Engaging Modern Learners

When to Push and When to Pull
An Introduction to the InQuire Engagement Framework™

insynctraining

20+ YEARS OF DRIVING DIGITAL ENGAGEMENT IN THE VIRTUAL CLASSROOM

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With contributions from Charles Dye and InSync Training's Community of Practice

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Dedicated to everyone who designed and taught virtually through the pandemic. Remember you are all modern learners.

The capacity to learn is a gift;

the ability to learn is a skill;

the willingness to learn is a choice.

- BRIAN HERBERT

Introduction

DOES YOUR EXPECTATION of how you learn align with what it was even a couple of years ago?

How about the way you learned in 2019, before the pandemic?

Of course it doesn't! So why are you teaching the same way you did 10, 20, even 30 years ago?

We keep teaching like it's the industrial age - putting learners on our assembly lines. It doesn't make sense in this information era. So why do it?

Training professionals are inundated with just too many technologies, theories, and ideas. It's hard to navigate through the latest trends and make decisions about how to design for the modern learning landscape.

And we can't ignore the impact the pandemic had on training. We all went virtual – very quickly. Pushing content to individuals training from home, with children, spouses, and pets all clamoring for attention and bandwidth.
We did this clumsily. And without the training we needed ourselves to feel confident in the outcomes.

We went with what we knew. Content. Slides. Video. It felt safe. But that safety was an illusion. We wound up with all day sessions on video, so called "Zoom Fatigue" and a lot of bad training.

Environmental engagement was totally overlooked. We just kept (and keep!) pushing content out there, hoping some will stick. If we continue to maintain the status quo by promoting a Push training culture, we will soon become irrelevant. We need to engage learners and move from "Push Training" to "Pull Learning", even during live events.

Where Do We Start?

Modern learners know they have a lot of choices in how they learn, and they expect (demand!) that we make those choices available to them in an engaging way. If we don't, they'll find the answers they need on their own.

Sounds great – we love a motivated learner! But 'finding the answers on their own' may not be effective and doesn't allow us to ensure consistent learning opportunities for everyone.

So, we need to provide engaging learning opportunities that align with the expectations of the learners and the needs of the business. On top of that, our learners don't sit still. Their environments are constantly changing, they are learning at their desks, in the classroom, in their homes, on the road, and on the job.

These factors, coupled with the constantly evolving learning technology landscape, make learning and development a difficult profession to navigate.

And, we are navigating without a map.

How do we evolve the learning culture when we aren't even clear about our destination?

What's the Answer?

To find the answer, I turned to my Personal Learning Network (PLN). The Training (or Learning & Development, or Talent Development, or [insert department name here]) industry has so many incredible thought leaders, who share an almost infinite number of approaches that can guide us on the convoluted path to successful learning solutions.

While I'm a practitioner, I consider myself a learner first. I have spent my career exploring, applying, and adapting the suggestions of other learning leaders to create learning that sticks.

These ideas make a lot of sense independent of one another. The challenge lies in how to integrate these approaches in a coherent, constructive way. It's an integration that I've personally struggled to make until recently. Then, after spending some time engrossed with my PLN, I had a revelation about the connections between three particular models:

Model	Author
Five Guiding Principles for Modern Workplace Learning	Jane Hart
Five Moments of Learning Need	Dr. Conrad Gottfredson and Bob Mosher
Push / Pull Training	Performance Improvement Blog

Once I got out of my own learning silos and started combining ideas, all the lightbulbs went off!

And these concepts, along with our own research into the constructs behind learner engagement helped InSync launch the InQuire Engagement Framework™.

This eBook will integrate these concepts, focusing on learner engagement, to help training organizations evolve from a Push Training approach to a Pull learning culture. It just scratches the surface, but we have to start somewhere.

CHAPTER 1

Defining the Modern Classroom

TO TRULY UNDERSTAND the importance of Push training and Pull learning, we need to understand the first dimension of the InQuire Engagement Framework™: environmental engagement – largely focused on where and when people learn, and what outside factors influence the environment. (Chapter 3 will define all three dimensions of learner engagement together: environmental, intellectual, and emotional engagement.).

The modern classroom should NOT be defined as a place. Rather it's an experience. And it's not just one experience, but an infinite number of them. When you think about the way learners can now manage how, when, and where they learn, it's amazing.

When designing **your** modern classroom to maximize environmental engagement, consider:

- What technologies are part of the environment?
- What is the impact of current economic trends on your business and workforce?
- Where and when does modern learning happen?

Technology

We always seem to start with technology. I can't tell you how many times I've heard, "We've got Zoom, so everything we teach should be in Zoom!" And certainly, technology is part of the learning environment. We need to make informed decisions about virtual classrooms, authoring tools, tablets, and whatever the next educational technology tool might be. We need to make sure the technologies are accessible, usable, and supported by our IT departments. And we need to master them. But technology is just the vehicle to get us where we are going. Environmental engagement is much more than that.

Trends Driving the Modern Classroom

Globalization, mobilization, and social networking are three trends strongly impacting the training industry. By gaining insight into these trends and their impact, we can create more effective and efficient core practices within our organizations.

MAKING THE MODERN CLASSROOM GLOBAL

Our learner base has become global and highly diversified. Technology enables us to more easily reach these learners, but we need to adapt and evolve our classroom strategies to meet the needs of this diverse learner base. How do we respond to this trend?

We respond by acknowledging the deep influence that culture plays within the learning environment, especially when we have multiple cultures learning together.

Facilitating a global learning experience requires the ability to read the complex body language in the multicultural bandwidth. We need to design learning that takes cultural principles, interpersonal dynamics, and diverse communication traditions into consideration. Bringing all members of the learning team into this global conversation is critical – including the learners themselves. This new global learning space offers a great opportunity for us to learn from each other.

MAKING THE MODERN CLASSROOM SOCIAL

Thanks to email, messaging tools, social networks, and private communities of practice, we work in a hyper-networked virtual workplace. Information exchanges between employees happen informally, and internet resources provide quick access to information whenever it's needed.

Organizations are now thinking outside the classroom (traditional, virtual, or otherwise), and relying on resources and experiences outside of formal training events. Informal channels, including social media and professional networks, supplement formal learning experiences. These outlets provide you, the learning professional, with the power to access learning resources before, during, and after the classroom session ends.

You can build ever-growing communities for learners to exchange information, and even establish repositories for "tribal knowledge."

MAKING THE MODERN CLASSROOM... MODERN

Our learning spaces are evolving alongside technology advances. However, we still see existing content traditionally taught in the face-to-face classroom copied over to an online version without consideration of the benefits or drawbacks of available technology and the impact of environment. Instructional design and technology integration practices are often completely ignored. And often times the content isn't even suitable for online delivery!

Thanks to the pandemic, rushed timelines, and the desire to deploy content quickly, we may not be giving enough thought to the age-old question: just because we can, does that mean we should?

Success with all learning technologies, including popular mobile devices, requires strategic design, well prepared facilitators, and invested managers.

Designers need to consider the capabilities of new and emerging technologies. Facilitators need to leverage the potential of teaching approaches using these technologies in order to stimulate intellectual engagement of all learners. And managers need to appreciate the value of new approaches to the larger context of broad learning initiatives.

THE IMPACT OF THE PANDEMIC ON LEARNING

2020 didn't fundamentally change training strategies or organizational training needs; rather, it accelerated a trend. For years, organizations have been discussing moving more and more of their training to a virtual format. It took longer to implement than many

would have liked because simply, change is hard. We are all accustomed to the best training programs being implemented in the classroom. Webinars have been considered boring and often a last option when face-to-face wasn't available.

That's not our future anymore. While virtual classroom adoption of this magnitude may have taken another decade or more without the pandemic, we are not going backwards. I expect that 80% or more of the content that has been re-implemented in virtual live instruction will stay there. "Hold on there Sparky" you might be thinking – 'why would you think that?' – the answer lies in four key trends that have started this profound change in training delivery:

1. **A hybrid model of working will drive a virtual model of learning.** If employees are planning to split their time between homes, remote offices, and central offices, organizations will need to decide what types of activity should take place in each location. And chances are, learning will largely take place at home offices or with audiences in "mixed environments" – the only way to effectively allow everyone to participate as peer learners is to harness virtual learning (both live and self-paced). Anyone who has ever delivered to a part in-person, part virtual audience knows this – learners need to interact as peers in collaboration and problem solving, which would be vastly different if only some of the audiences are virtual.

2. **A philosophy of 'virtual first' will be applied to decisions about training implementation (and employees will expect it).** In the "before times", it was a common perception that more rigorous training programs required an in-person classroom experience. Now, with months and months of experience proving that much of this content can be taught effectively in a virtual environment, training programs will be designed for virtual delivery first. Strong arguments will need to be made to justify in-person classes, especially those that include travel re-lated expenses. There will, of course, be strong arguments to be made for some face-to-face programs – especially where collaboration and community building are critical.

3. **The skills needed for working in the new economy apply to learning in the new economy.** As the workforce becomes more virtual, global, and mobile, workers will need to develop skills that help them be successful – for example, fully 63% of sales either start online or will be accomplished with virtual sales, rather than in-person. As training professionals, we can partner with our businesses to not just provide the content they asked for, but to demonstrate the skills required for people to be successful in this interconnected world using virtual technologies and methods.

4. **Virtual classroom designs will evolve to minimize Zoom fatigue.** We really need to consider this experience from the learners' perspective. (Jane Bozarth talks about this in her November post, Normal. Ish.) In 2020, learners put up with poorly designed virtual classes that went on all day while on video...smiling. It was a lot of work to learn, but learned they did – it was a year like no other, and we all worked hard to make the best of whatever situation we were in. At some point, if things don't change, and we adapt learning treatments to virtual delivery, it won't end at "Zoom Fatigue", it'll end at "Zoom Attrition" - we'll just exhaust them into logging

off. I've said in the past that a lack of design and preparation in the virtual environment is much more obvious than a lack of design in the face-to-face environment – instructors can't just "wing it" based on their presence in the room and the design can't just present materials – the learner has to be engaged. As an industry, we will need to adopt instructional strategies and techniques that accommodate this "new normal."

Where and When Does Modern Learning Happen?

We often consider a learning environment to be defined by a technology, like a virtual classroom or eLearning. While technology certainly informs the learning environment, we need to first consider WHERE people learn, independent of technology. This is because a single technology can be deployed in multiple locations.

