
Training Design Factors Influencing Transfer of Training to the Workplace within an International Context

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ABSTRACT Numerous research studies on transfer of training within an organisation have been conducted, but seldom found in international settings. In an effort to examine the effect of training design on the transfer of human resource development (HRD) training for a global company, a training project for a Korean organisation was studied. The focus of the study was to examine the learning, transfer, and reasons for impeding or facilitating the training transfer made by the HRD professionals of a Korean organisation. Data analysis results revealed the degree of learning and training transfer and several reasons for high or low transfer of training. Discussions and conclusions were made to help programme designers in global contexts develop effective training programmes for cross-cultural application.

Introduction

Today's organisations are facing severe competition from around the world as more turbulence and pressures of continuing change are imposing upon them. In this global environment, organisations are encountering globalisation of their employees, as well as the business itself. This trend impacts upon employee training and development in order to cope with the global needs of employee performance. The change toward a more global orientation for employee training necessitates the need to understand the nature of learning and training transfer between organisations and countries. Despite the critical influence of transfer on the success of a business, many training initiatives of multi-national organisations fail to meet the cultural needs of recipient organisations in multi-cultural settings (Lim & Wentling, 1998). Designing a global training programme that accommodates the cultural

needs becomes a critical task for human resource development (HRD) professionals in today's organisations.

Several theoretical and practical reasons initiated the need for this study. First, numerous empirical studies on transfer of training have been conducted in recent years (Baldwin & Ford, 1988; Ford & Weissbein, 1997), but seldom in cross-cultural settings. When the issue of transfer of training is raised in cross-cultural settings, cultural differences between countries should be included as one of the variables impacting the transfer of training. Considering the lack of research studies in cross-cultural training transfer (Ronen, 1989), identifying the cultural factors influencing transfer of training in cross-cultural environment is an important area of study. Secondly, current theories and models of transfer of training were also considered inappropriate to study the nature of learning and transfer of training in cross-cultural environment (Lim & Wentling, 1998). The need to set up a model for international transfer of training is growing more than ever. Through the model, the factors in training design, organisation and cultural differences affecting the transfer of training can be examined and verified in a cross-cultural environment. From a practical point of view, HRD practitioners in multi-national companies need guidelines to better understand the transfer of training within a global context. The findings of this kind of study will help programme designers within multi-national companies develop overseas training programmes that better meet organisational and individual needs, and are culturally appropriate.

The SK Group is one of the biggest conglomerates in Korea; ranked as the fourth biggest conglomerate in Korea in terms of sale revenue in 1999. Fifteen companies with various product lines comprise the conglomerate. The SK Training Centre, the centralised training centre for all employees of the SK Group, has implemented various overseas training programmes to develop the training professionals of each company in the SK Group. For the SK Training Centre, however, there has never been an effort to identify how and why several factors in programme design, culture, and work environment impede or facilitate the transfer of training conducted in foreign countries. Recently, the SK Training Centre has raised a need to modify training programmes conducted in foreign countries to better apply the training to jobs and tasks of the trainees. Finding the variables of impeding and facilitating the transfer of training is considered as the first step to design a training programme that enhances performance of the trainees. By identifying those reasons and feeding major findings back to the training design and the training transfer process, it is expected that HRD practitioners will be better able to create a foreign training programme that meets organisational and individual needs to transfer the training on the job.

Questions for Investigation

The purpose of this study was to examine the degree of learning and training transfer achieved by HRD professionals of SK Group in Korea, and to identify what factors in training design affect the learning and transfer of training. The following research questions were developed to investigate the purpose of the study.

To what extent do trainees perceive that their learning has resulted from training?

To what extent do trainees perceive that their learning has transferred to their jobs?

What are the reasons for high or low perceived learning and training transfer to their jobs?

What factors in training design affect trainee's learning and transfer of training to the job?

