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# **6 EASY STEPS** **TO MAXIMIZE** **EMPLOYEE** **ENGAGEMENT**

EDUCATION PROGRAMME & STRATEGIC  
IMPLEMENTATION MANAGER, EULAR

*Employee engagement has never been more important. In this age of uncertainty, whether that's societal upheaval, volatile markets or the impact of rapidly evolving technology, it is vital to have your people on your side to help weather the storm. We all know that an engaged workforce is a motivated, productive workforce, but when it comes to day-to-day business decisions, many organizations prioritize actions that benefit the bottom line over employee engagement issues.*

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But employee engagement has a bigger impact on the bottom line than you might think. If employees aren't engaged, they are less likely to fulfill their full potential, more likely to leave, and won't perform like you need them to. This is damaging not just on an individual level, but at the team level - because low engagement has a domino effect, and can quickly become a destructive force across the entire organization.



**63%**  
of learning professionals say that  
engagement will become more  
important in the coming years<sup>1</sup>

<sup>1</sup> "The State of Learner Experience, Engagement, and Solutions 2020", HR Research Institute

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# **WHAT IS MODERN EMPLOYEE ENGAGEMENT?**

Put simply, “employee engagement” refers to the effective alignment of employees to their work roles. This means being physically, cognitively and emotionally engaged in their work. *Modern* employee engagement moves beyond the surface level of engagement we have come to expect from organizations, and instead strives to discover what really motivates people at work.

Traditionally, it was thought that engagement was purely about salary and money - i.e. increasing an employee’s salary would increase engagement. However, it is now widely understood that there are deeper drivers and motivators that factor into engagement. It’s no longer enough to offer free massages, table tennis or subsidized gym memberships. Instead, modern employee engagement means that we must tap into what really makes our people tick to help them remain happy and engaged at work.

**85%**

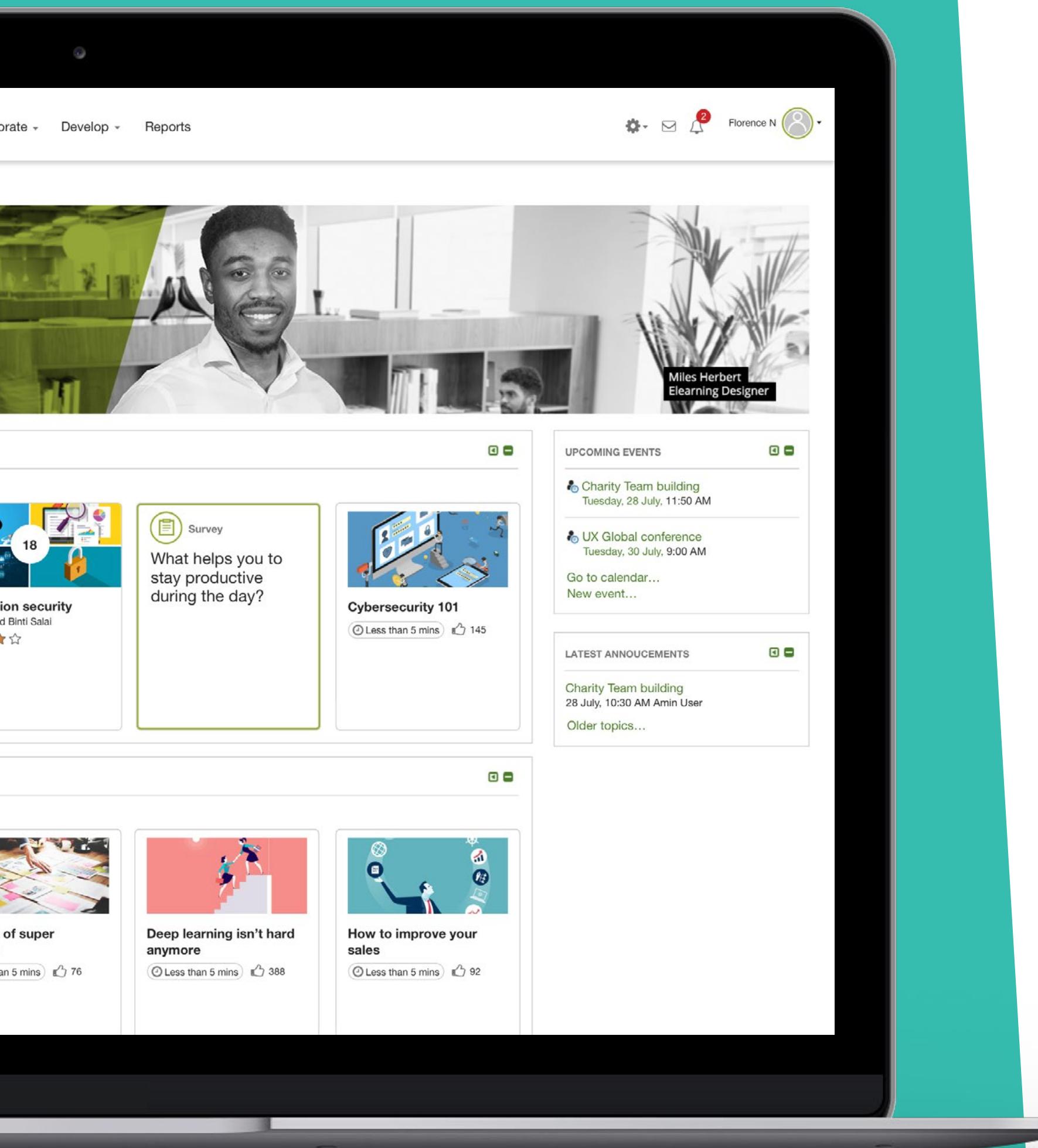
of employees globally are not engaged or actively disengaged at work.<sup>2</sup>



