Motivation & Engagement Playbook

How to get your learners to start using - and keep using - your learning platform

Introduction

Most learning leaders already recognise the critical role of training and development in their organisations. But too many people have spent thousands of dollars on flashy content and a 'cutting edge' learning platform, only to find that

1. no one uses it, or
2. it doesn't achieve the desired business outcomes.

This is not just a **waste of time and money**: it's also **demotivating** for your workforce - not to mention making your life much more difficult (think how much harder you'll have to work to convince staff to participate in your NEXT initiative).

In this paper, we'll tackle some of these thorny questions head on:

➢ Why spend money on learning and development?

➢ Why do so many learning initiative **fail**?

➢ What **role** does motivation and engagement play in learning?

➢ And finally, what are some practical tips to help you to **develop**, **launch** and continue to **deliver** a successful learning program?

Training… why does it matter?

So why should you care about training in the first place? The short answer is that it makes **financial sense:**

- According to Gallup, 87% of employees worldwide are disengaged at work. **Productivity** and **profitability** often suffers as a result. The opposite is also true: in businesses with **highly engaged** teams, Gallup found that profitability increased by 21%, sales productivity by 20%, output quality by 40%, and absenteeism went down by 41%.
- In a Dale Carnegie and MSW study, companies with **engaged** employees outperformed others by **up to 202%.**
- A study by **Workplace Research Foundation** run over a number of years found that a 10% increase in investment on employee engagement could increase profits by $2,400 per employee per year, and that increased **employee motivation** resulted in a higher share price.

And, surprise surprise, what employees need to stay engaged, is good **learning and development opportunities**:

- "87% of millennials say **professional development** or career growth opportunities are very important to them in a job." **(Gallup)**
- "70% of respondents said that **job-related training and development opportunities** influenced their decision to stay at their job. " (**NCTI**)
- 46% of employees cite **'limited opportunities to learn new skills'** as the top reason why they are bored in their current roles and looking for a change 80% indicate that **opportunities to learn new skills** would increase their interest and engagement (**Udemy**).

If that doesn't convince you, numerous studies have shown how **learning & development** can impact the bottom line:

- According to **Salesforce**, continuous training can yield up to **50% higher net sales** per representative.
- Companies that offer comprehensive training programs have 218% higher income per employee than companies without formalized training, and enjoy a 24% higher profit margin than those who spend less on training **(ATD)**.
- In a study of more than 3,100 U.S. workplaces, the **National Center on the Educational Quality of the Workforce (EQW)** found that on average, a 10% increase in workforce education level led to an 8.6% gain in productivity, while a 10% increase in the value of equipment increased productivity by 3.4%.

What's the secret to a successful learning initiative?

While we can agree that in theory, L&D is a good idea, there are plenty of training initiatives that flop. So how do you make sure that yours brings the desired results? There are lots of ingredients that go into the mix, but ultimately, success depends on two critical components: **motivation** and **engagement**. Without these, you're unlikely to even get things off the ground, never mind build any kind of momentum.. So what do they actually mean?

Engagement

There's no consensus on what **'employee engagement'** means, but the following definitions are a good starting point:

- *a combination of **commitment** to the organisation and its values, and a **willingness** to help out colleagues (*CIPD*)*
- *the extent to which a person **chooses to apply** their talent, energy and care toward any effort (*TD*)*
- *employees' intellectual, physical and emotional **commitment** to the **organization** and its **mission**. (*Forbes*)*
- *the '**discretionary effort**' that someone puts into a task: engaged employees go the extra mile vs just doing the bare minimum*
- *engaged employees feel **valued, confident, inspired, enthusiastic** and **empowered** to do their jobs (*Dale Carnegie*)*

Learner engagement

While *employee engagement* refers to overall engagement in one's job, *learner engagement* refers specifically to the act of learning. We can describe it as the degree of **attention, curiosity, interest, and passion** that individuals show while learning. Why does it matter? Because the **more engaged** a learner is, the better they will **understand, remember** and **apply** the material they've learned - giving you better ROI on your training investment.

Some people view engagement in terms of **'flow'**, a phenomenon identified by psychologist Mihaly Csikszentmihalyi as a state of "*energized focus, full involvement, and enjoyment in the process of the activity*".

But if someone is **'engaged',** isn't that the same as saying that they're **'motivated'**? Not quite.

Motivation vs Engagement

Although we tend to use these terms interchangeably in the workplace, there are some important differences between motivation and engagement.

