

Paul Matthews



**13 Barriers  
to Implementing  
Learning Transfer  
– and how to  
beat them**



**PEOPLE ALCHEMY**



**B**efore looking at why we avoid proactively implementing learning transfer processes, we need to be sure the effort of doing learning transfer is worth it. So, what is learning transfer and why is it so important?

Like many terms, the phrase 'learning transfer' seems to mean different things to different people. In organisational learning, it usually refers to the implementation of learning that has happened in a prior formal event, such as a training course or an elearning course. It means the translation and application of the learned knowledge, skills and attitudes into effective action that improves job performance, is sustained over time, and is beneficial for the output of the workflow.

You will also hear terms like training transfer, embedding learning, making learning stick,

transfer of learning, and others. When you are talking to someone about learning transfer, ask them what they mean by it, so you have a common understanding. The conversation will go better if it is not based on different assumptions.

Learning transfer should underpin the whole notion of training, and yet too often we focus on the transmission of information from the trainer to the trainee, and then the retention of the informa-

tion by the trainee. We tend to overlook the primary purpose of organisational training: improved employee performance, and that can only happen when there is sufficient learning transfer. A huge amount of money is spent annually on em-

ployee training, yet past studies have shown that failure of transfer from the training setting to the real job is all too common.

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*If the training programme does not achieve significant transfer and subsequent deployment of the learning, it's not worth much!*

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Not surprisingly, employers are increasingly demanding that training yields a measurable and meaningful return on their investment beyond 'bums on seats' data. Hopefully, L&D trainers are finally waking up to the fact that organisations are starting to hold them accountable for change beyond the training room, and therefore they must influence beyond the training room. Keeping themselves inside the boundaries of training and other formal interventions does not generate results that are comfortable to report in those accountability conversations.

Rather than being based on evidence, most investment in training and development appears to be based on faith that it will work, or because it is regarded as a 'given good'. But that faith seems to be misplaced. All too often the way we try to achieve change through learning is based on flawed models built around one big event. Information and skills from events that only cover concepts once have been shown to yield little long-term retention, even when quality and satisfaction ratings, so-called 'happy sheets', for the learning event are high.

My hope is that, despite the barriers to implementing learning transfer as an integral part of your L&D initiatives, you will no longer be able to imagine delivering any training without it. In fact, it should become obvious that *Not using transfer strategies when you could, would be tantamount to malpractice* for any learning and development professional.

Of course, we are not just talking about wasted training budget here. Every day an employee isn't ready to work and ready to be independently productive carries a cost, not a profit. Shortening the 'speed to proficiency' time saves money as well as reducing frustration, improving morale, and providing other side benefits, such as lower attrition rates. If shrinking the time to proficiency is one of the most significant contributions that

L&D can make to an organisation, learning transfer is the key to achieving this.

We are talking about a shift in focus from what it takes to complete a training event to what it takes to get employees proficient at their job using the material from the training event. The degree to which learning transfer occurs has a direct impact on the value the organisation will harvest from the training investment. Successful learning transfer depends on a mindset that permeates the entire learning programme, from design through delivery to the end game. It depends on a focus on business benefits through improved performance rather than a focus on learning outcomes.

As organisations attain higher levels of learning maturity, their mindset about employee development shifts away from viewing learning and development as stand-alone, separate, external activities. Instead, they view learning and work as intimately connected and development happening as part of their employees' day-to-day work. Mature learning organisations are increasingly discarding long held or traditional beliefs about how learning should be created and facilitated, and are instead focusing on creating the right conditions, context, and culture for learning to take place.

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*“A learning organisation is a group of people working together collectively to enhance their capabilities to create results they really care about.”*  
*Peter Senge*

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which plays out within the cultural environment. The longer process and its surroundings must be considered holistically if you want the learning transfer component to be successful.

As with a chain, the entire process is only as strong as its weakest link. We therefore need to look at all the links in this chain, including those parts of the process that predate the actual learning transfer, because these set up the initial conditions and inputs. Since the entire process takes place over time, you can think of it as a workflow. The term 'workflow' presupposes a sequence of tasks, or even mini workflows, that build on each other, step by step, over a period of time. It is an orchestrated and repeatable pattern of activities that takes specified inputs and, all going well, culminates in a specified set of outputs. The word 'workflow' reminds us of the fact that people must DO something rather than just intellectually learn something. Albert Einstein said "Learning is an experience. Everything else is just information".

