MEASURING THE PERCEIVED TRANSFER OF LEARNING AND TRAINING FOR A CUSTOMER SERVICE TRAINING PROGRAM DELIVERED BY LINE MANAGERS TO CALL CENTER EMPLOYEES IN A FORTUNE 200 FINANCIAL SERVICES COMPANY

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The purpose of this study was to explore what effect manager involvement in the delivery of training has on employee learning (transfer of learning) and on student behavior after training (transfer of training). Study participants were randomly assigned to the experimental and control groups and a customer service training program was delivered with and without manager involvement. Quantitative and qualitative data were collected immediately after training using a retrospective pretest-then/posttest-now instrument developed to measure the participants’ perceived transfer of learning. Quantitative and qualitative data were collected approximately 4 weeks after training also using a retrospective pretest-then/posttest-now instrument developed to measure the participants’ perceived transfer of training. Quality assurance data generated by the organization for the first full month after the training program was completed were collected to measure the actual transfer of training. A 13-item version of the Marlowe-Crowne Social Desirability Scale (MC-C) was included with the perceived transfer of training survey to measure the potential for self-perception bias with the perceived transfer of learning and the perceived transfer of training data. ANOVA results for the perceived transfer of learning and perceived transfer of training data indicated that there were no statistically significant differences between the experimental and control groups. ANOVA results for the actual transfer of training data mirrored the results found
for the perceived transfer of training. The possibility of self-perception bias in using the retrospective pretest-then/posttest-now instruments was recognized as a study concern with MC-C data indicating a much higher level of social desirability with the sample population than with reported non-forensic norms. A slight positive influence on the transfer of learning and on the transfer of training was found when a participant’s direct manager was involved in the delivery of training.
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CHAPTER 1
INTRODUCTION
Significance of the Study

The purpose of this study is to explore what effect manager involvement in the delivery of training has on employee learning (transfer of learning) and on student behavior after training (transfer of training). The problem of training transfer has been documented thoroughly, with estimations that as little as 10% to 15% of what is actually taught in the classroom or spent in training expenditures is reflected in long-term behavioral change on the job (Baldwin & Ford, 1988; Georgenson, 1982; Naquin & Baldwin, 2003).

In addition, studies have shown that only 35% or 40% of trainees will immediately attempt to transfer what they were taught in the classroom to the workplace (Broad & Newstrom, 1992; Huczynski & Lewis, 1980). This is in line with studies that support the conclusion that the transfer of learning and the transfer of training will decline significantly over time without any maintenance of training (Baldwin & Ford, 1988; Broad & Newstrom, 1992; Gers & Bolin, 1999).

According to Broad (2005), "Measures of performance following many training and other interventions have shown very low levels of payoff, only 10 to 30 percent of desired performance levels, according to several experts" (p. 1).

To improve the transfer of training percentages and to improve bottom-line results, many training practitioners and theorists in the last 3 decades have suggested that management be involved in the phases of analysis, design, development, implementation, and evaluation of training programs (Baldwin, Wagner, & Chasteen,
No previous studies have examined the effectiveness of management involvement in the classroom implementation of training programs. It has been assumed that manager involvement in the facilitation of training will yield positive transfer of learning and transfer of training results.

Because no previous research study could be found to support or reject the assumption that manager involvement in the implementation phase of training has a positive influence on the transfer of learning and transfer of training, this study is the first to examine this long-held assumption. Support this assumption would give training professionals a stronger business case to involve managers in the implementation of training. On the other hand, a rejection of this assumption would give training professionals a reason to look at methods outside of manager involvement in training delivery to improve the transfer of learning and the transfer of training in the workplace.

To test the assumption, a study was conducted in which the perceived transfer of learning and the transfer of training were measured between two groups of students, with the treatment variable being the people involved in the delivery of training. For the control group, training professionals facilitated the training. For the experimental group, trainers and managers facilitated the training by working together as a team. The measured difference in the transfer of learning and in the transfer of training results between these two groups rejected the long-held assumption that manager involvement
in the implementation of training yields positive transfer of learning and transfer of training benefits.

As a result, this study provides information to training and business professionals that using managers in the implementation of training initiatives may not necessarily improve desired business outcomes.

Background

It is recognized that the U.S. economy is changing and that organizations are being forced to adapt to meet the challenges of a post-9/11 world. Because of this uncertain economic environment, organizations are under pressure to improve productivity, efficiency, and service quality with reduced budgets and increased cost controls (Colteryahn & Davis, 2004).

Due to these economic pressures, according to Colteryahn and Davis (2004), understanding the business and aligning learning and development strategies to contribute to an organization’s strategy is an absolute necessity for workplace learning and performance professionals. It’s no longer enough to be expert at learning and development theory and implementation. To be effective, training, learning, and other performance interventions need to align with business strategy. Workplace learning and performance professionals need to understand where the business wants to go. By anticipating the impact of organizational strategy on the business and aligning interventions accordingly, practitioners will play a critical role in determining whether an organization is successful in achieving its goals. (p.33)
With an estimated $50 billion directly spent by U.S. companies in 2004 for employee training and development, the need for training professionals to show the value of training is growing (Clark & Kwinn, 2005). The American Society for Training and Development has also recently recognized this trend. It is evident that an increasing number of organizations are expecting training professionals to demonstrate results and show more value from training (Sugrue & Kim, 2004).

With the changing economy, the need to align training to the business becomes more pronounced. Thus, Dana Robinson and Jim Robinson's (1996) performance consulting and Peter Senge’s (1990) learning organization have become increasingly important. These two concepts deal with improving the performance of organizations at the tactical and strategic levels. Both these concepts stress the involvement of management in training.

*Performance Consulting*

The expectation that training activities need to align with business results represents a critical component of performance consulting. Robinson and Robinson (1996) defined performance consulting as “where the purpose and role is to partner with management to identify and achieve performance excellence” (p. x).

Performance consulting, through partnering with management and linking training to business needs, has been receiving greater attention because of business competition in a fast-paced and quickly changing marketplace. Although many organizations have not yet made the link between training and performance, training and management practices appear to be merging (Hall, 2004; Quinn, 2004; Robinson & Robinson, 1998; Sugrue & Kim, 2004; Willmore, 2004).
Sugrue and Kim (2004) noted in the 2004 ASTD State of the Industry report that organizations recognized as BEST award winners by the ASTD include those that are considered industry leaders and are focused on aligning learning with business and employee needs. In addition, a trend identified in the report indicated that “the BEST learning organizations have C-level involvement and support, and systematically involve leaders as role models and teachers” (p. 5).

Thus, as more organizations embrace the concept of linking training to business results through performance consulting, more of them will link management involvement in training to business results. This concept of using leaders as teachers forms a large component of what is needed to create a learning organization (Senge, 1990).

*The Learning Organization: Leaders as Teachers*

The leader-as-teacher concept within a learning organization uses leaders as role models and teachers to foster learning for everyone in the organization (Senge, 1990). It is widely assumed that managers are best suited to implement the learning process within organizations because they are responsible and accountable for the performance and productivity of their employees. In addition to being the best suited to implement training, managers are also assumed to be the best positioned to reinforce positive behavior, provide feedback, and deliver coaching (Gilley, 2000; Gilley & Maycunich, 2000).

Senge (1994) agreed that managers, when compared to training professionals, are better suited to make learning happen:

Training and development professionals are not, as a rule, nearly as knowledgeable about organizational matters as are managers. Consequently,
they often lack the credibility to assist in addressing complex issues that require substantive knowledge. Second, they have no accountability for managing such processes, so they lack the wherewithal to help people actually make needed changes. . . . For these reasons, we have found that the only people who can be truly effective in making learning happen are managers themselves. From local line managers to senior managers, this is not a job that can be delegated. (p. S46)

Although learning organizations are rare because the attitudes and skills needed to make them a reality are rare (Senge, 1994), the practice of using managers as training resources has not been rare. It is this practice of using leaders as teachers that warrants further exploration.

*Managers as Trainers*

The concept of using managers to deliver training has been openly discussed for the last 3 decades. The focus of these discussions, however, revolves around the reasons why managers should be involved in the delivery of training.

Hoffman (1981) listed several reasons why line managers should be involved in the delivery of training:

Getting line managers to serve as instructors aims at the obvious benefit: (a) students get the word from their own boss, increasing the credibility of the message, assuring attendance, and minimizing boss-generated interferences; (b) the manager, having presented the material, is more likely to reinforce it on the job; and (c) the manager, in preparing and presenting the session, will also learn
a lot about the material personally. . . . Thus it’s better for trainees to get the message from their boss, even when he/she is not a smooth instructor. (p. 69)

Grace and Straub (1991) also wrote of the benefits of involving managers in the training of line employees. The benefits they described included an increase in the expertise of the managers and a strengthening of the role-model relationship with their subordinates (p. 51). In addition, the authors noted an example of training delivered by managers that resulted in increased credibility of the training program by other managers and employees (p. 50).

A report by Institute of Management & Administration (IOMA) (2002) outlined seven reasons for the manager-as-trainer business case, including the following: (a) the manager is the person who is most familiar with his/her direct reports; (b) The manager’s focus is, and should always be, on the bottom-line results of the organization; (c) the manager-report relationship is strengthened; (d) money will be saved on formal training and development programs; (e) the annual review/appraisal process is simplified because the manager can track the results of training; (f) the logistics of conducting training is simplified because training is not tied to formal training facilities; and (g) the time required to make the manager-as-trainer program a success is possible because there are successful executives who deliver training (pp. 7, 10).

As stated earlier, there is a lack of research supporting the assumptions made by the three representative articles noted. No research study was found that measures the impact of managers on the transfer of learning or the transfer of training when managers are involved in the delivery of training.
With the trend toward training departments to show the value of training and to increase their partnership with the business, it becomes more important to understand the value of the involvement of managers in the delivery of training. As Sugrue and Kim (2004) noted in the 2004 ASTD State of the Industry report, BEST award-winning organizations are involving managers in the delivery of training, whereas this trend is not as apparent in the non-BEST organizations (p. 16). Although the research conducted in this study fails to support the idea that involving managers in the delivery of training yields statistically significant positive learning and training outcomes, the research does support the notion that there is the potential for positive learning and training outcomes. Additional research could indicate whether manager involvement strengthens the partnership between training departments and the business.

Theoretical Framework

The theoretical framework surrounding this study begins with the fact that managers wield a great deal of influence over their direct subordinates. This is a core principle of management. Hersey, Blanchard, and Johnson (2001) referred to management as “the influencing of people and other scarce resources” to attain business goals (p. 2) and then defined it as “the process of working with and through individuals and groups and other resources (such as equipment, capital, and technology) to accomplish organizational goals” (p. 8).

Clearly, a core component of a manager’s job is to influence people. This interpersonal influence becomes leadership (Hersey et al., 2001; Mintzberg, 1995). Many communication theorists have observed that manager influence in getting employees to accomplish organizational objectives involves the use of social power.
This social power comes from six bases: (a) coercion, (b) reward, (c) legitimacy, (d) expert, (e) reference, and (f) informational (Raven, 1995).

With manager influence on employees clearly documented, it is realistic to assume that managers will wield the same power over employees in the training classroom as they do outside the training classroom. It is also a fair assumption that managers will have greater power over employees than non-managers (e.g., trainers) simply because they have more interpersonal communication with the employee than anyone else in the organization.

Thus, the manager is in the best position to influence the employee in retaining the information taught (learning transfer) and using the knowledge and skills taught (training transfer). Based on this theoretical framework, manager involvement in training programs should improve the effectiveness of training.

There appear to be many benefits to having managers facilitate training programs for their employees. A major benefit of using managers to facilitate training is the positive influence on trainee learning and the encouragement of applying the learning back to the workplace (Weiss, Huczynski, & Lewis, 1980).

In addition, managers who are trainers of the materials gain a higher level of knowledge and expertise in what is taught. This could then give managers more tools to coach, reward, and develop their employees in the workplace setting and become better role models (Grace & Straub, 1991; Honeycutt, Ford, & Tanner, 1994).

Even when changing the corporate culture, leaders must attend the training to ensure that what is taught is transferred throughout the organization (Grace & Straub, 1991; Wells & Schminke, 2001). In their research, Wells and Schminke also asserted
that organizational leaders should participate in ethics training as an essential part of building an effective training program (p. 143).

Manager involvement in training programs is not limited to training line employees. The same benefits accrue to the organization when senior managers deliver training to junior managers (Kanter, 1994; Manicutty, 2005).

The theoretical framework for this study is one which starts with the foundation that managers wield influence over subordinates in the workplace using the six basis of power described previously. In addition, it is this manager power that influences the transfer of learning and the transfer of training with the subordinates before and after training is completed. With this in mind, it is assumed that managers will wield the same power in the classroom during the implementation training program. It is also a given that managers have not been historically involved in the participation or delivery of training programs to their subordinates. Thus, it will be interesting to discover through this study if managers do have the same influence in the transfer of learning and the transfer of training in the classroom as they have out of the classroom.

As a result of the theoretical framework research, which assumes that managers can influence their employees in the classroom through participation in or facilitation of training, two avenues of research were considered. The first avenue was to research the effect of manager participation in training with employees. The second avenue was to research the effect of directly involving managers in the facilitation of the training to employees. Neither of these two avenues of research had been vigorously pursued. In order to give the current study the best chance of measuring impact, the second avenue was pursued. It was assumed that managers who are involved in the delivery of
training would have more influence on the perceived transfer of learning and the transfer of training than those managers who participate in the training.

With this avenue of research decided upon, the study tested how effective it was to have front-line managers involved in the delivery of training to employees compared to those groups of employees with no manager involvement. As noted earlier, this study rejects the assumption that manager involvement has a positive influence on the transfer of learning and the transfer of training. The results of this study provide additional information to help companies decide whether manager involvement in the delivery of training to their teams makes good business sense or whether manager involvement is more critical in pretraining and posttraining situations.

Purpose of the Study

The purpose of this study was to explore what effect manager involvement in the facilitation of training has on the transfer of learning and the transfer of training.

Research Hypotheses

\( H_01: \) There is no statistically significant difference in the perceived transfer of learning (knowledge transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers (e.g., trainers).

