Project Name: Design Document

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IDT 545

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Scope of Project

The goal of this project is to provide the knowledge and skills practice needed for the participants to build an action plan to improve training transfer. The target audience consists of campus leaders in the for-profit, postsecondary education sector. The content of this program consists of the steps necessary to build the action plan. This course will be delivered using a computer-based module and will be completed in 16 weeks.

Learner Analysis/Description

The target audience consists of 150 campus leaders of that oversee a for-profit, postsecondary education campus. Each campus consists of 300-700 students and consists of five functional departments. Because the campus leaders impact the work environment by driving culture, priorities and support structures of their campus, they are in the position to positively or negatively impact training transfer. Campus leaders are highly educated, typically holding Masters degrees or higher, and they usually have a background specializing in one of the five functional departments.

Description of Pedagogy/Andragogy

This module will utilize experiential learning, scenario-based learning strategies, principles of andragogy, and will implement strategies to facilitate training transfer. Experiential learning is based on the belief that people learn best through experience (Kolb, 2015). Learners will gain experience by completing an action plan as they work through this course. Scenario-based learning is anchored in the idea that experience leads to expertise. It utilizes real-world scenarios to accelerate expertise by providing experience outside of the normal job (Lyman,

2013). This course will utilize real-world scenarios to teach training transfer concepts. Training transfer is best facilitated by individual characteristics, training design, and work environment factors. This course will implement design strategies that benefit transfer, such as making training similar to the actual work and helping trainees understand how to transfer their new skills (Bhatti et al., 2014). This is accomplished by having Campus Directors complete an action plan to implement the new knowledge and by walking them through the action plan during the training. Though supervisor support is not integrated into the computer-based training module, it is intended that Campus Directors submit their action plans to their supervisor for review and feedback. In this way, environmental transfer factors involving supervisor support and follow-up can contribute to the training effectiveness. Finally, this course will implement principles of Andragogy, including communicating why the learning is needed, providing experiential instruction, and using a real-world problem to anchor the instruction.

Learning Objectives

At the completion of the post-course activity, the trainee will be able to:

- Recognize the impact that work environment and campus culture have on training transfer.
- 2. Recognize the different components of an effective action plan.
- 3. Develop an end-goal for an action plan.
- 4. Identify specific follow-up activities that will be implemented at the campus.
- 5. Develop an action plan that facilitates long-term training transfer.

Forms of Assessment

• Trainees will participate in a pre-test and post-test to assess their acquired knowledge of completing an action plan that facilitates training transfer.

- Trainees will also complete an action plan and submit it to their supervisor for review and feedback.
- Short knowledge checks will be completed in each of the 6 steps of completing an action plan.

Project Management Chart/Timeline

Deadline	Phase	Element
	Design	Write the design document
11/02/20	Design	Submit the design document
11/07/20	Alpha	Section I development
11/12/20	Alpha	Survey on instructional product prototype
11/28/20	Alpha	Section II development
12/07/20	Alpha	Survey evaluation tool development
12/07/20	Alpha	Section III development
12/19/20	Alpha	Section IV development
01/02/20	Alpha	SME testing and feedback
01/09/21	Beta	Alpha evaluation review
01/16/21	Beta	Steps to achieve the objections (Section V) development
02/06/21	Beta	Deadlines, milestones, and resources (Section VI) development
02/28/21	Beta	Monitoring, evaluating and updating the plan (Section VII) development
03/13/21	Beta	Submit beta prototype
03/20/21	Gold	Beta evaluation review
03/27/20	Gold	Beta evaluation development
04/03/20	Gold	Final review
04/10/20	Gold	Submit gold project

Team Assignments and Responsibilities

Design	Kelly Lishman
Project design, direction and content	X
Design Document	Kelly Lishman
Scope of Project	X
Learner Analysis	X
Description of Andragogy	X
Forms of Assessment	X
Project Management Timeline	X
Usability Testing Procedures	X
Style Manual	X
Flow Chart	X
Story Boards	X
Participant Guide	X
Development	Kelly Lishman
Module Prototyping	X
Module Hosting	X
Module Testing and Review	X

Usability Testing Procedures/Alpha and Beta Evaluation Procedures

The usability of this course will be assessed through the following procedures to determine the effectiveness and learner satisfaction. This tutorial will be tested in three phases: Alpha, Beta and Gold phases.

