

Learning Transfer During Role Transitions at Work

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Abstract:

This qualitative study investigates the experiences of working learners and learning workers in rapid role transitions and skill transfers. The aim is to identify features, behaviors, and practices facilitating successful learning transfer towards novel roles. Semi-structured interviews were conducted with 75 consultants from two multinational consulting firms, and thematic analysis was used to interpret the data. Findings reveal eleven common practices, categorized into four themes, that aid in learning transfer and role adaptation. This research extends existing knowledge on learning transfer and highlights essential skills, dispositions, and abilities needed for the future workforce that will face novel role transitions at an accelerated pace.

Introduction

Educators today must prepare students for a future of work that is increasingly volatile, uncertain, complex, and ambiguous (Dede, 2018). In the past, preparing learners for work meant preparing them for an occupation or profession they may have held for their entire career. Today, factors like artificial intelligence and globalization cause rapid job disruption. Preparing learners for the work of today and the future means preparing them to be resilient, thereby ensuring that they can rapidly transition and transfer learning between novel types of work with minimal formalized reskilling or upskilling (Dede, 2018).

There is very little discussion on the tactical elements of what it means for people to have their work disrupted and face rapid transitions. One reason is that the pace of disruption only recently accelerated, making it challenging to find populations who have successfully undergone rapid transitions. Fortunately, the management consulting industry offers an analogous exploration of this phenomenon. In many large firms, it is common for individuals to quickly move between roles successfully. For instance, consultants in this study may have been a Quality Assurance Tester one day and a Trainer, Communications Designer, Due Diligence Analyst, or Project Manager the next. By leveraging interviews with 75 consultants at two multinational consulting firms, this qualitative study describes the emergent practices that individuals who frequently engage in rapid role transitions draw upon to transfer—or even transform—their knowledge forward.

Conceptual Background

1. Next Level Learners

The learning workers and working learners are conceptualized as Next Level Learners (Grotzer et al., 2021). Through this view, educators can better prepare them to thrive in a future where little is certain, except for the need to become effective lifelong learners who learn and work (Grotzer et al., 2021) (Table 1).

Next-level learning represents a shift in how learning and learners are typically conceptualized, positioning them as capable of transferring learning between one context and another. It positions a learner as agentive and asset-based, assuming they can bring forward learning, knowledge, skills, and abilities that they already possess into novel contexts as a starting point (Grotzer & Forshaw, 2021).

2. Sociocultural Learning Transfer

The phenomenon of using knowledge, abilities, skills, or learning from one setting to another is known as learning transfer (Perkins & Salomon, 1992; Bransford et al, 1999). When viewed through a sociocultural lens, transfer is the process of interpretation and negotiation between learners and their sociocultural contexts, during which learners draw from diverse knowledge to tackle new problems (Pea, 1987; Voss, 1987).

This view considers individual learner's motivations and dispositions (Loboto, 2012; Perkins & Salomon, 2012), peers and instructors (Engel, 2012; Zhu et al., 2022), context-specific factors (Grotzer, 2015), and the realization that learners may transfer learning from a task or prior knowledge and achievement (Chin et al., 2019).

Research Questions

The study was designed to understand the practices of individuals who successfully transfer learning to new roles and to contribute to the literature on how we prepare learners for an increasingly volatile, uncertain, complex, and ambiguous future of work. These aims informed a research question of: What are the practices that individuals exhibit during frequent and successful transitions to novel roles?

Methodology

1. Participants

This study involves 75 early to mid-career (Figure 1; Figure 2) strategy consultants from two multinational consulting firms in North America. The purpose of selecting these diverse firms was to better understand the practices consistent across both organizations and less likely to be influenced by individual firm culture. Participants were recruited through convenience sampling via internal communications channels with the support of the Chief Learning Officer.

Participants (Figure 3; Table 2) averaged eight novel roles each; the breadth of roles each completed is vast, and to the outside world, may appear to be different jobs that would be surprising to see on a single person's resume (Table 3).

2. Data Collection

The study involved conducting 60-minute semi-structured video interviews with each participant. With permission, the interviews were recorded and transcribed. The first phase of each interview began with high-level questions about the participants' journey to consulting, followed by questions about their roles since joining. In the second

phase, questions focused on specific role transitions, including the initial weeks, preparation, challenges faced, and specific activities undertaken. The third stage involved hypothetical transition scenarios.