\( H_02: \) There is no statistically significant difference in the perceived transfer of training (behavior transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers.
H_03: There is no statistically significant difference in the actual transfer of training (behavior transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers.

Limitations

Restrictions outside the control of the researcher included the following:

1. Because the training was conducted within a call center for a Fortune 200 financial services company, there were several obstacles to scheduling and conducting a training program using managers. The researcher had no control over when to start or complete the training as a result of many business constraints (e.g., call volumes, employee turnover, etc.). There was also the risk that the business would decide the training was not valuable and would cancel the training. This would significantly disrupt the study and would have required the selection of a new training program with which to conduct the research or change the focus to post hoc analysis. In essence, the researcher was at the mercy of the business environment and the organizational leaders in making the decision to proceed with the study.

2. The researcher also had no control over the mix of permanent and temporary employees for the groups included in the study. It was assumed that temporary employees would not have the same level of organizational commitment as those considered to be permanent employees. In addition, the manager would have less influence in coaching, rewarding, and developing these temporary employees because of laws prohibiting co-employment situations. Because the training was required for both temporary and permanent employees, both groups were included in the study.
3. As with most call centers, there is a high attrition rate as a result of employee
turnover and lateral movement to other positions. There was the risk that a significant
portion of those included at the start of the study would be unavailable at the end of the
study.

4. The study was limited to two specific customer-service oriented workgroups
within the call center location selected. The training was deemed necessary for these
two groups only. Thus, it was not possible to increase the number of employees
included in the study.

5. No transfer of learning tool was available to measure the actual knowledge
transfer of the training program. The organizational culture discouraged this practice,
and organizational leaders felt that this measurement was unnecessary for the study.
This limitation, coupled with the short deadline for the training program to begin, as
determined by the business leaders, prevented the development, testing, and
implementation of a formal learning measurement tool.

6. A transfer or training measurement tool was available, known within the
business as a quality assessment (QA) form, but the data gathering process was owned
entirely by the business. The researcher had no control over how the data were
gathered and reported. The risk was that the data gathered by the business to be used
for this study would not be collected and/or reported due to system errors and business
constraints.
Delimitations

Restrictions within the control of the researcher included the following:

1. Although there was no evaluation tool currently in place with the training program to measure the actual transfer of learning, the researcher could overcome this limitation with the development and implementation of a retrospective pretest instrument that measures the perceived transfer of learning. This tool was developed and put into place before the training was delivered.

2. Because the business owned the actual transfer of training measurement tool, the researcher could reduce the risk of not obtaining the desired data by developing and implementing a retrospective pretest instrument that measures the perceived transfer of training. This tool was developed and put into place before the training was delivered.

3. The selection of trainers and managers to deliver the training was also important to control. A manager with poor facilitation skills could unfavorably skew the data results and jeopardize the validity of the study. Managers with good-to-exceptional facilitation skills were selected to match up with trainers of a similar skill level.

4. Random selection of the test and control subjects was also a concern. The researcher obtained the complete list of employees who were assigned to take the training and randomly assigned them to the experimental and control groups. The risk was that after assignment, there would be an unbalanced representation of employees by manager. There was also the risk that employees would have to be moved into the opposite group to accommodate work shifts and schedule concerns from the business. To minimize these risks, the researcher separated the manager teams and randomly
selected employees so that each manager team was equally represented in the experimental and control groups.

Summary

It is expected that the partnership between training and the business will only grow stronger in the near future as economic conditions put pressure on organizations to improve to stay competitive. This means that training professionals will need to focus their efforts on improving business results and organizational leaders will need to ensure that training initiatives deliver value. The idea of using managers as trainers presented by Senge (1990) is one of the endpoints in this strategic alignment between management and training. It remains to be seen whether this endpoint has any real benefit on the outcome of training.

Chapter 1 provided a general overview of the study. The chapter included a discussion of the study’s background, purpose, research hypotheses, significance, limitations, delimitations, and definition of terms. Chapter 2 contains a review of the literature on the transfer of learning, the transfer of training, and the influence of managers on the transfer of learning and transfer of training. Chapter 3 describes the methods and procedures used to collect and analyze the data results. Chapter 4 describes the analysis of the data gathered and presents the data discovered. Chapter 5 includes a summary of the findings, presents conclusions, and makes recommendations for future research.
CHAPTER 2
LITERATURE REVIEW

Overview

Although the terms transfer of learning and transfer of training are often used interchangeably (Fleishman, 1987), which creates confusion (Haskell, 1998), most training professionals are familiar with Kirkpatrick’s (1998) four levels of evaluation (Noe, 1986). The transfer of learning and the transfer of training are used in this context in this study.

Kirkpatrick (1998) defined learning as “the extent to which participants change attitudes, improve knowledge, and/or increase skills as a result of attending the program” (p. 20). Thus, the transfer of learning involves the learner’s acquisition of the attitudes, knowledge, and/or skills taught during the program. The transfer of training was also defined by Kirkpatrick as “the extent to which change in behavior has occurred because the participant attended the training program” (p. 20).

Because the purpose of this study was to explore what effect manager involvement in the delivery of training has on the transfer of learning and the transfer of training, the literature review chapter examines three overall areas: (a) the general research into the transfer of learning, (b) the general research into the transfer of training, and (c) the specific research into the role of manager involvement in the transfer of learning and in the transfer of training.

The scope of the literature review is limited to research into the effect of training and workplace factors on the transfer of learning and the transfer of training. The realm of cognitive psychology, although important to an understanding of how the transfer of
learning and the transfer of training function within the human brain, was omitted from this review. Those persons interested in cognitive psychology can review the works of Cormier and Hagman (1987), Cree and Macaulay (2000), and Haskell (2001) as a good starting point.

Because the transfer of training involves the application of knowledge from training to the workplace, generally it has been accepted that the transfer of learning precedes and enables the transfer of training. Broad and Newstrom (1992) stated that the “transfer of training is impossible to imagine in the absence of effective prior learning. Clearly, one is the prerequisite for the other” (p. 73).

Thus, a change in behavior in the workplace cannot take place if there is not a transfer of learning in the classroom. Many of the models presented in the literature demonstrate this relationship between the transfer of learning, the transfer of training, and actual workplace performance (Baldwin & Ford, 1988; Garavaglia, 1995; Holton & Baldwin, 2003; Huczynski & Lewis, 1980; Kirkpatrick, 1998; Rouiller & Goldstein, 1993).

As a result, the literature review more heavily focuses on the transfer of training than on the transfer of learning. In some cases, the two topics are discussed together, making it difficult to separate the discussion between the transfer of learning and the transfer of training. Clearly these two topics are closely related and cannot be discussed as separate topics in this literature review.

During the review of the existing literature, five major categories impacting the transfer of learning and the transfer of training emerged: (a) the organization, (b) the peers, (c) the individual, (d) the learning experience, and (e) the manager. These categories were chosen for the literature review based upon the organization of the
workplace. Much like a 360-degree feedback system, it is recognized that performance is affected, not only by the individual, but by the people (peers and managers) and systems (organization and training) around them. Thus, these five categories are discussed in this literature review. Because this research focuses on the influence of the manager on the perceived transfer of learning and the transfer of training, the manager category has been placed in the last section of the literature review.

The Organization

A review of the organization’s impact includes the areas of the literature that concern the study of the organization’s culture, structure, reward systems, and executive support that influence the transfer of learning and the transfer of training. Several researchers and authors have discussed the impact of the organization on the transfer of learning and the transfer of training.

Gilley and Maycunich (2000) described the effect of the organization on learning transfer:

Organizations contribute to the lack of learning transfer by establishing policies, procedures, work environments, and managerial practices inappropriate or not conducive to creating a developmental organization. Many organizational leaders believe that employees are easily replaced, hence reinforcing the notion that learning and change wastes time. (p. 238)

Clearly the workplace environment, also known as the transfer climate, plays an important role by either being supportive or unsupportive of the learning and training transfer process (Gilley & Hoekstra, 2003; Haskell, 1998; Huczynski & Lewis, 1980;
The concept of creating an organization that supports the learning and training transfer process follows Senge's (1990) idea of the learning organization. Gilley and Maycunich (2000) discussed the process of how to transition from a traditional to a learning organization:

Business leaders must alter the environment to support and encourage learning, link learning to business operations, communicate the importance of the learning organization, demonstrate their commitment to learning, transform the organizational culture to one of continuous learning and improvement, establish organizationwide strategies for learning, eliminate organizational bureaucracy, encourage employee involvement, and embrace continuous, adaptive, improvement-oriented learning approaches throughout the organization. (p. 15)

Shandler (2000) detailed the implementation of competency-based learning in organizations, identifying seven guidelines to help learning in organizations. These seven guidelines are to (a) align the organizational learning with business and personal success, (b) build learning into all operations and activities, (c) recognize and reward learning, (d) generate many learning opportunities, (e) set aside time for learning as an organization, (f) create physical space and facilities conducive for learning, and (g) maximize learning on the job (pp. 65-67).

Thus, researchers recognize that organizations can create barriers and facilitators to the learning and training transfer process and that those organizations which remove the barriers and create the facilitators are more closely aligned to the
concept of the learning organization (Belling, James, & Ladkin, 2004; Shandler, 2000). In addition, those organizations that become learning organizations create a work environment that facilitates the transfer of learning (Gilley & Hoekstra, 2003; Haskell, 1998; Senge, 1990).

Some studies have provided empirical evidence showing the relationship between the work environment and the transfer of learning and training, including those by Rouiller and Goldstein (1993) and Tracey, Tannenbaum, and Kavanagh (1995).

Rouiller and Goldstein (1993) examined the relationship between the organizational transfer climate and the transfer of training to the workplace. In their study, they followed fast-food manager trainees from their supervisory training back to their workplace and conducted a posttraining survey on supervisory skills and job performance. In addition, before the trainees were assigned to their work location, the authors conducted an organizational transfer climate survey for each work location. The study found that, the more positive the organizational transfer climate, the higher the level of training transfer (pp. 381-388).

To further research the influence of the organization on the transfer of training, Tracey et al. (1995) conducted a study to examine the influence of the organizational climate and culture on posttraining behavior. In this study, they found evidence to support the claim that the transfer of training climate and a continuous-learning culture had a direct effect on the transfer of training (p. 248).

Clearly, the literature and research presented support the claim that the organization plays a significant role in the transfer of learning and the transfer of training.
The Peers

This area of the literature focuses on the impact of the student’s peers on the transfer of learning and the transfer of training. Many researchers and authors have documented and discussed the effect of a student’s peers on the transfer of learning and the transfer of training both in and out of the classroom.

In the classroom, having peers participate in the training program together will improve the learning transfer process (Broad & Newstrom, 1992; Ehrenberg, 1983) and increase the amount of training transfer (Beaudin, 1986; Broad & Newstrom, 1992). Outside the classroom, peer support has been seen as a significant factor in the transfer of training (Belling et al., 2004; Broad & Newstrom, 1992; Cromwell & Kolb, 2004; Facteau, Dobbins, Russell, Ladd, & Kudisch, 1995; Gers & Bolin, 1999; Hawley & Barnard, 2005; Milne, Dudley, Repper, & Milne, 2001; Newstrom, 1986; Tracey et al., 1995). Thus, having or not having peer support in and out of the classroom is seen as a facilitator or barrier to the learning transfer and the training transfer process (Belling et al., 2004; Newstrom, 1986).

Studies conducted on the influence of peers in the transfer of learning and in the transfer of training process have provided mixed results. Some studies have indicated that the influence of peers on the learning and training transfer process is not as great as other factors (Belling et al., 2004; Newstrom, 1986).

Other studies, conversely, have shown that peers exert a great deal of influence on the transfer of learning and on the transfer of training process (Cromwell & Kolb, 2004; Facteau et al., 1995; Hawley & Barnard, 2005; Milne et al., 2001; Tracey et al., 1995).
Cromwell and Kolb (2004) noted that the findings of their study "provide further evidence that support of a trainee’s peers is influential in the transfer process. . . . Trainees who perceived higher levels of peer support indicated they were applying, to a higher extent, the newly learned knowledge and skills" (p. 465). Interestingly, the Hawley and Barnard (2005) study findings supported the claim that peer support, even across geographical distance, can have a positive effect on the transfer of training. Another interesting result came from the Milne et al. (2001) study, which suggested that peers tend to have more influence than managers in the transfer of training.

Although the various studies have shown mixed results concerning the amount of peer influence, all agree that peers influence the transfer of learning in the classroom and the transfer of training to the workplace.

The Individual

This area of the literature review focuses on the impact on the transfer of learning and the transfer of training of an individual’s (a) knowledge, skills, and abilities; (b) personality; (c) attitudes and personal values; and (d) motivation.

Naquin and Baldwin (2003) noted the importance of the individual on the transfer of learning, asserting that “the people who enter organizational learning experiences, and how they enter, are among the most important predictors of transfer outcomes” (p. 81).

Broad and Newstrom (1992) also recognized that the characteristics of the learner play a significant role in the transfer of learning: “Trainers need to recognize that trainees seldom come to them with a clean slate; rather, they are a product of years of
experience and habits. Sometimes these acquired practices interfere with new learning” (p. 88).

Knowledge, Skills, and Abilities

A trainee’s knowledge, skills, and abilities, gained from reading, previous experience, listening, observing, and thinking, are considered as moderate to very important factors in the transfer of learning and the transfer of training process (Baldwin & Ford, 1988; Bates, 2003b; Haskell, 1998). Regardless of the degree of influence, the trainee’s pretraining knowledge, skills, and abilities are seen as an influence in the transfer of learning and the transfer of training process.

Personality

The trainee’s personality also is seen as an important factor in the transfer of learning and the transfer of training process (Baldwin & Ford, 1988; Bates, 2003b). It has also been argued, however, that the trainee’s personality (i.e., ego strength, locus of control, etc.) contributes to the transfer of learning process but has little or no contribution to the transfer of training process (Miles, 1965; Noe, 1986; Noe & Schmitt, 1986).