This costs businesses \$500 billion in lost productivity a year in the US alone.<sup>3</sup>

<sup>2</sup> “Employee Engagement: Maximizing Employee Potential” report, Gallup.

<sup>3</sup> “How Much Are Disengaged Employees Costing Companies? Billions!”, C.A. SHORT.

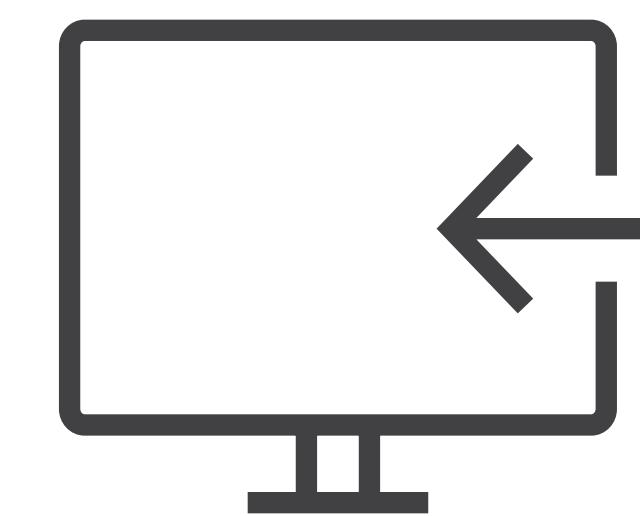


# **WHAT IS A LEARNING EXPERIENCE PLATFORM?**

*A learning experience platform (LXP) is a system supporting the behaviors of creation, curation and collaboration. The range of solutions within the LXP category differ significantly, from recommending personalized content in the flow of work to consumerizing access to learning.*

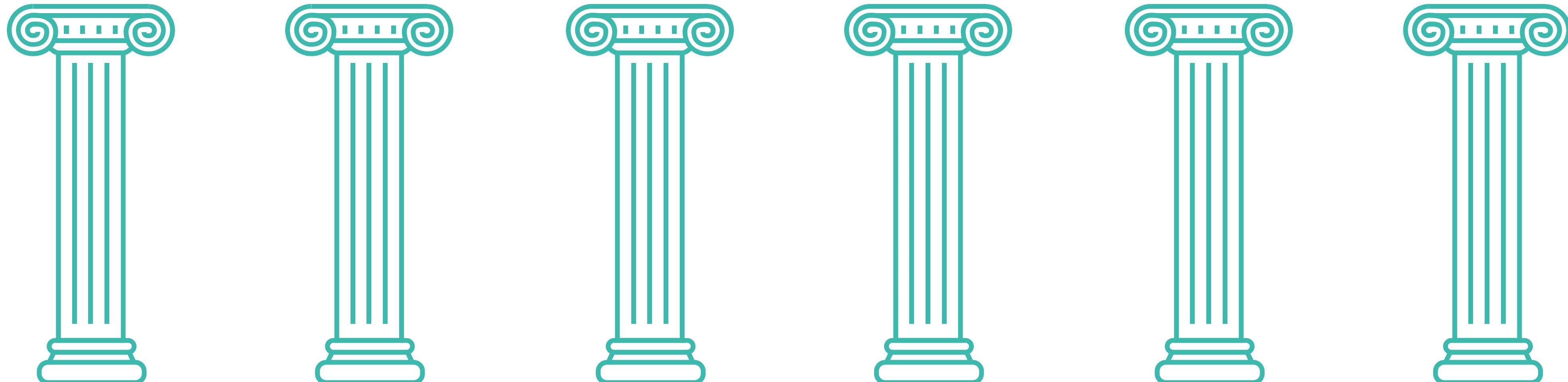
Critically, many LXPs try hard to distance themselves from the traditional LMS. Some vendors try to position the LXP as “the new LMS,” but there is no reason that one should replace the other. In fact, using an LMS in conjunction with an LXP gives organizations the best of both worlds, ensuring that the need for both formal and informal learning environments are satisfied.