So, think of the formal training event as simply one step in the workflow activities and experiences that is required to get the results you want. A traditional training course, without an effective learning transfer workflow wrapped around it, is most unlikely to deliver reliable employee behaviour change or any significant business benefits. Without further intervention, the traditional structured and linear nature of learning in the classroom does not prepare people well for the more complex and ambiguous world of work.

That complex world of work is powerful. Returning trainees have less power to change the system surrounding them than the system has power to maintain its inertia. Without help, trainees tend to revert and conform to the system after doing training. However, it is possible to empower the trainees and to shift the culture

in the system, so it becomes fertile ground for growth and development.

Despite the common-sense argument that training that is not used is wasted money, the tools and activities to ensure successful learning transfer are often not used at all, or they are only used superficially and

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*The system, if left unchecked, can untrain your trainees faster than you can train them.*

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thus have little impact. This is not to say that all training is wasted. There are certainly training programmes that are successful in achieving the desired business results, but these are in the minority when compared to the vast amount of training that is delivered each year. In most cases, if the system does not change, it is unlikely to support individual change, and may well be inimical to it. If you think your training programme is special and will buck the trend, think again.

There are considerable bodies of research that show that the effect of training over the longer term is limited, and yet senior teams still see it as the solution. One

reason for this is that they view their organisation as an aggregation of individuals. Given this premise, people must be selected for and trained with the right knowledge and skills to

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execute their strategy and improve the organisation's performance. Competency frameworks are developed to suit the organisational strategy, and training courses follow.

This approach makes very little, if any, allowance for the fact that organisations are systems of interacting elements, with structures and processes and leadership styles, as well as professional and cultural backgrounds. If we see the

organisation as a system with many interacting components, and the captain of the ship/system is the senior team, it can be difficult to confront that senior team with an uncomfortable truth: failure to execute on strategy and change organisational behaviour is not down to individual worker deficiencies but is due to the way that the captain is steering the ship. It is much easier for the captain to hear that members of the crew need training than it is for them to hear that their own performance as captain is contributing to the problem.

Hopefully the scene is now set. You can see how learning transfer fits into the conversation about learning and development, and why ignoring it simply isn't an option. And yet, learning transfer still seems to be the resident elephant in many rooms where a training programme is under discussion. When I point at the elephant, there is usually an acknowledgement of its existence, followed by a slide back into the comforting rut of course delivery. "Yeah, we need to do something about that, but right now we need to focus on the logistics for all the trainees from the EMEA region."

Why do so many people in L&D do little or nothing about learning transfer when doing something is such simple common sense? Perhaps the elephant has been there for so long that people in L&D now just assume that it's part of the furniture. To me, this elephant is BIG, and impossible to ignore. To me, the case for proactively driving the learning transfer process is self-evident, and yet so many people choose to behave as if the elephant doesn't exist. Why? If we look at some of the reasons that people avoid implementing learning transfer methods, we can start to understand how to change the conversation.

*The case for proactively driving the learning transfer process is self-evident.*

## Learning transfer barriers

By the way, some of what follows may annoy you as I am being a bit provocative, or you may find you are gritting your teeth and wishing you didn't agree...

### 1. "I never really thought about it"

"Elephant? Really? Where? No-one else is mentioning it."

Actually, many people are talking about the elephant in books, on blogs, at conferences. This is nothing new, and not uncommon. They may not call it 'learning transfer'. They may use terms like 'making learning stick', 'making training effective', 'embedding learning', and many others.

### How to fix it

Now that you are aware, start to notice how often you hear talk of the learning transfer elephant. If your colleagues don't talk about the elephant, you will need to look outside your own organisation to avoid the internal groupthink that is ignoring the elephant. Find books (including mine\*), find blogs, and find commentators who talk about learning transfer and hear what they have to say. You are reading this ebook, so you are already on this road. Then ask some pointed questions about training effectiveness within your own organisation. Get the conversation started about what might need to be done to promote learning transfer and make training more effective.

[paul-matthews.com/learning-transfer-at-work/](http://paul-matthews.com/learning-transfer-at-work/)

### 2. "My job is to train people or deliver other formal learning"

"You asked for training; you got it. Job done. Our responsibility finishes at the end of the course. Learning transfer is not our responsibility." In effect, they are saying that their job is delivering information and not building skills that require practice based on that information. They see the necessary skill building and behaviour change as a job for those out in the field.