For example, a virtual classroom can be accessed from an individual's desktop computer, from a mobile device, or even from within a more traditional classroom setting where a group is co-located. In this context, a virtual classroom is a technology that supports learning, not where learning occurs and just clicking buttons doesn't ensure engagement.

WHERE DO PEOPLE LEARN?

Modern learning takes advantage of the myriad learning environments in which it is delivered. For example:

- **In the classroom.** Generally consisting of an instructor and multiple learners, a classroom is a formal face-to-face environment in a dedicated physical space. Printed materials, instructional technologies, and presentations can support the classroom environment.

- **On a desktop computer.** Thanks to learning virtualization, and the formal deliverability of content using technologies like eLearning, social learning, and virtual classrooms, the desktop computer is now a learning environment. When we categorize a desktop computer as a place, we assume that it isn't included in a classroom setting. Under this definition, learners participate in training while physically separated from one another. If learners are co-located in the same classroom and access content via desktop computer, the computer is a technology, and the classroom is the PLACE where people learn.

- **On a mobile device.** Mobile, or mLearning, is a place where learners work from a tablet or smart phone. Mobile devices as a "place" allow learners to be on-the-go, at their desks, or just about anywhere. (Note: A full-featured laptop computer is not a mobile device. Rather, it fits under the "desktop computer" category because a laptop has the same functionality as a desktop computer.) Mobile devices support a variety of learning technologies, including video, eLearning, and virtual classrooms.

- **On The Job (OTJ).** Usually an informal process, on the job training occurs where a learner performs their role. An employee uses new skills and approaches mastery by leveraging experts, resources, and learning technologies as they need them on the job. While learners may use technologies installed on different devices, like a tablet or desktop computer, the WHERE is on the job.

Like so many things, the unexpected and sudden move to a remote workforce caused by the pandemic has changed so much about the physical learning environment. Working and learning from home (as opposed to a formal office environment) has expanded all of these definitions of 'place.'

When selecting a learning 'place' for your program, remember: the right choice is a function of context and a true engagement concern Think of where the learner will perform the task after training is over. Will they use Excel on the desktop in their cubicle to create pivot tables? If the answer is yes than in this case, the most appropriate environment for learning would be a desktop computer. This environment most closely mimics where the learner will complete the task in the real world. It is more authentic.

Let's say, though, that you're teaching a group of supervisors how to manage the inventory in their warehouse via a tablet application. You would want to design learning for a mobile device, since it's the most authentic treatment for this skill. My opinion is "If they are going to perform the task that way, then they should learn the task that way."

WHEN DOES MODERN LEARNING TAKE PLACE?

In addition to selecting the learning environment, instructional designers also need to consider when the learning will take place.

To start, will you consider the experience formal or on demand? Formal events are structured, measurable, and scheduled. On demand events, on the other hand, are less structured and happen just-in-time.

The "when" of learning is directly related to the "where" of learning. You'll have to evaluate in what environment the learners will need the content, and when they'll need it. Consider whether the learners will need a formal introduction to the skill in a structured environment before attempting it on their own, or if they can learn it while actively doing the work. Following this thought process can help you more easily determine which "when" is most appropriate for your learners.

Selecting an authentic learning environment makes it easier to pick the correct "when." For us, a **classroom environment** is defined as a formally convening, pre-scheduled, and definitely outside of the place of work event. If you select this environment, your "when" is formal, as the time spent learning in a classroom is managed and measurable.

In both **mobile learning environments and desktop computer learning environments**, learning can be either formal or on-demand. Various technologies allow learners to access content on demand or formally, providing you with more flexible delivery options.

For example, eLearning or video modules accessed on a mobile device can be on demand and scheduled virtual class sessions completed on a desktop computer can take place formally.

The less formal **OTJ** environment usually calls

for an on-demand learning experience. For example, in order to learn how to create a new PowerPoint template for a deliverable later in the same week, a learner may choose to seek guidance from a colleague, access an online tutorial, or review an online forum. This less formal OTJ training is just-in-time (JIT), since it's accessed at the moment of need.

WHICH COMES FIRST?

Learner needs drive the "where" and "when" of learning, so they both need to be considered at the same time. You need to determine both before identifying the instructional techniques and learning technologies you'll use.

The core of every learning experience is the individual learner. Delivery mechanisms and trends are not nearly as important as the individuals participating in our programs. Keep your focus on the individual and use your "where" and "when" choices to meet their needs and create environmental engagement. Doing so will help you meet the goal of the modern classroom: creating authentic, impactful, and useful learning experiences.

CHAPTER 2

Engaging the Modern Learner

ENGAGING LEARNERS HAS always been challenging. Not only has training evolved into a blended learning model, but the modern classroom is also influenced by multicultural cohorts, hybrid workplaces, a mobile workforce, and social networking tools. Managing these influences and integrating them into a blended program requires planning, training, and understanding from all members of the training delivery team.

There are also a lot of devices out there available as tools for us to leverage. We need a lot of context for our learning in order for it to feel meaningful. We're multi-tasking and interrupted all the time. Our workplace includes many generations, and each of these generations has unique needs and traits. For example, millennials tend to value relationships and use lots of devices, while craving on-demand and collaborative learning.

When we think about engaging the modern learner, we tend to focus on designing learning specifically to captivate millennials. Doing this can cloud our judgement.

For example: several years ago, I was teaching a face-to-face class and I asked, "How do we engage millennials in Pull learning?" The answer for several (older) people was, "everything that engages millennials, would engage me, too."

I didn't expect this, and that's the crux of our issue. We have a lower expectation of engagement for our general audience. We somehow think of young learners as unicorns – magical creatures that require fantastically engaging learning experiences.

The truth is we all require, even crave, that kind of intellectual engagement. To get there, we need to stimulate learner curiosity and emphasize relevance and applicability. So, if we design this very dynamic, motivating content, it would engage all of our learners, not just millennials. Remembering this truth helps us raise the bar.

Our learners are changing. That's because as work evolves, our learners adapt to match the new requirements of their work.

We're not just teaching content anymore; we're teaching our learners how to work, how to perform, and how to take action.

As a result, the learning function isn't just a line-item expense anymore. Training professionals are partners in the business who impact our organizations on a deep, meaningful level. In spite of our ability to affect change in our companies, we are still designing content based on outdated models, because that's how it's always been done. We know, though, that face-to-face learning isn't the "Cadillac" of training anymore. It's just one of many learning treatments. We need to actively create better learning experiences by incorporating all of the options available to us in order to design training that sticks.

What is Learner Engagement?

Let's start with what learner engagement IS NOT. Learner engagement is not motivation, which is a character trait. It's not attitude; contributes to Emotional engagement, but it's largely preexisting (I might be motivated to come listen to training, but I might lose that). It's not the competence of the trainer or active participation. As you know, just because a learner is completing an activity, or following provided directions for an exercise, it doesn't mean that they are engaged in the learning process.

To fully understand learner engagement, we need to consider the mental state of our learners and the reaction caused by the learning treatment.

Anecdotally, we all can picture what a lack of engagement looks like. But when we try to pin down an actual definition, things become more blurred. Some liken engagement to motivation, while others talk about causal factors affecting engagement, without providing a definition at all. Looking to academic sources adds to the confusion.

A casual review of academic research from the past years finds more than 300 scholarly articles and more than 2,000 trade articles that use the term, "engagement." However, the fact is that only a couple of formal research efforts have looked at learner engagement at all, for all the ballyhoo associated with it.

Organizational behaviorists have considered "worker engagement" and its dimension s of "Emotional Engagement" and "Intellectual Engagement." Initial research has found that the traditional engagement model from Organizational Behavior and other research is a good first step but misses a key factor that the modern classroom brings into the learning experience - the learning environment.

Our definition of modern learner engagement, therefore, includes three dimension dimensions:

- **An emotional response to the training:** How does the learner "feel" about the content and its presentation/treatment?
- **An intellectual response to the training:** Does the instructional experience require and involve the learner's intellect?
- **An environmental response to the learning:** Do the learners interact with the learning environment and is the environment changed because of the training?

(These dimensions are the foundation for the InQuire Engagement Framework™. This will be explored in more depth in the next chapter.)

If we constrain engagement with these dimensions, differences between engagement and concepts such as collaboration and interaction become clear.

Collaboration is a social learning exercise that uses a set of tools to interact. Interaction is a stimulus/ response interaction between the learner and some aspect of the instructional treatment. Engagement is an internal learner dynamic that varies throughout a learning experience, which can affect motivation, persistence, and satisfaction.

ENTER, STAGE RIGHT...
THE MODERN CLASS-ROOM

I define the modern classroom as, "the superset of possible learning environments, and related instructional treatments and techniques, in which a learner may find him or herself in the corporate training domain."

Modern classroom instructional contexts include formal and informal content treatments, as well as performance support and on-the-job training. Treatments leverage a wide spectrum of techniques to accomplish their objectives, ranging from immersive simulation to YouTube videos and mobile-enabled job aids.

It likely comes as no surprise to learn that each treatment has strengths and limitations that affect the implementation for your organization. These differences are important for your implementation and are similarly important in how they affect learner engagement.

The Modern Classroom and Learner Engagement

Every modern classroom method directly influences the emotional and intellectual response dimensions based on content, treatment, relevance to the learner, and several other factors rooted largely in adult learning principles. The key to properly implementing modern classroom treatments depends on correctly addressing these issues in development. The *environmental dimension* of learner engagement is often overlooked in development and implementation. It's necessary to consider how likely the learner is to interact with the content *in that particular learning environment* to achieve the desired outcomes.

To manage that consideration and enhance learner engagement, you need to look at the environment you are using to deliver and evaluate the utility of that environment from the perspective of the learner. This will help us answer the universal question of Training departments: "Is this good for teaching?"

There are several takes on this question. There are those who adopt the latest and greatest, no matter what. There are those who want to keep doing what we've always done. And let's not forget those in the "this isn't how I was trained" camp, among a variety of others.

Don't choose sides in this debate - because all sides have good points to make. Instead, look at the world through the learner's eyes, and ask yourself: "Does the instructional treatment in question provide the best environment to teach this particular thing?"

This approach gets back to the concept of authenticity introduced when considering the "where" and "when" of learning. Our instructional decisions need to create learning experiences that mirror how individuals will use the skills. Imagine a sales training class with a live in-person seminar for negotiation skills. Learners would be coached and evaluated, until the instructor could "look 'em in the eye" and know they had achieved mastery.