**37%**  
of organizations plan to adopt a learning experience platform.<sup>4</sup>

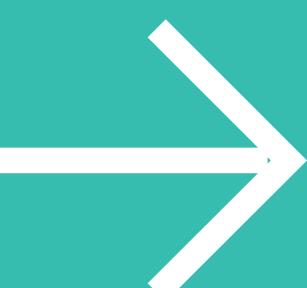


<sup>4</sup> Learner Experience 2019, Brandon Hall

*At Totara, we believe that there are six pillars of engagement. Each of these pillars represents a different way for you to uncover the hidden experts in your organization, facilitate informal learning and, ultimately, build better employee engagement.*



Read on to discover how to leverage each of the six pillars to reveal the wealth of ideas and expertise in your own organization.



# 1

## DISCOVERY



When it comes to designing a blended learning program, formal and company-mandated learning is only one piece of the puzzle.

**There is a huge amount of other content out there, both inside and outside your organization - but it's no good if employees don't know that it exists. Podcasts, articles, YouTube videos and even forum threads -** your people are always finding useful, interesting content, but they may not always know how or where to share it.

That's why it's up to us as learning professionals to facilitate the easier discovery of relevant, useful and thought-provoking content. For many organizations, this means introducing a new approach to learning, and embracing the wealth of content already available in the wider world.

**65%**



of organizations give learners the ability to search for, explore and discover learning opportunities, with over one-third offering learning recommendations based on learner data.<sup>5</sup>



Despite this, only one-quarter of organizations currently have an LXP in place.