Alpha Testing and Evaluation Procedure

The purpose of the Alpha testing and evaluation phase is to gather feedback on the content, design and structure of the *Facilitating Long-Term Training Transfer at Your Campus* course. Participants in the MSIDT program will conduct the initial Alpha testing. The following questions will be asked during the Alpha testing phase using a Qualtrics questionnaire.

Feedback will be collected and applied to the tutorial before progressing to the beta testing phase.

General Course Questions

Did the course cover topics you were expecting? Why or why not?

What is one thing that you enjoyed the most?

What did you wish to see in the course (and wasn't there)

If you could change one specific thing, what would that be?

What made you stick to the end?

Did the training meet your expectations?

Did the e-learning course cater to your learning preferences?

How do you feel this course could be improved?

Would you prefer to take this course online or in the classroom? Why?

Did you encounter any technical problems during the course? If yes, elaborate.

Course Content

How relevant was the course material to Campus Directors in the for-profit, postsecondary education sector?

How difficult or easy was it to understand the concepts?

Which topics do you wish were more in depth?

Did you have to Google/research some topics while taking the course? Why?

How would you rate the course in terms of structure (logical, easy to follow, confusing)?

Were there any moments that you felt frustrated? Why?

Did you skip any parts? Why?

Was the course content consistent with the course objectives?

Was the course too challenging/ not challenging enough?

Make two suggestions to improve understanding of the course content.

Learning Outcomes

How confident are you in applying what you have learned?

What was the most useful thing that you have learned?

Did the course make you think differently about a particular topic?

Name one topic you didn't know anything about.

Identify three important concepts or ideas that you learned in this course.

Pace and Navigation

Did the e-learning unfold in a clear direction?

Did you understand where you had to click to move forward? If not, why not?

Rate the e-learning access set up.

Rate the ease of navigation.

Did you have any issues navigating the e-learning course?

Visual Design

How would you rate the quality of the visuals (images, videos)

Did the images used enhance the lessons?

Rate the overall visual design of the course content and materials.

Rate the legibility of the texts and fonts in this course.

Rate the quality of the photography used in this course.

Rate the use of animations in this course.

Interactivity

Was the interactivity suitable for the content? Why or why not?

Was there enough /too much interactivity?

Did any of the activities help you gain a clearer understanding of the subject?

Did case studies and scenarios help you gain a clearer understanding of the content?

Multimedia

Rate the amount of multimedia used in the course.

Rate the quality of multimedia used in the course.

Rate the amount of narration used in the course.

Rate the voice and quality of the narration used in this course.

Did the narration add value to this e-learning module? Why or why not?

Beta Testing and Evaluation Procedure

The purpose of the Beta testing and evaluation phase is to test the complete construction of the *Facilitating Long-Term Training Transfer at Your Campus* course with end-users in their own environment. Ten subject matter experts will be recruited that either have Instructional

Design experience or have worked in the for-profit, postsecondary education field to conduct the Beta testing. The following steps will be incorporated to the Beta testing phase:

- 1) <u>Target End-User Participants</u>: During this phase, I will identify 10 end-users that currently work as Instructional Designers or have worked in the for-profit, postsecondary education sector.
- 2) <u>Beta Questionnaire Development</u>: The Alpha questionnaire will be analyzed and adjusted, based on feedback from the Alpha testing phase, to form the Beta Questionnaire.
- 2) <u>Testing</u>: During the beta phase, the online course will be emailed to participants, along with the Qualtrics questionnaire, to facilitate immediate feedback.

Style Manual

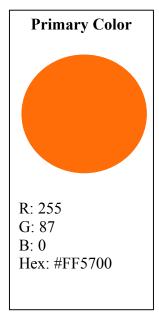
Screen Resolutions

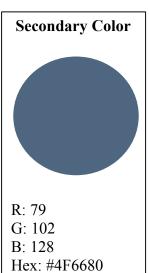
The learning module will use 16:9 aspect ratio and should allow for auto-scaling to fit the user's browser size. This aspect ratio was selected to provide more white space for content and design.