Sounds great, but what if I told you that these learners actually conducted their sales calls and negotiations online using a live virtual platform? Does the in-person live seminar sound as good as a well-designed virtual program that leveraged the same environment that the salespeople would be doing their jobs in?

Task and learning *authenticity* underlie the obvious choice. In the virtual training example, the virtual platform more closely mimics the actual task environment, providing the same tools and capabilities each learner will have to master to do their actual job.

These skills are much too complex to learn on demand, so the solution provides structured, formal training on both the skills and the platform they'll need to use. Once learners understand they will be working in that virtual platform, they will expend as much effort learning the platform and how to optimize it in a sales call as they will on the actual mechanics of negotiation.

The learning environment changes with the learners as they interact in it—slides advance, chats are discussed, annotations are made—and as the environment changes, the learners refine their perception within that environment to act on what is important to succeed in the negotiation.

Not only does this example meet our authenticity test for "where" and "when" learning will take place, it also addresses all dimension s included in our definition of engagement. The learners respond emotionally and intellectually to the content, and the learning environment changes because of the content and the learner interaction with it.

Why is Engagement Important in the Modern Classroom?

Let's explore *why* engagement is important in the learning environment. Your initial reasoning is likely drawn from your instructional experience. You may think, "Of course, engaged learners are better!", and that's true. But how can we measure the effect of engagement on instructional outcomes?

LEARNER PERFORMANCE IN WHAT WE SEEK TO TEACH

In the past, the effectiveness and impact of learning was measured by how well learners performed on a test. Testing is a reasonable place to start, but it ignores personal biases relating to the learning experience in favor of data. A score of 93% on the test is a score of 93% on the test; it doesn't mean more than that.

Our definition of learner engagement determines that this type of measurement isn't enough. All aspects of learner engagement, including evaluating the effect of engagement on learner behaviors and attitudes after the instructional experience, must be considered to properly assess outcomes. This approach will help you to see big differences between learners.

Think about this example of a training solution teaching a software skill:

Learner 1 loves her job and its tasks (Emotion Factor High) but finds the content fairly slow and unchallenging despite being critical to her job (Intellect Factor Low). As a consequence, she doesn't participate much, and ignores the questions asked by other learners, and the demonstrations and activities using the software in the web-based seminar (Environment Factor Low). Test Score: 93 percent.

Learner 2 is so-so about her job (Emotion Factor Low), but she finds the content challenging and believes it to be important to her job (Intellect Factor High). The instructional treatment is directly applicable to her job and her personal responsibilities, so she actively participates and asks questions as to how the content is applied to the task in the software (Environment Factor High). Test Score: 89 percent.

By test scores alone, it would be easy to assume that Learner 1 performs better than Learner 2. However, by using the assessment scores only, we lose insight of learner outcomes down the road, and it's possible that our assessment measures the wrong thing.

Based on the information provided beyond the assessment score, which learner do you believe is more likely to go on and perform the actual task more effectively?

The key in answering the question of learner performance with respect to engagement is to define measure(s) of effect. Establish rubrics based on these measures that are situated within real world contexts and provide instruction in different learning environments. If the right environment with contextualized content is presented to the learner, the learner's engagement goes up, learner self-efficacy improves, and achievement (even that just measured by summative testing) improves.

LEARNING HOW TO LEARN IN A DIFFERENT ENVIRONMENT

There hasn't been much research conducted with a diverse learner audience to understand the effects of learning environments on the learner's attitudes, behaviors, perceptions, and performance *while learning* until the introduction of Dr. Charles Dye's research on learner engagement, which is the foundation of InSync's InQuire Engagement Framework™ .

In the examples above, the learner who's trying to apply the content in a real-world context in the classroom enters the world ready to perform the task...but what else does she leave the classroom with?

Applying our definition of learner engagement, the learner who actively participates (and is, therefore, more engaged) experiences changes in all three dimensions, and completes a particular learning experience with a sense of how to *learn and act* within that learning environment.

This competency is a skill of learning in and of itself. Within any particular learning environment, learners develop methods to navigate their way through the experience by discerning how to interact with the environment. For example, a learner may think, "If I raise my hand, the instructor will call on me;" or "If I click this

question mark button, I'll access a help function". Learners refine their *understanding of what works and what doesn't within the learning environment* to achieve the outcome they want. The big take-away here is that the learner learns not only the subject matter being taught, but also how to interact in a particular learning environment to glean the most relevant information.

This explains the need for an Environment Factor in the engagement construct. While perhaps not earth-shattering when most instruction is face-to-face, in the context of modern workplace learning, this is a big deal.

Modern workplace learning provides, quite literally, hundreds of potential environments in which to deliver instruction. If learners understand how to interact in a particular environment, their engagement will improve (Environment Factor goes up), and their learning will be enhanced.

Additionally, if the environment is based on—or, even better, uses—a real-world context, the learner develops true competence by participating in the learning experience. The knowledge and skills developed in the instructional experience are directly transferable to the real-world task.

CHAPTER 3

The InQuire Engagement Framework™: Three Dimensions of Learner Engagement

I've referenced the InQuire Engagement Framework several times – time to explain what I mean.

InSync's InQuire Engagement Framework™, developed by Dr. Charles Dye, is based on an operationalized situated cognition model and neuroscience, and optimizes learner trajectory by considering the learner, the learning environment, and the learner-environment interaction through measurable and well-defined measures of effect. Access the original research here: https://opencommons.uconn.edu/dissertations/2403/

Since the introduction of the virtual classroom in the 1990s, we've been concerned with how we can en-sure people are actually llearning, and it's become increasing clear that Inter-acting in the digital environment is very different than interacting face-to-face.

Virtual classrooms provide many opportunities to en-sure that learning happens – we just need to make sure we know what they are.

What is Environmental Engagement?

"Environment Engagement" is how the learner's interaction with the learning environment changes both the environment and learner's perception of the experience.

If a tree falls in the woods and no one witnesses it, does it make any noise? If an individual hates the virtual classroom, does it have an impact on the success of the program?

Of course it does. The learning environment and the learner are both changed by contributions from the learner, interactions with the other learners, delivery of content, and interactions with the

facilitator. In the case of the virtual classroom, this environmental engagement begins with comfort with the capabilities and requirements of the virtual classroom.

What is environmental engagement and why should it matter

Our research tells us that:
Environmental engagement relates to the perception of and interaction with the learning environment it-self. We consider: How do learners perceive the learning environment? Does it create a constructive, effective experience? Does the learner interact with the environment?

The facilitation process aligns with both design and delivery within a particular environment, like the virtual classroom. When a learner is environmentally engaged, the learner knows how to interact with the environment and easily perceives opportunities when they can connect and interact with the content, peer learners, or the facilitator.

We often think the virtual learning environment exists outside of our control. In reality though, we can positively manage and contribute to the environment to foster strong learner engagement in the virtual classroom environment.

When a learner is environmentally engaged, they:

- Find the activities meaningful
- Value interactions with their peers
- Value the facilitator and the instruction
- See how the materials, etc., are valuable outside of the learning environment

When they are environmentally disengaged, they:

- Find materials and interactions frustrating or irrelevant
- Are noticeably dismissive or contrary
- "Check-out" of activities.

What is Intellectual Engagement?

"Intellectual Engagement" is what the learner thinks about the information presented in the learning experience.

And the question is: Can the virtual classroom actually achieve the same learning results as a face-to-face approach?

Or is it a 'second best' solution? The answer is, if our approach is authentic and well-designed, we can en-sure that virtual learning is REAL learning. And help learners recognize this as well.

In the same way we can foster environmental engagement, facilitators have a unique opportunity in the virtual classroom to stimulate intellectual engagement. This opportunity isn't NEW - great teachers have piqued our interest and motivated our participation since the earliest educational experiences. But many of us have doubts as to whether intellectual engagement in the virtual classroom can rise to the levels we expect in a more traditional approach.

Intellectual engagement involves more than learners feeling mentally inspired by training content. Facilitators must recognize that the learning environment is changed by how people are learning, and how much they are learning, and manage the class accordingly.

Our research uncovered that facilitators need to focus on specific, proactive action in order to support this dimension of engagement:

Research demonstrates that activities that might exemplify this aspect of learner engagement would include asking sophisticated questions (particularly "follow-on" questions that build on a point made earlier in the same discussion) and a sense of alignment of subject matter with task and performance (Cooper, 2010) – they may make frequent comparisons to practices "in the field," and questions from such a person would be directed at the question of real-world implementations of theoretical or activity-based concepts presented in the learning experience.

When a learner is intellectually engaged, they:

- Demonstrate inquisitiveness, curiosity
- Want to learn more – and does it themselves
- during the lesson or after it

When they are intellectually disengaged, they:

- Find the material irrelevant, boring, or unimportant
- Dismiss the opinions of others

What is Emotional Engagement?

"Emotional engagement" is how the learner feels about the learning experience.

We often frame corporate training as a compulsory process: complete these requirements and move on to the next task. It's a reinforcement of a "Push" learning culture that is content centric, and not a personal experience.

Effective learning involves an emotional component. Employees want to do well on the job. They hope to have the skills required to meet their goals. They stress about balancing their professional responsibilities while upskilling. The training function has an ob-ligation to recognize these emotions, and facilitators can improve virtual training experiences by addressing them in their delivery approach.

It's important to realize that the learning experience is changed by how learners feel about the experience. Facilitators should strive to enable individuals to feel good about the experience, and even nurture a sense of community.

Charles Dye's research shows that emotional engagement serves as a key dimension of learner engagement.

"*Experienced facilitators focus on activities that might exemplify this aspect of learner engagement, including positive collaboration with peers (McDonald & MacKay, 1998; Calvani, et al., 2010), articulation of shared experience and social modeling (Bandura, 1986), scaffolded development/demonstration of skill/expertise with a facilitator (Vygotsky, 1986), and the sense of self-worth that comes from participation in a learning experience (Cooper, 2010).*"

When a learner is emotionally engaged, they:

- Have frequent discussion with facilitators and peers
- Active contribution and integration of concepts raised by others
- Establishment of relationships with other learners
- Appear active and respectfully

When they are emotionally disengaged, they:

- Find opinions of others distracting
- Find collaborative activities loathsome
- Participates only when it is required

CHAPTER 4

Three Models That Will Change the Way You Think About Engagement

We've established that there are three dimensions of learner engagement, all of which are critical to success. But how to we achieve them?