Motivation
- motivation is a **reason** that drives someone to act in a particular way *e.g. putting in extra hours to close a tricky deal in order to earn a sales bonus, or because you enjoy the thrill of a challenge*
- this reason can be **external** (extrinsic motivation), or it may come from **inside** the individual (intrinsic motivation)
- **intrinsic** motivation arises from **doing** the activity, whereas **extrinsic** motivation comes from the **consequences** of doing the activity
  *e.g. if you enroll in a course because you enjoy expanding your knowledge, you are **intrinsically** motivated; if you're doing it to earn a raise or promotion, you're **extrinsically** motivated*

Motivation vs engagement
- basically, motivation is what brings you to the activity or task, while engagement is what you experience while you're doing it
- in some ways, engagement is similar to intrinsic motivation, because it's focused on the **experience** rather than the **outcome**
- if you're strongly **motivated** to do something, there's a much greater chance that it will hold your attention and you'll put effort into it - i.e. you'll be **engaged**
- however, you can be actively **engaged** in a task without having a real motive for doing it, and you can also be **motivated** to do something but not be fully **engaged** in the activity.

You're probably starting to see how learners who are motivated but not engaged (and vice versa), will not succeed in their efforts. We can plot a matrix to illustrate these different scenarios.

The Motivation - Engagement matrix

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	Not motivated	Motivated
Not engaged	**I** ● the learner has no compelling reason to learn, and is failing to connect with the material ● learning outcomes are not achieved ● especially common with mandatory or compliance training	**II** ● the learner has reason to learn but is struggling to connect with the material ● some learning will occur, but slowly and/or sub-optimally
Engaged	**III** ● the learner is not driven to learn but the course is holding their interest and attention ● learning is incidental but possible ● learning success depends on content quality and instructional techniques	**IV** ● the learner has a strong reason to participate in the program, and is paying attention to the course ● optimal learning environment with the most likely chance of success

Clearly the worst possible scenario is quadrant I, where learners are neither motivated nor engaged. And the most effective learning occurs in quadrant IV, where individuals are motivated AND engaged.

That's all great, but how will it help me create an effective learning program? Let's recap:

MOTIVATION focuses on the 'WHY' of the activity - giving people a good **reason** to do something.
ENGAGEMENT focuses on the 'WHAT' of the activity - making sure that the experience itself is enjoyable, challenging and, well - **engaging**!

So if your training initiative is to achieve your learning outcomes and business goals, you need to give your learners a REASON to participate in the program, as well as an engaging EXPERIENCE.

Learning is intrinsically motivating

"But learning is boring… how am I ever going to motivate my employees to complete the training?" In fact, the opposite is true, and humans are **hardwired to enjoy learning**. In Raph Koster's brilliant book '*A Theory of Fun for Game Design*', the author explains how fun and learning are inextricably intertwined, describing the happy chemicals that are released in the brain at that *"moment of triumph when we learn something or master a task."* I.e. the main reason we enjoy games is due to the fun of **mastery**, **comprehension** and **solving puzzles**, i.e. from learning!

But before you get too excited...
- just wanting to do something does NOT mean that you'll do it (think of those unused gym memberships and home exercise machines...)
- there are always a dozen other important things which are competing for our time and attention
- not all learners will be interested in every topic ; some topics can be hard-going even for the most dedicated learner

Let's take a closer look at how you can MOTIVATE your learners.

Rewards, Incentives & Penalties

Countless theories of motivation have been proposed over the years to explain why we act the way we do. One of the best-known ones is **incentive theory**, which suggests that behaviour is motivated by a desire for **reinforcement** or **incentives**. So what exactly is an incentive, and how can you use it?

Incentives
- incentives are a **way to motivate** people to do something *e.g. the **promise** of a stock option or commission, or the **threat** of losing your job*
- incentives can be POSITIVE or NEGATIVE - we usually describe these as **sticks** or **carrots**
- incentives are usually **external**, however some incentives can trigger **internal** rewards like feelings of **accomplishment, community** or **autonomy**
- incentives should always have a **time period**, a measurable **action or goal**, and a **reward** or outcome associated with them

Rewards
- a reward is a **prize or benefit** given to someone for an achievement, for good performance, etc.
- rewards can be **extrinsic** or **intrinsic, positive** or **negative** (i.e. a **penalty** or **punishment**)
- extrinsic rewards can be **monetary** *(e.g. a cash prize or gift certificate)* or **non-monetary** *(such as a trophy or formal recognition from your boss)*

Motivation, Reward or Incentive?
- **motivation** and **incentives** provide a CAUSE for an action or behaviour, whereas **rewards** are a RESULT of the behaviour
- incentives are offered BEFORE the action takes place, while a reward or penalty is given AFTER the behaviour
- a reward can be **unplanned** *e.g. your boss might give you an unexpected pat on the back to reward a special achievement*
- rewards can also be strong **motivators**, as they **reinforce** the target behaviour (you'll continue to perform well in the hope that you'll be rewarded again)
- with extrinsic motivation, we act specifically to **earn a reward** or **avoid a punishment**; with intrinsic motivation, the **activity itself** is rewarding (or provides an **internal reward**)

Rewards, penalties and incentives can be effective ways to motivate your learners, but they can also work against you if used incorrectly.

