



Tool Talk: The Learner Engagement Loop

Leading Learning Podcast Transcript for Episode 323

Jeff Cobb: [00:00:00] Engaged learners are best positioned to realize the full impact of your learning offerings as they'll apply what they learn. Engaged learners are going to help you reach more of the right learners by telling others about your offerings. And engaged learners can help to increase revenue through referrals and by returning to you for additional learning products and services.

Celisa Steele: [00:00:25] I'm Celisa Steele.

Jeff Cobb: [00:00:26] I'm Jeff Cobb, and this is the Leading Learning Podcast.

Celisa Steele: [00:00:35] Welcome to episode 323 of the Leading Learning Podcast. This marks the fifth episode in our informal series on tools for learning businesses. In episode 312, we talked about the Market Insight Matrix. In episode 315, we talked about the Value Ramp. In episode 318, we covered the Product Value Profile. And in episode 320, we covered the MIDDLE ME learning product lifecycle.

Jeff Cobb: [00:01:02] You can find links to all of our tool talks in the show notes for this episode at leadinglearning.com/episode323. Today, though, we're focusing on learner engagement, and our learner engagement loop can help you think through and plan for effective and meaningful learning engagement before, during, and after learning experiences.

Celisa Steele: [00:01:24] We'll come back to those before, during, and after phases and what you can do during them, but, to use the same why-what-how framework we've used for the other tools in this series, we'll first talk about why to focus on learner engagement.

Jeff Cobb: [00:01:39] So why should your learning business focus on learner engagement? Why do we want learner engagement to take root and flourish?

This transcript accompanies the episode of the Leading Learning Podcast available at www.leadinglearning.com/episode323.

Celisa Steele: [00:01:48] One argument—and probably an obvious one—in favor of learner engagement is that, if learners are engaged, they're going to have an improved experience. It's going to be better, nicer, more meaningful for them if they're engaged.

Jeff Cobb: [00:02:04] Right. So that's the learner perspective on engagement. We should also keep in mind that if learners are engaged, they're probably going to learn better. They're going to be better able to apply what they've learned. So engagement helps with learning effectiveness, and, from the learning business perspective, that's huge because that kind of effectiveness drives the triple goals of most learning businesses.

Celisa Steele: [00:02:25] And we talk about those three goals a lot: reach, revenue, and impact. Learner engagement helps increase the reach, revenue, and impact of a learning business. Reach, that's about connecting with as many of the right learners as you can. So it's not just about quantity but also about quality.

Celisa Steele: [00:02:46] Revenue, that's the fuel that keeps your learning business running and growing. And, even for nonprofit organizations, positive net revenue is essential. And then impact is what makes a learning business vital and sustainable over time. If you create significant value for the learners and the organizations and the market you serve—and if you can show that value to the learners, the organizations, and the market that you serve—then your learning business will thrive.

Jeff Cobb: [00:03:16] Learner engagement can help with reach, revenue, and impact. Engaged learners are best positioned to realize the full impact of your learning offerings as they'll apply what they learn. Engaged learners are going to help you reach more of the right learners by telling others about your offerings. And engaged learners can help to increase revenue through referrals and by returning to you for additional learning products and services.

Celisa Steele: [00:03:45] At Tagoras, we're experts in the global business of lifelong learning, and we use our expertise to help clients better understand their markets, connect with new customers, make the right investment decisions, and grow their learning businesses. We achieve these goals through expert market assessment, strategy formulation, and platform selection services. If you are looking for a partner to help your learning business achieve greater reach, revenue, and impact, learn more at tagoras.com/services.

Jeff Cobb: [00:04:20] Now that we've undoubtedly convinced you that learner engagement is good for your learners and your learning business, let's talk about what learner engagement is.

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode323.*

Celisa Steele: [00:04:29] Yes, and it's important to define what learner engagement is because it's one of those slippery terms that can get bandied about without much attention to what it actually looks like. And so a definition can help turn that somewhat amorphous and abstract idea of learner engagement into something that you can recognize and measure and design for.