Attitudes and Personal Values

Studies examining the impact of trainee attitudes and personal values are commonly found in the literature. The results of these studies show that attitudes and personal values play a significant role in the transfer of learning and in the transfer of training (Baldwin & Ford, 1988; Baldwin & Magjuka, 1991; Bates, 2003b; Belling et al., 2004; Broad & Newstrom, 1992; Tannenbaum & Yukl, 1992).
The results of the study by Belling et al. (2004) support the concept that attitude and personal values play a significant role in the transfer of training. It was found that 88% of the survey respondents agreed that seeing the benefits of applying what they have learned facilitates the transfer of learning. In addition, 87% of the respondents agreed that their own determination and the appreciation of their strengths and weaknesses facilitated the transfer of learning. These items were ranked as the highest two facilitators of the training transfer process (p. 244).

Motivation

Of all the factors seen as significant influences on the transfer of learning and the transfer of training process motivation has been the most studied. Researchers consider motivation to be a crucial part of the learning transfer and the training transfer process (Baldwin & Ford, 1988; Baldwin, Magjuka, & Loher, 1991; Bates, 2003b; Broad & Newstrom, 1992; Facteau et al., 1995; Gregoire, Propp, & Poertner, 1998; Tannenbaum & Yukl, 1992).

Gregoire et al. (1998) discussed the importance of motivation on the transfer of learning and the transfer of training process:

Motivation is a critical interactive component affecting attitudes of trainees in all three aspects of the transfer process – pre-training environment, training environment, and post-training environment. If motivation is lost at any level of the training environment, it is unlikely that transfer will occur. (p. 3)

Many studies have shown that an individual’s knowledge, skills, abilities, personality, attitudes, personal values, and motivation all have the potential to significantly affect the transfer of learning and the transfer of training processes.
The Learning Experience

Evidence from the literature review indicates that the learning experience will affect the transfer of learning because that is the time when the learning content and the learner interact formally. In addition, the learning experience can have an influence on the transfer of training because the content of the training typically represents what the organization wants trainees to perform. Thus, this literature review focuses on the influence of training design and the training content on the transfer of learning and the transfer of training.

Training Design

Training design, in essence, describes the principles and methods used by instructional designers to ensure that learners retain the information taught in the classroom and use the learned knowledge and skills in the workplace. By this definition, training design is meant to influence the transfer of learning and the transfer of training (Antonacopoulou, 1999; Baldwin & Ford, 1988; Beaudin, 1986; Ehrenberg, 1983; Gers & Bolin, 1999; Holton, 2003; Newstrom, 1986; Tannenbaum & Yukl, 1992).

It is widely accepted that a training program with a solid grounding in adult learning principles can support the transfer of learning and the transfer of training, whereas a poorly designed training program can have the opposite effect. Holton (2003) identified the importance of training design, writing that training "may be taught with low transfer design so that learners have little chance of turning knowledge into workplace experience" (p. 62).
Training Content

It is also recognized that training content that is not grounded in the realities of the workplace can cancel any effect of having a well-designed training program. Thus, relevant training content plays a critical role in the transfer of learning and the transfer of training (Antonacopoulou, 1999; Baldwin & Ford, 1988; Ehrenberg, 1983; Holton, 2003; Montesino, 2002; Newstrom, 1986).

Although the idea of ensuring that the learning content and the environment are aligned to the realities of the workplace appears to be commonsensical, over the last 4 decades the performance problems of many organizations have been linked to this misalignment (Baldwin & Ford, 1988; Hall, 2004; Mager & Pipe, 1970; Robinson & Robinson, 1996).

Holton (2003) pointed out the importance of having the best possible content in the training program, writing that training “may have little perceived content validity, making it difficult for learners to understand how it relates to their jobs” and reduce the transfer of what is taught back to the workplace (p. 62).

Clearly from the literature review there is agreement that the design and content of the training program are important factors in facilitating the transfer of learning and the transfer of training.

The Manager

This area of the literature review focuses on the influence of the manager on the transfer of learning and the transfer of training. Much of what can be found in the literature concerns the role of the manager on the transfer of learning and the transfer of training before, during, and after the intervention.
The literature reveals that managers exert a great deal of influence on the transfer of learning and the transfer of training process (Bates, 2003a; Brinkerhoff & Montesino, 1995; Cromwell & Kolb, 2004; Facteau et al., 1995; Gilley & Maycuniche, 2000; Gregoire et al., 1998; Noel & Dennehy, 1991; Weiss et al., 1980).

Bates (2003a) summarized the importance of managers in the transfer of learning and the transfer of training process:

Managers and supervisors play a critical role as transfer agents when they use their managerial skills and abilities to support and influence employee learning transfer, help training generate the outcomes for which it was intended, and enhance the return their organization realizes from training investments. (p. 243)

**Pre- and Posttraining Managerial Support**

Many studies in the literature agree with the concept that positive manager support before and after training can have a positive impact on the transfer of learning and the transfer of training (Baldwin & Magjuka, 1991; Brinkerhoff & Montesino, 1995; Facteau et al., 1995; Gregoire et al., 1998; Gumuseli & Ergin, 2002; Hawley & Barnard, 2005; Weiss et al., 1980).

It is important to note that supervisor support is a complex system that can also influence the trainee’s motivation. The trainee could perceive managerial support as authoritarian, and this could actually suppress the transfer of learning and the transfer of training (Baldwin & Magjuka, 1991; Facteau et al., 1995).

Baldwin and Magjuka (1991) explained this effect:

We suspect that, in organizations where the training climate is less favorable, making training mandatory might yield more of the demotivating and
dysfunctional consequences documented in previous research. On the other hand, again consistent with our earlier discussion, making training voluntary may inadvertently convey a signal of relative unimportance to trainees already faced with a myriad of other organizational mandates. (p. 34)

This tends to support the analysis of the results of one the first studies into the effect of pre- and posttraining managerial support on the transfer of learning and the transfer of training. In the study by Weiss et al. (1980), the authors found that “it would appear that among the course members studied, it was the boss's attitude and management style which was the determining factor in training transfer” (p. 19).

One study found that managers exerted no influence on the transfer of learning but did exert influence on the transfer of training (Gumuseli & Ergin, 2002). Although it is only one reference point, it does suggest that posttraining support by the manager can have a greater influence than pretraining support.

**During-Training Managerial Support**

Unlike the literature that focuses on the influence of managers before and after the training program, almost no studies have examined the influence of managers during the training program. Only one study was found that measured the effect of manager involvement in the delivery of training on the perceived transfer of learning and the transfer of training (Ellinger, Watkins, & Bam, 1996).

In their qualitative study, Ellinger et al. (1996) interviewed several managers who had served as instructors and several trainees who had participated in the manager-led training. What was found through the interviews was that “managers who viewed instructing as an integral role reported the strength of their relationships as a factor in
their success. Some trainees suggested that poor relationships negatively impacted the training experience and outcomes” (p. 14-2).

Although only one study was found that supported the concept that managers can have a positive influence on the transfer of learning and the transfer of training by actively participating in the trainee’s learning process, many more authors and researchers support this idea (Broad & Newstrom, 1992; Hoffman, 1981; Lange, 2005; Noel & Dennehy, 1991).

It is important to note the complex relationship dynamics that come into play when a manager assumes the role of a teacher in the classroom. Lange (2005) warned of the possibility of managers taking over the class, which would limit trainee participation or the sharing insights that might contradict the training content. In addition, Hoffman (1981) believed that the trainee’s manager, and not just any manager, wields the greatest influence in the transfer of learning process in the classroom.

Richmond and Roach (1992) noted that the teacher-student relationship is important in the learning process and that “it would certainly behoove teachers to use the positive power and compliance-gaining strategies that most foster student cognitive/affective learning and build positive motivation toward the content matter” (p. 61).

Before, during, and after the training intervention, managers can influence a trainee’s motivation to learn and can support the transfer of skills to the workplace. Thus, according to Richmond and Roach (1992), the same influence can be expected if
the manager is participating in the intervention and/or delivering the content and using positive power and compliance-gaining strategies.

Summary

Chapter 2 has provided a review of the current literature that examines the transfer of learning and the transfer of training. Several studies and articles were found that supported the importance of the organization, the peers, the individual, the learning experience, and the manager on the transfer of learning and the transfer of training.

The review of the literature reveals that the transfer of learning and the transfer of training processes are complex systems influenced by many factors. Much research literature involves factors that influence the transfer process before and after the training event. Few studies have examined the influence of the training event itself, and those that have done so have focused on the design and content of the program. Unfortunately, there is a lack of research into the influence of managers as instructors or participants on the transfer of learning and the transfer of training.

Chapter 3 provides a description of the methods used to collect and analyze the data. Chapter 4 describes the results obtained from the study, and chapter 5 discusses the findings and provides recommendations for future research.
CHAPTER 3
METHODS AND PROCEDURES

Overview

The purpose of this study was to examine the relationship between manager involvement in the delivery of training and the transfer of learning and the transfer of training. This chapter describes how the study was conducted and is divided into the following sections: (a) Population, (b) Sample, (c) Instrumentation, (d) Data Collection Procedures, (e) Data Analysis, and (f) Summary.

Population

The population group for this study included permanent and temporary customer service employees employed by the automobile finance division of a Fortune 200 financial services company. Approximately 2,500 persons were employed by the automobile finance division across three major metropolitan areas at the time of the study: (a) Dallas-Fort Worth, Texas, (b) Tampa, Florida, and (c) Orange County, California. In addition, the entire population group functions in a traditional line supervisor-subordinate organizational structure at the operations level.

Sample

The study sample drew from a convenience group of all permanent and temporary customer service employees employed at the Orange County, California, location. This location was selected because it was a separate company prior to an acquisition by the larger financial services company in 2005. As of January 1, 2006, the newly acquired company was fully integrated into the larger company (e.g., work systems, HR benefits, performance appraisals, etc.). The study sample size was 134
employees in two distinct workgroups, both of which have daily customer-relations interactions. Of the 134 total employees who participated in the study, 60 came from Workgroup A and 74 came from Workgroup B.

A stratified random sampling method was used to ensure that the experimental and control groups were comprised of roughly the same mix of employees between the 2 workgroups and 14 manager teams to be trained. The business needs also dictated that the training sessions were evenly distributed between the two workgroups to minimize disruptions in the work volumes inherent in telephone call and operations centers. Thus, the business needs of the organization drove the need for the use of a stratified random sampling method.

To make the sample a stratified random sample, all of the targeted employees were first grouped by the manager team in which they work. Once the individuals were separated by team, half of the employees within each team were randomly assigned to the experimental and control groups. To ensure randomization, each person was entered as a list into an Excel spreadsheet, and a value of 0 or 1 was assigned to each employee via the random number generator function. The employees with a 0 value were assigned the experimental group, and the employees with a 1 value were assigned to the control group. In some cases, the random number generator function was run several times until half the team was assigned to the experimental group and the other half to the control group. This process was then repeated for each team, which ensured that an even number of employees were initially assigned to the experimental and control groups to meet the stated business requirements.
Subsequently, several last-minute changes to work schedules were made, and some employees had to be moved from the control to the experimental group and vice versa. The splitting of employees between the control and experimental was unknown to the business leaders, and any changes to employee schedules were not meant to influence the experiment’s outcome. After some schedule changes, employee attrition, and lateral movement, the final control group included 71 employees, and the experimental group, 63 employees. The control group consisted of 31 employees from Workgroup A and 40 from Workgroup B. The experimental group consisted of 29 employees from Workgroup A and 34 from Workgroup B.

The control group was comprised of all employees attending training with no manager involvement in delivery. The experimental group was comprised of employees attending training with manager involvement in delivery. A 12-hour training program covering basic customer service skills was delivered to both groups in an identical manner. The core of the training program was off-the-shelf, but was customized to the targeted automobile finance company. The training program was already adopted as the preferred program to train employees on basic customer relations skills and was in use at the Plano, Texas, work location.

An unexpected environmental issue arose when some managers were unable to attend the initial manager training session. This manager training session was designed to ensure that all managers could effectively coach and develop their employees concerning the skills those employees would soon be taught. Because some managers missed this session, they were scheduled to attend and participate with
their employees. These managers attended with the experimental group in order to avoid any contamination with the control group.

The study took place at a location which had no prior experience with the training program, and this strengthened the internal validity of the study, reducing any effects due to experimental treatment diffusion, compensatory rivalry (also known as the John Henry effect), and compensatory equalization of treatment. Also, no resentful demoralization of the control group existed because the experimental and control groups were unaware of the manager delivery treatment variable and identical training content was delivered between the two groups (Gall, Gall, & Borg, 2003).

Instrumentation

Two retrospective pretest-then/posttest-now instruments were developed. The first pretest-then/posttest-now instrument was designed to assess the employee’s perceived transfer of learning and the second to assess the employee’s perceived transfer of training.

The retrospective pretest-then/posttest-now instrument measuring the perceived transfer of learning asked participants what they perceived they had learned from where they were at the start and where they were at the end of the training intervention. Several learning categories were measured with this instrument to assess the various concepts presented during the training program, which gave the instrument a high level of face validity. No other validity or reliability checks were done before implementation of the perceived transfer of learning and the perceived transfer of training instruments.

The retrospective pretest-then/posttest-now instrument measuring the perceived transfer of training asked participants what skills they perceived they had been using
before training compared to the time they were taking the survey after training. The same categories used in the perceived learning transfer instrument were copied over to the perceived training transfer instrument to ensure consistency with the concepts presented during the training program. After data collection, the two instruments were also analyzed for internal consistency to ensure that they were reliable in assessing the content of the training program.

In addition, a behavior-based quality assessment tool was used to validate and support the perceived training transfer results from the retrospective pretest-then/posttest-now instrument. The company used the quality assessment tool to score employees on the service they provide customers; however, it was not used uniformly, and only posttraining quality results could be reliably collected.

To measure the amount of potential bias in a person’s responses toward or away from socially desirable answers, the 13-item short form of the Marlowe-Crowne Social Desirability Scale, known as the MC-C (Reynolds, 1982) was included at the end of the perceived transfer of training pretest-then/posttest-now instrument. As reported by Reynolds, the MC-C demonstrated an acceptable level of reliability ($r = .76$) and strong concurrent validity with the standard version of the Marlowe-Crowne instrument ($r = .93$) which is also shown to be a highly reliable and valid instrument in measuring social desirability self-perceptions (Andrews & Meyer, 2003; Crowne & Marlowe, 1960).