- if someone is already **intrinsically motivated** to do something because they enjoy it, then they don't need any rewards or incentives to participate
- in fact external incentives can REDUCE their level of motivation, because it puts the focus on the **outcome** instead of the **activity**
- if we have to be 'paid' or persuaded to do something, we start to perceive the activity negatively - and once the incentive is removed, our motivation disappears and we stop doing it
- in psychology, this is known as the **overjustification effect** - we start to justify our actions in terms of the incentive that was offered (even if we didn't need the incentive in the first place)
- **negative** incentives can be effective in promoting a specific behaviour, but can have a damaging effect on **morale** and overall satisfaction
- **extrinsic** rewards can sometimes make people feel anxious, as they're not in control of their own happiness - if they receive praise or recognition for their actions, they get a buzz, but if they don't receive anything, they'll feel demotivated; these ups and downs can become stressful and may cause employees to avoid the activity entirely
- if you promise rewards and penalties but then don't **deliver or enforce** them (or don't do this quickly enough), you'll lose credibility and the incentive will become meaningless
- complex incentive schemes can also be an **administrative nightmare** of calculating points, activity, bonuses and rewards... don't do this to yourself (or your learners)!

The Motivation Matrix

You can visualise these options as a grid of intrinsic vs extrinsic, positive vs negative motivators. Although a mixture of motivators can be effective, generally the greatest wins are in **quadrant I: Intrinsic - Positive** motivators (see the [Appendix](#) for a more detailed list of triggers and motivators).

	Intrinsic / Internal	Extrinsic / External
Positive	**I** For example: ❖ PASSION (doing something that you love) ❖ SELF-VALIDATION (the feeling of doing something worthwhile) ❖ MASTERY (the satisfaction of getting good at something, gaining a skill) OUTCOME: Success, fulfilment and happiness	**II** MONETARY: e.g. cash prize, bonus, salary increase, commission, phone or travel allowance, gift voucher NON-MONETARY: e.g. recognition, a certificate, promotion, or company car OUTCOME: some sense of success, but dependant on others for continued happiness and fulfillment
Negative	**III** For example: ❖ FEAR OF FAILURE (avoiding a task because you might fail) ❖ INSECURITY (feeling uncertain about yourself or your future) ❖ FEAR OF MISSING OUT (anxiety that others are doing or getting something that you've been excluded from) OUTCOME: Success with high burnout and some unhappiness even after achieving success	**IV** For example: ❖ fear of losing your job, getting a pay cut / losing earnings, losing the respect of your colleagues or manager ❖ fear of embarrassment OUTCOME: some success, but continued feelings of anxiety and unhappiness, even after attaining success

How to use incentives effectively

You can use incentives and rewards to motivate your learners effectively by following some basic guidelines:

- try wherever possible to use **intrinsic** rather than extrinsic motivators; they're more powerful and long-lasting, and will lead to more successful learning (and more motivated learners)
- the **quicker** you can **demonstrate** intrinsic rewards, the better *e.g. ensure that learners get immediate **feedback** on their progress and can quickly **apply** the skills they've learned, to trigger feelings of **mastery** and **competence***
- use treats or **small rewards** like a *fun prize, coffee voucher, points or badges*: when rewards are **large enough** to trigger behaviour but **too small** to fully justify the behaviour, individuals will seek another reason to explain their efforts
- use [variable rewards](#) - research shows that we are more likely to change our behaviour and develop habits when rewards are **unpredictable**
- be careful how you **position** the task or incentive, as the same reward can be perceived either **positively** or **negatively**; if a job is extremely well-paid, is it because it's highly competitive, or because it's so unpleasant that people must be coerced into taking it? (We can all learn a lesson in PR from [Tom Sawyer's](#) fence-painting adventures...)
- use external incentives that also feed an **intrinsic reward** *e.g. a trophy, new job title, or added job responsibility can also give the individual a sense of **competence, accomplishment** or **purpose***
- make sure that your incentives are encouraging the **right kind of behaviour** *e.g. reward learners for **applying knowledge** (by linking rewards to KPIs), rather than for completing a course as quickly as possible*
- use **different rewards** for different tasks: in his book "*[Drive](#)*", Daniel Pink says that external rewards can motivate us to perform **routine** or boring tasks, but should never be used with complex or **creative** tasks; intrinsic rewards allow people to focus on the experience, so they're more likely to come up with novel ideas and creative solutions *e.g. use **extrinsic incentives** to encourage your sales team to memorise a list of prices, but not to come up with solutions to deal with difficult customers*
- use **negative** incentives only when absolutely necessary, and **balance** them with positive rewards *(e.g. impose a small penalty for staff who don't complete a test, while also giving prizes and recognition for the most active participants).*