This chapter briefly describes three models that have had a strong, positive influence on how I think about implementing modern learning initiatives. Together, they help to create an environment that engages learners environmentally, intellectually, and emotionally.

As you review these models, I challenge you to think about how you would apply these models to change the learner experience in your organization and how they could impact engagement. Keep in mind that our overall goal is to integrate the concept of Push/Pull training and we need to start with these basic ideas.

Model 1: The Guiding Principles of Modern Workplace Learning (Dr. Jane Hart)

The concept of modern workplace learning is about engagement and the learner experience. Our job as learning professionals is to engage the learner by remembering these different experiences.

Dr. Jane Hart identified five Principles of Modern Workplace Learning. Reviewing and understanding these principles provides an excellent starting point in our journey to creating a Push/Pull approach.

Principle 1: ***Supporting a much wider range of learning experiences.***
Learning experiences today consist of much more than just formal training. Yes, face-to-face scheduled classroom events and eLearning modules will likely always be part of training. However, they are only part of the experience now. Dr. Hart intelligently points out that the modern workplace learning culture includes a wide variety of learning experiences, and our role requires us to support

them. There's a lot more learning experiences out there, and that fact is part of the modern workplace learning culture.

Principle 2: *Loosening control and autonomy.*
The idea of letting go of all aspects of a training solution strikes fear in the hearts of all learning professionals. We have a desire to control the entire learning experience from start to finish. However, adult learners are inherently motivated to go and find the information that addresses their unique situation. We need to acknowledge this pattern of behavior and support it in our learning solutions. Remember, not everything needs to be assessed. We are quickly moving away from the traditional "sage on the stage" role, and towards one of learning architect. For Dr. Hart, loosening our control is a key principle of modern learning that we need to embrace.

Principle 3: *Supporting and enabling learners, not just designing and managing content.*
We need to move beyond the traditional "sage on the stage" role and understand that our responsibilities go beyond simply designing and delivering learning modules.

In modern workplace learning, we need to support learners, and enable them to learn in the way that works best for them. Curated resources, user generated material, mentors, coaches, and collaborative communities of practice are all options available to us as we work to meet this modern learning principle.

Principle 4: *Focusing on performance, not just learning.*
It's not about training courses, it's the performance that's going to drive the learning. Our focus needs to be on how performance affects learning. Embracing this change in focus will help us continue to develop our new relationship to the business.

Learning, as we've covered earlier, is about so much more than content. Now it's about teaching people how to work, and how to perform those new skills well when it matters the most: back on the job.

Focusing on performance ultimately drives change to everything else about our jobs, like identifying when a job aid will suffice rather than a formal training event.

Principle 5: *A new relationship between learning and development and the business*.
With the fifth principle, Dr. Hart continues to advocate for learning's value to, and relationship with, the business. Again, we aren't simply event managers or order takers. Learning should be part of the workflow, and as such, we should be engaged in the process much earlier. We can embed resources, tools, and learning where people need it, and by doing so, our value to the business will become obvious. With this principle, logic continues that we will no longer be the first group to get fired in the event of a layoff.

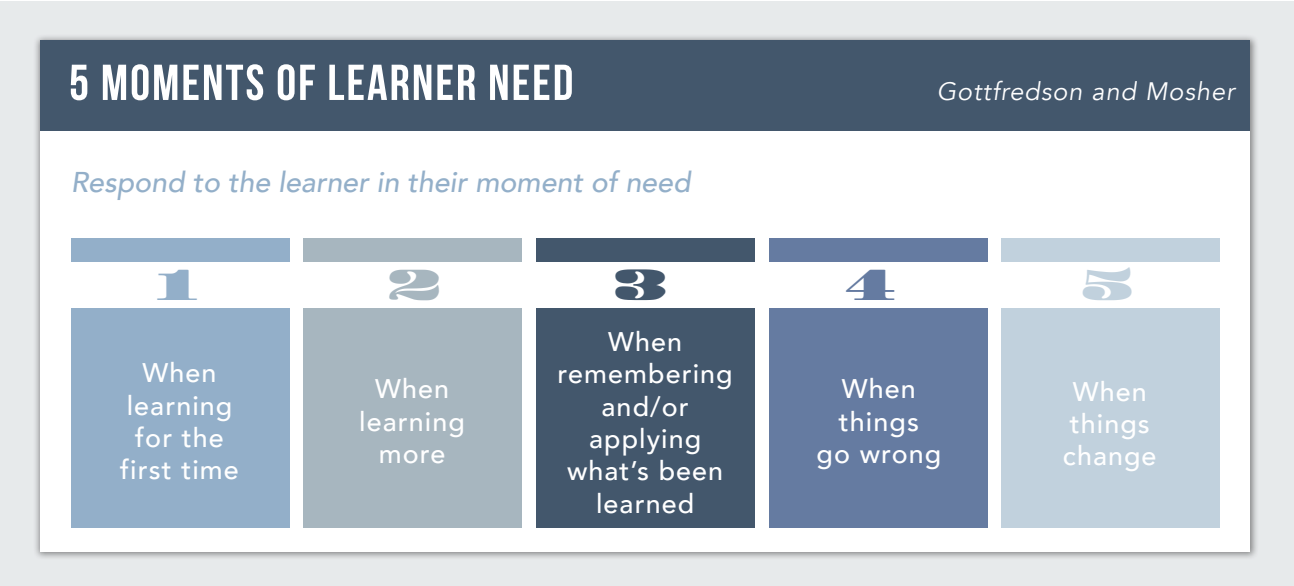
Model 2: Five Moments of Learning Need (Dr. Gottfredson & Bob Mosher)

Thinking about Dr. Jane Hart's Principles of Modern Workplace Learning inspired me to reassess my instructional design process. Ideally, I'll design so that content will be embedded in the flow of work so that it's available in a learner's moment of need.

But what's that personal moment of learning need? How do we identify that? I urge you to think about your day to day – what did you learn today when you needed to? You may have had to figure out how to put an out of office responder on your email or use a new feature on a platform you use for your daily tasks. If we think about the five Principles of Modern Workplace Learning, we're actually applying them in a specific moment of learning need.

This is where Dr. Gottfredson and Bob Mosher's model of the "Five Moments of Learning Need" came in to play.

Moment of Need 1: *When learning for the first time.* Addressing this moment of need is something learning professionals do really well. Traditionally, we meet this need with scheduled



learning solutions teaching new skills. The learning events may be face-to-face classes, blended learning courses, or eLearning. For example, new supervisors learning the skills required for their role may attend a two-day onsite workshop.

Moment of Need 2: *When learning more.* The easiest way to think about this moment of learning need is to go back to my supervisor training example. Maybe a new supervisor needs to give their direct report feedback for the first time and it wasn't in their initial training. Now they're trying to find the best way to learn that new skill. Maybe they attend a formal event; maybe they go to a mentor; maybe they look something up online; maybe they rush into it without learning anything. We need to identify those moments when people will need to learn more and embed content in the right place.

Moment of Need 3: *When remembering and/or applying what's been learned.* Back to my new supervisor training example. Maybe we taught a skill in the two-day class and six months later our learners need to use it for the first time on the job. That's a different moment of need than the ones they've experienced before. Now, they need to refresh skills they've already learned. What can they pull from that original training that refreshes their skills in a way that works for them? Keep these moments in mind when designing the resources for the initial training, and make them available after the formal program ends so the learner will have a trusted resource to access when they need to apply what's been learned previously.

Moment of Need 4: *When things go wrong.* We know that not everything goes right on the job. Think about our new supervisor trainees. Maybe they're in their first feedback meeting with a team member, and the meeting goes completely awry. They practiced the meeting format in our workshop, but it didn't translate to real life for them. That new supervisor will look for resources to help them recover from this event. Think about how we could help them in that emerging moment.

Moment of Need 5: *When things change.* Final use of our extended example: there's been a change in supervisor workflow process and they need to understand how it impacts their day-to-day work, and why they need to update their approach. The change isn't so major that it requires a full in-person training program. They'll need appropriate job aids and informative resources to help them manage this new process. If we anticipate that change, we can embed training in the moment of need.

Dr. Gottfredson and Bob Mosher's model is helpful on its own, but it's hugely powerful when combined with Dr. Jane Hart's Principles of Modern Workplace Learning and InSync Training's InQuire Engagement Framework™ . The connection between the models is this: the Principles of Modern Workplace Learning say that we're becoming more of a partner and that this is a result of our focus on performance and including our learning designs in the workflow. The Five Moments of Learning Need model provides opportunities where we can embed learning where and when our learners need it most and the InQuire Engagement Framework™ outlines ways to apply engagement to the virtual classroom.