In addition, each perceived transfer of learning and transfer of training question in the two retrospective pretest-then/posttest-now instruments included a space for respondents to explain why they perceived a difference in the pretraining and posttraining responses provided. The purpose of this was to have additional data to
explain the potential presence or lack of any self-perception bias found through the MC-C findings.

Due to business constraints, a posttest and pretest knowledge transfer instrument was not produced to assess the validity of the retrospective pretest-then/posttest-now instrument to assess the perceived knowledge transfer. The business leaders within the automobile finance division of the company placed no value on a pretest/posttest instrument to measure the transfer of learning and wanted no additional class time to be used to conduct this measurement. In addition, previous courses in the customer service training program used in this study included no actual knowledge transfer measurement.

Data Collection Procedures

Data were collected using two methods: online and paper-based. The online method utilized an internet-based Web site that could deliver and track the survey responses. At the time of the study, the automobile finance company used this Web site to create and conduct posttraining surveys and maintained a subscription to the service. To distribute the retrospective pretest-then/posttest-now instruments, an e-mail hyperlink would automatically direct the survey takers to the first page of the survey.

The paper-based method was identical to the online version of the survey and was copied verbatim into a Microsoft Word document. The survey respondents could complete the survey by printing out the Word document and returning it to the researcher via company interoffice mail.

In accordance with IRB standards and practices, both versions informed the participants that the instrument was for research and that they could choose not to take
the assessment. As an incentive to boost the survey return rate, each person who completed a survey was entered in a drawing to win a $50 gift card. One winner was drawn at random from two lists. The first list contained those completing the perceived knowledge transfer and the perceived training transfer surveys at that time. The second list contained those completing the second survey. Both the online and paper-based versions of the retrospective pretest-then/posttest-now instruments contained a section for participants to enter their name and contact information to facilitate both gift card drawings.

For measuring the perceived transfer of learning, the paper-based retrospective pretest-then/posttest-now instrument was administered immediately at the conclusion of the training program. This allowed for an immediate completion and return of the survey. Those who did not fill out the survey at the conclusion of training in the classroom had the option to complete the paper-based survey at their desk.

The online version retrospective pretest-then/posttest-now instrument to measure the perceived transfer of learning followed via e-mail the same day to all the participants. This ensured that everyone had the opportunity to complete the survey using their preferred method.

For measuring the perceived transfer of training, a retrospective pretest-then/posttest-now instrument was administered approximately 4 weeks after the conclusion of the training program. Four weeks was chosen as the checkpoint because that is the generally accepted time in the training industry in which behaviors taught in the classroom will either be used or abandoned. An e-mail with the hyperlink to the online survey and containing the paper-based survey attachment was sent to all
employees who attended the training approximately 4 weeks previously. All who received the e-mail had the option to either take the survey online or to print and return the paper-based survey via interoffice mail.

At this 4-week checkpoint, employees were asked to gauge their perceived use of the skills taught in training from where they were at the start of training and where they were at the time the instrument was completed. Several behavior categories were also included with this instrument to assess the use of the various concepts presented during the training program.

As noted earlier, a 13-item MC-C instrument was added to the end of the perceived transfer of training retrospective pretest-then/posttest-now instrument. These social desirability data were collected along with the perceived training transfer data.

In addition to the perceived transfer of training measurement, many employees in the study were measured using a quality assessment tool used to measure the desired customer service behaviors. No consent was needed for this assessment because the organization used it to measure performance, and the data gathered were available to all managers. As noted previously, pretraining quality score data for the month before the training could not be collected because the business delayed in making this tool available to the new work location. As a result, only a posttraining quality score for the first full month after training could be collected to measure the difference between the control and experimental groups.

Because the internal quality assessment tool measured employees on the same categories taught in the training program, the internal quality assessment had good face
validity in measuring whether employees were demonstrating the desired behaviors taught in training.

The process for obtaining scores for the quality assessment tool included the following: (a) A behind-the-scenes software program recorded customer phone calls for all employees at times scheduled by the quality department; (b) the employee’s manager logged into the software system and reviewed the employee’s audio/video-recorded call; (c) the manager assigned a quality rating score for the call on several factors using the software; and (d) the manager submitted the form, which was later compiled by the performance management department. The data from the quality assessment instrument were collected directly by the researcher from the organization’s performance measurement intranet Web site.

Since monetary rewards and incentives are derived from these quality scores, managers are frequently calibrated to ensure that their rating assignments are fair and consistent among all manager teams. In these calibration sessions, managers listen to previously recorded calls and assign their ratings. The assigned ratings are then discussed openly and a consensus reached on how to score the call. These sessions are led by the quality department and are held generally once per month to ensure that managers stay calibrated on how to score their employee’s calls. The scoring method used to determine the QA score is derived from the number of observed customer service behaviors divided by the customer service behaviors that apply during that specific call. The QA score is then converted into a percentage score with a range of 0% to 100%.
The quality scoring process is a standard process within the company, and no additional communication to the managers was necessary to obtain the results. To ensure minimal manager bias, the managers were not informed that the researcher was using this internal quality measure to assess the transfer-of-training effectiveness of the customer service training program delivered to their employees.

The quality assessment data were added to the study to provide another data point in which to validate the results of the retrospective pretest-then/posttest-now instrument and were recommended when using a retrospective pretest (Nimon & Allen, 2006).

Data Analysis

The three hypotheses of this study, as discussed in chapter 1, are the focus of the data analysis in chapter 4:

\[ H_01: \text{There is no statistically significant difference in the perceived transfer of learning (knowledge transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers (e.g., trainers).} \]

\[ H_02: \text{There is no statistically significant difference in the perceived transfer of training (behavior transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers.} \]
H03: There is no statistically significant difference in the actual transfer of training (behavior transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers.

The data analysis of H01 included the retrospective pretest-then/posttest-now data for the perceived transfer of learning which was collected immediately after training was conducted. The data analysis of H02 included the retrospective pretest-then/posttest-now data for the perceived transfer of training which was collected approximately 4 weeks after training was completed. The data analysis of H03 included the internal quality score data to validate H02 and support the retrospective pretest-then/posttest-now data for the perceived transfer of training.

The retrospective pretest-then/posttest-now, the MC-C, and quality score data were entered into the Statistical Package for the Social Sciences™ (SPSS) software (SPSS Inc., Chicago, IL, www.spss.com). A reliability check of the perceived transfer of learning and transfer of training pretest-then/posttest-now instruments was run using SPSS. A split-plot ANOVA was run in SPSS to measure the statistical significance for H01 and H02 for the retrospective pretest-then/posttest-now data. A one-way ANOVA, also using SPSS, was run to measure the statistical significance for H03 to compare the quality scores provided by the business and to validate the analysis of H02.

To measure the effect of any self-perception bias, the MC-C results were compared to the nonforensic instrument norms provided by Andrews and Meyer (2003)
using the descriptive statistics calculated via SPSS. These data were gathered with the retrospective pretest-then/posttest-now data for the perceived transfer of training.

As a final check to explain the potential presence or lack of self-perception bias, the qualitative data provided by the survey respondents to describe why they felt there was a difference between the pretraining and posttraining transfer of learning and the transfer of training were also analyzed for major themes and trends.

Summary

The results of the data analysis shed some light on the assumptions made about manager involvement during training and its impact on the transfer of learning and the transfer of training. What makes this study important in the field of training and development is that no other study has attempted to isolate the variable of having a manager deliver training in the classroom and measuring the effect of this on the perceived transfer of learning and the perceived transfer of training. As noted in chapter 1, the increasing focus on the alignment between training and the business and the pressure for companies to become learning organizations will only increase the presence of managers in the classroom. At this time, a study in the effect of manager delivery of training on the transfer of learning and the transfer of training becomes important. Chapters 4 and 5 report these findings and conclusions.
CHAPTER 4
RESULTS AND DISCUSSION

Overview

The purpose of this study was to explore what effect manager involvement in the facilitation of training has on the transfer of learning and the transfer of training. To do this, the study created an experimental and control group and delivered training to the group participants with the treatment variable being whether or not a manager was involved in the facilitation of training. Chapter 4 presents the data collected and the findings derived from the analysis in the following sections: (a) Demographics, (b) Reliability, (c) ANOVA Assumptions, (d) Validity, (e) Self-Perception Bias, (f) Hypotheses Analyses, and (g) Summary. Unless otherwise noted, Statistical Package for the Social Sciences™ (SPSS) version 14.0 (SPSS Inc., Chicago, IL, www.spss.com) is the statistical software package used.

Demographics

As discussed in chapter 3, the study utilized a convenience sample of all permanent and temporary customer service employees employed at the Orange County, California, call center location. To divide the sample into the experimental and control groups, a stratified random sampling method was implemented. A sample of 134 employees was obtained for the start of the study. After working with business constraints, 71 employees were assigned to the control group and 63 employees to the experimental group.

Two months later, at the end of the study, the control and experimental groups had decreased in size to 57 and 54, respectively. This negative 17.2% total mortality
rate of the sample population was caused by employee attrition (voluntary and involuntary), lateral movement to other workgroups, and/or promotions to new positions. Employee attrition was the largest contributor to this study’s overall mortality rate.

Table 1 provides a breakdown of the starting and ending participation and mortality rates for the control and experimental groups in this study.

Table 1

*Study Population and Mortality Rates of Control and Experimental Groups*

<table>
<thead>
<tr>
<th>Category</th>
<th>Control Wkgp A</th>
<th>Control Wkgp B</th>
<th>Control Total</th>
<th>Experimental Wkgp A</th>
<th>Experimental Wkgp B</th>
<th>Experimental Total</th>
<th>Study totals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start of training n</td>
<td>31</td>
<td>40</td>
<td>71</td>
<td>29</td>
<td>34</td>
<td>63</td>
<td>134</td>
</tr>
<tr>
<td>End of training n</td>
<td>18</td>
<td>39</td>
<td>57</td>
<td>23</td>
<td>31</td>
<td>54</td>
<td>111</td>
</tr>
<tr>
<td>Mortality rate</td>
<td>-41.9%</td>
<td>-2.5%</td>
<td>-19.7%</td>
<td>-20.7</td>
<td>-8.8%</td>
<td>-14.3%</td>
<td>-17.2%</td>
</tr>
</tbody>
</table>

*Note.* Mortality rate = (End of training n / Start of training n) – 1.0.

An analysis of the higher mortality rate for Workgroup A finds that a larger percentage of temporary employees (contract employees) are represented by this workgroup when compared to Workgroup B. It is widely known in the call center industry that temporary employees have a higher involuntary attrition rate when compared to full-time employees. Thus, these finding are not considered unusual.

The perceived transfer of learning survey was conducted immediately at the end of training. The participants were given the option of completing and returning a paper-based or online survey. A total of 78 perceived transfer of learning surveys were returned, with 43 being submitted online and 35 returned manually or via interoffice
mail. This gives the first survey a return rate of 58.2%, which was considered acceptable at that time.

Of the 78 perceived transfer of learning surveys received, however, a total of 58 had complete data and were usable. Of the 20 that were unusable, 17 were submitted online and 3 were submitted on paper. This higher percentage of incomplete online surveys is attributed to participants opening the survey, seeing the length, choosing not to fill it out, and then pressing the submit button. With a paper-based survey, participants who did not want to complete the survey had only to throw it away. The higher return rate with paper surveys was also boosted by the handing out of the surveys immediately after training and asking the participants to complete it before leaving the classroom. This assured that many surveys were returned quickly. As a result, the return rate of usable perceived transfer of learning surveys was 43.3%.

The perceived transfer of training survey was conducted approximately 4 weeks after training was completed. As with the perceived transfer of learning survey, participants were given the option of completing an online or paper-based survey. A total of 60 perceived transfer of training surveys were returned, with 59 submitted online and only 1 submitted manually through interoffice mail. This gave the second survey an initial return rate of 54.1% using the surviving sample population, which was also considered acceptable at that time.

Of the 60 perceived transfer of training surveys received, however, only 32 were usable. All 28 unusable surveys were submitted online, with most containing empty data. A few other surveys with incomplete data were also thrown out from the study. As a result, the return rate of usable perceived transfer of training surveys from the
surviving population was 28.8%, which is far below researcher expectations. This higher rate of incomplete surveys may also be attributed to the nature and length of the survey. An additional measure (the MC-C) was added to the second survey, which increased the length. This additional length is considered a factor in the higher number of incomplete surveys submitted.

Although some of the perceived transfer of training surveys were incomplete and unusable, 4 surveys did have usable MC-C data. A total of 36 perceived transfer of training surveys included usable MC-C data. This provided the MC-C a return rate of 32.4% with the surviving population.

The final data obtained were the actual QA scores generated by the business. These scores were collected to validate the perceived transfer of training data obtained through the surveys. Unfortunately, only the QA scores from Workgroup A could be used in the study. The managers from Workgroup B had not been fully trained in the use of the QA scoring methods and had not been calibrated at the time the QA scores were collected for the study. As a result, a total of 154 posttraining QA scores from only Workgroup A were collected by the business in the 1st full month after the completion of the training program. Of these 154 scores reported, 53 came from the No Manager control group, 78 from the Any Manager experimental group, and 23 from the My Manager experimental group. Some individuals had as few as 1 QA score because only 1 call was scored and others had as many as 6 calls scored. The average person had between 2 and 3 calls given a QA score. It is also important to note that the QA scores of only individuals who were still working in Workgroup A were recorded. Several of the original Workgroup A study participants has either left the organization
through voluntary and involuntary attrition or moved to other areas of the business as a result of lateral transfer or promotions.

Reliability

The reliability of the retrospective pretest-then/posttest-now instruments was an initial concern of the study. Although the instruments had face validity because the 15 questions derived directly from the training content sections, there was researcher concern that the instruments would have little internal consistency.

The raw data from the perceived transfer of learning and the perceived transfer of training surveys were entered and run in SPSS using the reliability analysis function. For the internal consistency check for the perceived transfer of learning and the perceived transfer of training surveys, all groups were first combined and then separated by treatment group to ensure that internal consistency for all groups was consistent.

The perceived transfer of learning survey displayed a high level of internal consistency with both the pretraining and posttraining survey results. The perceived transfer of learning survey was shown to have a pretraining Chronbach’s $\alpha$ of .943 and posttraining Chronbach’s $\alpha$ of .962. The Chronbach’s $\alpha$ for the perceived transfer of learning survey ranged between .939 and .970 among the 3 treatment groups. Table 2 provides the results of this analysis.