3. Data Analysis

The analysis procedure was grounded in a design based way of conducting qualitative research that centers on understanding. We primarily used abductive thematic analysis, which involved open coding to allow for emergent and evolving codes and identifying codable moments” (Boyatzis, 1998).

After the initial coding round, we used a digital whiteboard to visualize the emergent codes and categorize them thematically. This approach fosters collaboration between researchers, facilitates an intuitive integration of insights, and aids in identifying patterns and gaps (Costa & Morelli, 2018).

We pinpointed eleven practices commonly observed in people who frequently engage in learning transfer and rapid role transition. We developed a codebook, which we applied across the entire dataset (Table 4).

Findings

1. They have the belief and desire to transfer learning to novel roles

Participants generally share a belief and confidence that their past skills, knowledge, and abilities will help them approach unfamiliar tasks and roles. This is often underpinned by a broader belief that they are capable of learning whatever is “thrown” at them.

“I gained confidence to know that I knew enough that I could be confident that I could go figure out the rest.”

“Even though sometimes there are opportunities that are thrown at you that you might not necessarily know how to go about... Never feel like anything is impossible.”

And by recognizing that things they have learned in the past do indeed transfer forward or are applicable to novel roles.

“Is what I have done, the things that made me successful here, applicable anywhere else? And nine months into the new role, yep, they're applicable.... You'll certainly have to tailor it, but it works.”

“I think there's been some type of common thread within the work for the most part I would say... There's been some things that's similar... from previous projects to the new one.”

2. They practice metacognitive behaviors to assume a pro-transfer disposition

Building on their belief and desire to transfer, participants also described leveraging metacognitive behaviors such as reasoning between sameness and difference to understand how to appropriately transfer forward what is helpful, and leave behind what isn't.

“My frame of reference really had to change. What I'm used to doing for adults in a business sense is not going to be the same as what I do with high school students in an internship program. At the same time, there were some core aspects of training development that I had learned that I could still carry over.”

They also self-assess what they know, and what they need to learn to identify the path forward.

“Taking a set of circumstances and problem statement and then determining, “what are the knowns, what are the unknowns? How can I split this problem into smaller parts and then get to something that's going to lead me to a solution?”

Finally, they engage metacognitively with their emotions and thinking patterns, modulating them to their benefit.

“There have definitely been times where I felt like, what is really the purpose of the work I'm doing? Is it meaningful? Am I learning? Could anyone else be doing it? Then I think it's important to reframe, what am I learning here? Why is this work important for my personal journey and the work? Thinking about it more optimistically allows you to reframe, and learn more.”

3. They leverage social relationships to support, enable and further their ability to transfer

Engaging with managers, experienced others, and a broader network is recognized as an important aspect of transferring in learning and role success.

“Very early on in my career I was told, "It's not always what you know, it's who you know that can help you in being successful because you can only know so many things." It's really important to have a good network to be able to blast out questions or say, "Hey, I need some help with this.”

“People who are part of my network of peers but aren't necessarily on a project, they often also play a role in that they'll help me with the color commentary or understanding the context of what's going on in a project.”

Often they can help be the bridge between a prior context and a novel one.

“I needed to quickly come in and project manage setting up a chatbot. I'd taken a one-day course in AI, I knew enough to be dangerous...I knew there was one expert that I knew who was the bridge... He knew what I did, talent, but he also was an expert in artificial intelligence...”

“For that latest transition that I spoke to, I had three meetings a week for 30 to 45 minutes to explain what I was thinking and then get feedback. At the beginning...when I was transitioning, I was bombarding my team's calendar.”

4. They are agentive in navigating their environment and seeking out information, assets or opportunities that they need to be successful at both transferring and upskilling.

Gaining initial situated awareness of their new project industry and organization is a common practice across consultants. Often this can look like doing research, speaking with key stakeholders, or reading firm publications and reports.

“Always start with discovery. Who's doing it today? What do they like about it? What don't they like about it? What's broken? What's working? Collect all the information... Get educated about that industry as quickly as possible.”