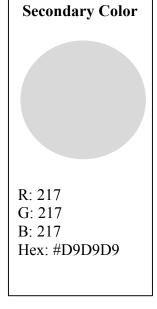
Color Palette

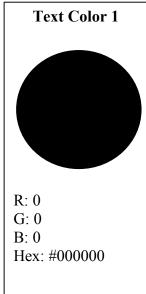
This learning module is designed to inspire focus, motivation, action, and clarity. The main learning module colors are black, white, orange and grey. For the most part, black text will be used on a white background and orange and grey will be used as accent colors. Orange typically represents enthusiasm, happiness, determination, encouragement and success (Color Wheel Pro - See Color Theory in Action). "It combines the energy of red and the happiness of

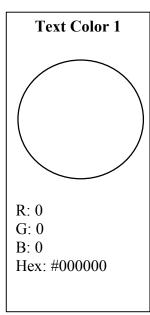
yellow" (Color Wheel Pro - See Color Theory in Action). Though black can denote many different things, using it as the text denotes elegance and formality (Color Wheel Pro - See Color Theory in Action). Grey is a great balance to orange and follows the black and white theme.











Typography

The main font is *Avenir Next LT Light* and *Lato*. The font size and stylistics are listed below according to content type.

Content Type	Description
Title Page	Avenir Light, 36pt, bold/ or Roboto (Rise)
Headings Font	Avenir Light, 30pt, bold/ or Roboto (Rise)
Subheadings Font	Lato, 16pt, bold
Body Font	Lato, 14pt, regular
Button Text	Lato, 14pt, regular

Normal character spacing will be used for all text. Lists that are not numbered should use a filled circle (•) to denote list items.

Images and Icons

Images will be resourced from *Storyblocks* (www.Storyblocks.com) and the icons used for the learning module will be sourced from *The Noun Project* (www.thenounproject.com). The icons and images will match, or complement, the learning module's existing color palette.

Navigation Elements

The project will utilize the built-in Storyline and Rise navigation elements.

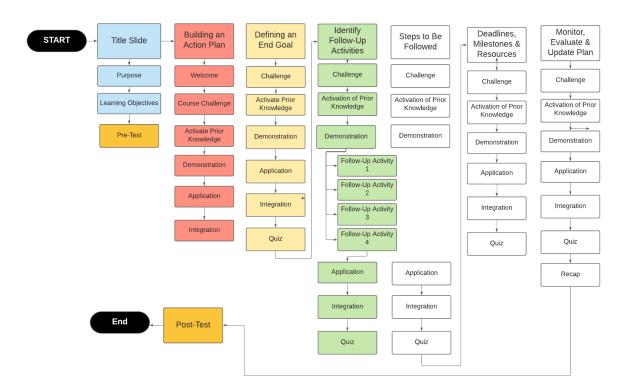
Flow Chart

Research Focus: Transfer of Training Learning Theory: Transformative Learning Theory Authoring Tool: Storyline and Rise Assessment Tool: Quiz and Planning Document Audience: Campus Directors in the For-Profit, Postsecondary Education Sector

Facilitating Long-Term Training Transfer at Your Campus

That Improves Compliance and Facilitates Consumer Trust

Kelly Lishman | IDT 545-51



Storyboards

Building an Action Plan

<u>Purpose</u>	<u>Screen</u>	Welcome Section
Title Slide		Building an Action Plan to Facilitate Long-Term Training Transfer at Your Campus
Welcome		Welcome to "Building an Action Plan to Facilitate Long-Term Training Transfer at Your Campus." In a few short weeks, your sales team will participate in training on how to incorporate compliant and ethical sales practices. However, how your representatives incorporate the training they receive is up to you. As Campus Leaders, you play a critical role in determining whether or not the training we deliver to your reps is transferred to on-the-job performance. The purpose of this training is to help you understand the role you play in training transfer, identify what initiatives you can incorporate to improve training transfer for your sales representatives, and to help you develop an action plan to incorporate these initiatives at your campus.
Course Challenge		Upon completion of this course, your objective is to develop an action plan to facilitate a work environment that helps your sales representatives apply the training they receive. You will submit your action plan to your supervisor for feedback and it will be utilized over the next six months as you plan, monitor, and review the progress your sales representatives make at applying what they learn to the workplace.
		At the end of this course, participants will:
Learning		1. Recognize the impact that the work environment and campus culture have on training transfer.
Objectives		2. Identify specific follow-up activities to the training that will be implemented at the campus
		3. Construct the important parts of an action plan.
		4. Develop an action plan that facilitates long-term training transfer. When was the last time you planned and implemented an change? Maybe you made plans for a house rennovation. Maybe you
Activate Prior Knowledge		implemented changes at work. When you set out to implement changes, how did you start? Did you first identify a goal? Did you list the steps of your plan out or just go about it one step at a time? How did you know when you achieved your goal? When implementing changes it helps to first develop a an action plan.
What is an Action Plan?		An action plan is a checklist for the steps or tasks you need to complete in order to achieve the goals you have set. Action plans increase the likelihood of a goal being accomplished. They also add clarity and structure to goals, making them easire to track and identify when they are achieved.
		Sometimes people or businesses don't spend time developing an action plan before an initiative which, in most cases, leads to failure. Benjamin Franklin once said, "Failing to plan is planning to fail."
Benefits of Action Plans		1. It helps to provide you with clear direction. Action plans outline exactly what steps to be taken and when they should be completed. In other words, you will know exactly what you need to do.
		2. Per the American Society of Training and Development, the odds of an idea actually being implemented or a goal being achieved are 10% if you hear a goal you like, 25% fi you decide to implement the idea of achieving the goal, 40% if you decide when to implement the idea or goal, 50% If you plan on how you are going to do it by developing an action plan.
		3. Action plans give you the ability to track your progress toward your goal. This helps you to stay motivated and committed throughout the project.
		4. Listing the steps of a plan helps you to correctly prioritize your tasks based on effort and impact. As a result, you are more likely to succeed at achieve your goals.
The components of an action plan.		Define the goal, list the steps to be followed, add deadlines, set milestones, identify the resources needed, monitor, evaluate and update the plan.
Example of Action Plan		Here is an example of the type of action plan that will be completed at the end of this course (portray example).