The internal consistency results for the perceived transfer of training were similar to the results found with the perceived transfer of learning. Chronbach’s $\alpha$ for the perceived transfer of training survey ranged between .929 and .983 among the 3 treatment groups. Table 3 provides the results of this analysis.
Table 2

*Internal Consistency Results for Perceived Transfer of Learning Survey*

<table>
<thead>
<tr>
<th>Treatment group</th>
<th>Cases</th>
<th>α</th>
</tr>
</thead>
<tbody>
<tr>
<td>All (Pretraining)</td>
<td>56*</td>
<td>.943</td>
</tr>
<tr>
<td>All (Posttraining)</td>
<td>56*</td>
<td>.962</td>
</tr>
<tr>
<td>No Manager</td>
<td>23</td>
<td>.970</td>
</tr>
<tr>
<td>Any Manager</td>
<td>18*</td>
<td>.965</td>
</tr>
<tr>
<td>My Manager</td>
<td>15*</td>
<td>.939</td>
</tr>
</tbody>
</table>

*Note.* Two cases total were excluded for missing data during the reliability check in SPSS (1 case apiece excluded from the Any Manager and My Manager groups).

Table 3

*Internal Consistency Results for Perceived Transfer of Training Survey*

<table>
<thead>
<tr>
<th>Treatment group</th>
<th>Cases</th>
<th>α</th>
</tr>
</thead>
<tbody>
<tr>
<td>All (Pretraining)</td>
<td>32</td>
<td>.955</td>
</tr>
<tr>
<td>All (Posttraining)</td>
<td>32</td>
<td>.968</td>
</tr>
<tr>
<td>No Manager</td>
<td>14</td>
<td>.983</td>
</tr>
<tr>
<td>Any Manager</td>
<td>11</td>
<td>.929</td>
</tr>
<tr>
<td>My Manager</td>
<td>7</td>
<td>.952</td>
</tr>
</tbody>
</table>

As shown in Table 3, the internal consistency measures of the perceived transfer of training survey were also strong when reviewing all treatment groups combined or
with each treatment group analyzed separately. For research purposes, having a reliability of .80 or higher is considered sufficiently reliable (Gall et al., 2003).

ANOVA Assumptions

Before comparing the means using an ANOVA split-plot design, three assumptions are checked: (a) homogeneity of variance, (b) normality (c) and independence of observations (Maxwell & Delaney, 2004).

Homogeneity of Variance Assumption

The homogeneity of variance assumption was run in SPSS for both the perceived transfer of learning and the perceived transfer of training with Box’s M test of quality of covariance matrices and Levine’s test of homogeneity of variances.

The perceived transfer of learning survey yielded a Box’s M test of 3.606, an $F$ of .569, and a significance ($p$) of .756. The perceived transfer of training survey yielded a Box’s M test of 14.842, an $F$ of 2.194, and a $p$ of .041.

For the perceived transfer of learning, Box’s M test was not significant, which indicates the data were consistent with the hypothesis of homogeneity of covariance matrices using the repeated measures variables of time (pre- and post-scores) across the treatment subgroups. For the perceived transfer of training, Box’s M test was significant, indicating that the variance-covariance matrices were not equal across the between-subject factor subgroup populations (multivariate homogeneity). Thus, the chance of a Type I error was affected across the treatment subgroups, and the significance results derived in the split-plot ANOVA were suspect for the perceived transfer of learning data.
The results of the Levine’s test of homogeneity show that the homogeneity of variance assumption was maintained for the transfer of learning survey and the transfer of training survey data. Thus, the pretest and posttest dependent variables were assumed to have equal error variances across the subgroups (univariate homogeneity). These Levine’s test results are shown in Table 4.

Table 4

Levine’s Test of Equality of Error Variances for the Perceived Transfer of Learning and Perceived Transfer of Training Surveys

<table>
<thead>
<tr>
<th>Survey data</th>
<th>Time</th>
<th>F</th>
<th>p</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transfer of Learning</td>
<td>Pre</td>
<td>.236</td>
<td>.791</td>
</tr>
<tr>
<td>Transfer of Learning</td>
<td>Post</td>
<td>1.620</td>
<td>.207</td>
</tr>
<tr>
<td>Transfer of Training</td>
<td>Pre</td>
<td>.842</td>
<td>.441</td>
</tr>
<tr>
<td>Transfer of Training</td>
<td>Post</td>
<td>2.239</td>
<td>.125</td>
</tr>
</tbody>
</table>

Normality Assumption

The normality of data is another assumption that must be considered before conducting an ANOVA. A normal distribution has a skewness and kurtosis value of 0. As shown in Table 5, the descriptive pretraining and posttraining data for the perceived transfer of learning and the perceived transfer of learning showed that the data do not precisely fit into a normal distribution.
The pretraining data for the perceived transfer of learning survey appeared to be the least normal, with a kurtosis value of 3.115. The other survey results came much closer to normality and are not a concern. Despite the pretraining data for the perceived transfer of learning survey being the least normal, Maxwell and Delaney (2004) stated that the “ANOVA is generally robust to violations of the normality assumption, in that even when data are nonnormal, the actual Type I error rate is usually close to the nominal (i.e., desired) value” (p. 112).

**Independence of Observations Assumption**

The final ANOVA assumption is the independence of observations. This assumption was met with the design of the study. All participants were randomly assigned to the control and experimental groups at the start of the study. In addition, it is also important to note that the sphericity assumption was not tested for this study because the within-subject factor (time) had only two levels (pre and post).

With all the assumptions checked, the Box’s M test of homogeneity of covariance matrices failed to support the assumption of homogeneity for the perceived transfer of training data. The failure of the Box’s M test, however, is not overly concerning due to
the strength of the repeated measures ANOVA used. With this in mind, the split-plot ANOVA summary table for the perceived transfer of training data was calculated through SPSS with the caveat that the Type I error rate was deviating from the .05 level of significance, which also affects the Type II error rate (Maxwell & Delaney, 2004). The split-plot ANOVA summary table for the perceived transfer of learning data derived from SPSS does not have the same Type I error concern. The pairwise comparisons for the perceived transfer of learning and the perceived transfer of training data were run in SPSS with no constraints to Type I error because the Levine’s Test indicated that the homogeneity of variances between the subgroups is assumed.

Validity

Another important concern that arose before the study was conducted was whether the customer service training program used would actually improve learning and change behavior. If the customer service training program did not contain solid content and concepts, the difference between the perceived pretraining and posttraining scores would not be statically significant. In other words, a poor training program with little useful content would undermine the validity of the entire study.

To generate a pretraining and posttraining perceived transfer of learning and transfer of training scores, the 15-item Likert questions were converted to numerical values with 1 (poor) and 5 (excellent). To obtain an overall score for each pretest and posttest survey, the average of all 15 items was computed.

The split-plot ANOVA for the perceived transfer of learning and the perceived transfer of training results were computed in SPSS. Tables 6 and 7 display the ANOVA summary table results.
Table 6

ANOVA Summary Table for Split-Plot Analysis of Knowledge Data

<table>
<thead>
<tr>
<th>Source</th>
<th>SS</th>
<th>df</th>
<th>MS</th>
<th>F</th>
<th>p</th>
<th>( \hat{\omega}^2 )</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>2.945</td>
<td>2</td>
<td>1.472</td>
<td>2.253</td>
<td>.115</td>
<td>.041</td>
</tr>
<tr>
<td>S/A</td>
<td>35.937</td>
<td>55</td>
<td>.653</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>36.890</td>
<td>1</td>
<td>36.890</td>
<td>99.896</td>
<td>&lt;.001*</td>
<td>.389</td>
</tr>
<tr>
<td>A x B</td>
<td>.908</td>
<td>2</td>
<td>.454</td>
<td>1.229</td>
<td>.300</td>
<td>.003</td>
</tr>
<tr>
<td>B x S/A</td>
<td>20.311</td>
<td>55</td>
<td>.369</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note. \( p < .05 \). A=Treatment, B=Time, and S/A = Error.

Table 7

ANOVA Summary Table for Split-Plot Analysis of Skill Data

<table>
<thead>
<tr>
<th>Source</th>
<th>SS</th>
<th>df</th>
<th>MS</th>
<th>F</th>
<th>p</th>
<th>( \hat{\omega}^2 )</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>.612</td>
<td>2</td>
<td>.306</td>
<td>.301</td>
<td>.917</td>
<td>.000</td>
</tr>
<tr>
<td>S/A</td>
<td>8.230</td>
<td>29</td>
<td>.284</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>10.088</td>
<td>1</td>
<td>10.088</td>
<td>57.935</td>
<td>&lt;.001*</td>
<td>.419</td>
</tr>
<tr>
<td>A x B</td>
<td>.051</td>
<td>2</td>
<td>.026</td>
<td>.148</td>
<td>.863</td>
<td>.000</td>
</tr>
<tr>
<td>B x S/A</td>
<td>5.050</td>
<td>29</td>
<td>.174</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note. \( p < .05 \).

For determining effect size (\( \hat{\omega}^2 \)) in Tables 6 and 7, the following omega squared formulas were used from Maxwell and Delaney (2004) (p. 598):

\[
\hat{\omega}_A^2 = \frac{SS_A - (a-1)MS_{S/A}}{SS_A + SS_{S/A} + MS_{S/A}} \tag{1}
\]

\[
\hat{\omega}_B^2 = \frac{(b-1)(MS_B - MS_{BxS/A})}{SS_B + SS_{BxS/A} + SS_{S/A} + MS_{S/A}} \tag{2}
\]

\[
\hat{\omega}_{AB}^2 = \frac{(a-1)(b-1)(MS_B - MS_{BxS/A})}{SS_{AB} + SS_{BxS/A} + SS_{S/A} + MS_{S/A}} \tag{3}
\]
The results of the ANOVA analysis indicate that the gain score comparison for the perceived transfer of learning data, shown by the interaction effect, was not statistically significant ($p = .300$). The gain score comparison for the perceived transfer of training data was also not statistically significant ($p = .863$). In addition, large associations were found between the dependent variable (Score) and the B main effect (Time) for both the perceived transfer of learning ($\hat{\omega}^2 = .389$) and the perceived transfer of training ($\hat{\omega}^2 = .419$). No significant association was found for the A main effect (Treatment) and the interaction effect (AxB). Only a statistically significant difference is found for the B main effect (Time) for both the perceived transfer of learning ($p < .001$) and for the perceived transfer of training ($p < .001$).

Figures 1 and 2 also graphically display in the change in the pretraining and posttraining scores for the perceived transfer of learning and the perceived transfer of training for each treatment group.
Figure 1. Pretraining and posttraining perceived transfer of learning score means by treatment group.
Figure 2. Pretraining and posttraining perceived transfer of training score means by treatment group.

To further analyze the effect of time in the data, the pairwise comparisons were reviewed from the SPSS output. This analysis showed a statistical significance between the perceived transfer of learning and the perceived transfer of training retrospective pretest-then/posttest-now scores for each individual treatment group. This information is shown in Table 8.
Table 8

Pairwise Comparisons for Pretraining vs. Posttraining Significance for Perceived Transfer of Learning and Perceived Transfer of Training Surveys

<table>
<thead>
<tr>
<th>Survey</th>
<th>Treatment</th>
<th>n</th>
<th>Pre M</th>
<th>Post M</th>
<th>M Diff.</th>
<th>p</th>
<th>d</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trans. of Learning</td>
<td>No Mgr.</td>
<td>23</td>
<td>2.530</td>
<td>3.883</td>
<td>1.353</td>
<td>&lt;.001*</td>
<td>1.785</td>
</tr>
<tr>
<td>Trans. of Learning</td>
<td>Any Mgr.</td>
<td>19</td>
<td>3.029</td>
<td>3.966</td>
<td>.937</td>
<td>&lt;.001*</td>
<td>1.396</td>
</tr>
<tr>
<td>Trans. of Learning</td>
<td>My Mgr.</td>
<td>16</td>
<td>2.999</td>
<td>4.129</td>
<td>1.130</td>
<td>&lt;.001*</td>
<td>1.638</td>
</tr>
<tr>
<td>Trans. of Training</td>
<td>No Mgr.</td>
<td>14</td>
<td>2.852</td>
<td>3.619</td>
<td>.767</td>
<td>&lt;.001*</td>
<td>1.300</td>
</tr>
<tr>
<td>Trans. of Training</td>
<td>Any Mgr.</td>
<td>11</td>
<td>2.860</td>
<td>3.660</td>
<td>.800</td>
<td>&lt;.001*</td>
<td>1.541</td>
</tr>
<tr>
<td>Trans. of Training</td>
<td>My Mgr.</td>
<td>7</td>
<td>3.123</td>
<td>4.037</td>
<td>.914</td>
<td>&lt;.001*</td>
<td>1.282</td>
</tr>
</tbody>
</table>

Note. p < .05.

The validity of the training program was supported by the pairwise comparison results, as shown in Table 8. The difference between what the participants perceived as their pretraining knowledge and perceived posttraining knowledge was statistically significantly different. In addition, the difference between what the participants perceived as their pretraining skill level and perceived posttraining skill level was also statistically significantly different. From a participant's perspective, the idea that the training program taught useful knowledge and skills was supported by these results.

Self-Perception Bias

In an effort to identify the potential for self-perception bias in the self-reported data provided by the study participants, the short form of the Marlowe-Crowne Social Desirability Scale was completed with the perceived transfer of training survey. The nonforensic norms of the MC-C, as reported by Andrews and Meyer (2003), were selected as the comparison data. The results of the MC-C conducted with the study...
participants were statistically significantly different from the nonforensic norms using a 95% confidence interval. The comparisons are shown in Table 9.

Table 9

Descriptives and Confidence Intervals for the MC-C Forensic Norms and Research

<table>
<thead>
<tr>
<th>Study</th>
<th>Participant groups</th>
<th>n</th>
<th>M</th>
<th>SD</th>
<th>SEM</th>
<th>CI&lt;sub&gt;95%&lt;/sub&gt;</th>
<th>d*</th>
</tr>
</thead>
</table>


The study results of the MC-C when compared to the nonforensic norms reported by Andrews and Meyer (2003) indicate that the study participants display a much higher level of social desirability which could potentially lead to self-perception bias.