Jeff Cobb: [00:04:51] And we personally don't believe there is necessarily a single right definition of learner engagement, but we do believe in the benefit and power of a shared understanding. And so we'll offer a definition of engagement derived from the Glossary of Education Reform. And that glossary has a bit of a K-12 focus, so it talks about "students," and we've shifted that here to "learners."

Celisa Steele: [00:05:15] And so, with minor edits, the definition says that learner engagement is "the degree of attention, curiosity, interest, optimism, and passion that learners show when they are learning or being taught, which extends to the level of motivation they have to learn and progress in their education." And we like this definition because it recognizes three dimensions of engagement: cognitive engagement, emotional engagement, and behavioral engagement.

Jeff Cobb: [00:05:48] And the definition mentions *attention*, *curiosity*, and *interest*. And those are words that speak to that cognitive engagement. It also mentions *optimism* and *passion*, which speaks to the emotional aspect of engagement.

Celisa Steele: [00:06:01] And it uses the verb *show*, which speaks to the behavioral piece. Engaged learners do things that make their attention, curiosity, interest, optimism, passion visible to others.

Jeff Cobb: [00:06:14] Another important part of understanding what learner engagement is is understanding that learner engagement doesn't necessarily happen spontaneously. It's not guaranteed. Certain conditions must exist in order for learner engagement to happen, just like plants that need sun and water and nutrients from the soil in order to thrive.

Celisa Steele: [00:06:34] Only in the case of learner engagement, the sun, water, and soil nutrients are meaning, safety, and availability. Meaning refers to the sense that participating in a learning experience and the effort related to participating in a learning experience are relevant and will provide the learner with a return on investment.

Jeff Cobb: [00:06:57] And then safety is the sense learners have of being able to participate as their true selves without fearing damage to self-image or status or career. Availability speaks to having the physical, emotional, and psychological resources necessary to participate in a learning experience.

Celisa Steele: [00:07:18] Now, those high-level explanations of the three requirements for learner engagement probably will benefit from a little bit deeper dive into how you can design learning experiences with meaning, safety, and availability in mind and thereby increase the chances of learner engagement. So let's do that. Let's put a little bit more meat on the bone.

Celisa Steele: [00:07:38] You can support meaning by making sure that your educational products and services contain relevant examples and practice opportunities for your learners. And keep in mind that practice doesn't have to be complicated. Simply having attendees type ideas or answers to a problem into a chat box during a live online session, for example, that can be a form of practice.

Celisa Steele: [00:08:04] But the trick is that you have to carve out time for practice, and you have to be willing to take the necessary time for meaningful practice. And sometimes that can mean periods of silence, and sometimes that can feel uncomfortable in a live Webinar, for example. But you have to keep in mind that noise and engagement are not equivalent.

Jeff Cobb: [00:08:23] Now, another way to support meaning is to make sure you're designing in opportunities to see or experience results, so learners get to witness firsthand the logical outcomes and results of particular choices and decisions. Case studies and role-playing can be a great way to do this in most adult learning situations.

Jeff Cobb: [00:08:44] And also make sure learners get meaningful feedback—not just "That's right" or "Way to go" or "No, sorry, try that again." But meaningful feedback about their specific approach to an activity or answer to an assessment. And you can look for opportunities for learners to provide feedback to each other as well.

Celisa Steele: [00:09:01] Another way to support meaning is to create tension between where learners are now and where they want to be. And then you resolve that tension by teaching them things that help close that gap. And this can apply particularly in your promotion of learning experiences—and we're going to talk more about promoting learning experiences in just a bit—but it also applies in the actual learning experience. Structuring lessons as stories,

giving them a narrative arc from presenting an initial problem and then guiding learners to a resolution, that can be a very powerful approach.

Jeff Cobb: [00:09:37] And, again, this doesn't have to be complicated. Even something as simple as saying there are three ways to dramatically increase learner engagement and then walking through those three approaches creates a sense of tension and resolution.