Top tips for motivating your learners

Here are some more ways to use **motivation** to increase the effectiveness of your learning initiative:

- you can't motivate your learners effectively if there isn't a strong REASON for the training program: make sure you've done a thorough [needs analysis](#) to see what performance gaps and learning gaps will help you achieve your business objectives
- involve **end-users a**s well as **managers** to find out what the training program should include - a top-down approach will build resentment
- know your **audience**: motivation is personal, and what gets one person excited will put another to sleep: do **surveys** to find out what people are interested in, what challenges they face, what they need to know to be more productive, what kinds of training they enjoy, etc.
- give them a **reason to participate**
    - explain **why** you're introducing or running the program, and how it affects them
    - make sure that the connection between the training and your business outcome is clear (if learners participate actively in the program and don't see an impact in their work, they'll be demotivated - and much less likely to take part next time round)
    - can your business goal actually be solved by training? if not, then everyone will end up frustrated
- show them the **value** of the program - how will it benefit them personally? will they increase their tips, commission, earnings, etc?
    - increase the **perceived value** of the program, for example by making it 'invitation only', or by setting criteria for participation; subconsciously, we value something more if there is a price attached, so consider having employees invest some of their free time in the program, or spend part of their training allowance or benefits package on the program
    - impose penalties for non-participation *e.g. if staff don't use the platform their accounts and progress will be deleted, or they won't be able to take part in other incentive schemes (but make sure you give them opportunities to 'redeem themselves' and win back their access)*
    - share **success stories** and case studies of how employees have increased their earnings, improved productivity, etc. through the program
- plan a **communication campaign** around the program, to let employees know all the above - use a variety of channels, and **repeat** the message over a period of time to ensure it gets through; don't wait for the last minute, either: start building buzz well before the launch, to get people excited

You should now have a pretty good understanding of how to motivate your learners, by understanding what makes them tick, by appealing to different internal drives and triggers, and by using a variety of different incentives and rewards.

We turn next to the other side of the equation: **engagement**. Once you've persuaded your learners to come to the table, there are countless factors that could influence how good - or bad - the **learning experience i**s, and how well you'll hold their attention. For example:

- the trainer
- the other learners
- the course content
- the learning platform
- the physical learning environment

… as well as a host of unpredictable external factors: did the learner get enough sleep last night, or do they have a cold? Are they stressed out because of problems at home, or distracted by other projects and assignments?

For this discussion, we'll assume that you're training learners in an online environment - although of course a lot of the same guidelines apply to face to face or blended learning. In this case, the main components of the learning program that you have control over is the content of the program, the choice of platform and technologies, and the logistics of the launch.

Engagement basics

Unfortunately, many learning initiatives fail by simply ignoring the basics, e.g. the **learning content.** Make sure you've considered the following before launching *your* program:

● make sure that your **content** is prepared in advance, and that you've developed **enough material** to keep people busy for a few weeks, and let them **binge** if they feel the need - there's nothing worse than getting people excited and then leaving them hanging with an empty screen
● use **microlearning** principles: make your lessons short (under 5 minutes), and use short messages and tips for variety
● use **video** - it's much more engaging than text, and it's how modern humans prefer to consume their content
● get the **level** right: too difficult and they'll give up, too easy and they'll get bored, and won't learn anything. aim for the *'Zone of Proximal Development'*: learning happens in the sweet spot between the '**comfort zone**' and the '**panic zone'**
● since your learners may be at different levels, use optional **scaffolding** and **variable pathways** through the learning material
● use good **learning design principles**: learner-centric, interactive, clear objectives and explanations, variety in your media and activities, summaries and checklists, etc.
● use music, humor, storytelling, emotional hooks, visuals, etc. to **grab attention**
● keep your text light, **conversational**, and informal as far as possible, where appropriate - use emojis, abbreviations, slang, etc. to talk to people on a personal level
● make it **personalised** - the content should be tailored to the individual and what they need to know; try to also use your own people in the content: incorporate personal examples and experiences, use team photos, videos or stories, and ask how they solve particular challenges
● use **gamification** techniques: friendly **competition** is a great way to make an activity more enjoyable - think leaderboards, trophies, certificates, or progress reports; award a prize to the learner of the week, or to the best team or region… the possibilities are endless!
● and if you feel that you don't have the skills or resources to produce something worthwhile and engaging, call in some **experts**, whether for content development, video production, a more in-depth needs analysis, or the full Monty.

