each employee is assessed at one and three month intervals post training. The manager evaluation and peer evaluation forms were developed using the existing self-rating post-training survey as a base, to ensure the target areas were assessed. A six question survey was developed for both managerial and peer assessment using a 5-point Likert scale ranging from Strongly Agree to No Opinion. The employees will be assessed based on their implementation of training goals such as the three steps for providing customer service or the five steps for handling complaints. There is also space for the evaluator to leave any direct feedback to the employee, and space to notate specific examples of positive and negative customer interactions that the employee has been involved in. While the manager evaluation calls for a signature from the manager, the peer review is to be left unsigned as to ensure anonymity and prevent conflicts across the team; each employee will be randomly assigned to two co-workers for evaluation each review month. As an additional check point to prevent personal statements or conflict from affecting the peer reviews, the peer surveys will also be reviewed by the manager prior to passing on the feedback, so that any aversive or extraneous comments can be removed. The survey is designed to provide
assessment data to the organization, while also providing the employee with qualitative feedback.

In order to implement this program, it is recommended that a small training session included in the current training plan, which will provide specific assessment guidelines for peers to follow (Martin, 2010). It has been shown that evaluation scores are more consistent if the raters are provided with a base for assessment. An essential portion of the training should include a focus on remaining positive during the written feedback, while remaining honest; and also include definitive examples so that raters fully understand how to score across the range. As the Co-op is currently developing an additional component to focus on interpersonal interactions between employees, and how to build and maintain positive working relationships, this evaluation component can be trained at the same time. In the same context, it would be highly beneficial if managers were provided with a short guidance form or training session to review the same standards, as well as to refine the specific applications of the existing rewards program. As with feedback, it is beneficial to provide a clear reference platform for what types of behaviors should be rewarded.
Chapter 5

DISCUSSION

The issue of transfer of training is one that is getting more and more attention as the industry has come to realize that training is useless if the skills or constructs are not then applied to the workplace. Referencing the Grossman & Salas (2011) model, there are three main areas that affect the transfer of training – employee characteristics, the training design, and the workplace environment. While some employee characteristics are not malleable, there are others that can be adjusted (enhanced) through training methods, and thereby increase the likelihood that the training process will be transferred to the work environment. The training design should be modeled to the skill or construct being targeted, and also allow time for the implementation of the training in some fashion. Be it modeling, error training, or simply the time to act out the standards being posed, transfer is more likely to occur if the trainee is provided with the time to immediately utilize the skills being learned. Finally, the workplace environment is essential to the facilitating transfer such that it can make or break the initial steps in the training and transfer process. A trainee can have confidence, have been given the chance to practice the skills, and be ready to take them to the floor…however, if they do not feel that the organization (the company, their direct manager, their peers, etc.) are supportive of the implementation of the training, they are less likely to do so.
The model proposed by Grossman and Salas has been specifically narrowed to provide a streamlined approach to targeting the components that have the largest impact on the transfer of training. In evaluation the current training program at the Natural Foods Co-op, the established training design is targeted to provide modeled behavior for the trainees to reference, while boosting application skills through practice sessions. Proposed modifications to the self-rating assessment are directed towards the wording of the survey components, and increasing the frequency of assessments to provide a traceable baseline of self-efficacy, perceived utility, and motivation of the employee in regards to the training construct. Recommendations towards the training design reference including real world components to the training, through the use of error based training methods. Finally, adjustments are recommended towards implementing a feedback cycle, to encourage the transfer of training through input from both manager and peer sources.
## APPENDIX A

### Customer Service Worksheet-Assessment

**Recommended** Self-rating Questionnaire

<table>
<thead>
<tr>
<th>Customer Service Statements</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Part Agree/Part Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I understand how to apply the 3 steps to providing excellent service to customers.</td>
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<tr>
<td>I understand how to apply the 5 steps to handling complaints.</td>
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<tr>
<td>I understand how to apply the 4 steps to excellent internal service.</td>
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<td>I fully support the vision of creating a culture of service that is consistently positive and is a destination that is known for its great customer service.</td>
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<td>I feel my customer service skills will improve as a result of the customer service training I received in NET.</td>
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<td>I feel my customer service skills were already developed before I came to Sacramento Natural foods co-op.</td>
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<td>I would like to receive additional support and training to improve my skills at customer service</td>
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<td>I received training from my department manager with in my first 2 weeks of employment on the importance of customer service.</td>
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<td>My manager provided me with 4 &quot;compliments of Sacramento Natural Foods Co-op&quot; stickers.</td>
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<td>My manager explained how to use the make it right form.</td>
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<td>My manager demonstrates excellent customer service.</td>
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<td>My manager shows support towards excellent customer service.</td>
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<tr>
<td>My manager demonstrates excellent internal customer service.</td>
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<tr>
<td>My manager shows support towards excellent internal customer service.</td>
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<tr>
<td>My manager actively solves problems that stand in the way of providing excellent customer service.</td>
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</tbody>
</table>

Use the space below, or the back, to comment and add anything else that might be useful for feedback on our current customer service environment.

Employee Training Code: _____
Employee Evaluation
Management Feedback

Employee Name: ____________________________

<table>
<thead>
<tr>
<th>Customer Service Statements</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Part Agree Part Disagree</th>
<th>Strongly Disagree</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>The employee follows the 3 steps to providing excellent service to customers.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>The employee follows the 5 steps to handling complaints.</td>
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<tr>
<td>The employee uses the 4 steps to excellent internal service.</td>
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<tr>
<td>The employee supports the vision of creating a culture of service that is consistently positive and is a destination that is known for no bad service.</td>
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<tr>
<td>The employee uses the make it right form correctly and for each applicable situation.</td>
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<tr>
<td>The employee has shown improvement since the last customer service training session.</td>
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</tr>
</tbody>
</table>

Use the space below, or the back, to comment and add anything else that might be useful for feedback.

________________________________________________________________________________________________________________________________________________

Use the space below, or the back, to provide a specific reference for a positive interaction that you have witnessed between the employee and a customer, as well as an interaction that could be improved upon.

________________________________________________________________________________________________________________________________________________

________________________________________________________________________________________________________________________________________________

__________________________________________________________________________________________________________________________________________________________________________________________________________

Date ____________________________  Manager’s Signature ____________________________
APPENDIX C

Employee Evaluation
Peer Feedback

Employee Name: 

<table>
<thead>
<tr>
<th>Customer Service Statements</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Part Agree</th>
<th>Part Disagree</th>
<th>Strongly Disagree</th>
<th>No Opinion</th>
</tr>
</thead>
<tbody>
<tr>
<td>My co-worker follows the 3 steps to providing excellent service to customers.</td>
<td></td>
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<tr>
<td>My co-worker follows the 5 steps to handling complaints.</td>
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<tr>
<td>My co-worker uses the 4 steps to excellent internal service.</td>
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<tr>
<td>My co-worker supports the vision of creating a culture of service that is consistently positive and is a destination that is known for no bad service.</td>
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<tr>
<td>My co-worker uses the make it right form correctly and for each applicable situation.</td>
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<tr>
<td>My co-worker has shown improvement since the last customer service training session.</td>
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</tr>
</tbody>
</table>

Use the space below, or the back, to comment and add anything else that might be useful for feedback. Please remember to be positive and honest in your statements and examples.

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Use the space below, or the back, to provide a specific reference for a positive interaction that you have witnessed between your co-worker and a customer, as well as an interaction that could be improved upon.

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Date

**Evaluator: Please do not include your name in order to ensure anonymity.**
References