This attitude arises when L&D set themselves up as an order taker, as a shopkeeper. One of the common tools that contribute to this paradigm is the traditional Learning Management System (LMS), with its list of courses and events that people can book to attend. It's like ordering something off an online shopping site where the seller is not involved in any way with how the product will be used. Some even have an algorithm that says, "Other learners who attended this course also attended these other courses."

A common lament I hear among L&D people is their lack of access to the top table and exclusion from top-level decision making. I often find that the people with this lament are the very same people who have the 'shopkeeper attitude'. Think about it for a minute. Would you, as a senior decision maker in an organisation, want to have the head shopkeeper from a small peripheral department at your board table? Not likely.

### How to fix it

Start getting interested in how people are using your training courses, and why they order them in the first place. Assume that at least part of the process of learning transfer is

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*Start getting interested in how people are using your training courses, and why they order them in the first place.*

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your responsibility and notice how that shifts your thinking about your role as a trainer, and as a course and programme designer.

People want a training course to solve a problem they have. What is that problem? Become someone who solves problems for people rather than someone who just sells stuff that might be a solution if the buyer has chosen wisely and uses what they have bought correctly. If we are buying anything other than a commodity, we really appreciate the expertise of a salesperson who takes the time and effort to find out what problem we are trying to solve and then guides us to a viable solution and how to make best use of their product.

### 3. "We buy the training from an external supplier"

When the training is outsourced, the external training provider is primarily interested in selling training. If the subject of learning transfer is even discussed, it becomes a finger pointing exercise. The training company says that it is up to the client to handle learning transfer activities, and the client points at the training company saying that their training course has not worked.

### How to fix it

To me, responsibility lies in both camps. The procurement process within the client company should be making sure that it is buying all the components needed to ensure the success of the training course. Otherwise, it is a bit like buying a car without the wheels.

Equally, the selling process within the training provider should ensure that their client understands the need for effective learning transfer and should provide help and support to put that in place. Unfortunately, it seems to be acceptable to buy training, and to sell training, without wheels.

### 4. Management says, "It's not our responsibility"

Management says that their job is operational excellence, not staff development. "L&D should be doing staff development."

### How to fix it

There are two aspects to this. One is that most management role job descriptions include a section that states their responsibility for developing the members of their team. If the job description does not include this responsibility, it should.

The second aspect, which they also cannot run away from, is that most of the learning that happens at work, happens on their watch in the general day-to-day workflow. The 70:20:10 learning model tells us this, and even a moment's reflection also tells us this from our own

experience of where we learned to do what we do at work.

What most managers don't understand is that unbeknownst to them, they have superpowers. These powers manifest themselves every time the manager answers a question, delegates a task, or has a conversation or other form of

interaction with a team member. They also manifest when a team member observes how their manager inter-

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*What most managers don't understand is that unbeknownst to them, they have superpowers.*

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acts with anybody else – either directly or in any other way. By their actions, the manager sets the mini culture within the team to be accountable or not, to learn or not, to blame or not, to help or not, to experiment or not, to seek excellence or not, to serve customers or not, to go the extra mile or not. Employees look to their manager for a lead to understand what is rewarded and what is frowned upon.

Every manager has an immense effect on how their team functions and performs, and most don't begin to comprehend the magnitude of their power. They are always 'developing' their team members to behave a certain way by being the manager they are, and they have far more power over moulding team behaviour than L&D ever will. A manager cannot abdicate their input into staff development because it is already baked into their role. They have no choice in the matter. The question is whether they will become aware of their power and use it consciously, or whether they remain unaware and use it haphazardly.

The managers out there in your organisation are an extension of L&D, whether you like it or not. Without them, you will have limited ability to impact the organisation. Do they proactively support what you do? Do they stand to one side and stay neutral? Do they sabotage what you do, intentionally or through apathy?

They have an immense impact on how successful L&D can be, so you need to be collaborating with them and enabling them to do what they need to do to help your learning initiatives get results.

## 5. "Our managers are not trained coaches"

Some would say that if we mandate that learning transfer is a management responsibility, managers couldn't do it effectively anyway because they don't have the time/skill/inclination/support.