<sup>5</sup> Learner Experience 2019, Brandon Hall

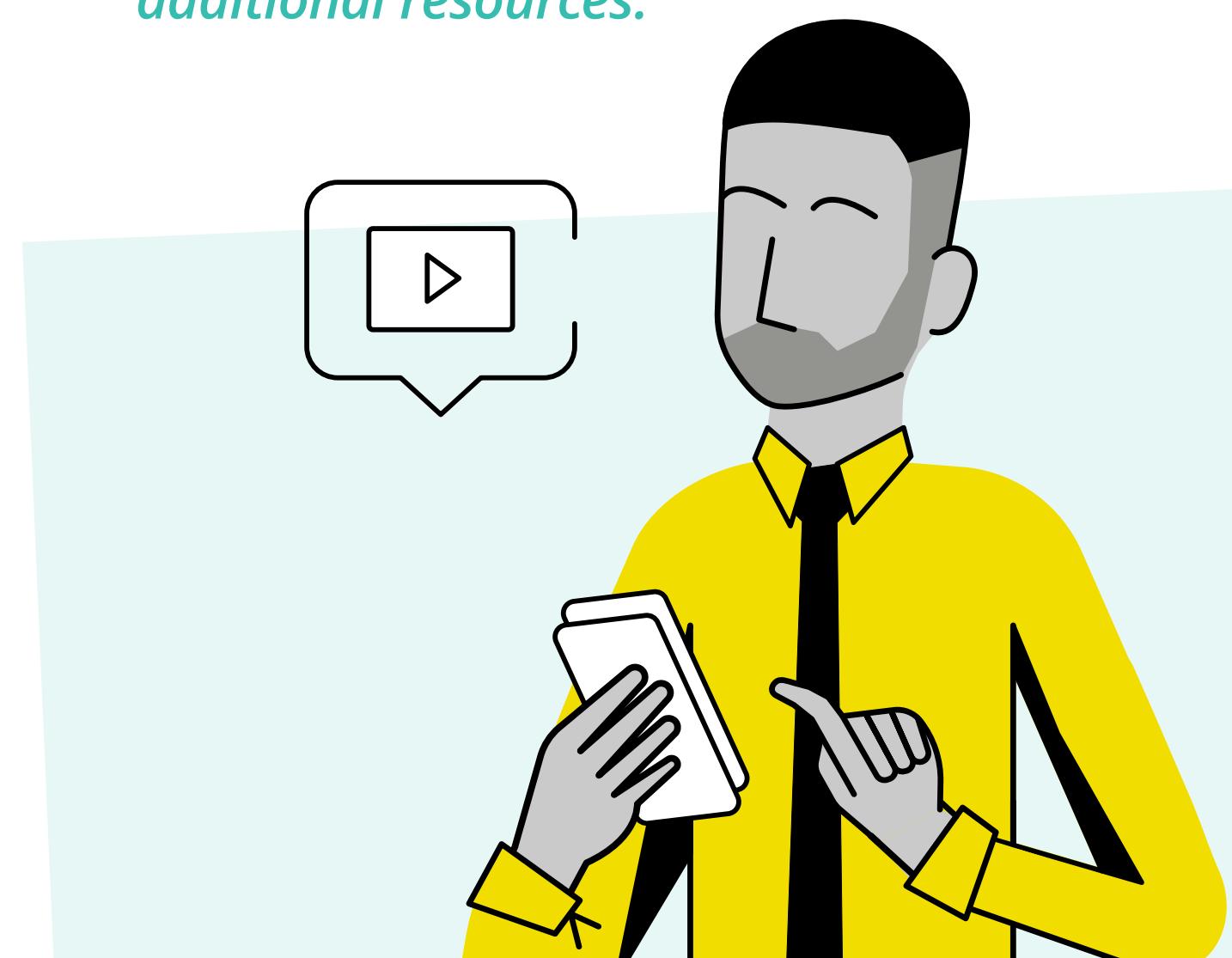
## MAKING IT EASIER TO DISCOVER CONTENT

There's no need to invent the wheel: the way we find content online should inspire the way we find content at work. **A massive 97% of digital consumers<sup>6</sup> have used social media in the last month**, showing that a digital-first strategy is the new normal.

But the type of content people share in the workplace will be vastly different to the content they'll seek in their downtime. Instead of stumbling across funny animal videos, quizzes about their favorite TV shows or watching clips of their favorite sports teams, they will be looking for resources to answer a specific question, help them perform an unfamiliar task, or improve their productivity at work.

Once one person has gone through the effort of finding a useful resource, it doesn't make sense to have everyone repeat the same process - which is where the LXP comes in. By providing an employee engagement system for people to easily share what they've found, it means that everyone benefits from the time and effort of others. With an LXP, we can harness the best parts of social media, such as finding, responding to and sharing content within seconds, while removing the unnecessary distractions with filtered views, tagging systems and smart algorithms to ensure that people see the most relevant information to their work.

**EXAMPLE:** *Mohammed is preparing for a presentation, but he doesn't enjoy public speaking. He searches online for tips, and finds a useful YouTube video to help him improve his skills. He posts a link to the video on the employee engagement system, with a comment stating how useful he found it. His teammates watch it, and respond with their own tips and resources. This way, Mohammed's colleagues benefit from the video, and Mohammed benefits from the additional resources.*



<sup>6</sup> Globalwebindex, Social media marketing trends report.

## MAKING FRIENDS WITH ROBOTS

While artificial intelligence (AI) can feel like a bit of a buzzword, there are many organizations making waves with AI technology - especially when it comes to helping employees find relevant content and reducing the time otherwise spent searching.