“I would ask the engagement director, "Share every material you have on this asset." I'm going to go through that. Then, I'll go to the internal database on best practices per industry”

Several participants also specifically describe starting transitions to novel roles by recognizing their knowledge gaps and doing self-led research to get situated with the context and subject matter.

“It was a subject area that I had no clue about. It was about fiber optic cables. I had no clue what those were... I would watch a bunch of YouTube videos and read a bunch of articles about what we were actually doing.”

“I got on YouTube and started Googling around...I started watching hip and knee procedures on the internet saying, this is how this product is used, this doctor in India seems to like it for these reasons. This doctor in the UK prefers a competitor's products for these reasons.”

Discussion

1. Takeaways

To succeed in a world where rapid role transitions are the norm, learners must be better prepared. This applies not only to consultants and consulting firms but also to educators in K-12, college, and workforce development who need to consider the skills, dispositions, knowledge, and abilities that they need to develop in their classrooms. For these audiences, there are two main takeaways. Firstly, the practices discussed intersect with elements of existing perspectives in the literature, such as actor-oriented transfer (Lobato, 2012), expansive framing (Engle et al, 2012), and agentive leveraged contexts transfer (Grotzer & Forshaw, 2021). Finally, the participants' experiences suggest rethinking how we view transfer. Rather than seeing it as an "outcome," we might better conceptualize it as a cognitive process where learners develop proficiency. Individual differences in transfer are expected (Kubricht et al, 2016), indicating it varies in proficiency and is something that can be taught.

2. Limitations

This study has three main limitations. First, the author's consulting expertise likely influenced the study's design, data collection, and interpretation. To help mitigate this influence, four additional coders assisted with analysis, coding, and theme development. Second, the recruiting strategy was convenience-based and open sign-up. The recruiting material also clearly indicated the study's purpose, so participants were likely eager to discuss role transitions. Third, it is possible that interviewees' comments were inconsistent with their real-life activities; thus, the protocol asked broad questions, for specific examples, and hypothetical questions to check response consistency.

Tables and Figures

Table 1: Features of a Next Level Learner

Features of a Next Level Learner from Grotzer et al., 2021
<ol style="list-style-type: none"> 1. They are agentive, actively seeking learning opportunities and shaping their environments to suit their needs. 2. They prioritize developing flexible expertise applicable across various contexts instead of deep but narrow knowledge. 3. They understand the interplay between emotion and cognition in their learning processes. 4. They are self-aware, using metacognitive strategies and neuroscientific insights to enhance their learning. 5. They are culturally aware, reflecting on their assumptions and striving to understand diverse perspectives.