To further see whether the difference between the pretraining and posttraining survey responses was driven by a desire by the participants to appear favorably with the trainers and researchers, a review of the qualitative feedback questions was conducted. The open-ended questions asked the participants to explain the difference in the before-and-after responses for each of the 15 knowledge and skill questions presented. Although many participants recorded no reasons for the difference in pretraining and posttraining responses, those who did respond indicated overwhelmingly that they had learned new knowledge and skills that enabled them to perform better in their work roles.

Responses such as “The session helped me to better define my customer conditions” and “The class taught me new concepts and techniques that I now apply to
customer contact” explain the difference in pretraining and posttraining changes. These specific examples reflect the theme provided by many other participants.

It is unclear whether the results of the MC-C from the study group should reflect the nonforensic norms reported by Andrews and Meyer (2003). No additional research was found that looked specifically at customer service representatives. The nonforensic norm data were derived from college students and military trainees (p. 489). No data were found to support a claim that customer service representatives display a high amount of social desirability when compared to the general population. Because of the large difference in the confidence intervals found between the participants and the nonforensic norms, this is clearly an area for further research. Given the statistical difference in MC-C results, there is the possibility of self-perception bias affecting the perceived transfer of learning and the perceived transfer of training survey results.

To assess whether any self-perception bias influenced the 3 treatment groups equally, a univariate ANOVA was run with the MC-C data that was tied to a given treatment group. Because 4 out of the 36 useable MC-C surveys could not be tied to a treatment group, they were excluded from the data run in SPSS. The Levine’s test of equality of error variances indicated that the homogeneity of variances assumption was met ($F = 2.129, p = .137$).

The results of the univariate ANOVA shown in Table 10 indicate that there were no statistically significant differences between the 3 treatment groups. This indicates that the effect of any self-perception bias does not affect the results across treatment groups because any self-perception bias would affect each group equally. Any self-perception bias, however, does negatively influence the validity of the training program.
For determining effect size ($\hat{\omega}^2$) in Table 10, the following omega squared formula was used from Maxwell and Delaney (2004) (p. 105):

$$
\hat{\omega}^2 = \frac{SS_B - (a - 1)MS_W}{SS_{Total} + MS_W}
$$

Table 10

**Univariate ANOVA Summary Table for MC-C Scores**

<table>
<thead>
<tr>
<th>Source</th>
<th>SS</th>
<th>df</th>
<th>MS</th>
<th>F</th>
<th>p</th>
<th>$\hat{\omega}^2$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Between groups</td>
<td>5.095</td>
<td>2</td>
<td>2.548</td>
<td>.478</td>
<td>.625</td>
<td>.000</td>
</tr>
<tr>
<td>Error</td>
<td>154.623</td>
<td>29</td>
<td>5.332</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>3105.000</td>
<td>32</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note. Number of useable MC-C cases = 32.

From the results provided in Tables 9 and 10, the potential for social desirability bias in the perceived transfer of learning and the perceived transfer of training data must be considered given the results provided in MC-C data.

**Hypotheses Analyses**

*Hypothesis 1*

$H_01$: There is no statistically significant difference in the perceived transfer of learning (knowledge transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers (e.g., trainers).

As noted in Table 6, the interaction effect of treatment and time was not statistically significant ($p = .300$). An additional analysis of the pairwise comparisons between the pretraining and posttraining scores indicate that the posttraining means
between the treatments were not statistically different. There was a difference in the pretraining means for the treatments. These results are shown in Table 11.

Table 11

*Pairwise Pretraining and Posttraining Comparisons Between Treatment Groups for the Perceived Transfer of Learning Survey Results*

<table>
<thead>
<tr>
<th>Time</th>
<th>Treatment&lt;sub&gt;1&lt;/sub&gt;</th>
<th>M&lt;sub&gt;1&lt;/sub&gt;</th>
<th>Treatment&lt;sub&gt;2&lt;/sub&gt;</th>
<th>M&lt;sub&gt;2&lt;/sub&gt;</th>
<th>p</th>
<th>d*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre</td>
<td>No Mgr.</td>
<td>2.530</td>
<td>Any Mgr.</td>
<td>3.029</td>
<td>.034*</td>
<td>.707</td>
</tr>
<tr>
<td>Pre</td>
<td>No Mgr.</td>
<td>2.530</td>
<td>My Mgr.</td>
<td>2.999</td>
<td>.056</td>
<td>.605</td>
</tr>
<tr>
<td>Pre</td>
<td>Any Mgr.</td>
<td>3.029</td>
<td>My Mgr.</td>
<td>2.999</td>
<td>.906</td>
<td>.041</td>
</tr>
<tr>
<td>Post</td>
<td>No Mgr.</td>
<td>3.883</td>
<td>Any Mgr.</td>
<td>3.966</td>
<td>.701</td>
<td>.110</td>
</tr>
<tr>
<td>Post</td>
<td>No Mgr.</td>
<td>3.883</td>
<td>My Mgr.</td>
<td>4.129</td>
<td>.279</td>
<td>.359</td>
</tr>
<tr>
<td>Post</td>
<td>Any Mgr.</td>
<td>3.966</td>
<td>My Mgr.</td>
<td>4.129</td>
<td>.490</td>
<td>.260</td>
</tr>
</tbody>
</table>

*Note. p < .05. Cohen’s d uses SD weighted average method.*

There was statistical difference (p = .034) in the perceived pretraining transfer of learning mean scores between the No Manager and Any Manager treatment groups and moderate practical significance (p = .056 and d = .605) between mean scores for the No Manager and My Manager treatment groups. There was no statistical (p = .906) and little practical significance (d = .041) between the pretraining Any Manager and My Manager groups. For the perceived posttraining transfer of learning results among the 3 treatment groups, there were no statistically significant differences in addition to low effect sizes and sample sizes.

The statistical difference in the pretraining means between the No Manager and Any Manager treatment groups was an interesting and unexpected finding. Those who did not have their manager present in the training program rated themselves much lower than those who had a manager present. Although not statistically significant (p =
.056), those who did not have their manager present also rated their pretraining knowledge much lower than those who did have their manager present. These differences were not repeated after training was completed.

Hypothesis 1, however, looked for a statistical difference in the posttraining perceived transfer of learning mean scores between the three treatment groups. The data support the hypothesis that there is no difference in the posttraining transfer of learning scores. As shown in Table 11, the posttraining means for the No Manager, Any Manager, and My Manager treatment groups were not statistically significantly different.

**Hypothesis 2**

$H_02$: There is no statistically significant difference in the perceived transfer of training (behavior transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers.

As noted in Table 7, the interaction effect of treatment and time was not statistically significant ($p = .863$). An additional analysis of the pairwise comparisons between the pretraining and posttraining scores indicated that the posttraining means between the treatments were not statistically different. These results are shown in Table 12.
Table 12

Pairwise Pretraining and Posttraining Comparisons Between Treatment Groups for the Perceived Transfer of Training Survey Results

<table>
<thead>
<tr>
<th>Time</th>
<th>Treatment&lt;sub&gt;1&lt;/sub&gt;</th>
<th>Treatment&lt;sub&gt;2&lt;/sub&gt;</th>
<th>M&lt;sub&gt;1&lt;/sub&gt;</th>
<th>M&lt;sub&gt;2&lt;/sub&gt;</th>
<th>p</th>
<th>d*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre</td>
<td>No Mgr.</td>
<td>2.852</td>
<td>Any Mgr.</td>
<td>2.860</td>
<td>.975</td>
<td>.016</td>
</tr>
<tr>
<td>Pre</td>
<td>No Mgr.</td>
<td>2.852</td>
<td>My Mgr.</td>
<td>3.123</td>
<td>.347</td>
<td>.453</td>
</tr>
<tr>
<td>Pre</td>
<td>Any Mgr.</td>
<td>2.860</td>
<td>My Mgr.</td>
<td>3.123</td>
<td>.381</td>
<td>.373</td>
</tr>
<tr>
<td>Post</td>
<td>No Mgr.</td>
<td>3.619</td>
<td>Any Mgr.</td>
<td>3.660</td>
<td>.869</td>
<td>.068</td>
</tr>
<tr>
<td>Post</td>
<td>No Mgr.</td>
<td>3.619</td>
<td>My Mgr.</td>
<td>4.037</td>
<td>.147</td>
<td>.630</td>
</tr>
<tr>
<td>Post</td>
<td>Any Mgr.</td>
<td>3.660</td>
<td>My Mgr.</td>
<td>4.037</td>
<td>.208</td>
<td>.779</td>
</tr>
</tbody>
</table>

Note. p < .05. Cohen’s d uses SD weighted average method.

There was no statistical difference in the perceived pretraining transfer of training mean scores between the No Manager, Any Manager, and My Manager treatment groups. There was also no statistical significance in the perceived posttraining transfer of training mean scores between the No Manager, Any Manager, and My Manager groups. In addition, there was little effect size between the No Manager and Any Manager treatment groups and generally moderate effect size between the remaining comparisons (.373 ≤ d ≤ .779). As a result, Hypothesis 2, that there is no statistically significant difference in perceived transfer of training results between the 3 treatment groups, is supported.

Hypothesis 3

H<sub>0</sub>3: There is no statistically significant difference in the actual transfer of training (behavior transfer) results between employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers.
To test the hypothesis that there is no statistically significant difference between the actual transfer of training between the 3 treatment groups, a one-way ANOVA was run in SPSS, with the employees QA scores collected by the business for the 1st complete month after the training program was completed. Because the managers in Workgroup B were not calibrated to use the new QA scoring system, their numbers were excluded from the analysis. Only the QA scores for Workgroup A were used because those managers were calibrated for using the new system. The number, mean, and standard deviation for the useable QA scores are listed in Table 13.

Table 13

Descriptives for QA Scores

<table>
<thead>
<tr>
<th>Treatment group</th>
<th>n</th>
<th>M</th>
<th>SD</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Manager</td>
<td>53</td>
<td>74.396</td>
<td>17.903</td>
</tr>
<tr>
<td>Any Manager</td>
<td>78</td>
<td>74.410</td>
<td>15.859</td>
</tr>
<tr>
<td>My Manager</td>
<td>23</td>
<td>77.916</td>
<td>17.798</td>
</tr>
</tbody>
</table>

Before running the one-way ANOVA in SPSS, the homogeneity of variances test was conducted. Levine’s $F$ statistic of 5.042 and $p$ of .008 indicates that the homogeneity of variances assumption was not met. As a result, the Type I error rate for the ANOVA summary table is suspect. The results of the one-way ANOVA can be found in Table 14.
Table 14

ANOVA Summary Table for QA Scores

<table>
<thead>
<tr>
<th>Source</th>
<th>SS</th>
<th>df</th>
<th>MS</th>
<th>F</th>
<th>p</th>
<th>$\hat{\omega}^2$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Between Groups</td>
<td>229.047</td>
<td>2</td>
<td>114.524</td>
<td>.359</td>
<td>.699</td>
<td>.000</td>
</tr>
<tr>
<td>Within Groups</td>
<td>48234.855</td>
<td>151</td>
<td>319.436</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>48463.903</td>
<td>153</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The significance ($p = .699$) indicates that the means between the 3 treatment groups were not statistically significantly different. In addition, the effect size was negligible between the No Manager and Any Manager groups and small for the other comparisons. These findings also support Hypothesis 2, in which there is no statistically significant difference between the perceived transfer of training results among the 3 treatment groups. In other words, the actual results were similar to the perceived retrospective pretest-then/posttest-now results. This finding is significant because there is no concern for self-perception bias with the actual transfer of training data. With the results of Hypothesis 3 supporting Hypothesis 2, the concern that self-perception bias negatively influenced the results found in Hypothesis 2 is reduced.

Summary

The reliability of the perceived transfer of learning and the perceived transfer of training surveys were analyzed and were found to be reliable. The ANOVA assumptions for the perceived transfer of learning and perceived transfer of training data were checked. It was found that the perceived transfer of training survey data failed to meet the homogeneity of variance assumption, which negatively affects the Type I error rate for the ANOVA summary. The validity of the training program is supported by the increase in the scores between the pretest and posttest data.
The potential for self-perception bias was measured through the Marlowe-Crowne Social Desirability Scale, and a difference was found between the results and the documented nonforensic norms. This result weakened the validity of the training program; however, the qualitative data from the surveys suggest that the difference in the retrospective pretest-then/posttest-now scores were the result of the training program.

The data fail to reject the 3 hypotheses presented in the study. There were no statistical differences in the posttraining means between the treatment groups for the perceived transfer of learning, the perceived transfer of training, and the actual transfer of training. Chapter 5 contains a summary of the study’s findings, conclusions, and recommendations.
CHAPTER 5

SUMMARY OF FINDINGS, CONCLUSIONS, AND RECOMMENDATIONS

This chapter summarizes the findings of the study to determine whether having managers involved in the delivery of training influences the transfer of learning and the transfer of training processes. This chapter also includes the conclusions of the study and the recommendations for future research given the results of what was discovered.

Summary of Findings

The purpose of the study was to explore what effect manager involvement in the facilitation of training has on the transfer of learning and the transfer of training. A stratified random sample of 134 customer service employees was taken from a call center office in Orange County, California. The employees in the study were randomly assigned to the control and experimental groups. During the timeframe of the study, there was a total mortality rate of -17.2% for the control and experimental groups.

The research design involved measuring the perceived transfer of learning immediately at the end of each training course to be followed up approximately 4 weeks later with the perceived transfer of training. The results were then analyzed by the treatment variable in the study: No Manager Involved, Any Manager Involved, and My Manager Involved.

During the development of the retrospective pretest-then/posttest-now perceived transfer of learning and the perceived transfer of training instruments, no validity and reliability checks were conducted before implementation. After implementation, the instruments were found to have a very high level of internal consistency, with reliability measures above .900 across all treatment groups and times. Although the content of
the perceived transfer of learning and the perceived transfer of training surveys mirrors the specific content of the training program, the structure of these instruments lends itself for use by other researchers concerned about internal consistency.