Model 3: Push Training and Pull Learning

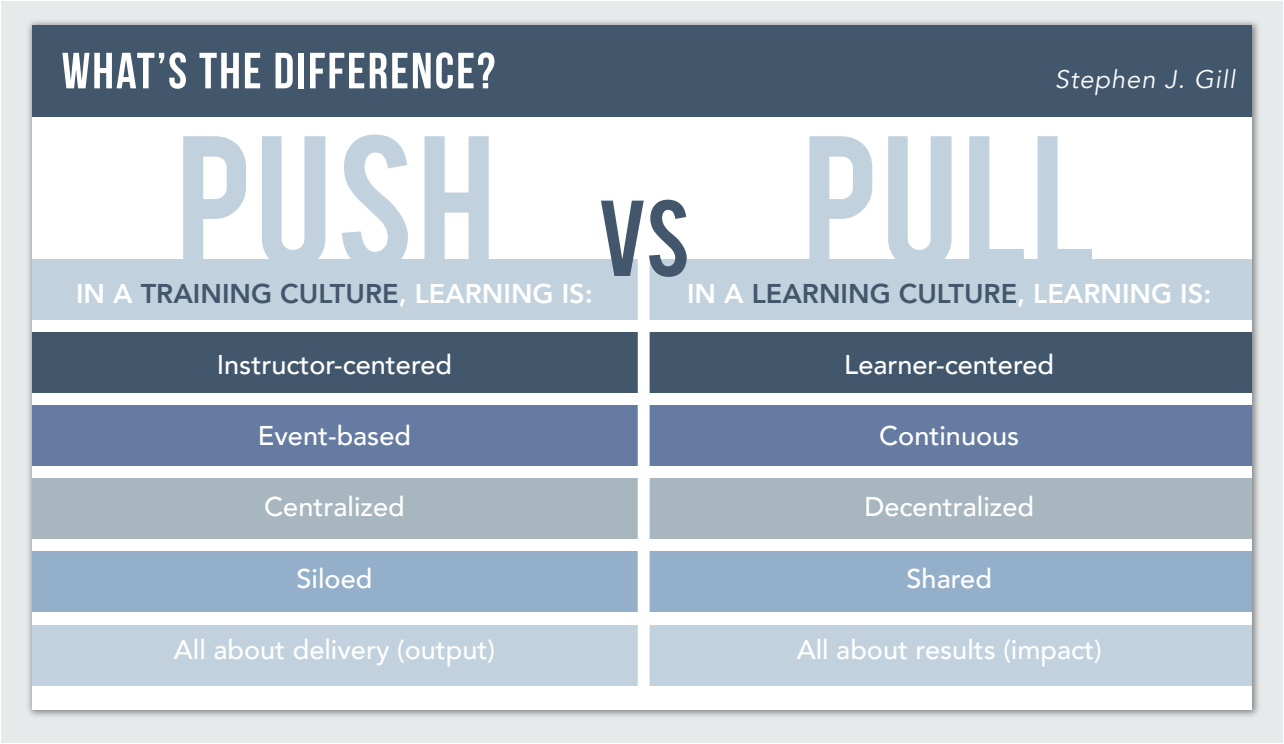
From an organizational perspective, things change slowly and people are conditioned to do the same things the same way they've always done them. As we move from this industrial economy, which was revolutionary 100 years ago, to this knowledge economy, we haven't changed how we're training.

This is interesting because there's no other business function that's still managed like it was a century ago. We know that the way we train, in classrooms and boot camps, is not efficient, and people don't remember most of what they learned.

Learning is undergoing a vast rate of change due to the digital revolution that's underway right now. The digital revolution is transforming all aspects of business, including learning, and it's forcing us to develop new models and change our approach and models.

We are finding that we're moving away from delivery-focused, instructor-centered, scheduled events, based on centralized and siloed content. Instead, we're moving towards on-going, learner-centered, decentralized learning solutions that focus on results.

This evolution perfectly describes Push training versus Pull learning. Push training comes to the learner, whether they're ready (and willing) or not. In comparison, Pull learning is made available to learners when they need it.



This is a major change in culture which most companies do not know how to adopt. As partners in the business, we need to prove the value of including more Pull learning opportunities for our learners. In order to meet the needs of modern learners, we need to focus on this Pull learning model as a significant part of our blend, where people can connect and learn from one another.

We need to facilitate that, just like we need to embody Jane Hart's Principles of Modern Workplace Learning, and support Dr. Gottfredson and Bob Mosher's Five Moments of Learning Need.

Making the Connection

When I think about how these three models come together, I see it this way: We need to create learning experiences that work best for our learners. We don't look at each person individually. Generally, our learners have the same needs, and the same content needs to be reinforced, and they need to practice the same stuff.

On a more detailed level, the connections in my mind look like this.

Dr. Jane Hart's five Principles of Modern Workplace Learning set the foundation for how we think about the workplace moving forward. The model also establishes the concept that we need to support our learners when they have a moment of need.

The Five Moments of Learning Need from Bob Mosher and Dr. Gottfredson create definitions of the specific moments in which learners have needs. These definitions help us to better understand where we need to embed the resources we'll create.

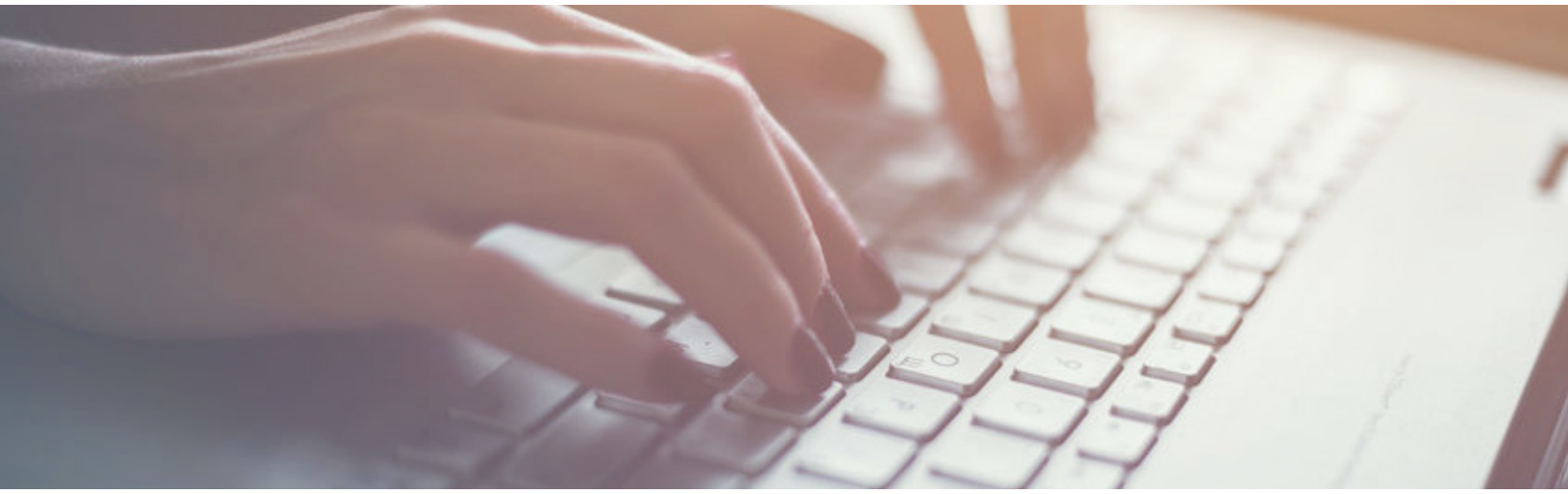
Finally, the Push training and Pull learning model helps us distinguish between the moments of need.

Push training and Pull learning really support the Principles of Modern Workplace Learning. We're enabling learners in all moments of need (Modern Workplace Learning Principle 3). And as a training organization, we're focused on performance, not just learning (Modern Workplace Learning Principle 4). Additionally, we know we are good at Push training, since we use this approach with Moments of Learning Needs 1 and 5. This training for these moments is scheduled. It's assessed. It's required. We know how to manage this. When learning more and remembering what's going on, these are opportunities for Pull learning.

As you can see, these models are much more powerful when considered together.

CHAPTER 5

Making a Pull Learning Culture Work



Creating and distributing learning materials is not enough. We need to purposefully motivate learners to explore the materials, experiences, and network interactions available to them.

These three models make sense independently, and combined, they have inspired me to think differently about the ways we can, and should, meet learner needs.

We need a set of conditions to come together in order to make it work, otherwise they become academic and go the way of previous L&D fads.

We've heard about learning cultures, and learner-centric before. We've talked about these concepts for years. They've been academic because they're independent concepts that we haven't learned how to pull together.

Each one of these models could be considered a new trend, or passing fad, but if we integrate all three into our work under the InQuire Engagement Framework™, I believe they can change the way we design, develop, and deliver learning, to truly support and engage modern learners.

What do we need to do to make a Pull learning culture work?

Every learning event and resource we create and deliver needs to be useful, engaging, and purposeful. And we need to be sure that learners are experiencing learning where, when, and how it best suits their individual situations.

At a high-level, other needs include:

- Management buy-in
- Enabling technology
- Engaging content
- Infrastructure
- Less regulation
- Providing the WIIFM and value to learners
- Easy access for learners
- Marketing and advertisement

A Step-by-Step Guide

I've designed a process that can help you build a Pull learning culture within your organization.

Step 1: *The content needs to exist.* This is pretty obvious. We can't implement a culture of Pull learning if the learning assets are not in place. That library needs to exist, and the content needs to be valid. It needs to be up to date. It needs to be engaging. It needs to follow all of our instructional design standards.

Step 2: *The content needs to address real needs.* It isn't enough for the content to exist. Additionally, we can't just guess about what the needs of our learners are. Identify when people are going to get in trouble; when they'll call the help desk; when they'll need reinforcement. Call the help desk and say, "What types of calls do you get?" and build job aids to support the subjects and issues raised on those calls. Conduct follow-up sessions for formal training. Get together two months after a program and see what isn't working well. Create tools to support those moments. Figure out what the real needs are and build content around that. In the traditional model, we build training because it seems like a good idea at the time. Now we have the opportunity to better establish and meet the needs of our learners.

Step 3: *The target audiences need to KNOW it exists.* Having the content in the right spot is great, but it's not enough. Our target audience needs to know the resources are available to them, and how to access them. Why don't we incorporate the tools our learners need to use into the training of those tools? This will enable them to have the knowledge and skills they need in their moments of need! When you have the opportunity, show the learners where the resources live, and teach them how to access them. Make this show-and-tell process part of every learning solution.

Step 4: *The users need to be confident it is worth their time.* In my experience, this is the most difficult step in the change process. How are we going to impact the mindset of our learners so their first instinct is to access our learning resources in their personal moment of need? Why would they go to our resources instead of using Google like they always have? What's stopping them from calling over their cubicle or not learning at all? How do we get them to participate in the Pull learning culture?

The answer, I think, will be different for every organization. It's going to take some time. If we follow the first three steps (make sure the content exists, it addresses real needs, and the audience knows it exists and we teach them to use it), the confidence and momentum will start to build.

We need to teach and reinforce the value of what we are contributing to the organization. We have to acknowledge the fact that learners are out there getting content on their own. Our job in this new learning culture is to make sure they have the tools they need to do their jobs, that the content is correct, that it's easy to use, and meets our standards.

Overcoming Obstacles to Implementing a Pull Learning Culture

In order to create a Pull learning culture, you need to mitigate a number of possible obstacles.

Obstacle 1: *This is a change for your entire organization (except maybe the learners).* Your learners might be quicker to adapt to this change than you or your organization. They want the right information in the right place, at the right time. One way to avoid this obstacle is to start small. Make the access to these new Pull opportunities easy. Keep communicating about the resources, and the value of the culture shift to the organization at large.