Figure 1: Distribution of Participant Tenure in Consulting

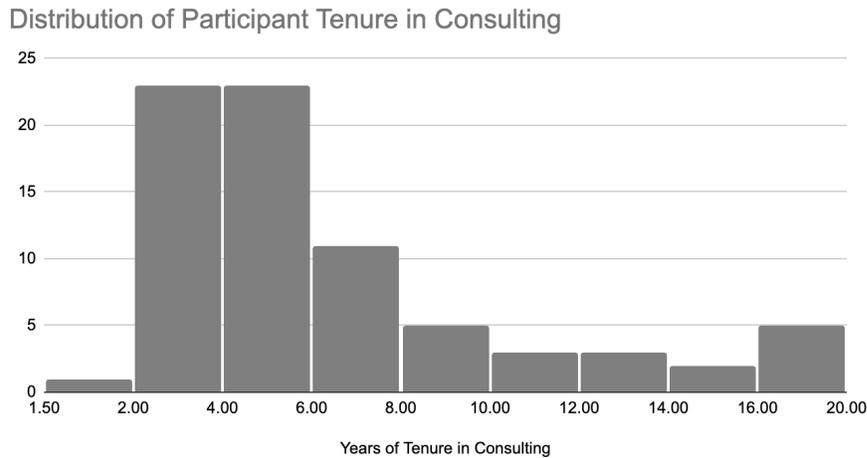


Figure 2: Frequency of participant role level

Breakdown of participant role level

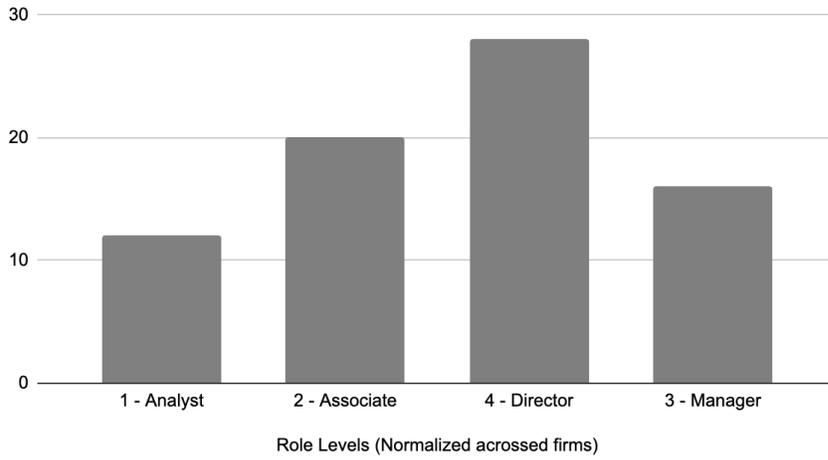


Table 2: Participant Tenure and Transitions

	Tenure	Transitions
Average	6.0	8.0
Median	4.5	8.5

Figure 3: Distribution of participants number of novel role transitions

Distribution of participants number of novel role transitions

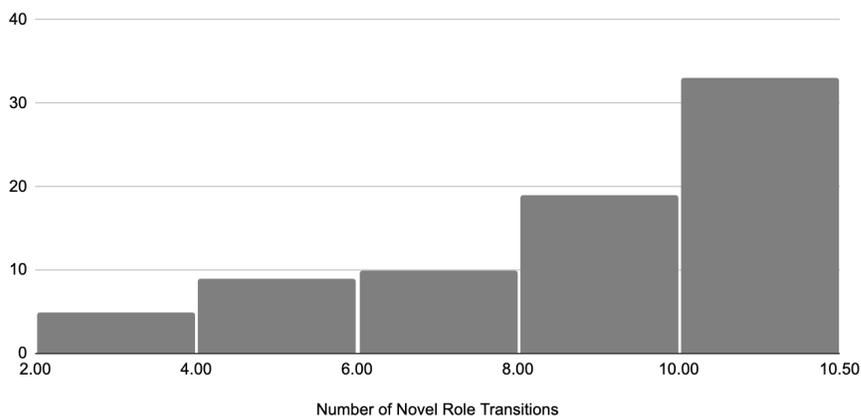


Table 3: Novel Role Times Mentioned in Participant Data

A non exhaustive list of individual role titles mentioned in participant data			
Agile Coach	Digital Delivery Lead	Investment Funds Analyst	Research Analyst
Analytics	Digital Strategist	Lab Researcher	Safety Analyst
App Developer	Digital Talent Developer	Learning Experience Designer	Sales Associate
Automation Developer	Due Diligence Analyst	Legal Paperwork Preparer	Scientific Informatics Analy
Big Data Developer	Education Access Researcher	Machine Learning Analyst	Scrum Master
Business Analyst	Employee Experience Designer	Marketing Analyst	Service Desk Lead
Business Case Developer	Environmental Sustainability	Marketing Strategist	Software Engineer
Business Readiness Analyst	Executive Coaching	Merger and Acquisition Analyst	Software Implementation M
Call Center Designer	Financial Analyst	Metaverse Experience Designer	Stakeholder Manager
Change Management Practitioner	Gamification Designer	Net Developer	Strategist
Cloud Solution Architect	Business Transformation Lead	Operating Model Designer	Supply Chain Analyst
Communication Specialist	Homelessness Strategic Planner	Organizational Designer	Talent Developer
Computer Scientist	HR Process Optimizer	Pharma Operations Specialist	Talent Manager
Content Management Architect	HR Strategist	Pricing Strategist	Talent Strategist
Customer Experience Designer	Human Resources professional	Product Lifecycle Manager	Talent Strategy Work
Customer Segmentation Analyst	Human-Centered Designer	Product Manager	Technical Analyst
Data Analyst	Infrastructure Analyst	Program Delivery Lead	Technical SME
Data Engineer	Infrastructure Engineer	Program Manager	Test Architect
Data Migration Developer	Instructional Designer	Project Delivery Lead	Training Designer
Deployment Specialist	Integration Manager	Project Manager	Venture Capitalist
Design Thinking Facilitator	Inventory Optimization Analyst	Reporting Analyst	Workforce Development