The MC-C data were collected with the perceived transfer of training survey, and the data suggest that there was the potential for bias by the participants to report the difference in what they perceived they learned more favorably. The MC-C findings weaken the validity of the training program. Conversely, the qualitative responses provided by the participants strengthen the validity by indicating the training program actually improved knowledge and skills.

In addition, there was a concern over Box’s M test for the perceived transfer of training data in which the assumption of the homogeneity of covariance matrices was not met. With the potential of having a Type I error outside of .05, the statistical results for the perceived transfer of learning and the perceived transfer of training were similar. In both cases, the pretraining and posttraining scores are shown to be statistically significantly different. In addition, the strength of the repeated measures ANOVA and the robustness of the data reduced this concern.

The actual transfer of training measure was tested through the QA scores generated by the business to measure the level of customer service provided by the employees. With this test, there was also some concern over the Levine’s test results, which rejected the assumption that the homogeneity of variances was met.

As for the three hypotheses, which test the influence of managers on the perceived transfer of learning, the perceived transfer of training, and the actual transfer
of training, the results indicate that managers have no statistical influence in the posttraining outcomes. These results are discussed in more detail.

Discussion of Findings

The results of the study find no statistical difference between treatment groups for the perceived transfer of learning. Hypothesis 1 explores the influence of managers on the perceived transfer of learning.

H₀₁: There is no statistically significant difference in the perceived transfer of learning (knowledge transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers (e.g., trainers).

The results of the study support the null hypothesis that there is no statistically significant difference in the perceived transfer of learning between the 3 treatment groups. The results of the study do not support the literature discussed in chapter 2 that claims managers involved during the training exert a great deal of influence on the transfer of learning process (e.g., Broad & Newstrom, 1992; Hoffman, 1981; Lange, 2005; Noel & Dennehy, 1991). The results moderately support the research study by Gumuseli and Ergin (2002), which found that managers did not exert influence on the transfer of learning.

Although the study does not support the literature claiming that managers positively influence the transfer of learning results from a statistical standpoint, it does somewhat support the claim that there is some slight nonstatistically significant benefit to having managers involved in the delivery of the training. The average posttraining perceived transfer of learning scores did rise with the level of manager involvement. As
shown in Table 8, the No Manager group has an average perceived posttraining transfer of learning score of 3.883. The Any Manager group rises slightly to 3.966, and the My Manager group rises again slightly to 4.129. The score difference between the No Manager and My Manager groups is .246. This difference may not be much, but there is some lift to the perceived posttraining transfer of learning score. This finding tenuously supports the claim by Hoffman (1981) that the trainee’s manager wields the greatest influence on the transfer of learning process.

Another interesting finding discovered during the check of this hypothesis is the statistical difference in perceived pretraining knowledge between the No Manager control group and the Any Manager and My Manager experimental groups. The statistical significance between the No Manager and Any Manager groups and the practical significance between the No Manager and My Manager groups is unexpected. What this implies is that when a manager is present in the training program, the participants may perceive their starting level of knowledge to be much higher than those where no manager is present in the training. Interestingly, however, is that the posttraining results are not similar to the pretraining results. In other words, if the participants with a manager involved in training believe that their starting level of knowledge is higher, this higher starting point may not translate into a higher ending point.

Hypothesis 2 looks at the influence of managers on the perceived transfer of training.

H_02: There is no statistically significant difference in the perceived transfer of training (behavior transfer) results among employee groups who attend training partially
facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers.

The results of the study moderately support the null hypothesis that there is no statistically significant difference in the perceived transfer of training among the 3 treatment groups. The results of the study do not support the literature discussed in chapter 2 that claims that managers involved during the training exert a great deal of influence on the transfer of training process (e.g., Broad & Newstrom, 1992; Gumuseli & Ergin, 2002; Hoffman, 1981; Lange, 2005; Noel & Dennehy, 1991).

Although the Gumuseli and Ergin (2002) study is not supported, it is important to note that these researchers used a Turkish company. The cultural differences between Turkey and the United States may account for the studies finding different outcomes with manager involvement.

Interestingly, similar to the findings in the perceived transfer of posttraining learning scores, a very similar finding is discovered with the posttraining perceived transfer of training scores. As shown in Table 8, the average posttraining perceived transfer of training scores rise from the No Manager group ($M = 3.619$) to the My Manager group ($M = 4.037$). The only difference with the perceived transfer of learning and perceived transfer of training scores is that the No Manager group remained nearly identical with the Any Manager group ($M = 3.660$). The posttraining perceived transfer of training score difference between the No Manager and My Manager group is .418. Although this increase is not statistically significant, it is higher than the .246 increase found between the same groups with the perceived transfer of learning scores. Evidently, there is some nonstatistical lift to the perceived posttraining transfer of
training score when the trainee’s direct manager is involved in the delivery of training. As noted with the hypothesis 1, this tenuously supports the claim by Hoffman (1981) that only the trainee’s manager, and not just any manager, can exert the most influence on the transfer of learning process.

Hypothesis 3 looks at the influence of managers on the actual transfer of training.

H\textsubscript{0}3: There is no statistically significant difference in the actual transfer of training (behavior transfer) results among employee groups who attend training partially facilitated by their current manager, partially facilitated by a manager to whom they do not report, or fully facilitated by non-managers.

The results of the study support the null hypothesis that there is no statistically significant difference in the actual transfer of training among the 3 treatment groups. As found with hypothesis 2, the results of the study do not support the literature discussed in chapter 2 that claims that managers involved during the training exert a great deal of influence on the transfer of training process (e.g., Broad & Newstrom, 1992; Gumuseli & Ergin, 2002; Hoffman, 1981; Lange, 2005; Noel & Dennehy, 1991). By using actual metrics used by the business, the findings of the second null hypothesis are strongly supported.

What becomes interesting is that the actual transfer of training results, reflected by the QA scores, mirrors the perceived transfer of training scores. Although there is no statistical difference, there is a slight increase in the QA scores between the No Manager and My Manager groups. As noted in Table 13, the QA score mean is 74.396 for the No Manager group, 74.410 for the Any Manager group, and 77.916 for the My Manager group. This is a QA score increase between the No Manager and My
Manager group of 3.520. This again shows that there is a nonstatistical lift in actual transfer of training results when the trainee’s direct manager is involved in the delivery of training. Once again, Hoffman’s (1981) claim is tenuously supported that only the direct manager can influence the trainee in the transfer of learning process.

Conclusions

The implications of this study point favorably to using call center managers to deliver training to their subordinates in financial services organizations. Although there is no statistically significant difference, there appears to be a slight upward trend in the levels of perceived transfer of learning, perceived transfer of training, and actual transfer of training with the trainees. For similar financial services organizations trying to gain an edge in today’s fast-paced economy, a 5% gain in the transfer of training could make the difference in gaining a competitive advantage.

It also needs to be said, however, that simply inserting a manager into the delivery of training may not yield a positive return. The organizational leaders should look at the situation and pick the best opportunities to involve managers in the delivery of training. Because the study shows a nonstatistical increase only when a direct manager is involved, having a manager deliver training to a large audience may benefit only the members of the manager’s team, thus diluting any positive effect of manager involvement.

As a result, it becomes even more important for organizational leaders and training department professionals to work together to find the right opportunities to utilize managers in the training process. These individuals cannot ignore the literature reviewed in chapter 2 that supports the concept that manager support before and after
training can have a positive impact on the transfer of training (e.g., Baldwin & Magjuka, 1991; Brinkerhoff & Montesino, 1995; Facteau et al., 1995; Gregoire et al., 1998; Gumuseli & Ergin, 2002; Hawley & Barnard, 2005; Weiss et al., 1980).

Clearly, the transfer of learning and the transfer of training processes are complex. As discussed in chapter 2, a great deal of literature supports the idea that the organization, peers, individual, learning experience, and manager all influence the transfer of learning and the transfer of training. To make things more complex, these factors all have different subfactors that can influence the final results of training.

It is these factors that drive the need for business leaders and training professionals to work together. The organizational leaders have much more control over the organization, peers, individual, and manager influences. The training professionals have much more control over the learning experience. By working together, these organizations can realize Senge’s (1990) vision of a learning organization. Those organizations that do reach this goal will have a true competitive advantage in the global workplace.

Recommendations

The results of the MC-C Social Desirability Index for the study provided an interesting and unexpected finding. It was found that the MC-C nonforensic norms and the results of the MC-C within the study were statistically significantly different, with study results well above the nonforensic norms. It was found in the study by Andrews and Meyer (2003) that the nonforensic norms were statistically significantly different when compared to the forensic norms. In addition, the nonforensic norms were found to be well below the forensic norms. This indicates that certain groups of individuals can
have different group means for the MC-C instrument. Because the MC-C was created
to help social work and healthcare professionals gauge the amount of bias in self-
reported data, no research deals with what can be expected when it is given to
individuals whose role is to project a positive self-image to others over the telephone or
in person (e.g., customer service representatives, sales professionals, etc.). The MC-C
is shown to be a valuable tool for social work and healthcare professionals, but it is
possible that it may be a poor tool to use in nonforensic situations. Thus, the use of the
MC-C to gauge the level of social desirability in the corporate setting, specifically for
those in person-to-person customer contact roles, is an avenue for future research.

Another area for potential research involves the concept, explored by Ellinger et
al. (1996), that the relationship between the manager and the subordinate trainee can
influence the transfer of learning and transfer of training. Measuring the managers’
relationship with their direct report was not a part of this study. The study by Ellinger et
al. was a qualitative study, and it might be a benefit for future researchers to place a
quantitative measure on these original findings. By taking the structure of this study and
adding a manager relationship index scale, the correlation between the manager-
subordinate relationship and training outcomes can be found to support the original
qualitative findings. With these findings, it adds another tool for organizational leaders
and training professionals to use when selecting managers to be involved in the delivery
of training programs.

This study also was limited by the amount of time that a manager could be
involved in training delivery. Due to organizational constraints, managers delivered a
portion of the training and not the whole training program. Another interesting study
could be to examine whether the amount of time spent by managers in the delivery of
training influences the transfer of learning and the transfer of training. Statistical
differences might have been found in this study had the manager been involved from
start to finish. This becomes an interesting avenue for future research given the
findings from this study.

In addition, this study did not have the advantage of having an actual transfer of
learning measure available to compare with the perceived transfer of learning
retrospective instrument. A replication of this study using an actual transfer of learning
measurement that is proven to be reliable and valid would be useful in analyzing the
impact of manager-delivered training on the transfer of learning.

Another avenue for future research could be to study if temporary and permanent
employees have different transfer of learning and transfer of training outcomes. This
study did not separate the temporary and permanent employees during the data
collection process. It is generally assumed that temporary employees do not have the
same level of organizational commitment which is reflected by the higher involuntary
attrition rates seen in the workplace. It would be interesting to run a replication study
and see if temporary employees have the same transfer of learning and transfer of
training rates as their permanent counterparts.

Finally, the very similar findings between the perceived transfer of training and
the actual transfer of training scores strongly support the use of retrospective
pretest/posttest instruments. The similarity between the perceived transfer of training
and the actual transfer of training results in addition with the high level of internal
consistency of the retrospective pretest/posttest instruments used in this study strongly
support the validity of these types of instruments in collecting data. In using a retrospective pretest/posttest instrument, however, the researcher must still be concerned about the possibility of self-perception bias. In any event, this ultimately gives researchers another approach for collecting data in the event actual transfer or learning or actual transfer of training data are not available.
APPENDIX A

PAPER-BASED PERCEIVED

TRANSFER OF LEARNING SURVEY
DSE End-of-Class Knowledge Check (3/21 – 3/23 Class)

Disclaimer: Please Read

The survey information you provide will be used for research purposes and all individual responses are anonymous. By answering all questions in this brief survey, you are eligible to submit your name into a drawing for a $50 Target gift card. One lucky associate will win this prize. A second survey will follow one month after this one and you can double your chances of winning the $50 Target gift card by completing the follow-up survey! The prize drawing will be held on or around May 15th and winners will be contacted by phone and/or internal email. Good luck!

If you have any questions, please contact Gus Perez at tie-line 404-7520 or gus.perez@company.com.

Do you wish to continue?

Yes, I do wish to continue [ ]

No, I do not wish to continue [ ]
Knowledge Questions

Please take a few minutes to select the rating scale for each subject area covered in the DSE training program. Please note that you are rating your understanding of the subject both BEFORE and AFTER the training program. If you have a difference between the BEFORE and AFTER responses, please briefly explain why there is a difference.

1 = Poor; 2 = Fair; 3 = Good; 4 = Very Good; 5 = Excellent

1. My understanding of the subject of the Self-Talk Cycle:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BEFORE attending the session:  
AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


2. My understanding of the subject of Stop/Challenge/Focus:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BEFORE attending the session:  
AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


3. My understanding of the subject of the Four Customer Conditions:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEFORE attending the session: □</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>AFTER attending the session: □</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

---

4. My understanding of the subject of Establishing Rapport (Task vs. Relationship Tension):

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEFORE attending the session: □</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>AFTER attending the session: □</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

---

5. My understanding of the subject of Personalizing:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>BEFORE attending the session: □</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>AFTER attending the session: □</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
6. My understanding of the subject of Listening:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BEFORE attending the session:  
AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

---

7. My understanding of the subject of Questioning:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

BEFORE attending the session:  
AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

---

8. My understanding of the subject of Empathizing:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

BEFORE attending the session:  
AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
9. My understanding of the subject of the Zone of Indifference (Satisfaction/Dissatisfaction Model):

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
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BEFORE attending the session:      |      |      |           |           |
AFTER attending the session:      |      |      |           |           |

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


10. My understanding of the subject of Explaining:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
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BEFORE attending the session:      |      |      |           |           |
AFTER attending the session:      |      |      |           |           |

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


11. My understanding of the subject of Saying No:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
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<th>Very Good</th>
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</table>

BEFORE attending the session:      |      |      |           |           |
AFTER attending the session:      |      |      |           |           |

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
12. My understanding of the subject of Adapting:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
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<th>Very Good</th>
<th>Excellent</th>
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BEFORE attending the session: □ □ □ □ □
AFTER attending the session: □ □ □ □ □

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


13. My understanding of the subject of Asking for an Expression of Satisfaction (Advocating):

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
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BEFORE attending the session: □ □ □ □ □
AFTER attending the session: □ □ □ □ □

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


14. My understanding of the subject of Thanking and Follow Up (Supporting):

<table>
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<tr>
<th>Poor</th>
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<th>Very Good</th>
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BEFORE attending the session: □ □ □ □ □
AFTER attending the session: □ □ □ □ □

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


Page 6 of 7
15. My understanding of the subject of The Recovery Skill for repairing damage caused by mistakes or problems:

<table>
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<tr>
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Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

[Blank space for drawing]

16. Did your direct manager deliver any part of the training during Day 2 of the training program?

Yes [ ]
No [ ]

**Drawing Entry**

Optional (Enter your name and phone number for the $50 Target Card Drawing)

What is your name and extension (tie xxx-xxxx)?