Obstacle 2: *Assessment of materials and helpfulness to the learner.* Not everything needs to be assessed in the modern classroom. Assess when you need it. If you're not going to use the data you collect,

don't waste time and energy tracking it. Provide avenues for feedback on the content you provide, and your learners will let you know when the content doesn't meet their needs!

Obstacle 3: ***Tracking requirements.***
Do you need to know every time an infographic, for example, is downloaded? What are you going to do with this information? When you track learner interactions, be sure you have a goal in mind associated with the data you are collecting. Without that goal, your data is pointless.

Tracking content access can also guide the development of new Push and/or Pull training materials. If your call center employees are constantly downloading product guides, you will know that it's time to review what they are really looking for, and if you can deliver that content in a more effective and efficient way.

Obstacle 4: ***Ensuring employees/learners have a good Personal Learning Network (PLN).***
We can help set up PLNs for our learners by providing content and creating community where possible. We can't force people to be social, and we can't create their PLN for them. We can, however, make suggestions and provide opportunities and a platform for collaboration.

Obstacle 5: ***Letting go of 100% control.***
A Pull learning culture isn't replacing the need for formal training. Instead, it's giving learners ownership and responsibility to find the information during those other moments of need. We will find it challenging to let go of the control we're so used to having. The best part of Pull learning is that we're providing structure and vetted resources to an informal process that our learners are already using.

Moving from Theory to Practice

UNDERSTANDING THE THEORY behind these different models – the Five Moments of Learning Need, the Principles for Modern Workplace Learning, and Push/Pull – helps us identify the needs of our learners, and how our learning solutions can meet those needs.

However, it's important to note that being aware of these models and implementing them well are two very different things.

We need to anticipate these moments of need, embed content in the workflow so our audience can learn what works best for them. It will take concerted effort to make this plan work. We must shift from "What is engagement?" to "How do we develop engagement in the instructional treatments we've talked about thus far?"

I will now provide concrete examples of how to apply these concepts through social collaborative and microlearning options.

Pull Learning Through Social Collaborative Tools

SOCIAL COLLABORATIVE LEARNING DEFINED

Social collaborative learning is not using Facebook or Twitter to teach. It's a process of involving people to work together to produce a shared instructional outcome, whatever that happens to be. It is:

- Ensuring facilitators and learners work together towards a common goal
- Enabling learners to collaborate on projects
- Drawing on a set of tools and expertise from outside the individual to contribute to a collective outcome.

Social collaborative learning can be formal or informal. Because this is how we've all been learning all of our lives, it's universal. It's participatory, because it requires active engagement from an entire community. It's a competency for our work, so we should build it as a competency for our learners.

Examples of social collaborative learning include:

- VoiceThread projects
- Wiki-style sites where Subject Matter Experts (SMEs) share expertise
- Posting learner-created resources on internal social networking sites
- Group problem solving about how to help specific customers

COLLABORATION AS A COMPETENCY

Inherently, this approach involves teamwork, which requires us to establish collaboration as a competency. Today's workplace includes extensive collaboration, and by including it in our learning solutions, we can have a deeper impact on our organizations. We want learners to work and learn together. Furthermore, thanks to the functional media tools available to us, we seem to have a toolset that can allow collaboration to easily take place.

In spite of this, I believe that trainers will find it challenging to establish collaboration as a competency. Why? Because the concept of collaboration is ambiguous. It's hard to say who's in charge of collaboration. For example, if I were to break an online class into groups of five and say, "Complete this task," how would they know who was in charge? Would everyone fully participate?

To avoid these problems, we need to include immersive collaborative experiences, instead of contrived role-plays, in the modern classroom. Learners must be able to model those collaborative exercises back on the job.

I believe that if we teach our learners how to collaborate within the safety of a training

experience where we aren't just teaching the content, we will teach them how to collaborate effectively and be more successful in their jobs.

You should aim to include well-designed collaboration in your learning solution designs through breakout rooms, whiteboards, or social collaborative exercises. Your goal should be to teach people how to collaborate in training so they can bring that over to their work.

Today's workers perform 50 to 80 percent of their tasks collaboratively. If we don't measure that as a competency, we are falling short when it comes to measuring skills that lead to workplace success.

HOW TO IMPLEMENT A PULL SOCIAL COLLABORATIVE LEARNING ACTIVITY

One of the worst things we can do is force collaboration where it's inappropriate or ignore it when it's appropriate. We've all been in situations where you've seen someone step out of the group and do their own thing, and the result isn't as optimal as if everyone worked together.

Alternatively, you can think of examples where collaboration isn't appropriate.

If you're going to implement a social collaborative Pull learning activity, I recommend you follow these steps:

Step 1: ***Decide where collaboration is necessary.*** If it is part of your objective to enable social collaborative learning, make sure it's part of your learning and relevant to the task performed. Remember, if it's not relevant to the flow of work, it won't get used, and it won't stick.

Collaboration as a competency has to be where collaboration really happens. You have to design participatory collaboration – all of the learners need to be part of the process. The learners don't necessarily need to be leading the process or contributing a lot, but they need to be part of the discussion and hear what the others have to say.

Step 2: ***Recognize the key features involved in a social collaborative Pull activity and include them in your designs.*** Keep the following in mind:

- Peer interaction is the core mechanism through which this activity happens. Participation is recognized and encouraged when it happens.
- The Pull is being driven by a task need – don't force collaboration where it isn't appropriate, but give them the opportunity to collaborate fully when it's related to the learning objective.
- A good sign that collaboration is occurring is if a good Q&A is going on between peers. It's not solely from the person leading the discussion and performing the task.
- When you design this activity, have a desired end state in mind, but know that success is also defined by the learners. The act of effectively collaborating can be an end in-and-of-itself as an objective of the event. Keep that in mind when defining your rubric for success.

Step 3: ***Ensure that the feedback provided by the people leading the instructional experience is formative.*** You want the feedback to be constructive so it guides learners along the pathways they want to go on.

Why is this important? Because:

- It may be that the pathway deviates from the desired outcome. It may be that the unexpected direction needs to be honored and discussed, as well.
- If there's one right answer, we need to lead them to it. But in many cases, there are multiple right ways to perform a task. Good facilitators can moderate the discussion without overruling and telling.
- As we know, "telling ain't training." Keep feedback constructive and use it as an opportunity to guide learners to a learning moment.

Step 4: ***Finally, keep in mind that the end result is not the only thing that's important.*** Perhaps one of the desired outcomes is that people work really well together in a particular environment. We need to be able to measure those things. But to do that, we need to give people the opportunity to reflect and articulate what they got out of every learning experience.

Some of the most powerful instructional experiences I have been a part of have been where there was a hidden agenda of getting people to work together, but it wasn't explicitly stated. At the end, that's where it gets rolled out that "Oh by the way, you had to work together. Reflect on that." And people can say, "Well, you know, maybe I wasn't as effective on that as I could've been." Or "It was good someone told me 'X' early so I could accommodate it in my project plan." We need to not just say "What did we do? And how did we do?" The social collaborative experience involves the individual as well as the group – we need to get at both of those things when we evaluate. The journey is as important as the end.

CONSIDER THIS EXAMPLE

You ask a group of people in a virtual learning lesson to create a project plan. You have someone from accounting, someone from operations, someone from IT, and someone from human resources. They all have their own expertise within a domain. Each has information the others need to develop or accomplish the task at hand. Everyone has to give input.

If you think about this from a design perspective – how do you measure that? Maybe you look at the interaction between the learners. The beauty of the virtual classroom is that you have artifacts of that interaction.

You can look at, did the IT person say, "That won't work because we aren't rolling out the new platform until January"? Or, did the operations guy say, "Well, we can't do that because of safety."

When the Q&A and dialogue is happening between the learners, that's a powerful thing. That discussion doesn't have to be live. It can be an online forum or message board. Don't think that social collaborative has to be live – it can be. But if we want to give people the opportunity to think, digest, and contribute, perhaps they take time and you do it over a few live sessions.

THE FIVE MOMENTS OF LEARNING NEED SUPPORTED BY SOCIAL COLLABORATIVE LEARNING

Think about social collaborative learning in your organization. Then ask yourself these questions: Do we need to collaborate? How do we implement a collaborative scenario? How do we moderate it?

We consulted our learning practitioner friends and asked them to share how they use social collaborative learning for each of the Five Moments of Learning Need outlined earlier.

Their suggestions may help you identify ways to provide social collaborative learning support for your learners' moments of need.

1. When learning for the first time, we usually have a formal Push Training situation. How can you use social collaborative tools in this moment of need?

- *Communicate to learners on the resources so they can discover on their own (key point – use formal resources to do training upfront)*
- *Group activities*
- *Web based activities/hands on*
- *Discussion group to keep new learners sharing information they are learning so not everyone has to discover on their own*
- *Pre-session intros in a collaborative tool – what do they want to get out of the course*
- *Educate them on experts to connect with*
- *Role play*
- *We are planning to pilot using social collaborative tools after a traditional push new hire course. The social collaborative tools would help new hires during the transition period from the class to their role.*

2. "Learning More" often happens informally. How would you use social collaborative tools in this moment of need?

- *Badges & gamification*
- *Provide a menu of specific training videos and documents (wouldn't that be great if we used those same training documents as assets in the formal training and we taught people how to use them in the specific moment of need?)*
- *Community of practice, SharePoint, wikis, etc.*
- *Tutorial pages/one pagers*
- *When an employee posts a question on our social site, and the question is answered correctly, we mark it as official so that others know that it is valuable*
- *Introduce new hires to current people on their team instead of only supervisors or leads*
- *Use mentors*

3. Remembering and applying generally happens on the job. How would you use social collaborative tools in this moment of need?

- *Job aids (How do I do it right now?)*
- *SharePoint*
- *Quizzes and tests (wouldn't it be great instead of a big participant guide, we taught people how to use job aids and where to go more in-depth?)*
- *Wikis*
- *Group study*
- *Research Guides that remind learners of items learned in 1 and 2*
- *OneNote – how to pages*
- *Capturing information in a dynamic knowledge base*
- *After new hire training and exposed to the job, ready tool to get support, ask questions, seek details or expertise*
- *We have role specific dashboards with links to materials and message boards*
- *Connecting with colleagues on the topic, people who were in a formal training*
- *Knowledge retention assessments*
- *Ask me! Board*

4. When things go wrong, we often need support right away. How would you use social collaborative tools in this moment of need?