Table 4: Code Book Excerpt

Theme:	Code:	Definition:	Quote Example:
Belief and Desire	Cultivate motivation to transfer their learning	Learners see the value of learning transfer in their work.	“One of the things that I've believed in, and possibly not exactly my entire career, but close to it, is that whenever you're changing position, try to make at least one element of it to be a step outside your comfort zone, because that's what will help push you and help you learn more.”
	Foster confidence and belief that they can transfer	Learners are confident in their ability to transfer skills and knowledge gained from previous roles to unfamiliar tasks.	“I gained confidence to know that I knew enough that I could be confident that I could go figure out the rest.”
Dispositional and Metacognitive	Practice self-reflection about the transition	Learners examine their experience and advancement in their role.	“Strategy and consulting and product management are not completely different. They're just the flip sides of the coin. That makes it easier to switch the roles. If you look in that bent of mind, for example, technology and strategy doesn't be in silos. There is always strategy. And soon after that, the technology comes into picture. So if we seen that bent of mind,

			switching the roles is very easy because everything, if you see, that's a flip side of coin that you're doing."
	Reason between sameness and difference	Learners deliberate between what is similar and different about this role or task from work they have done before.	"My frame of reference really had to change. What I'm used to doing for adults in a business sense are not going to be the same as what I do with high school students in an internship program. At the same time, there were some core aspects of training development that I had learned that I could still carry over. But I just think the biggest shift was learning how to work with a new audience."
	Self-assess what they know, and what they need to learn	Learners assess their own areas of weakness and what skills they may need to develop to succeed.	"It was great to come in and have an operational background and a good understanding of people, and so that translated very well. And so when I came, what I needed to understand were the fundamentals of consulting. I could have come in at a higher level such as a manager because I managed a portfolio before. But it made sense for me to come in and get the foundations of consulting down."
Social and Interactive	Ask for help when they need it	Learners know when and how to contact their supervisor or team for assistance with a task, and are confident enough to do so.	"For that latest transition that I spoke to, I had three meetings a week for 30 to 45 minutes to explain what I was thinking and then get feedback. And so, at the beginning of the process, when I was transitioning, I was you know, bombarding my team's calendar."
	Leverage their network to close learning gaps	Learners know when and how to reach out to people outside of their team for guidance, and are confident enough to do so.	"Basically I needed to quickly come in and project manage a setting up a chatbot. I didn't really... I'd taken in a one-day course in AI, so I knew enough to be dangerous. But in that instance, I knew there was one expert that I knew who was the bridge... He knew what I did, talent, but he also was an expert in artificial intelligence... And then it was the same thing, where I knew I could project manage it. I knew the templates made sense as the client introduced to what was needed to be done, the engineering team. But I just pulled in the right people I needed."
	Share unfinished work to build knowledge	Learners share unfinished work, seek feedback on it, and rapidly iterate as a means of getting started quickly and drawing upon everything they know.	"I was building something while she was building something, and I'd bring it to her and she'd be like, "I don't even know what you're trying to say here." And I'd be like, "Oh, yeah, yeah, okay." And then I would go back and... "What would you change? How does this... Oh, okay, cool." And then I would go back and just do it."
Agentive and Inquisitive	Bring forward existing work products	Learners consider the existing assets and work products that they bring to new tasks and how they can be applied in their current work.	"I had this project plan that I made when I was a consultant that I can say, oh, let me just dust this off. And I've got a starting point. So, I'm not starting from scratch, and it was the confidence of knowing I'd seen bits and pieces of this before."

	Take opportunities for learning	Learners take strategic risks to advance their careers, upskill, self-start, and push themselves outside of their comfort zone.	“In 20xx there was a project that changed the direction of my career, and it was a large scale intelligent op model piece of work. It gave me a chance to get away from change management... and get more into talent strategy and op model work”
	Rapidly build landscape awareness	Learners develop situational and contextual awareness of their new task or role by surveying the industry, functional, and company landscape.	"I've been most successful, when I've done my own research and tried to understand everything I know about the clients. What are their past 10 years? Have they had leadership changes? What are their values? Anything I can find, to get up to speed on the direction they're aiming towards”

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