Celisa Steele: [00:09:51] So that's a quick look at how to support meaning, one of those three requirements needed for learner engagement. Now let's talk about how to support safety. First, make sure your learning offerings are empathetic. Make sure that those providing and delivering the experiences—so that means your designers and then your instructors and facilitators—make sure they understand the learner's needs and desires and are focused on supporting their learning.

Celisa Steele: [00:10:19] And, to do this, you're going to need to be in regular communication with your audience, continually soliciting input about their challenges and opportunities and then sharing that feedback with those on the front lines of developing and delivering your educational offerings. And, of course, the Market Insight Matrix, which we've talked about in an earlier episode, is a great tool for doing that.

Jeff Cobb: [00:10:41] Definitely. Now, another way to support safety is by having policies in place that make it clear privacy and confidentiality will be respected. And this will help learners be able to speak their mind, ask their real questions, and share their real concerns.

Jeff Cobb: [00:10:56] And you can also signal the respect for privacy and confidentiality as part of the sign-up or registration process for a learning experience. But it's often important to reiterate it during the actual learning experience. It can be part of the expectation setting at the beginning of a synchronous experience, for example, whether that's online or off.

Celisa Steele: [00:11:17] Also, you want to make sure to let learners know that it's expected that they'll make mistakes. And, in fact, mistakes are good because they're valuable tools in learning. And that's another way to support safety. Also, make sure that you don't shame or embarrass anyone for mistakes, but instead give them good, specific feedback that helps the mistake-maker—and then the other learners who are also witnessing this—understand what to do differently in the future.

Jeff Cobb: [00:11:46] Related to valuing mistakes, make sure your learning offers low-risk opportunities for failure and thereby learning. Depending on the field or profession you serve, the stakes can be lower or higher. Obviously, in medical professions or aviation, failure can mean life or death.

Jeff Cobb: [00:12:03] So you want learners to have a chance to fail in a safe setting. And, of course, technology is helping more and more here with extended reality, virtual reality, augmented reality allowing for those low-risk failures to mimic the real world as closely as possible and making them that much more valuable as learning experiences.

Celisa Steele: [00:12:24] The last way to support safety we'll mention is by emphasizing community. You want your learning offerings to promote a sense of "We're all in this together." Your success and your learning are my success and my learning, and vice-versa. And keep in mind that adult learners usually bring tremendous experience to a learning situation, and they may know as much about a topic—or at least a particular aspect of a topic—as the facilitator or instructor.

Celisa Steele: [00:12:52] And so, for everyone's benefit, you want to tap into the knowledge and experience that the learners can share themselves. And one way to do that is by emphasizing community and that peer-to-peer learning, peer-to-peer sharing.

Jeff Cobb: [00:13:06] And that brings us to the third condition needed for engagement, namely availability. One way to support availability is by making sure the content is chunked into manageable segments. You don't want to overload your learners cognitively.

Celisa Steele: [00:13:21] Another way to support availability is by making sure the content is accurately leveled—that is, make sure to align the content to learners' prior knowledge and experience. To support that, you might, for example, need to do some pre-assessment or, at the very least, make sure your course or session descriptions are very clear about the level at which the material will be taught. So experts can go to the more advanced session and novices can go to a more basic session, for example.

Jeff Cobb: [00:13:52] And, lastly, we'll mention that you should either provide or make clear in advance what learners need to fully participate in the learning experience. And this could be everything from required reading to a laptop or pen and paper to time carved out for full attention and quiet space for reflection.

Celisa Steele: [00:14:11] So these are elements you can design into your offerings to help ensure meaning, safety, and availability, those three necessary conditions for engagement, and make sure that those are met.

Jeff Cobb: [00:14:24] And we should note that the absence of these elements—the lack of relevant examples or practices, for example—or the opposite of these elements—irrelevant examples and practices, for example—those impact engagement too by discouraging it and by decreasing the chances that learner engagement can actually take root and flourish.