- *Brainstorm challenges*
- *Sharing best practices*
- *Troubleshooting videos*
- *Performance support*
- *IM & email for instant response*
- *Find a mentor*
- *Job aids*
- *Troubleshooting/role plays*
- *List of who to call/contact*

5. A change in process or product often triggers formal training again. How would you use social collaborative tools in this moment of need?

- *Share learning best practices (instead of two days of lecture, we build upon what people have learned already. We don't need to re-teach the first set up, just what has changed)*
- *Real time communication*
- *Ask what they think they need. Then ask others to provide suggestions*
- *Community of practice, formal meetings and discussions*
- *Best practices among learners who are following the change(s)*
- *Building on what we know to take us to where we need to be*
- *We post short videos to our social site, and award employees badges when they've watched all the videos/read all the posts about the change*
- *Focus on what is new, not what they know*

Pull Learning through Microlearning Tools

Microlearning provides information in quick, easily consumable pieces. Busy learners who are used to getting information quickly (thanks, Google), appreciate microlearning treatments. Microlearning is a great option to include in your Pull learning culture.

MICROLEARNING DEFINED

Microlearning is simply a learning treatment approach. We've all heard the term "sound bite" which is a short piece of media meant to convey an idea. In a lot of ways, this is similar to a microlearning treatment.

Microlearning is a method of treatment that can use a variety of tools. Common examples include simple job aids, short quizzes, video clips, and blog posts.

Each piece of microlearning typically lasts between two and ten minutes and is meant to address a specific topic effectively and efficiently.

My recommendation is to keep each piece of microlearning discrete and stand-alone. They can, of course, be strung together to create a full learning experience. But each piece of microlearning should be accessible on its own and designed to meet a particular objective.

Can you imagine a formal training, like a two-day class on project management, as a series of microlearning pieces strung together? We could teach people how to use the microlearning so they can do the job on their own! It provides context. Formal training broken up into chunks is a great way to implement a microlearning solution.

HOW TO IMPLEMENT A PULL MICROLEARNING ACTIVITY

A Pull activity for microlearning, in many respects, could be considered performance support. In this context, a task requirement requires a learner to find out how to do something.

Following these recommended steps will help you build useful Pull activities.

Step 1: *Identify learning objectives.* We need to decide whether we are addressing one objective or more. If it's multiple objectives, microlearning is probably not your answer. It could be multiple microlearning pieces. If you think about the guidelines, 5-10 minutes max is limiting and it

would be very challenging to address multiple objectives. This is especially true when we think about people just trying to get an answer to a single problem they're having.

Step 2: ***Plan for communication.*** Efficiency of communication is king. We need to design Pull microlearning to provide quick and meaningful access to answer the questions being asked. It needs to be easy to access and navigate.

Multiple treatments are often appropriate here. For example, ask learners to watch a three-minute video and provide them with access to a job aid. They can watch the video with job aid in front of them while taking notes. Then, they won't have to re-watch the video when they get stuck in the future, because they have provided their own context. They can simply access the provided job aid.

What's beautiful about microlearning is that you can embed it anywhere. If your LMS allows it, you can link between multiple objects (video links to job aid that links to a process document). Those are powerful tools, and they can be strung together to create a learning path that lets the learner decide how much they want to get exposed to a particular treatment.

You need to communicate these characteristics, though, for Pull microlearning to work. Learners need to know about the tools. They need to know how to access them, and in what order (if it's one tool in a series). They need reminders about these tools at appropriate touch points after the formal program ends.

Step 3: ***Let it go. You can't measure everything.*** If it only takes a learner three minutes to watch a video, they probably won't take another three minutes to answer an evaluation about it. Generally speaking, microlearning is not assessed. What we look at instead is access rates, like number of downloads. How often is it used? That info is useful for a couple of reasons.

Remember the Pull is driven by a workflow need. The learner has to do something, so they're driven to go in and find an answer. If they do that, they have access to that content every time they need it.

Think about the concepts we talked about previously:

- They have to know it's there
- They have to know it's accurate, and
- They have to be able to get it in a meaningful amount of time to answer the need that they have.

So, if we track those kinds of access rates, it gives us information as learning managers. The rates tell us that maybe there's a process problem. Maybe tools that are downloaded more frequently than expected reflect that there's a need for a more in-depth treatment. Remember, always have your objectives in mind when determining what data to collect!

When we evaluate a microlearning Pull activity treatment, we have to think about how often is it used and how is it used? As a consequence, what we look for is a high level of access by the target population early and then it tailing off as they develop expertise in the task. If we don't see that kind of standardized reduction in usage, there may be a problem in our system or training treatment.

A SALES TRAINING EXAMPLE

You have new Client Relationship Manager (CRM) and you've implemented the capability of looking at client history. That's important for the salespeople and they, in the process of their workflow of developing a bid, would want that information. However, they don't know how to look at this client history, even though it's only five mouse clicks.

As a consequence, us telling them that it's important, and us telling them that the CRM is a benchmark of a successful approach to sales is meaningless. It's important for someone being exposed to the concept for the first time, but that's not our audience. Our audience just wants to know how to get to the client history. So show them that!

Pull out a short document or animation, and they have what they need! What's interesting is, if people are constantly pulling this piece of content, it shows you that there might be a bigger issue here. The CRM may not be as easy to use as you think it is. If you hit a piece of content multiple times because the platform is hard to use, that's something systems engineers can draw on to make a more effective interface.

MICROLEARNING ROI: SHOULD WE EVEN TRY?

Can you track increased effectiveness in the area addressed by a piece of microlearning?

When we're evaluating a microlearning Pull activity, we have to think about how often and how it's used, and maybe ask for some quick feedback: did it solve your problem?

So use it to teach, embed it in the right place, but also monitor it to see where you have training gaps.

THE FIVE MOMENTS OF LEARNING NEED SUPPORTED BY MICROLEARNING

Think about microlearning in your organization. Now ask yourself these questions: Do you use it? How do you implement it? How do you include it in broader learning implementations?

We consulted our learning practitioner friends and asked them to share how they use microlearning for each of the Five Moments of Learning Need defined previously. Their suggestions may help you with your learning initiatives.

1. When learning for the first time, we usually have a formal Push situation. How would you use microlearning in this moment of need?

- *Short intro videos*
- *Preview the topic*
- *Defining the WIIFM*
- *Separating steps of a process*
- *Show examples*
- *New employee company overview*
- *Help people see the final product*

2. "Learning More" often happens informally. How would you use microlearning in this moment of need?

- *"Did you know?" emails? (tips and tricks)*
- *Can't teach everything in formal training. This gives us a chance to have that information as needed.*
- *Job aids: written and video*
- *Short videos with options to click on links for more information*
- *102-level eLearning*

3. Remembering and applying generally happens on the job. How would you use microlearning in this moment of need?

- *Access to each piece of microlearning content for review*
- *Embed links to microlearning in the tools/ screens with the workflow*
- *Short challenges to build product*
- *Flow charts*
- *Job aids*

4. When things go wrong, we often need support right away. How would you use microlearning in this moment of need?

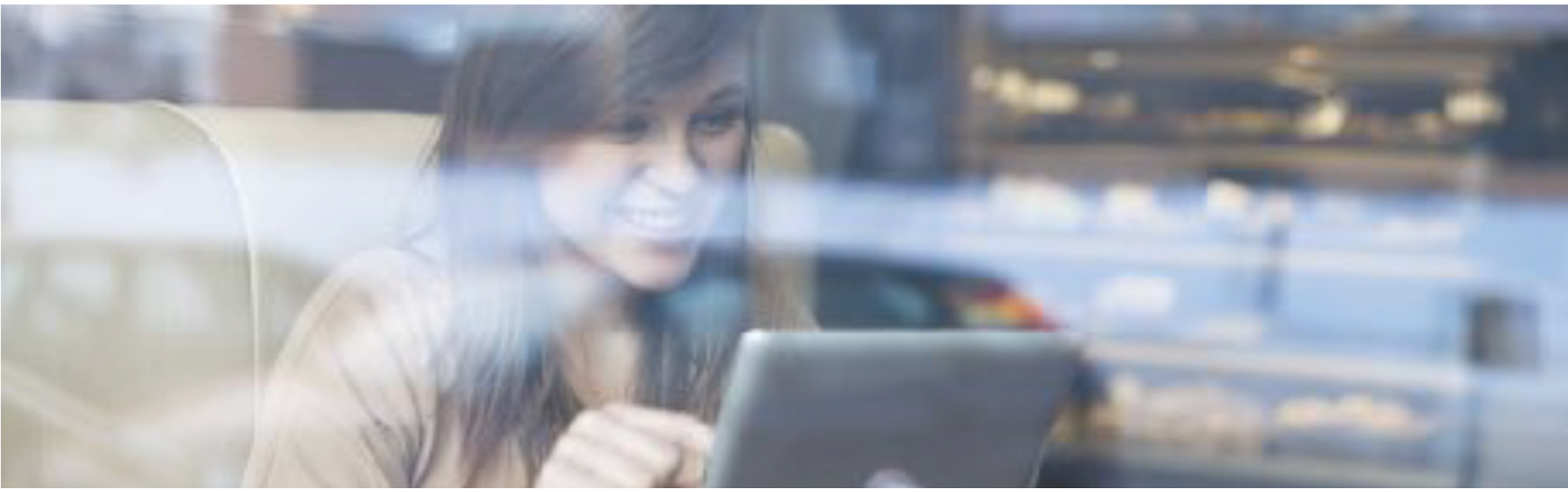
- *Common troubleshooting scenarios (we know the things that go wrong most of the time)*
- *Have links to further information through a troubleshooting job aide*
- *Simulations for troubleshooting*
- *Help desk*
- *FAQ or common issues*

5. A change in process or product often triggers formal training again. How would you use microlearning in this moment of need?

- *Short videos*
- *Get buy-in for change*
- *Update newsletter*
- *Mentoring*
- *Communicating and training on best practice*
- *Brief tool change*
- *Game on history of change area with a video of what is coming and why it's happening (fun, friendly, and fresh)*

CHAPTER 6

The Role of Environment in a Pull Learning Culture



FIRST LET'S REVIEW what a learning environment is. It is a sum of the learner in a particular situation accessing, or being exposed to, an instructional treatment.