Theoretical Framework

A Model of International Transfer of Training

In order to investigate the transfer of training across international settings, a theoretical framework for training transfer is necessary, but identification of detailed transfer factors is more important. From an extensive literature review on training transfer, several factors in learning environment, cultural differences and work environment were identified. First, the effect of training design on transfer of training has been studied by numerous researchers because it is believed to be one of the most important constructs affecting training transfer (Brinkerhoff & Gill, 1992). Two categories of training design variables were derived from many studies on transfer of training: instructional design and instructional method. For instructional design, Baldwin & Ford (1988) describe three instructional design issues that influence training transfer: identical elements, stimulus variability and teaching of general principles. According to them, transfer of training is maximised:

when there are identical stimulus and response elements in the training and transfer settings;

when a variety of relevant training stimuli are employed in the training content;

when trainees are taught the general rules and theoretical principles that underlie the training content.

Many researchers have discussed issues in effective instructional methods. The following findings refer to the various types of instructional methods increasing training transfer. Over-learning, a process of learning far beyond the required level of performance, supports retention of

training (Hagman & Rose, 1983). Posttraining interventions such as goal setting (Wexley & Nemeroff, 1975) has been shown to increase the motivation of trainees to transfer learned skills to the job. Garavalia (1993) suggests several instructional methods for effective training transfer:

- use of many different examples in various contexts;
- use of analogies;
- use of computer simulation;
- use of advance organisers.

As an effective way to increase transfer of training, Foxon (1997) advocates the action planning method for training. Finally, tutoring and coaching are considered powerful tools to apply new behaviour patterns and skills acquired in the training to the jobs and tasks (Huczynski, 1989).

Cultural differences were found to severely affect transfer of training in international settings. Those divergences include language barriers (Dillon, 1993), societal value differences (Adler, 1986), learning style differences (Hofstede, 1991) and technical differences (Lim & Wentling, 1998).

Work environment is another construct needed to examine training transfer. Two categories of work environment factors seem to surface from many studies on work environment factors affecting training transfer: work-system- and people-related factors. Work-system-related factors include open communication climate, change resistance climate (Rainey, 1983), opportunity to use training, pace of workflow (Ford et al, 1992), match between training and department goals, availability of tools to apply training (Richey, 1990) and reward for training (Willard 1992). People-related factors include support from supervisor and co-worker (Ford et al, 1992) and availability of mentor (Richey, 1990).

Based on a careful review of several models of training transfer (Huczynski & Lewis, 1980; Baldwin & Ford, 1988; Geilen, 1996; Lim & Wentling, 1998), common characteristics for a model of international transfer were identified (see Figure 1). First, a model of international training transfer must encompass three primary domains: learning environment, cultural differences, and work environment. Secondly, the three domains of the model include several sub-elements or variables that can affect transfer of training. Thirdly, the three domains and sub-elements interact with each other by shaping a specific pattern of influence on the transfer process. Fourth, the model of training transfer describes a systematic process that has direct or indirect relationships between the elements of each domain.

In this study, the framework of the model of International Transfer of Training was applied. Among the three domains of the model, this study selectively focused on several variables in the training design construct

to verify the degree of learning, transfer, and reasons of high or low transfer in global context.

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Figure 1. A model of international transfer of training.

Methodology

To explore the transfer of training, 10 individual case studies were planned and conducted. A case study for data collection and analysis was used because each trainee was expected to have a different pattern of training transfer. The subjects for the study included 10 HRD practitioners of SK Group in Korea who attended an HRD training programme offered by the Department of Human Resource Education at the University of Illinois at Urbana-Champaign. The 10 trainees came from four companies of SK Group, and their job titles included HRD specialists, assistant training manager and training manager.