Celisa Steele: [00:14:44] Many of the elements we just touched on—things like chunking, relevant practice—those are covered in our “An Essential Guide to Andragogy for Learning Businesses,” and they’re also discussed in our learning science podcast series. You can find links to that guide and the series in the show notes for this episode at leadinglearning.com/episode323.

Jeff Cobb: [00:15:16] We’ve covered why and what, so now let’s turn to how to focus on learner engagement.

Celisa Steele: [00:15:21] We have the Learner Engagement Loop, and that’s a simple flowchart with three boxes, and it has you look at what you can do to support all three dimensions of learner engagement—so cognitive, emotional, and behavioral.

Jeff Cobb: [00:15:36] It also has you look at how you can support those three dimensions at three key times, namely before, during, and after a learning experience. The learning experience might be a short self-paced online course, a months-long cohort-based workshop, a conference session, whatever.

Jeff Cobb: [00:15:54] For maximum results for any type of learning experience, signals and supports of engagement should begin before the learning experience, continue during the learning experience, and be reinforced after the learning experience ends—and this is the loop part. What you do after a learning experience ends often ideally leads back to the before box, meaning you’re cultivating past learners to be return learners.

Celisa Steele: [00:16:20] You can access the Learner Engagement Loop in the show notes for this episode at leadinglearning.com/episode323. And, when you download it, you’ll notice that we give more descriptive labels to the before, during, and after times to help you better understand what to focus on at each point.

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode323.*

Jeff Cobb: [00:16:38] Right. So before the learning experience, you're thinking about things like promotion and conversion. During the learning experience, you're working on appropriate design, development, and delivery. And then after the learning experience ends, you should focus on retention and reactivation.

Celisa Steele: [00:16:55] And this, of course, ties into the point that learning isn't an event; it's a process. You want to provide signals and supports of engagement at each point—before, during, and after—because that's how you'll get the most engagement. If your before activities make use of engagement, if you talk about how the learning experience and how you promote it is engaging, then you're going to prime the pump, and learners will show up ready and willing and expecting to be engaged.

Celisa Steele: [00:17:25] Then you, of course, have to deliver that engaging learning experience in the during phase. And then, if you do that, retention and reactivation will be easy, kind of a no-brainer. The learners will want to come back to you for more because they will have seen firsthand the value and impact of what you offer.

Jeff Cobb: [00:17:45] So let's talk about how you might approach your promotion and conversion efforts in ways that signal engagement. What can you do that might engage your prospects cognitively, emotionally, and behaviorally as you're working to convince them to sign up for a particular course or other learning experience?

Celisa Steele: [00:18:03] So we'll offer a few thoughts of what to do during promotion and conversion. You can, for example, focus on AIDA copywriting. So this is where you focus on securing prospect's attention, interest, desire, and action. That's the acronym that makes AIDA. And you can also do things like use social proof that is going to help you share previous learners' ratings and reviews and opinions of the experience.

Celisa Steele: [00:18:29] And then also, if you have it, share impact data how this course or this conference helped other learners achieve certain goals at work or in their life. And all of those things, if you're using those sorts of triggers, that AIDA copywriting, if you're looking at social proof, if you're showing impact data, all of those can begin to develop cognitive engagement in that promote and convert phase.

Jeff Cobb: [00:18:54] And we've seen learning businesses embrace this and really be able to move the dial both on the volume of enrollments they're getting but then also the engagement

level of people coming in. And one that comes to mind is the National Rural Electric Cooperative Association (NRECA). And a few years back they started what they described as a Value of Learning campaign.

Jeff Cobb: [00:19:17] And they went out, they weren't getting the level of engagement around their learning, they weren't getting the level of enrollments that they thought that they wanted. They went out. They really made a concerted effort to gather testimonials, to get data on the degree to which attendees at their educational offerings put what they learned into use back at work.

Jeff Cobb: [00:19:34] And they took this, and they set up a set of Web pages and related e-mail and other communication campaigns that were really aimed at getting attention and of elevating interest and desire among their prospective learners. And they definitely saw a lift in this and the level of engagement and also the level of enrollments that went along with that because people really were engaged in that before part of the cycle that we're describing.