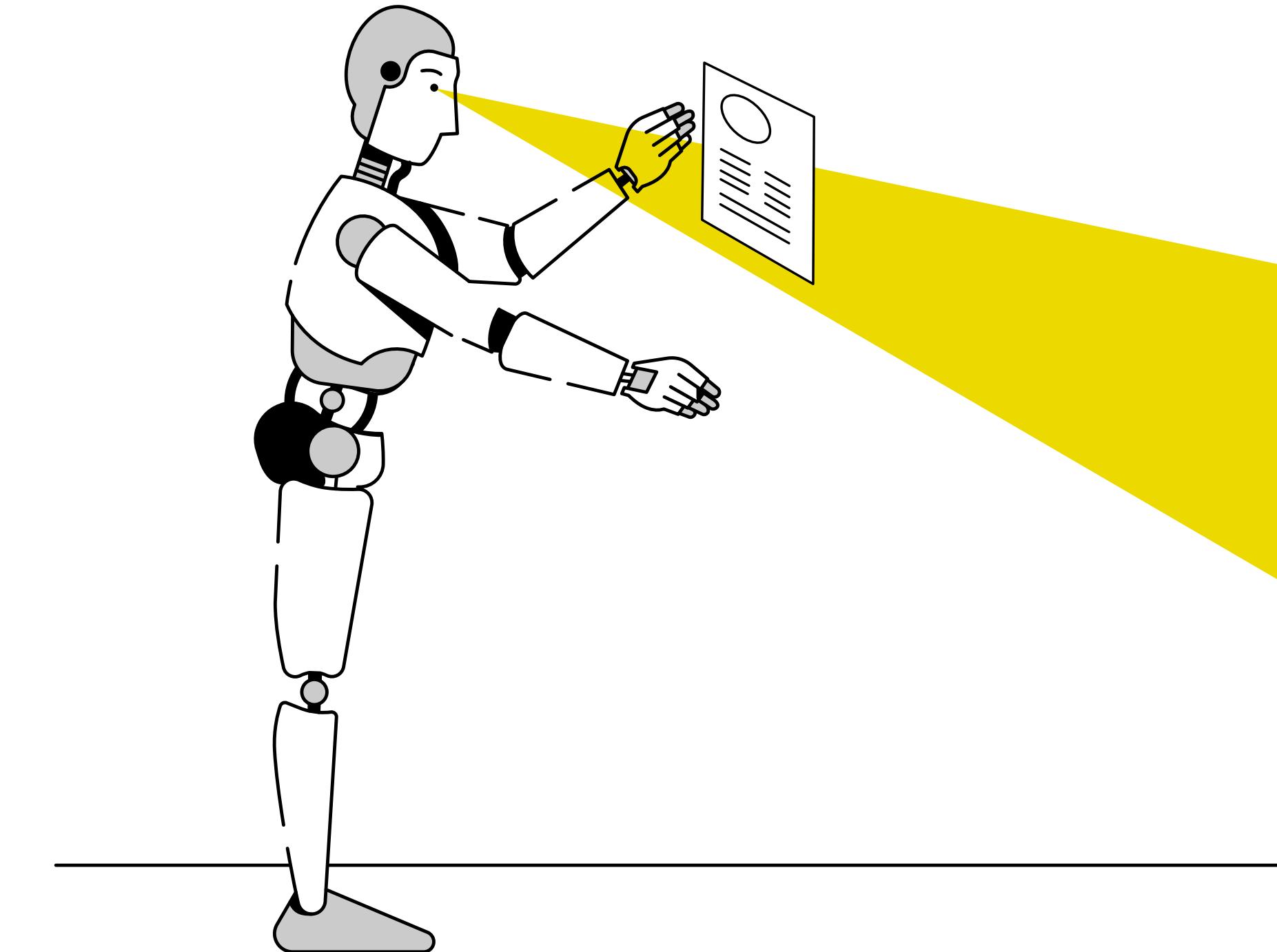
**35%**

of organizations' learning platforms recommend content based on learner information.<sup>7</sup>

A common way to help employees discover valuable content is with a chatbot. Chatbots are already widely used for customer service on websites, with 90% of organizations reporting that **complaints are resolved faster with bots<sup>8</sup>**,

and **chatbots are predicted to save up to 2.5 billion hours<sup>9</sup>** for businesses and consumers alike by 2023. So if they're already disrupting the consumer side of business, why not bring them into the organization?

AI, chatbots and algorithms can help sift through the huge amount of data stored on your platform (both the employee engagement platform and other integrated systems - but we'll get to that later) to help connect employees with relevant resources at the touch of a button. With this in place, the system can intelligently draw from user data (at an individual or an organization-wide level) to recommend complementary content. This could be as simple as a dashboard module saying "We saw you liked content about X, so we thought you'd like this content about Y",



or more complex recommendations where an employee engages in a conversation with a chatbot, who then analyzes their query to guide them towards useful courses from the integrated LMS.

<sup>7</sup> Learner Experience 2019, Brandon Hall

<sup>8</sup> "Humans + bots: Tension and opportunity ", MIT Technology Review Insights

<sup>9</sup> "Chatbots to Deliver \$11bn in Annual Cost Savings for Retail, Banking & Healthcare Sectors by 2023" Press Release, Juniper Research

## HOW TO MAKE IT HAPPEN

While you can rely on the input of employees to maintain engagement on a standalone system, there are significant breakthroughs when the LXP is integrated with the LMS. When the two are integrated and used together, the LXP can automatically pull through courses and resources from the LMS for easier discovery by employees.