### How to fix it

This excuse is really scary because of the aforementioned superpowers. If managers are unaware of their superpowers, the best we can hope for is that the use of those powers for better or for worse cancels out into some overall neutral effect. But think how much is to be gained by harnessing those powers for the greater good.

We need to take a leaf from the superhero comic books where the nascent hero becomes aware of their powers and then ideally learns from a teacher to use them wisely. In comic land, a superhero who uses their powers for the greater good is one of the good guys, and one who gets seduced into using their powers for their own gains, or just doesn't care about the consequences of their actions, is one of the bad guys.

Good managers should already have an amount of time in their schedules for regular, maybe weekly, one-on-ones, and discussions about learning

transfer from a recent training course can take place in that time. But many managers don't do regular one-to-ones,

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*A manager who admits to not doing regular one-on-ones is admitting to being a poor manager.*

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and therefore have no protected time available for learning transfer support. To me, a manager who admits to not doing regular one-on-ones is

admitting to being a poor manager of their team, a poor manager of their time, and a poor manager of their boss who has given them their workload, which they have accepted.

Coaching is a tool used to help people attain their goals, so it follows that programmes supported by one-on-one coaching show a better transfer of learning. It is true that a manager cannot be expected to have the same level of coaching and mentoring skills as a trained coach and therefore may not be able to support their team member in the same way as a professional coach. However, the manager is usually present from day to day, where an external coach is not.

The manager has an enormous impact because of their own attitude towards learning and experimenting with new ideas, and because of the way they manage the environment around the trainee as they embed their new learning. The manager can be supported with tips and guides on how to provide support for team members who are doing a training course. They could even be supported by coaches if the programme warrants it.

Consider how you characterise the manager's role. How you name a thing has consequences. If they feel, as many managers do, that they have no training as a coach and are therefore not a coach or good at coaching, don't call it 'coaching'. What can you call it in your culture that would work for them?

In my opinion, letting managers off the hook for supporting learning transfer, which is something that is largely within their sphere of influence and responsibility, is just perpetuating an unacceptable situation from generation to generation of managers. Stop the cycle and get the managers involved as coaches – no matter what it costs. The rewards for moving towards a coaching culture are significant, and not just for learning transfer.

## 6. "We can't afford to do it"

Some L&D people say that doing things to facilitate the learning transfer process takes time, money, and resources that they do not have.

### How to fix it

If you can't afford to do effective learning transfer, it seems rather silly to waste money on training that will, as a result, be largely ineffective. Think of it this way. You have a budget for L&D. Consider how you can get the most business benefits from that budget rather than how you can deliver the most trainings, the most 'bums on seats'. And realise that focusing on business benefits, performance, productivity, and results may win you larger budgets.

Consider this scenario. You send 10 people on a training course, and it costs you £1,000 for each person. How many of them change the way they do their job? Researchers have asked this question for many decades and although the figures vary widely, it is often around 20%. That is, two out of those 10 delegates will change the way they do their job to a sufficient degree and over a sufficient time that the training could be considered a success for them. Research also shows that six of those delegates will dabble with the changes and then mostly slip back into their old behaviours. In effect, the culture will untrain them without learning transfer support. And the remainder of the delegates will simply do nothing. They will return to their desk and the training course has no impact on how they do their job.

In effect, you have spent £10,000 to train two people, so logically, your organisation is prepared to spend

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*Adding effective learning transfer to a programme saves money! Can you afford not to do it?*

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£5,000 per person to get someone fully trained. What if you added effective learning transfer work-



improved programme gets those six people who dabble with the changes through the steps they need to take to properly embed those changes rather than let them go? The cost per head for an effectively trained delegate actually drops to £2,500.

## 7. “Our people are not ready for that kind of change”

Whenever I hear this excuse, in my mind I am thinking, ‘This L&D person is not ready to fight for that kind of change.’

The next thing that goes through my mind is ‘What are they scared will be uncovered by asking people to do something with what they have learned on a training course, and asking other people, such as their managers, to help them?’ Sure, people, especially managers, will need support, but to say baldly that employees and their managers are not ready, and therefore introducing learning transfer is not possible? Really?

### How to fix it

This typically stems from a resistance to change by L&D, and anxiety over the possibility of introducing a change to training courses and failing. This resistance often comes from a combination of other factors in this list.

Having said that, let’s take this avoidance statement at face value. If people are indeed not ready, how can we get them ready? That begs the question, ‘Ready to do what?’ What are we asking them to do and what are the perceived barriers to them being able to do it? Who sees those barriers and are they real or imagined?