A questionnaire was developed to obtain the trainees' perceived degree of learning and training transfer. The questionnaire included question items composed of the seventy training objectives extracted from the instructors' lesson plans that were used during the instruction. The trainees were asked to rate their perceived degree of learning and training transfer for each of the 70 training objectives. The questionnaire used a four-point Likert-type scale to measure the degree of the learning (0 for 'do not understand' to 3 for 'completely understand') and transfer (0 for 'none' to 3 for 'frequently use'). A structured interview guide was developed to investigate the reasons for high or low learning and

transfer, and to collect examples of successful transfer. Each trainee was asked to participate in two interviews for data collection. The reason for using the two-tiered interview process was because the trainees were expected to refresh their learning from the first interviews and provide more in-depth information during the second interviews. Asking the trainees' learning and application of the training objectives to their jobs during the first interview was expected to facilitate their responses to the second interview questions asking the specific examples of the successful training transfer. The questionnaire was asked to fill out during the first interview to determine each trainee's degree of learning and training transfer for each of the seventy training objectives. Responses from the questionnaire were used during the second interview to guide questions asking for reasons to explain the high or low learning and training transfer for each training objective. Data collection began 6 months after the training programme ended because the 6-month period was considered to be enough time for the trainees to apply their learning to their jobs and tasks. Other researchers (May & Reilly, 1997) also support the 6-month period as an appropriate time interval to assess transfer of training. The researcher conducted all individual interviews with each subject in Korea. Document review and observations were conducted to collect data regarding incidents and examples made by the trainees on the job. To evaluate the content and construct validity of the instruments used for the data collection, a pilot test was conducted. The pilot study consisted of a two-step process. First, the instruments were reviewed by the three researchers who had extensive research experience in HRD. Secondly, after modifying the instruments from the feedback of the three researchers, a pilot test was conducted with one participant of the training programme. From the pilot study, the instruments were modified and finalised.

Two methods were used for data analysis: basic descriptive statistics and qualitative analysis. The units of analysis for the descriptive case studies were:

- the trainees' perceived degree of learning;
- their perceived degree of training transfer;
- the reasons why learning and the later transfer of their learning to their jobs did or did not occur.

The degree of learning and training transfer was first analysed using basic descriptive statistics. The reasons for high or low perceived learning and training transfer for each training objective were explored and categorised.

The Training Programme

The Performance Improvement Technology Training Programme was designed by the University of Illinois to provide SK HRD practitioners with knowledge and skills in the area of computer technologies for training. The training programme was conducted for 3 weeks in August, 1997. The general objectives of the training programme were to identify and describe technologies that enhance learning, develop quality instructional materials and evaluate them, and effectively use a variety of technologies for instruction and administrative purposes.

Instructional emphasis in the course was placed on recent developments that involve the use of the Internet and its application in education and training. Instructional technologies such as computer-based instruction, computer-based testing, distance learning and intelligent instructional technologies were included in the curriculum. Instructional methods used for the training programme were lecture, reading, discussion, projects, benchmarking field trips and computer skill practice. A total of 70 specific learning objectives were developed for the course.

Findings

Degree of Learning

In order to identify what was learned or not learned during the course, the trainees were asked to rate their degree of learning for each of the 70 learning objectives in the course. As a group, the 10 trainees indicated a fairly high perceived degree of learning. The population mean score for the perceived degree of learning was 2.0 on a 4-point scale (scale range was 0–3), which indicates ‘mostly understood’ in the rating scale of the questionnaire. Further analysis was conducted to examine the degree of perceived learning within different goals of the course. The course learning objectives were categorised into four domains:

- learning principles and theories (18 objectives);
- conceptual understanding of performance improvement technologies (30 objectives);
- specific knowledge to master skills for distance learning technologies (11 objectives);
- skills for using distance learning technologies (11 objectives).

Table I shows the average perceived degree of learning for each category. As shown in Table I, the trainees perceived greater learning for objectives that addressed skill development and conceptual understanding. Slightly lower learning was perceived for objectives that addressed theories and skill-orientated knowledge.