Identify the progression of problems.	1. Identify the end-goal for your action plan. To do this, you will need to understand how to write a SMART goal to achieve the important objectives.
	2. Identify specific follow-up activities that can be implemented at your campus that will improve training transfer.
	Identify the steps to be followed to successfully implement the follow-up activities.
	4. Add deadlines, set milestones, and identify the resources needed.
Choose an action plan template	Choose and print an action plan template. We will work thorugh this template throughout this training.

Defining an End Goal

Type	<u>Purpose</u>	<u>Screen</u>	Section II: Define Your End Goal
	Challenge		Establishing an end-goal that effectively targets your objectives is a critical first step in establishing an effective action plan. By the end of this section, you will outline an accurate SMART goal for your action plan.
	Activate Prior Knowledge		To understand the importance of accurate planning, let's consider the true story of a sightseeing airplane that flew 257 people from New Zealand to Antartica and back in 1979. Unknown to the pilots, there was a minor 2 degree error in the flight coordinates. This placed the aircraft 28 miles to the east of where the pilots thought they were. As they approached Antartica, the pilots descended to a lower altitude to ive the passengers a better look at the landscape. Although both were experienced pilots, neither had made this particular flight before. They had no way of knowing that the incorrect coordinates had placed them directly in the path of Mount Erebus, an active volcano that rises from the frozen landscape to a height of more than 12.000 feet. Sadly, the plan crashed into the side of the volcano, killing everyone on board. It was a tragedy brought on by minor error - a matter of only a few degrees.
			Like what happened in the story of the airplane, establishing goals that are even slightly off target can cause action plans to significantly miss important objectives. This is why it is important to establish a SMART goal that aims precisely at achieving your core initiatives.
	What is a SMART goal?		SMART is an acronym that stands for Specific, Measurable, Achievable, Realistic, and Timely. Smart goals incorporate all of these criteria to help focus your efforts and increase the chances of achieving your goal.
			Specific: Goals that are speific have a significantly greater chance of being accomplished. To make a goal specific, consider who is involved in the goal, what do you want to accomplish, where is this goal going to be achieved, When do you want to achieve this goal, and why do you want to achieve this goal (corporatefinanceinstitute.com/resources/knowledge/other/smart-goal/)
			Measurable: A goal must have criteria for measuring progress. If there are no criteria, you will not be able to determine your progress and if you are on track to reach your goal. To make a goal measurable, consider: "How do I know if I have reached my goal?" "What is my indicator of progress?"
			Achievable: A goal must be achievable and attainable. The achievability of the goal should be stretched to make you feel challenged, but defined well enough that you can actually achieve it. Ask yourself: Do I have the resources and capabilities to achieve the goal? If not, what am I missing?
			Realistic: A goal is realistic if you believe that it can be accomplished. Ask yourself, is the goal realistic and within reach? Is the goal reachable, given the time and resources? Are you able to commit to achieving the goal?
			Timely: A SMART goal must be time-bound in that it has a start and finish date. If the goal is not time-constrained, there will be no sense of urgency and, therefore, less motivation to achieve the goal. Ask yourself, "Does my goal have a deadline?" "By when do I want to acheive my goal?"