As well as exposing any barriers to learning transfer behaviours, we need to apply an appreciative enquiry approach with a solutions focus. That is, what are they already doing that could promote learning transfer behaviours? Now, how can you support and encourage these useful behaviours?

## 8. “We don’t know how to add learning transfer methods to our training”

I do sometimes hear, “We know we should be doing something about learning transfer, but we don’t know how to modify our training programmes to include it.”

### How to fix it

Start reading about it. Start with my book on ‘*Learning Transfer at Work: How to Ensure Training >> Performance*’\* which includes 166 tips and references to other sources of good information on learning transfer. Then look for other resources on the web.

You may not realise it, but there has been over one hundred years of research into learning transfer, so there is plenty of material around. Having said that, much of that academic research has not found its way into common practice, so you may be better following modern commentators in the field who have a more practical rather than theoretical approach to learning transfer. It’s important to actually start doing something about learning transfer rather than just reading about it. Learn from your own experiences in your own organisation – every culture is different.



\* [paul-matthews.com/learning-transfer-at-work/](http://paul-matthews.com/learning-transfer-at-work/)

## 9. “What we do does not make any real difference”

Most training courses do indeed have things tagged on that are designed to encourage learning transfer. This might be something as simple as asking trainees to set some goals related to the course or asking the line manager to have a conversation with the trainee about the course. The problem is that not enough different things are done, and often what is done, like

the two examples mentioned, is insufficient and ineffective.

### How to fix it

Ultimately, to deliver effective learning transfer, you need to commit to the process and develop a full learning workflow that has all the elements needed to get the behavioural results you want.

Consider the analogy of a satnav system in your car. You enter your desired destination (for us, this is a desired behavioural outcome) and the GPS has information about your current location (for us the current behaviours). It is then possible to see the gap between the current location/behaviour and the desired location/behaviour. It is now necessary to design a step-by-step set of instructions to navigate across the gap to the desired destination.

We would never imagine we could use the satnav to get to the end destination without a complete set of instructions or get there if we ignored some of the instructions. To guarantee success, we need a full set of instructions, and we need to follow them. A similar commitment is required for learning transfer.

### 10. “No one is asking for it, so why change things?”

People may not be asking for learning transfer by name because they don't know what they don't know, but they are probably asking for better training because they want better results from training. Or they are asking for cheaper and quicker training so the results they are accustomed to getting don't seem so expensive.

### How to fix it

Is there pressure on your L&D budget because it is seen as an organisational spend that does not produce the results that could be gained

by spending that money elsewhere in the organisation?

Have you ever mentioned the fact that you could wrap a workflow programme around a training course to achieve good levels of learning transfer and therefore improve the results it gets?

Those who ask for training do so often on this assumption...

- Training = exposure to content
- Content exposure = learning
- Learning = behaviour change
- Behaviour change = better performance and results.

In other words, they erroneously believe that L&D has sacks full of pixie dust in the back room to sprinkle on trainees. Judicial use of pixie dust means that trainees return from a training course with their new knowledge and skills fully operational. Of course, if you do have any pixie dust left, you don't need to do anything about

*They erroneously believe that L&D has sacks full of pixie dust in the back room to sprinkle on trainees.*

learning transfer – just use the pixie dust. You can ignore this ebook and give it to someone who doesn't know where to buy pixie dust.

If the way that people ask for training seems to indicate that they believe in pixie dust, you need to educate them that the real-world equivalent is adding learning transfer activities to a training programme.

### 11. “Why add cost to training which usually does not live up to expectations?”

This excuse obviously begs the question as to why they are doing the training in the first place. It's analogous to a man standing in front of a fireplace with an armful of wood insisting that the fire gives him more heat before he gives it more wood.

## How to fix it

The question really should be “How can we make our training more effective at getting the outcomes we want?” In other words, consider how you can invest in the training programme to make it more effective at achieving the agreed goals.

You do have agreed goals, don't you? You do have an agreed set of expectations on what tangible change the programme will generate, and an agreed set of measures, don't you?

When people say a programme did not meet expectations, it usually means it did not meet 'their' expectations, and chances are those expectations were never fully shared with others to create an agreed and measurable output.

How can you ever succeed when the criteria for success are locked away in people's heads, and different people have different criteria? Clarity of outcomes is critical so you can put a value on those and decide what needs to be invested to achieve them.