Any particular learning environment has a number of different capabilities. To participate in a face-to-face classroom, you raise your hand; in a virtual classroom, though, you may click a check mark or answer a poll. In a virtual classroom, you may write on a whiteboard, but in a face-to-face classroom you may not be able to do that.

How do we design Pull activities for specific learning environments?

Remember, environment matters. The environment and the learner are part of this experience. When learners begin a training program, they have perceptions of what they're capable of doing.

Consider the fact that you will have different learners in the same environment. Just because everyone is in the same Adobe room, doesn't mean each one has the same environment.

What's interesting is the environment and learners are part of this experience. When a learner gets put in a particular situation, they have their own perceptions about what they are capable of doing in the room. Some virtual classroom attendees are comfortable chatting, while others are not. That comfort level isn't a bad thing – it's to be expected. But you need to understand that a learning environment with different learners in the same environment creates a different environment.

With respect to a Pull learning culture, we need to understand that, in certain situations, different environments provide better opportunities for the learner to get to the information or for the instructional treatment at hand. Some environments for a particular task are better suited to provide a successful outcome.

For example, think about:

- What's going to be around them when they access the learning?
- If you know people are on the road, a full Flash-based tutorial doesn't support their environment. Some things are better suited for certain environments.

If I'm teaching face-to-face sales, and I try to do that as a piece of self-paced content, it's going to be very difficult for learners because the relevance of the treatment to the actual task is poor. The environment does a bad job of reproducing the environment in which the task will be performed.

We need to match the environment to the needs of the learner for a particular task. In some cases, it's relatively straight forward. If we need to give the learner a three-minute video on how to navigate the CRM, great, give them a video!

The fidelity of the treatment isn't as important as access or effectiveness. But if the intent of the learner is to learn about face-to-face sales, a piece of microlearning won't be as good or as effective.

The learning environment and the learning treatment need to align with the intent of the learner. If those things line up, the instructional outcomes will be optimized.

What Takes Priority?

If the environment is dictated by the customer or learner and isn't the best for the content, what takes priority?

We need to think about where most of our users will be doing their work. If I'm a customer service rep and I need five steps for dealing with a hostile customer – I know that environment (desktop, at my desk, I know what I need to access). If I'm at home and I think "Oh, I had a bad experience today," and I want to access those five steps on my phone, it may not be the right place for me to address the problem.

Think about the environment you anticipate the need will happen in. If learners decide to access the information in a different way, that's up to them. We need to design for the environment where the need will take place.

Building Trust and Guiding Principles

To fully understand the relationship between learning environment and Pull learning, reviewing the importance of trust, and a number of guiding principles, is necessary.

THE IMPORTANCE OF TRUST

Learners need to trust your Pull learning. I reiterate: they need to know it exists. It needs to address real needs. They need to know it's accessible and worthwhile. We need to start small, create the content, put it in the right place, make sure everyone knows it's there, and over time, make people confident that it's worth their time.

Trust is critical to emotional engagement. It creates psychological safety.

Learners with a sense of belonging feel socially connected, supported, and respected. They trust their facilitators and their peers, and they feel a sense of fit in the virtual classroom.

They are not worried about being treated as a stereotype and are confident that they are seen as a person of value.

Learners who are confident they belong and are valued by their facilitators and peers are able to engage more fully in learning. They are more open to critical feedback, take greater advantage of learning opportunities, build important relationships, and generally have more positive attitudes about learning. In turn, they are more likely to persevere in the face of challenging content.

GUIDING PRINCIPLES

These are anecdotal principles based on my experience in implementing new treatments in traditional cultures.

Guiding Principle 1: ***Pull learning isn't going anywhere.***

People believe the best way to train is to get people into a room, virtual or otherwise, and sit them down and tell them. As a consequence, you have to build the content that supports the Push culture, but can be used in a couple of different ways:

- The first is to support the initial push.
- Keep in mind that you can take them and make them pull assets down the road.
- Consider a learner guide – how many have people have used a learner guide frequently after an instructional experience? Probably not many. A lot of effort goes into them, but they're rarely used later. Wouldn't it be better to take that guide and break it into standalone pieces of content that you can access from your desktop when you need them? It's an opportunity to leverage assets for long-term learner support.
- When you're building content for formal environment, build it for two uses. Give them permission and reinforce the idea that they can (and should) use it later. (Think: job aids.)

Guiding Principle 2. ***When we develop trust from the learner, we earn it through:***

- Content relevance – do the content, treatment, and environment align with their intent?
    - We don't want to sit through a 30-minute video to complete a 5 second task. We want to get it done now.
    - The answer is, "If they aren't going to your content, you've lost their trust."
- Content accessibility
- Value of content in the workflow

Guiding Principle 3: ***Consider collaboration as a competency.***

How do you establish collaboration as a competency in your organization? My recommendation to you is to act. Develop interaction rubrics that guide important interaction practices in your workforce. Develop them and build them into your design of a Pull activity.

To create those rubrics, look for the dialogue between different members of a team in a collaborative experience. Look for development group artifacts, not just individual accomplishments. If learners understand they're getting measured on set rubrics, they'll place importance on the way they participate against those rubrics.

CHAPTER 7

Evolving with the Modern Learning Culture

TO REALLY BUILD a learning culture in your organization that supports Pull learning, and that ultimately encourages people to learn on their own, I recommend the taking the following four steps:

Step 1:
Establish collaboration as a competency. I devoted an entire chapter in this book to the importance of collaboration as a competency. To reiterate: collaboration has a purpose. It is an integral part of how people work today, and if we can include it in our learning programs, we can teach them the value of collaboration, and how to do so effectively.

Step 2:
Create Community. Create and support a Community of Practice in your organization. Building community creates tribal knowledge for your employees and encourages collaboration. Community helps you plan to engage past, present, and future learners. It's a great way to create much-needed trust among learners and for your learning function.

Step 3:
Make learning authentic. Modern workplace learning is all about authentic learning. We want to deliver content to the right place (classroom, desktop, mobile, or on-the-job).

Step 4:
Embed learning to make learning easy. It can't be hard for learners to go out and find what they need. If it is, they won't do it. And if they do, they will use outside, easily accessible resources (think: Google). We aren't event coordinators anymore. We're becoming experience architects. Informal learning happens, so plan for it. Create resources like job aids, podcasts, and infographics. Let people get the information and move on. We are acting as partners in the business by anticipating needs. We aren't order takers anymore, and embedding learning helps us move away from that perceived role.

For more information on how to evolve your learning culture, refer to the infographic, *"What is Driving the Modern Learning Culture."* Information is available in the Resources portion of this book.

Moving Forward

SO WHAT'S NEXT? In using the term Modern Classroom, I've inferred that today's modern classroom and next year's modern classroom might be very different. We've certainly seen a huge change in the last several years!

The workforce is changing... "Virtual First" as a training methodology has become the norm.

Technologies are being introduced all the time; and most will play a role in the classrooms of tomorrow. For example, we are already starting to explore ways to incorporate augmented and virtual reality into our training programs.

How will these technologies impact modern learning? And how will you keep up? Start by defining who and what you want to include in your Personal Learning Network. Create a plan to ensure you are familiar with new trends, technologies, and design approaches so you are equipped with the tools you need to be successful.

And remember, as a modern learner, you need to continuously update your Personal Learning Network, create a path forward to continue you own formal learning, and model best practices for your learners and your team members. Be the advocate for modern learning in your organization.

InSync Training is also evolving; we've focused on the virtual classroom for more than 20 years. Now, we know we need to evolve our own practices and become advocates for the learning in the future. We look forward to supporting you as we evolve together.

Appendix

Resources

"A Qualitative and Quantitative Inquiry into the Learner Engagement Construct" (2019). Dr. Charles Dye Doctoral Dissertations. 2403. https://opencommons.uconn.edu/dissertations/2403

Five Guiding Principles for Modern Workplace Learning by Jane Hart: http://modernworkplacelearning.com/

Five Moments of Need by Dr. Conrad Gottfredson & Bob Mosher: http://www.learningsolutionsmag.com/articles/949/

Push / Pull Training from The Performance Improvement Blog: http://stephenjgill.typepad.com/performance_improvement_b/2015/06/pull-dont-push-employee-learning.html

InSync Training infographic "Engaging Modern Learners: When to Push and When to Pull": http://blog.insynctraining.com/infographics/engaging-modern-learners-when-to-push-and-when-to-pull

InSync Training infographic "What is Driving the Modern Learning Culture?": http://blog.insynctraining.com/infographics/infographic-what-is-driving-the-modern-learning-culture

About the Author Jennifer Hofmann

Jennifer Hofmann, virtual classroom and blended learning visionary, is founder and president of InSync Training, LLC. InSync is a global virtual consulting firm specializing in the design and delivery of engaging, innovative, and effective virtual learning. The company is a leader in the L&D industry in world-class virtual design, facilitation, and production. InSync delivers services using a proprietary virtual learning and engagement model called the InQuire Engagement Framework™ which uses brain science best practices to ignite and sustain learner engagement.

Under Jennifer's expert leadership, Inc. 500|5000 named InSync Training the 10th Fastest Growing Education Company in the U.S. in 2013, the 20th Fastest Growing Education Company in 2014, and to their Inc. 5000 list for four consecutive years. Dell Women's Entrepreneur Network, Forbes Most Powerful Women Issue, The NativeAdVantage, and Goldman Sachs 10,000 Small Businesses Program have all recognized her entrepreneurial drive.

Jennifer has written, and contributed to, a number of well-received and highly-regarded books including: *The Synchronous Trainer's Survival Guide: Facilitating Successful Live Online Courses, Meetings, and Events, Live and Online!: Tips, Techniques, and Ready to Use Activities for the Virtual Classroom, and Tailored Learning: Designing the Blend That Fits with Dr. Nanette Miner*. Her latest book, *Blended Learning*, introduces a new instructional design model that addresses the needs of the modern workplace and modern learners.

Jennifer frequently presents in-person and online for leading learning organizations including The Learning Guild, Training Industry, HR.com, and Training Mag Network. She serves on the Board of Directors for International Accreditors for Continuing Education and Training (IACET), supporting the accreditation InSync has maintained for 15 years.

Subscribe to Jennifer's blog Getting InSync (https://blog.insynctraining.com) and connect with her on LinkedIn for new content and timely insight.

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