[Blank space for drawing]

**Thank You**

Thank you for completing this survey! If you have any questions, please contact Gus Perez at tie-line 404-7520 or gus.perez@ [redacted].

To return the paper survey:
1. Write “Gus Perez 31002-0800” on the back
2. Fold the survey in half.
3. Tape or staple the survey to close it.
4. Drop in any interoffice mail bin (That’s it!)
APPENDIX B

ONLINE PERCEIVED

TRANSFER OF LEARNING SURVEY
1. Disclaimer: Please Read

The survey information you provide will be used for research purposes and all individual responses are anonymous. By answering all questions in this brief survey, you are eligible to submit your name into a drawing for a $50 Target gift card. One lucky associate will win this prize. A second survey will follow one month after this one and you can double your chances of winning the $50 Target gift card by completing the follow-up survey! The prize drawing will be held on or around May 15th and winners will be contacted by phone and/or internal e-mail. Good luck!

If you have any questions, please contact Gus Perez at tie-line 404-7520 or gus.perez@...  

* 1. Do you wish to continue?
   Yes, I do wish to continue
   No, I do not wish to continue

   Next >>
2. Knowledge Questions

Please take a few minutes to select the rating scale for each subject area covered in the DSE training program. Please note that you are rating your understanding of the subject both BEFORE and AFTER the training program. If you have a difference between the BEFORE and AFTER responses, please briefly explain why there is a difference.

1 = Poor; 2 = Fair; 3 = Good; 4 = Very Good; 5 = Excellent

* 1. My understanding of the subject of the Self-Talk Cycle:

<table>
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<th></th>
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2. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

* 3. My understanding of the subject of Stop/Challenge/Focus:

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4. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
5. My understanding of the subject of the Four Customer Conditions:

<table>
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6. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


7. My understanding of the subject of Establishing Rapport (Task vs. Relationship Tension):

<table>
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<tr>
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8. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


9. My understanding of the subject of Personalizing:

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10. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


89
11. My understanding of the subject of Listening:

<table>
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BEFORE attending the session:  

AFTER attending the session:  

12. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


13. My understanding of the subject of Questioning:

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BEFORE attending the session:  

AFTER attending the session:  

14. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


15. My understanding of the subject of Empathizing:

<table>
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BEFORE attending the session:  

AFTER attending the session:  

16. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


17. My understanding of the subject of the Zone of Indifference (Satisfaction/Dissatisfaction Model):

<table>
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<th>Very Good</th>
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BEFORE attending the session:  
AFTER attending the session:  

18. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

19. My understanding of the subject of Explaining:

<table>
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</table>

BEFORE attending the session:  
AFTER attending the session:  

20. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

21. My understanding of the subject of Saying No:

<table>
<thead>
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<th>Poor</th>
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<th>Very Good</th>
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BEFORE attending the session:  
AFTER attending the session:  

22. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
23. My understanding of the subject of Adapting:

<table>
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<th>Poor</th>
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BEFORE attending the session:  
AFTER attending the session:  

24. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

25. My understanding of the subject of Asking for an Expression of Satisfaction (Advocating):

<table>
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<th>Very Good</th>
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BEFORE attending the session:  
AFTER attending the session:  

26. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

27. My understanding of the subject of Thanking and Follow Up (Supporting):

<table>
<thead>
<tr>
<th>Poor</th>
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BEFORE attending the session:  
AFTER attending the session:  

28. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
29. My understanding of the subject of The Recovery Skill for repairing damage caused by mistakes or problems:

<table>
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</table>

BEFORE attending the session:

AFTER attending the session:

30. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

31. Did your direct manager deliver any part of the training during Day 2 of the training program?

Yes

No

3/21-3/23 DSE End-of-Class Knowledge Check

3. Drawing Entry

Optional (Enter your name and phone number for the $50 Target Card Drawing!)

1. What is your name and extension (tie xxx-xxxx)?

4. Thank You

Thank you for completing this survey! If you have any questions, please contact Gus Perez at tie-line 404-7520 or gus.perez@...
APPENDIX C

PAPER-BASED PERCEIVED

TRANSFER OF TRAINING SURVEY
DSE Skill Use Check (3/21 – 3/23 Class)

Disclaimer: Please Read

The survey information you provide will be used for research purposes and all individual responses are anonymous. By answering all questions in this brief survey, you are eligible to submit your name into a drawing for a $50 Target gift card. One lucky associate will win this prize. The prize drawing will be held on or around May 15th and winners will be contacted by phone and/or internal email. Good luck!

If you have any questions, please contact Gus Perez at tie-line 404-7520 or gus.perez@[redacted]

Do you wish to continue?

- Yes, I do wish to continue [ ]
- No, I do not wish to continue [ ]
Skill Use Questions

Please take a few minutes to select the rating scale for each subject area covered in the DSE training program. Please note that you are rating your ability to apply the information and concepts to actual customer situations both BEFORE and AFTER the training program. If you have a difference between the BEFORE and AFTER responses, please briefly explain why there is a difference.

1 = Poor; 2 = Fair; 3 = Good; 4 = Very Good; 5 = Excellent

1. **My ability to apply the information and concepts of the subject of the Self-Talk Cycle to actual customer situations:**

   BEFORE attending the session:
   - Poor: [ ]
   - Fair: [ ]
   - Good: [ ]
   - Very Good: [ ]
   - Excellent: [ ]

   AFTER attending the session:
   - Poor: [ ]
   - Fair: [ ]
   - Good: [ ]
   - Very Good: [ ]
   - Excellent: [ ]

   Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

   

2. **My ability to apply the information and concepts of the subject of Stop/Challenge/Focus to actual customer situations:**

   BEFORE attending the session:
   - Poor: [ ]
   - Fair: [ ]
   - Good: [ ]
   - Very Good: [ ]
   - Excellent: [ ]

   AFTER attending the session:
   - Poor: [ ]
   - Fair: [ ]
   - Good: [ ]
   - Very Good: [ ]
   - Excellent: [ ]

   Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

   

Page 2 of 9
3. My ability to apply the information and concepts of the subject of the Four Customer Conditions to actual customer situations:

<table>
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<tr>
<th>Poor</th>
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BEFORE attending the session: □ □ □ □ □
AFTER attending the session: □ □ □ □ □

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


4. My ability to apply the information and concepts of the subject of Establishing Rapport (Task vs. Relationship Tension) to actual customer situations:

<table>
<thead>
<tr>
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BEFORE attending the session: □ □ □ □ □
AFTER attending the session: □ □ □ □ □

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


5. My ability to apply the information and concepts of the subject of Personalizing to actual customer situations:

<table>
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BEFORE attending the session: □ □ □ □ □
AFTER attending the session: □ □ □ □ □

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


6. My ability to apply the information and concepts of the subject of Listening to actual customer situations:

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Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

7. My ability to apply the information and concepts of the subject of Questioning to actual customer situations:

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Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

8. My ability to apply the information and concepts of the subject of Empathizing to actual customer situations:

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Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
9. My ability to apply the information and concepts of the subject of the Zone of Indifference (Satisfaction/Dissatisfaction Model) to actual customer situations:

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BEFORE attending the session:  

AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


10. My ability to apply the information and concepts of the subject of Explaining to actual customer situations:

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BEFORE attending the session:  

AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


11. My ability to apply the information and concepts of the subject of Saying No to actual customer situations:

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BEFORE attending the session:  

AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


Page 5 of 9
12. My ability to apply the information and concepts of the subject of Adapting to actual customer situations:

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BEFORE attending the session:  

AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

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13. My ability to apply the information and concepts of the subject of Asking for an Expression of Satisfaction (Advocating) to actual customer situations:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
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BEFORE attending the session:  

AFTER attending the session:  

Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

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14. My ability to apply the information and concepts of the subject of Thanking and Follow Up (Supporting) to actual customer situations:

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BEFORE attending the session:  

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Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

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15. My ability to apply the information and concepts of the subject of The Recovery Skill for repairing damage caused by mistakes or problems to actual customer situations:

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Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.


16. Did your direct manager deliver any part of the training during Day 2 of the training program?

Yes [ ]

No [ ]
# Personality Profile Questions

This section is for research purposes only. No individual information will be shared and all responses are strictly confidential.

In this section, you will find 13 T/F statements. Please read each statement and select if the statement describes you (True) or does not describe you (False). All individual responses will be kept strictly confidential and anonymous.

<table>
<thead>
<tr>
<th>Statement</th>
<th>True</th>
<th>False</th>
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</table>
Drawing Entry

Optional (Enter your name and phone number for the $50 Target Card Drawing!)

What is your name and extension (tie xxx-xxxx)?

Thank You

Thank you for completing this survey! If you have any questions, please contact Gus Perez at tie-line 404-7520 or gus.perez@*

To return the paper survey:
1. Write "Gus Perez 31002-0800" on the back
2. Fold the survey in half.
3. Tape or staple the survey to close it.
4. Drop in any interoffice mail bin (That’s it!)
1. Disclaimer: Please Read

The survey information you provide will be used for research purposes and all individual responses are anonymous. By answering all questions in this brief survey, you are eligible to submit your name into a drawing for a $50 Target gift card. One lucky associate will win this prize. The prize drawing will be held on or around May 15th and winners will be contacted by phone and/or internal e-mail. Good luck!

If you have any questions, please contact Gus Perez at tie-line 404-7520 or gus.perez@...

* 1. Do you wish to continue?
Yes, I do wish to continue
No, I do not wish to continue

Next >>
2. Skill Use Questions

Please take a few minutes to select the rating scale for each subject area covered in the DSE training program. Please note that you are rating your ability to apply the information and concepts to actual customer situations both BEFORE and AFTER the training program. If you have a difference between the BEFORE and AFTER responses, please briefly explain why there is a difference.

1 = Poor; 2 = Fair; 3 = Good; 4 = Very Good; 5 = Excellent

* 1. My ability to apply the information and concepts of the subject of the Self-Talk Cycle to actual customer situations:

<table>
<thead>
<tr>
<th>Poor</th>
<th>Fair</th>
<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
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<tbody>
<tr>
<td>BEFORE attending the session:</td>
<td></td>
<td></td>
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<tr>
<td>AFTER attending the session:</td>
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</tbody>
</table>

2. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

* 3. My ability to apply the information and concepts of the subject of Stop/Challenge/Focus to actual customer situations:

<table>
<thead>
<tr>
<th>Poor</th>
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<th>Good</th>
<th>Very Good</th>
<th>Excellent</th>
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<tr>
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4. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
5. My ability to apply the information and concepts of the subject of the Four Customer Conditions to actual customer situations:

<table>
<thead>
<tr>
<th>Poor</th>
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<th>Excellent</th>
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<td></td>
<td></td>
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</table>

6. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

7. My ability to apply the information and concepts of the subject of Establishing Rapport (Task vs. Relationship Tension) to actual customer situations:

<table>
<thead>
<tr>
<th>Poor</th>
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8. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

9. My ability to apply the information and concepts of the subject of Personalizing to actual customer situations:

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10. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
11. My ability to apply the information and concepts of the subject of Listening to actual customer situations:

<table>
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<th>Poor</th>
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</table>

BEFORE attending the session: ❌

AFTER attending the session: ❌

12. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

13. My ability to apply the information and concepts of the subject of Questioning to actual customer situations:

<table>
<thead>
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BEFORE attending the session: ❌

AFTER attending the session: ❌

14. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

15. My ability to apply the information and concepts of the subject of Empathizing to actual customer situations:

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BEFORE attending the session: ❌

AFTER attending the session: ❌

16. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

108
17. My ability to apply the information and concepts of the subject of the Zone of Indifference (Satisfaction/Dissatisfaction Model) to actual customer situations:

<table>
<thead>
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BEFORE attending the session:  
AFTER attending the session:  

18. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

19. My ability to apply the information and concepts of the subject of Explaining to actual customer situations:

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BEFORE attending the session:  
AFTER attending the session:  

20. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

21. My ability to apply the information and concepts of the subject of Saying No to actual customer situations:

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BEFORE attending the session:  
AFTER attending the session:  

22. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
23. My ability to apply the information and concepts of the subject of Adapting to actual customer situations:

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BEFORE attending the session:  

AFTER attending the session:  

24. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

25. My ability to apply the information and concepts of the subject of Asking for an Expression of Satisfaction (Advocating) to actual customer situations:

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BEFORE attending the session:  

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26. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

27. My ability to apply the information and concepts of the subject of Thanking and Follow Up (Supporting) to actual customer situations:

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28. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.
29. My ability to apply the information and concepts of the subject of The Recovery Skill for repairing damage caused by mistakes or problems to actual customer situations:

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BEFORE attending the session:

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30. Please briefly explain any reason why there is a difference between the above BEFORE and AFTER responses in the space below.

31. Did your direct manager deliver any part of the training during Day 2 of the training program?

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3/21-3/23 DSE Skill Use Check

3. Personality Profile Questions

This section is for research purposes only. No individual information will be shared and all responses are strictly confidential.

* 1. In this section, you will find 13 T/F statements. Please read each statement and select if the statement describes you (True) or does not describe you (False). All individual responses will be kept strictly confidential and anonymous.

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<< Prev   Next >>

3/21-3/23 DSE Skill Use Check

4. Drawing Entry

Optional (Enter your name and phone number for the $50 Target Card Drawing!)

1. What is your name and extension (tie xxx-xxxx)?

<< Prev   Next >>
5. Thank You

Thank you for completing this survey! If you have any questions, please contact Gus Perez at the line 404-7520 or gus.perez@[redacted].
REFERENCE LIST