## 12. “Getting the trainees through the test is all that matters.”

This happens when training is put in place primarily for compliance purposes because there is a need to tick some regulatory boxes.

## How to fix it

I can understand this at the surface level, but to me, this seems a short-term approach. If there are regulations in place to control how people behave in certain regulated circumstances, one would hope that organisations try and achieve those behaviours. We are therefore back to the same need for effective learning transfer that achieves behaviour change.

Years ago, I visited a large care home and caught the tail end of a training course on infectious disease control. I was there to speak with the person delivering the training, so I waited at the back. On our way to his office, the trainer and I followed a group of the trainees and watched as they returned to their ward. Only

about a third of them used the antiseptic hand dispenser as they walked in the door, despite the training course they had attended a few minutes ago. I asked him how many people used to use the hand sanitiser dispensers, and he shrugged. From the trainer's point of view, he had fulfilled his obligation to train people and tick a box, but he seemed impervious to the obvious lack of behavioural change as a result of the training. This seemed to me rather bizarre.

On a more optimistic note, I remember a meeting with the head of compliance of a sizeable pharmaceutical company. She was new in her post and was in the process of rethinking how they delivered on their compliance obligations. Her thinking was very different to that of the care home trainer. She came to the realisation that she might well need to run separate tracks of activity in terms of compliance training. One track would be focused on getting the various boxes ticked by delivering the type of training that conformed to the requirements of the regulatory authorities. The other track would be focused on behavioural changes so employees would be far less likely to break the regulations.

## 13. “I can't deliver an effective learning workflow at scale.”

Some people already understand the need for a learning workflow to enable effective learning transfer but can't see how they can implement this at scale in their organisation.

Consider a short workflow that runs for eight weeks and has five simple small activities a week. That's 40 activities. Say you run this for 100 people, that's 4,000 activities to deliver, track and monitor. What about for 1,000 people? And workflows for more complex outcomes will run for much longer and have many more moving parts than this.

## How to fix it

It's clear you need digital help to deliver and manage learning workflows at scale. You won't

get this from your LMS or your LXP which are setup to deliver content. You need a workflow platform\*, and ideally one that specialises in workflows for learning and behavioural outcomes. That means it will involve stakeholders other than the learner, and it will have features to measure what you want to achieve – behaviour change.

\* [peoplealchemy.com](http://peoplealchemy.com)

## Over to you now...

We just saw 13 reasons why people in L&D avoid implementing learning transfer methods. This is by no means a complete list. What are other 'excuses' for not calling out the elephant?

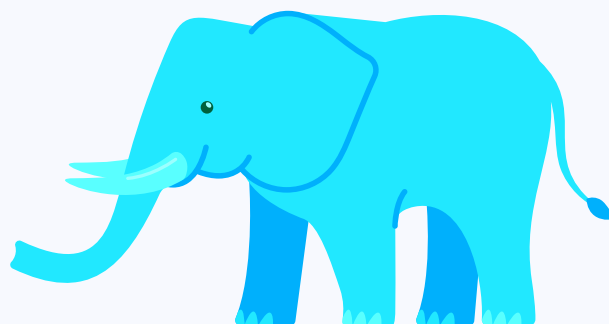
Take a moment and list the barriers in your organisation to discussing and implementing effective learning transfer tools and activities alongside learning design... What supports those barriers and keeps them in place?

How can you go over, around, or through those barriers to get the discussion going and to keep it going. No training programme should ever be born without being dressed in learning transfer clothes. Mark Twain, riffing on much earlier writing by Erasmus in the Middle Ages and before that Homer in the Odyssey, wrote "Clothes make the man. Naked people have little or no influence on society". Don't leave your training programmes naked. Dress them well.

Ask your colleagues, ask managers, ask your boss. Are they aware of the benefits of adding learning transfer activities to a training course?

How can you change the conversation and speak openly about the elephant?

Ignoring the elephant won't help you – and it annoys the elephant!



Thanks for reading this ebook. I hope you found it useful.  
You got this far which means you are serious about Learning Transfer  
and achieving sustainable behaviour change in your organisation.

Would you like to discuss your ideas how to do this?

What is your goal? What do you want to achieve?

Let's talk about it :-)



Contact me now to discuss how to achieve your L&D goals:  
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is more than content**