Jeff Cobb: [00:20:00] We've seen the American Speech-Language-Hearing Association do something very similar around its certifications, Value of Certification campaigns. So this is something you can be very conscious about and think about as part of cultivating the engagement that you really want your learners to have around your learning experiences.

Celisa Steele: [00:20:19] Promotions that focus on attention that prospects might feel between their current state and their desired state can help foster emotional engagement because people are going to be bought into like, "Gosh, I'm worried. Yes, I'm in this state. I want to be here." And then you're going to help them see how the learning experience can close that gap, and that's going to connect with them on the emotional level.

Celisa Steele: [00:20:41] And then this can happen through storytelling. Social proof again can be a factor here too, depending on what the quotes are you have from previous learners. But, again, that can really potentially engage folks emotionally during this promote and conversion stage. And so they're going to want to see in that social proof, to the greatest extent possible, people who have challenges similar to theirs. And, if you can present that, then they're going to be connecting at that emotional level.

Jeff Cobb: [00:21:11] And we'll note that pricing factors into this as well. And most people probably don't think of pricing and think of that as an aspect of engagement, but, really, pricing

is one of the most powerful psychological tools, the most powerful communication tools that we have around our offerings.

Jeff Cobb: [00:21:27] Whether something is high-priced or low-priced or middle-priced is going to have a big impact on how people identify with a particular offering, how they see themselves in relationship to it. And, if that price is right for that right learner, they're going to identify and engage as saying, "This is the type of offering that I'm willing to spend this type of money on." And it does become an initial part, particularly of that emotional level of engagement, in a learning experience.

Celisa Steele: [00:21:58] And then, of course, we want some behavioral engagement to begin during this promote and convert phase. And this might mean momentum actions and calls to action, things that begin to engage learners behaviorally, meaning learners are doing something. So they're viewing something or downloading related resources or information.

Celisa Steele: [00:22:18] And, for both marketing and engagement reasons, you want to get people doing something, taking action. And that something, ultimately, is going to lead to, hopefully, being them signing up for the course or whatever other learning experience you're offering.

Jeff Cobb: [00:22:35] And so that's that first phase, the before phase. The second phase, the during phase, covers what happens when you design, develop, and deliver your learning experiences.

Celisa Steele: [00:22:46] And when we think about engaging learners cognitively in this design, develop, and deliver phase, think about things like assessments, gamification, and other kinds of content interactions because those get the learners engaged mentally with the content.

Celisa Steele: [00:23:02] Karl Kapp is a favorite resource of ours around gamification for learning. He's written many books on it, including *The Gamification of Learning and Instruction* and *The Gamification Field Book*. And he breaks gamification down into two types. Structural, so using a structure around content but not really changing the content at all.

Celisa Steele: [00:23:24] And so a lot of gamification platforms take this approach. Or you can have a gamification approach that deals with content. So you change the content to make it more game-like itself. And so you can take either or both approaches. These can help you get into problem solving, critical thinking, higher-level thinking skills.

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode323.*

Celisa Steele: [00:23:43] And we have talked to Karl for the Leading Learning Podcast, and we'll make sure to share a link to that interview in the show notes. Also, scenario design is another way to engage learners cognitively, and a favorite resource of ours in that area is Cathy Moore, who we also talked to for the podcast, so we'll make sure to include a link to that interview as well.

Jeff Cobb: [00:24:05] Yeah, definitely check out those episodes. And now another. Stories that tie to learners' motivations and interests and that help them connect new information and content to past experiences, this will also engage them emotionally. Stories are also much more memorable.

Jeff Cobb: [00:24:22] If I hear a startling statistic—say 24.6 percent of children in North Carolina (which is where we live) face hunger on a regular basis—it won't take long before I forget that exact number and just remember that the percentage was way too high. But, if I hear a story about a mother facing the dilemma of sending a sick kid to school where they can get a free lunch versus keeping them at home where there's no food, I'll definitely remember that. Stories are powerful ways to help us remember. And remembering, of course, is necessary for learning.