More engagement tips

Content is critical, but don't neglect the **logistics** of the launch either:

- reduce any **friction** & make everything as **smooth** and **painless** as possible
  - make sure that the learning platform is **easy to use** and highly **accessible** *e.g. content and platform available in the local **language**, available on **all devices**, attractive design, simple interface, quick sign up and sign in (and preferably no need to sign in every time)*
  - think about your learners' **environment** and specific **challenges** *e.g. make sure the app is easy to download, doesn't use much data, can work offline, etc. -* and consider giving devices to your learners (if they don't have their own), or making shared devices available
- make a great **first impression** - and then keep up the **momentum** with consistently good content and a smooth experience; before long the learning will have become a habit
- **pilot test** with small groups to iron out any glitches and make sure everything runs like clockwork - and get feedback to see what can be improved (besides identifying possible barriers to a full launch, your learners will feel more invested in the program if they're able to **contribute** their ideas.)
- find out how **previous training program**s have been perceived: did learners enjoy them? why / why not? what type of learning activities did they enjoy the most / least?
- use **analytics** to keep tabs on engagement: how many users are starting the program, accessing the platform, completing lessons and coming back regularly to learn - this way you can take quick action if you spot any areas of concern *(e.g. if almost all users are starting but not finishing lessons, perhaps your **content is too difficult or too long**; if you've got fantastic lesson content but no one is accessing the platform, you might need to focus your efforts on **promoting the program**).*
- promote **autonomy** by giving learners a choice over **what and when** they learn

Top takeaways

We've covered some pretty broad areas today, but let's condense it down to some key takeaways:

- for a successful training program, you need to engage AND motivate your learners
- to boost engagement:
  - use a learning **platform** that's fun and easy to use
  - prepare engaging **content** (short, fun, relevant...)
  - use video, gamification, microlearning and personalisation to boost engagement
  - give your program the best chance of success with a successful **launch** - don't skimp on **planning**, **pre-launch testing** as well as **promotion**
- to boost motivation:
  - use a mix of positive, negative, internal and external incentives - but focus most of your effort on developing INTRINSIC motivation
  - target your motivation mix to your specific audience - what makes them tick?
  - tap into **intrinsic motivation** by building an enjoyable and **engaging** learning experience
  - provide some **external** motivation too: ensure that learners have a REASON to participate in the learning program; this will help them get over any initial hurdles when starting the program; it will keep them focused when other things are competing for their time and attention, and get them through more challenging or less interesting sections of the program
- finally, when you've hit on the magic ingredients of motivation and an engaging experience, don't shoot yourself in the foot by putting other barriers in the way of success: make sure the **environment** is conducive to learning; that people have enough **time**, management **support**, and the right **tools, devices & equipment** to learn; **plan and test** the program carefully, and **communicate** a **consistent message** about the program

Appendix: The Motivation Mix

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⊙ internal   external

positive

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POWER / INFLUENCE	MASTERY	COMPLETION / CLOSURE
SELF-ESTEEM	IDENTITY / EXPRESSION	BELONGING
CURIOSITY	PURPOSE	ACHIEVEMENT
CREATIVITY	AUTONOMY / CHOICE	COMPETENCE
VARIETY	LEARNING	SOCIAL CONTACT
PROGRESS	SECURITY / STABILITY	
ACCOMPLISHMENT	RESPONSIBILITY	

COMPETITION	FEEDBACK
PRAISE	RECIPROCITY
TANGIBLE REWARDS	HELPING / NURTURING
MONEY	STATUS
BENEFITS / PERKS	ADVANCEMENT
SOCIAL RECOGNITION	WORK ENVIRONMENT

Motivation Mix

negative

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FEAR OF FAILURE
FEAR OF MISSING OUT
DISAPPOINTMENT IN ONESELF

LOSS AVOIDANCE	FEAR OF PUNISHMENT
FEAR OF DISAPPOINTING OTHERS	SOCIAL PRESSURE
FEAR OF EMBARRASSMENT	FINANCIAL PENALTIES