

| <b>TEMPLATE: Steps to Develop a Transfer Strategy (Tool 6/7b)</b>                                                                                                                                                                                                                                                       |                                                       | <b>Training Project/Solution: _____</b>                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                     |
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| <b>A. Transfer Action and Timing</b>                                                                                                                                                                                                                                                                                    | <b>B. Supporting Cast</b>                             | <b>C. Difficulties Envisioned</b>                                                                                                                                                                                                  | <b>D. Transfer Strategy to Overcome Difficulties</b>                                                                                                                                                                                                                                                |
| <p><b>Example 1) Big Sky Medical</b><br/>           Following the training, Group managers ask employees frequent questions about action items that were developed during training and recognize employees who are implementing their action plan to end ineffective habits.<br/> <b>Time Frame:</b> About 2 months</p> | <p>The CEO, Ronda the client. The group managers.</p> | <p>Group managers frequently operate in a crisis mode. They are also frequently out of the office doing community work. Competing priorities and crisis management tendencies may mean that the transfer action never happens.</p> | <p>a) Meet with Ronda and discuss how we can get the CEO to sponsor a key action to influence the group managers.<br/>           b) Propose the possibility of a compliance implementation goal on the managers' personal performance plan and tied to their overall annual performance rating.</p> |
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**Note:** The time frame you select varies with the situation. You must consider the variables present in the work environment and select a reasonable time frame for the strategy to be in place. The strategy should work to influence execution for a period of time so as to influence success and become the new routine.