Scenario

<u>Purpose</u>	<u>Screen</u>	Section II: Define Your End Goal
Establish Context		Imagine your team has returned from the "Compliance Sales Practices" training meeting. They have learned how to communicate the features and benefits of our programs in a compliant way.
		When the company implemented "Compliant Sales Practices" training, who did they ultimately want to improve outcomes for?
		1. Sales Representatives
Specific-Who		Do compliant sales practices ultimately improve a Representative's experience or a student's experience? Also, consider who is more negatively impacted when Representatives make false statements or promises. Try Again.
		2. Students
		Yes. The ultimate goal is to improve the student experience and outcomes.
		What are you hoping this training will accomplish for students?
		1. To align student expectations about cost, potential jobs, and financial aid with the actual service we deliver.
Specific-What		Yes. By aligning student expectations with the actual service we deliver, we provide a better cusomer experience and generate trust.
		2. For students to have a positive experience with the Recruitment Department.
		We want students to have a positive experience, but it doesn't stop with the Recruitment Department. Our ultimate goal is for students to have a positive customer experience with every campus interaction. Try Again.

Identify Follow-Up Activities

<u>Type</u>	<u>Purpose</u>	Screen	Section III: Identify Follow-Up Activities that Overcome the Transfer Problem
Rise Documentation	Title		In this section, we will show you what the "Transfer Problem" is and four follow-up activities to overcome it.
Host Video	Challenge		The purpose of this section is to introduce you to the "Transfer Problem." When we say "transfer," we mean transferring knowledge and skills from the training environment to on-the-job performance. The American Society for Training and Development says U.S. organizations spend more than \$125 billion annually on employee training and development, however, research indicates that only a small percentage of training actually translates to organizational or individual improvements. In other words, transferring what is learned in the classroom or training environment to the work environment is an important and expensive challenge. Your challenge, at the end of this section, is to identify two follow-up activities that can be implemented at your campus, after the training occurs, to overcome the transfer problem. Let's start by learning more about the "Transfer Problem."
Rise Documentation	Introduce the Transfer Problem		The American Society for Training and Development says U.S. organizations spend more than \$125 billion annually on employee training and development. However, research indicates that a small percentage of training actually translates to on-the-job performance. This issue is known as the "Transfer Problem." Per Sakes: 40% of trainees fail to transfer immediately after training, 70% falter in transfer one year after the program, and ultimately only 50% of training investments result in organizational or individual improvements.
Rise Documentation	Introduce the Video		Let's watch this video to learn more about the "Transfer Problem."

Produced Video

Purpose	Screen	Section III: Identify Follow-Up Activities that Overcome the Transfer Problem	Image
Activate Prior Knowledge	2.1	Having you ever left a fantastic training meeting, only to forget it once you are back at work? If so, you are not alone. During the meeting you took meticulous notes and were inspired with incredible ideas that would drastically improve your team's performance. However, as soon as you get back to work you find yourself playing catch-up on missed work and focused on meeting looming deadlines and challenges? While US oranizations spend more than \$125 billion annually on employee training and development (Paradise, 2007/ Blume, Ford, Bladwin, Huang, 2010), studies indicate that only 10-20% of training is transferred to on-the-job performance. This training issue is known as the "Transfer Problem."	Image of man forgetting what he learned. Image of busy at work. Image of US organizations with \$125 billion highlighted. Image of training to person 20%.
The purpose of training	2.2	In organizational contexts, original learning in a training experience is rarely enough to render that training effective. Rather, it is the positive transfer-of training the extent to which the learning that results from a training experience transfer to the job and leads to meaningful changes in work performance - that is the paramount concern of organizational training efforts.	Image of transfer from training to person.
	2.3	Because U.S. companies spend billions of dollars training their employees, this poor return-on-investment is an important and expensive issue. It's also a complicated issue to resolve because there are numerous factors that impact the transfer of training to on-the-job performance.	Image of percentage of expense.
The impact of environment on training transfer	2.4	So, let's focus on one of the most important factors that impact training transfer. In 2002, Lim and Johnson concluded that organizational environment or "climate" is the "single most important requirement for successful transfer." However, many studies on training transfer concur that work environment is a key factor that either works to help or hurt the transfer of knowledge and skills to on-the-job performance. Why is this?	Image of work environment.
	2.5	Let's consider the ramifications of work environment on training transfer. Imagine returning to your job after having attended an outstanding leadership training meeting. You're excited to implement several innovative ideas and leadership strategies. However, when you meet with your supervisor to discuss the new ideas, rather than offering encouragement and support, she expresses hesitation. Regardless, you try to move forward with implementing the initiatives on your team. But, without adequate support you struggle at getting the resources you need to implement the new initiatives. Soon, you turn to your peers who attended the same leadership training meeting to discuss the challenges you're having. Your peers vent similiar concerns, saying things like, "this company is never going to let us innovate." Disheartened by a total lack of support, you abandon the new ideas and ultimately never fully apply the skills or initiatives you learned from the training.	Image of meeting with supervisor. Image of discussion with peers. Imaged of disheartened employee.
	2.6	In other words, even with a perfect training candidate and a perfectly designed training meeting, if the work environment does not incorporate proper follow-up support, transfer to on-the-job performance will likely fail.	Image of training failing to transfer as a result of work environment.
Solution	2.7	Thankfully, there are things that Campus leaders can do to facilitate the transfer of training to on-the-job performance. Next, let's look at four practical follow-up activities that can help your team apply what they learn when they return from training meetings.	Image introducing four Follow- Up Activities.