Celisa Steele: [00:24:57] Practice opportunities engage learners behaviorally. We know that doing helps us, and, as long as mistakes are welcome and it's a safe, low-risk environment, we're going to be more engaged when we're trying our hand at doing something, whether that's landing a plane in a simulator or just making notes about how a concept might be translated to and applied to our own work rather than just being told about a task or a concept.

Celisa Steele: [00:25:28] Social interactions with other learners or with the facilitators and instructors, that also helps to engage us behaviorally and allows us to tap into the range of experience and knowledge that those folks bring—which we already talked about the importance of trying to draw out that experience that adult learners bring to learning experiences.

Jeff Cobb: [00:25:49] And we'll note that approaches and activities during this design, develop, and deliver phase are probably the easiest to enumerate and come up with because this is where we tend to spend the most time thinking about learner engagement. But it's useful to think about how learner engagement beginning before this point and continuing after it is also extremely important. And it opens up some neat ways we might use old approaches and activities to leverage them into even more engagement.

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode323.*

Celisa Steele: [00:26:17] And so that brings us to the last phase, the last box in our loop, which is retain and reactivate, AKA the after phase. Follow-up assessments and review sessions can reinforce content and help combat the forgetting curve. Sharing next steps can extend and continue the learning. And all of those kinds of things can help with cognitive engagement.

Jeff Cobb: [00:26:41] Stories of impact and outcomes from other learners, those can continue to engage learners emotionally, as can things like badges, awards, and other forms of recognition and celebration.

Celisa Steele: [00:26:53] And behavioral engagement can be extended through on-the-job prompts, coaching that accompanies a learning experience, consulting, asking learners to provide their own reviews, ratings, or testimonials based on their experience. And then, of course, if you get testimonials, if you get data, if you get stories back from learners, you collect those here in this retain and reactivate phase, and you cycle those back into your promote and convert phase so that you're continuously increasing engagement by modifying and improving your offering over time.

Jeff Cobb: [00:27:30] The ideas we just shared about how to engage learners, it's by no means a comprehensive list. So we suggest that, as homework, you go to leadinglearning.com/episode323 and download a resource we're offering called "Learner Engagement for Learning Businesses," which includes a blank Learner Engagement Loop that you can use to help your team think through how and when to support learner engagement. And you can fill in the loop with actions you're already taking, as well as ideas for what you might do in each of those phases to better support learner engagement.

Celisa Steele: [00:28:05] There are no right or wrong tactics for learner engagement, but we do encourage you to address each dimension of engagement. So think about cognitive, emotional, and behavioral approaches and also think about before, during, and after learning experiences.

Celisa Steele: [00:28:31] So that's our look at learner engagement. Again, you can get the "Learner Engagement for Learning Businesses" resource, which includes a blank loop, by going to the show notes for this episode at leadinglearning.com/episode323.

Jeff Cobb: [00:28:45] At leadinglearning.com/episode323, you'll also see options for subscribing to the podcast, and we hope you will subscribe if you haven't yet. We like subscription numbers because they help us with measurement and evaluation.

*This transcript accompanies the episode of the Leading Learning Podcast
available at www.leadinglearning.com/episode323.*

Celisa Steele: [00:28:58] We'd also be grateful if you would take a minute to rate us on Apple Podcasts or wherever you listen, especially if you enjoy the show. Jeff and I personally appreciate ratings and reviews, and they help the podcast show up when people search for content on leading a learning business.

Jeff Cobb: [00:29:14] Lastly, please spread the word about Leading Learning. In the show notes at leadinglearning.com/episode323, you'll find links to connect with us on Twitter, LinkedIn, and Facebook.

Celisa Steele: [00:29:25] Thanks again, and see you next time on the Leading Learning Podcast.

[music for this episode by DanoSongs, www.danosongs.com]