**EXAMPLE:** *Jason has completed his mandatory cultural awareness training in Totara Learn, and as far as he knows, he's done all the relevant activities. However, the next time he opens up his Totara home page, he spots a recommendation for a pack of cultural awareness performance support resources, pulled from Totara Engage, which he didn't know existed. He then downloads these for use on an upcoming business trip abroad.*

The data and interaction between the LMS and LXP are invaluable when understanding an organization's learning and engagement patterns. Perhaps certain courses are generating engagement, but people aren't achieving great results. Maybe there are some very successful courses hidden away on the LMS that are significantly boosting the sales of those who take them, but nobody is talking about them. We'll go into more depth about engagement data and reporting later, but there is significant business value when the LMS and LXP are evaluated holistically as a cohesive, integrated platform.

## CROWDSOURCING RESOURCES AND KNOWLEDGE

When someone has a question in your organization, where do they go? If they are fortunate enough to share a physical work environment with a relevant subject matter expert, they may just drop by their desk for an informal chat. But what if they are located in separate offices?

They may turn to an instant message or an email, but then they are relying on the recipient's response. Instead, for the sake of time, efficiency and usefulness, it is often sensible to ask the question in an open forum and invite a range of responses.

For instance, someone can go to their team's workspace and post the question "Does anyone have any useful resources on X?", which then invites the entire team to weigh in. While the subject matter expert can still respond (and it makes sense to @ mention specific teammates whose responses you would like), it also allows others with knowledge of the subject to have their say. The added advantage here is that everyone else in the workspace benefits from these "ambient updates," where they see the conversation happening and find it useful even if they weren't specifically looking for these resources.

The screenshot shows a workspace interface titled "IT Department" under "Public workspace". The top navigation includes "Discussions", "Library", and "Members (37)". Below the navigation, there is a search bar, a "Browse files" button, and a "Sort by Last Updated" dropdown. A large video thumbnail for "5 STYLES OF LEADERSHIP" by Brian Tr... is prominently displayed, showing 210 likes and 8 comments. A comment from Diana Kral at 10 January 2020 8:30 am discusses identity information, mentioning that there are many things to protect it and being careful with it. A sidebar on the right contains a message from Linda Sohl about leadership styles and a comment from Victor Kho about transformational leadership.

**IT Department**  
Public workspace

Discussions Library Members (37)

Start a discussion Post

Search discussions Q Browse files

Sort by Last Updated

Linda Sohl 11 January 2020 1:48 pm  
Which of the leadership styles do you find the most successful?  
5 Different Types of Leadership Styles | Brian Tr... Watch later Share

Like (210) Comment (8)

View earlier comments

Victor Kho 11 January 2020 5:30 pm Edited  
I think Transformational leadership is the most powerful one, but it's the hardest one to achieve. Requires a lot of training and softskills.  
Like (388) Reply (30)

Diana Kral 10 January 2020 8:30 am  
There are a number of things you can do to protect your identity information:  
Be careful with your identity information, how much you give out and who you... More  
Like (329) Comment

Created 4 mins ago  
This is the workspace of the IT department. We can share resources within the department to solve problems. Let's make IT great!

## ***Things to consider when enabling easier discovery***

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- How do your teams currently access their learning?
- What types of content will people be able to find?
- How will you decide what's "relevant" to each employee?
- Will you use an algorithm to surface content?
- Do you need to "push" certain content to the top of search results?
- Should teams be recommended learning opportunities as they work?
- Will you use a tagging system to allow for easy categorization and filtering of content?
- Who's in charge of directing learners to new training?
- Do you have a recommendation strategy in place, e.g. when someone creates new training content do they know who would benefit from the material?
- Will you have enough content to ensure your content discovery process works properly?