Analysis was also conducted to examine the extent to which the trainees felt that certain objectives promoted either a high or low degree of learning. Sixty-three of the 70 objectives were rated above the mid-point on the 4-point scale (>1.5), while seven of the objectives were rated below the scale mid-point. On the 4-point scale, 0 indicates 'do not understand', while 3 indicates 'completely understand.' During the second interviews the trainees were asked to provide reasons why certain objectives had resulted in either a high or low degree of learning.

Learning objective domains	Number of objectives	Mean	SD
Learning principles and theories	18	1.90	0.66
Conceptual understanding of performance improvement technologies	30	2.06	0.70
Specific knowledge to master skills for distance learning technologies	11	1.86	0.82
Skills for distance learning technologies	11	2.14	0.71
Total	70	2.00	0.72

Table I. Average perceived learning based on training objectives.

Table II contains a list of the factors that contributed to their learning.

Reasons for high degree of learning	f^*	$\%^{**}$
• Highly related to their job	143	21.9
• Previous understanding or knowledge	141	21.6
• Quality of examples and demonstrations	77	11.8
• Opportunity to apply on the job	65	9.9
Reasons for low degree of learning		
• Forgetting due to the time lapse	76	44.4
• Lack of interest in the topic	54	31.6
• Lack of understanding during the training	30	17.6

*The number of times this reason was provided for each of the objectives that the trainee indicated had resulted in either a high or low degree of learning.

**Percentage of responses based on 63 high learning objectives and 7 low learning objectives.

Table II. Most common reasons for high or low perceived learning.

Transfer of Learning

An analysis of the degree of transfer was conducted through interviews with the trainees and by reviewing documented evidence of transfer. The trainees seemed to have many chances to transfer what they had learned through the training to their jobs and tasks. The average of the 10 trainees' perceived degree of training transfer for the 70 learning objectives was 1.61, which indicates a moderate degree of perceived transfer. The group's perceived degree of transfer was somewhat lower than their perceived degree of learning. Table III shows the average perceived degree of transfer for the four categories of learning objectives. It is interesting to note that the trainees felt that they had the greatest transfer of objectives that addressed learning theories and conceptual understanding of performance improvement technologies. This seems counter to the general notion that specific skills are most likely to transfer.

Learning objective domains	Number of objectives	Mean	SD
Learning principles and theories	18	1.71	.89
Conceptual understanding of performance improvement technologies	30	1.67	.95
Specific knowledge to master skills for distance learning technologies	11	1.37	1.01
Skills for distance learning technologies	11	1.52	1.08
Total	70	1.61	.97

Table III. Average perceived transfer based on training objectives.

Trainees' perceptions of the transfer of training were identified during the first interviews. Five trainees said that they began using some of the performance improvement technologies presented during the training when they returned to their jobs. Seven trainees indicated that they intended to apply what they learned from the training to their future jobs and tasks. Evidences of the training transfer were found from the document review. Six trainees were identified to apply the learning to specific HRD projects, such as developing virtual training systems, online training home pages and knowledge management systems.

Although the trainees felt that transfer of learning had occurred, it was not always an easy transfer. Five trainees said that some of the conceptual objectives from the training were difficult for them to transfer, while six trainees said that some of the skills they had learned during the

training were hard to transfer. During the second interviews, the trainees were asked to provide reasons why some of the objectives transferred, while others did not.

Table IV provides a summary of the most common reasons why transfer did or did not occur. The primary reasons for high perceived degree of transfer was:

- the opportunity to use their learning on their job (77%);
- needed for personal use (14%);
- used what was learned to persuade others (5%).

The trainees provided numerous examples to explain the opportunities they had to use what was learned on their jobs. These examples included opportunities for planning and discussion purposes (28%), for programme development (14%), for information system design (13%) and for instruction (11%). The most common reasons for low transfer included:

- the lack of opportunity to apply the learning on the job (64%);
- no direct relationship of the learning with their job (15%);
- lack of understanding of the content (9%).