<u>Purpose</u>	<u>Screen</u>	Section III: Identify Follow-Up Activities that Overcome the Transfer Problem
Quote		"It has been recognized that constraints and obstacles in the post-training environment can interfere with and limit the transfer of training. Research has also found that the transfer climate and support provided to trainees are particularly important for transfer." Harry J. Martin
Activity Introduction		The following activities are practical and cost-effective methods to promote the transfer of skills and knowledge to the workplace.
Follow-Up Activity #1: Action Plans		Action plans are written documents completed by trainees during or immediately following training that specify how the trainee expects to implement learned skills on-the-job. These plans involve the learner more deeply in the concepts and relationships, thereby promoting greater insight and collateral learning. They encourage action to be taken and specify how the improvements will be assessed. Overall, action plans help learners think through and write down how they will apply the learning to the job.
Follow-Up Activity #2: Performance Assessments		Performance assessments involve activities that measure or observe the behavior of trainees in their work setting, following instruction. Numerous studies indicate that follow-up assessments promote the transfer of learning.

<u>Purpose</u>	<u>Screen</u>	Section III: Identify Follow-Up Activities that Overcome the Transfer Problem
Follow-Up Activity #3: Peer Meetings		Peer meetings are periodic meetings of trainee groups, folloiwng instruction. These meetings are typically facilitated by a professional staff employee or external consultant. At these meetings employees share examples of how they are applying the skills an dinformation from the training, explain the impact of their application on operations and performance, and explore barriers to application an dhow they can be eliminated. Peer meetings can be a useful tool in ensuring that peers provide support that facilitates positive transfer. These meetings promote transfer by improving the trainee's understanding of the material and by motivating them through direct encouragement and the examples given by other trainees.
Follow-Up activity #4: Supervisory Consultations		Supervisory consultations are designed to put the trainee's immediate supervisor into the role of coach or mentor to encourage skill application. Through supervisory consultations, supervisors can give trainees feedback, encouragement, reinforcement, and provide them opportunities to practice newly learned skills and behaviors. This is a good time for supervisors to discuss specific actions that the trainee is taking to implement the training and to provide support and encouragement.
Emphasize the need for supervisors to		Myth: Training transfer happens all by itself. Fact: Employee training and development doesn't happen as a result of one meeting, or even as a result of a few training meetings. Employee training and eevelopment requires that managers implement daily development initiatives that help teams remember, focus on, and implement desired skills.
support training transfer		Myth: Applying company training to the job is solely and employee's responsibility. Fact: Managers/ supervisors play a crucial role in helping employees apply new skills and knowledge to their job. Employees need to be motivated to execute the training they receive. Managers play an essential role in motivating employees to acquire new knowledge and to apply their skills.
Communicate		Improved Performance at every level: employees improve performance individually, thereby impacting team and campus performance.
training transfer		Greater employee satisfaction and retention: Employees that perform well feel better about their jobs and receive more positive feedback from their supervisor. Overall, this results in happier employees that stay longer with their company.
		Cost Benefits: Effective follow-up activities create outcomes that justify triaining expenses.
Application		Select which follow-up activities you would like to implement at your campus to facilitate effective training transfer for your sales representatives.
Recap		Recap learning

References

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