Reasons for high or low perceived transfer	<i>f</i> *	%**
• Opportunity to use on the job	325	77.4
• Used for personal use	60	14.29
• Used to persuade others	20	4.76
Reasons for low transfer		
• Lack of opportunity to apply on the job	270	64.3
• Not directly related to my job	63	15.0
• Lack of understanding of the content	39	9.3

*The number of times this reason was provided for each of the objectives that the trainee indicated had resulted in either a high or low degree of transfer.

**Percentage of responses based on 39 high learning objectives and 31 low learning objectives.

Table IV. Reasons for high or low perceived transfer.

Training Design

In this research study several characteristics of the design of the training programme affected the trainees' learning and transfer of training directly or indirectly. From the trainees' comments about the training design, the inhibiting and promoting factors of training design on the learning and training transfer were identified. The number in parenthesis is frequency

of response from the trainees. The inhibiting training design factors identified were:

- inappropriate benchmarking-visits (4);
- lack of sufficient time to preview the training content (2);
- lack of thorough needs assessment for each trainee (1);
- insufficient practice and exercise session (1);
- mismatch between the practice session and the learning content (1);
- inappropriate grouping of trainees for workshop activities (1);
- lack of clarification of technical terminology (1);
- insufficient lab hours for computer use (1).

The promoting training design factors identified were:

- instructor's mental and emotional involvement in the instruction (3);
- instructor's demonstration of teaching principles through the instruction (2);
- demonstration of specific examples (2);
- self-directed daily wrap up meeting (2);
- instructor's sensitiveness to cultural differences of the trainees (1);
- step-by-step instruction moving from basic to advanced learning content (1);
- skill practice session (1), teaming up of work group with mixed specialties (1);
- pre-distribution of reading materials (1);
- participatory learning method (1);
- use of audio and visual material during instruction (1).

Even though it was not specifically indicated in the above list of training design factors, the role of training coordinator was indicated as an important factor for the success of the training. Coordination was especially required, not only for translating the instruction during class, but for guiding the trainees with appropriate suggestions during the daily wrap-up meeting regarding the application of their learning to jobs and tasks. To do this, the coordinator needed to understand the trainees' jobs and work environment.

The self-directed wrap up meeting seemed to help the trainees in several ways. First, it provided the trainees an opportunity to reflect daily learning and relate the learning to jobs and tasks. Secondly, several trainees mentioned that the daily wrap up meetings helped them clarify some of the confusing concepts of performance improvement technology. Thirdly, the wrap up meetings also helped novice trainees in computer technology understand basic technical concepts and network terminology. Whenever a trainee raised a technical question to the whole group during the meeting, one of the computer specialists answered the question.

Discussion

Several themes emerged from the data analysis of perceived learning and transfer and the examination of actual examples of transfer. These themes and their resultant implications are organised around degree of learning, training transfer, and training design.

Degree of Learning

The 10 trainees who participated in the performance improvement technologies training programme showed different perceived degrees of learning and training transfer from the data analysis. In general, all 10 trainees showed a high perceived degree of learning. From the responses of all 10 trainees, one pattern of learning was found. Even though the perceived degree of learning for all trainees was satisfactory, the training objectives in the conceptual domain seemed to be relatively more difficult to learn than skill-related training objectives. Among the seven training objectives that showed low perceived degree of learning, only one was related to skill-related objectives, while the other six objectives were conceptual.

There were numerous reasons for low or high perceived learning, but one distinct category was found to influence the learning to a great degree. It was the category of reasons related to job application of the training that accounted for most of the reasons for low perceived learning (i.e. forgetting due to lack of opportunity to use on the job) and for high perceived learning (i.e. highly related to my job and opportunity to apply on the job). From this finding, it seems that job-related reasons had the strongest influence on learning. Other major reasons for low or high perceived learning could be classified into two categories. The first category included the personal reasons for using what was learned such as lack of interest or previous understanding of the training content. The second category included training design aspects that account for high perceived learning, such as examples and demonstration, practice opportunities, class projects and daily wrap up meetings.

Transfer of Learning

The trainees seemed to have many chances to transfer the training objectives to their jobs and tasks, but they showed different perceived degrees of transfer among them. From the data analysis, transfer of training showed a relatively lower perceived degree than that of learning. It is indicated, however, that job-related reasons had the greatest influence on training transfer. Of the reasons for low perceived transfer, job-related reasons, such as lack of opportunity to apply on the job or information that is not directly related to their job, had the most

influence on transfer. Of the reasons for high perceived transfer, job-related reasons such as opportunity use on the job have the most influence.

In contrast to learning, conceptual-related training objectives were perceived to be more highly transferred by the trainees than specific knowledge or skill-related objectives. The training objectives covering 'learning principles and theories' and 'conceptual understanding of performance improvement technologies' were perceived as highly transferred objectives. Training objectives covering 'specific knowledge to master skills for distance learning technologies' and 'skills for distance learning technologies' were perceived to be less well transferred. The reasons for this could be based on the job characteristics of the trainees. As indicated from the reasons for high perceived transfer of training, the trainees were more engaged in tasks that required mental or conceptual activities than did in skill-related tasks.

Training Design

From previous research studies, several training design variables were found to influence the transfer of training such as identical elements between the learning and job setting, stimulus variability in instruction, teaching of general principles (Baldwin & Ford, 1988), and over-learning (Hagman & Rose, 1983). The findings of this study also showed similar evidence with these research studies. First, the training content was said to be mostly identical with the trainees job requirements except one technical difference in language conversion for a software programme. Secondly, use of various instructional methods, such as examples and demonstration, practice session, and project completion, seemed to promote better learning during the training. Thirdly, over-learning seemed to promote the retention of trainees' learning after the training. Many trainees seemed to clearly remember and applied the learning principles to the design of online courses, which were emphasised several times by one instructor, 6 months after the training. Some trainees mentioned that even though they already knew the learning principles, they tended to focus on the use of advanced computer technologies without considering whether those technologies support the learning or not. The training gave them an opportunity to revisit the basic learning principles and apply them to the design of online training programmes.

From the data analysis, nine out of 10 trainees indicated that they had a project to complete after the training. One of the trainees even mentioned that the training programme was successful because most of the trainees were assigned some types of projects to complete after the training. From this, the transfer variables such as motivation and goal-

setting might be drawn not only from personal characteristics, but also affect learning and training transfer as the training design factors.

Conclusions

Not all learning from any training programme can be expected to be transferred or applied to jobs and tasks for the trainees. This is especially true for the case of international transfer of training. To assure the maximum transfer of a training programme several considerations must be made prior to and during the training programme. First, to make a good training design that accommodates the cross cultural training needs, thorough training needs assessment at the individual participant level seems important to ensure the success of training transfer as well as the quality of training. The cross-cultural training needs of the participant's level may vary from individual to individual. The more a training satisfies the individual participant level cross-cultural training needs, the better the chances of the training transfer exist. Secondly, the use of diverse instructional methods is considered an important strategy for training design that leads to successful training transfer. By providing learning experiences in different ways, the trainees can master the training content conceptually and experientially. Diverse learning stimuli also helps retention of the learning to a great degree. Thirdly, in the case of delivering training programmes for foreign students, the instructor's sensitivity to the cultural differences that students may experience during the instruction is an important factor for successful training. The course coordinator also plays a critical role in guiding the students' learning and application of the learning back to the jobs and tasks.

Several research implications surface from this study. First, it appeared that trainee personality variables influenced the learning and training transfer, but were not explored in this study. Including the variables of trainee characteristics in future research designs will enhance breadth of future studies. Secondly, this study focused on the transfer of training in international settings. Comparing the differences found in the transfer of training between domestic and international settings is an interesting topic in need of study. Thirdly, studying the transfer of training in different training delivery environments, such as using distance education technologies, will be another way to study the transfer of training between countries.

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