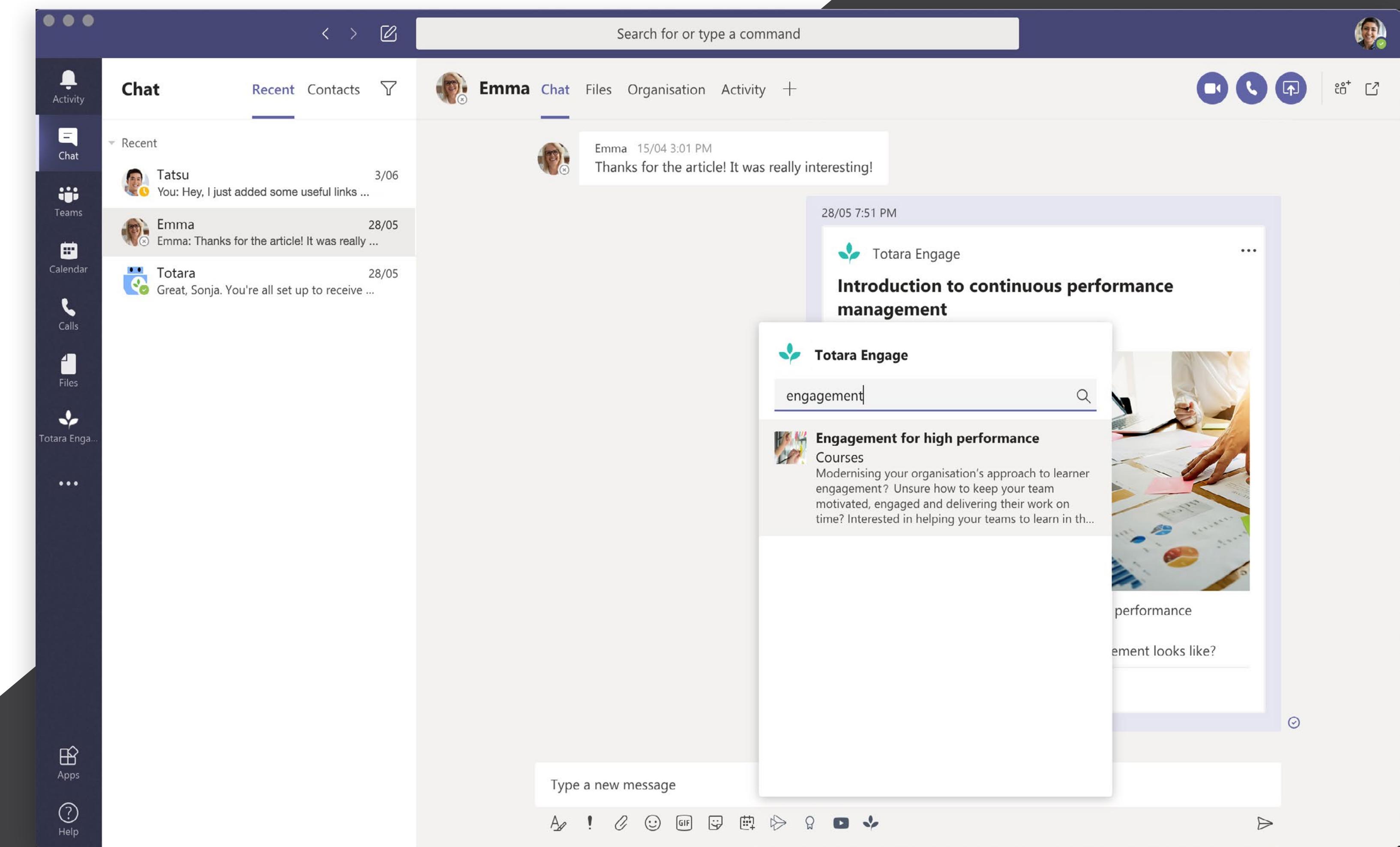


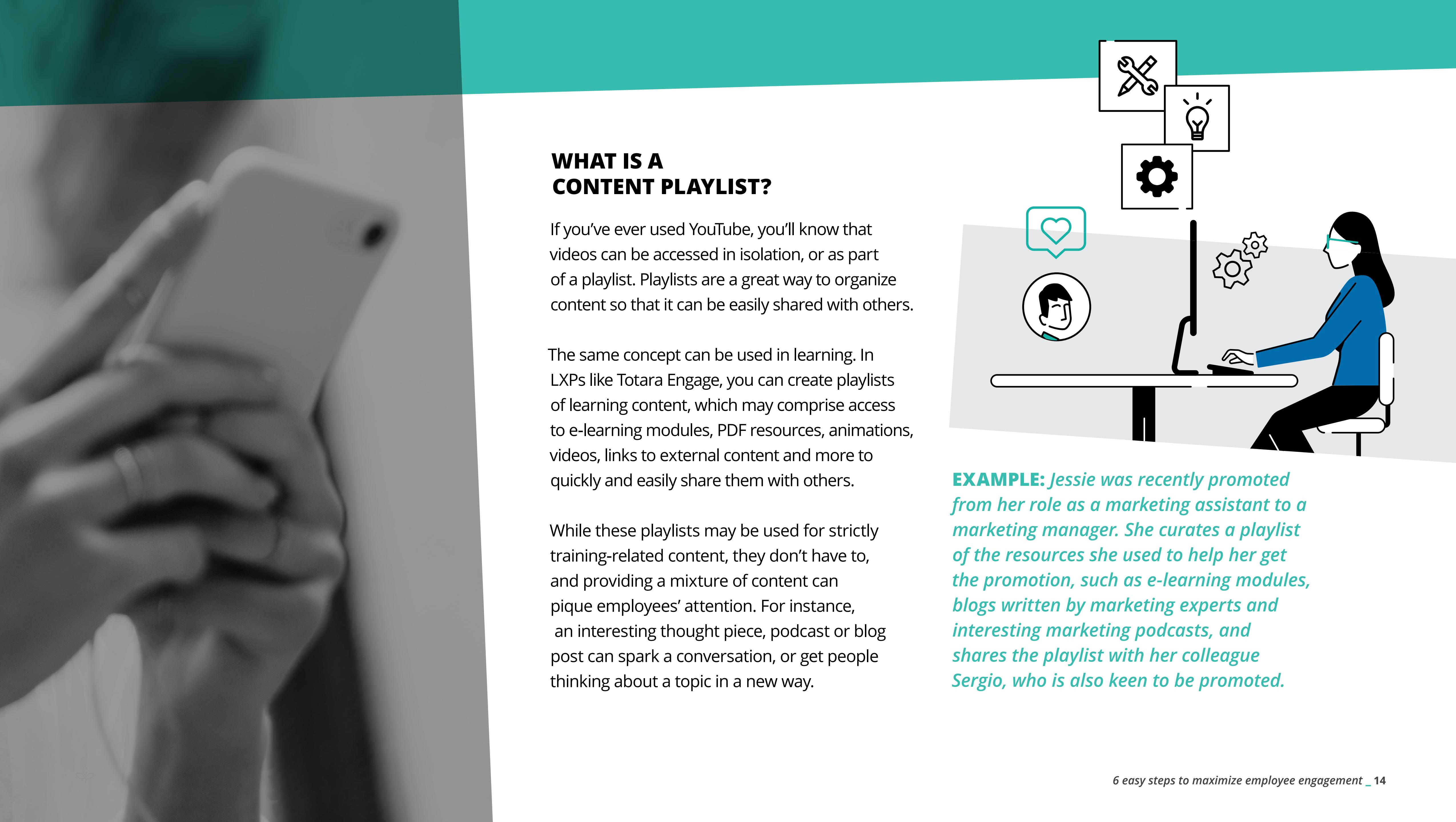
# 2

## CURATION

Many pairs of eyes are better than one.

Your people will be active in lots of different places, whether that's on LinkedIn, Twitter, professional networking groups, MS Teams, focused Slack channels and many, many more. Whether they're watching TED Talks in their downtime or attending industry events, your people are constantly finding interesting content that would likely benefit others in the team - but in many ways, there is just too much content. When people are drowning in a constant deluge of articles, videos and news, how do we know what deserves our attention and what we can tune out? This is where the power of curation comes in.





## WHAT IS A CONTENT PLAYLIST?

If you've ever used YouTube, you'll know that videos can be accessed in isolation, or as part of a playlist. Playlists are a great way to organize content so that it can be easily shared with others.

The same concept can be used in learning. In LXP's like Totara Engage, you can create playlists of learning content, which may comprise access to e-learning modules, PDF resources, animations, videos, links to external content and more to quickly and easily share them with others.

While these playlists may be used for strictly training-related content, they don't have to, and providing a mixture of content can pique employees' attention. For instance, an interesting thought piece, podcast or blog post can spark a conversation, or get people thinking about a topic in a new way.



**EXAMPLE:** Jessie was recently promoted from her role as a marketing assistant to a marketing manager. She curates a playlist of the resources she used to help her get the promotion, such as e-learning modules, blogs written by marketing experts and interesting marketing podcasts, and shares the playlist with her colleague Sergio, who is also keen to be promoted.

## **WHAT ARE THE BENEFITS OF PLAYLISTS?**

Both creators and consumers of playlists can benefit from their creation.

Creators can establish themselves as experts on a particular topic, building their reputation and earning badges, recognition or other rewards for their contribution (more on that later.) Also, in the act of creating the playlist, they will naturally improve their curation skills, helping to raise the standard of content shared across the platform. Managers should acknowledge the efforts of playlist creators in performance reviews to ensure that their contribution to the teams' learning and knowledge sharing is valued.

Playlists also save time for those using them, as they don't need to duplicate the efforts of the creator in finding useful resources, and the content has also been vetted for quality and effectiveness by the curator. This also helps improve the consistency of learning across the team, as it's much easier for everyone to work their way through an established playlist.

Additionally, people tend to trust their peers, so user-created playlists provide a useful informal complement to your formal learning program. This benefits those who want the opportunity to go above and beyond, and can even capture the attention of those who may not actively seek out new content for themselves.



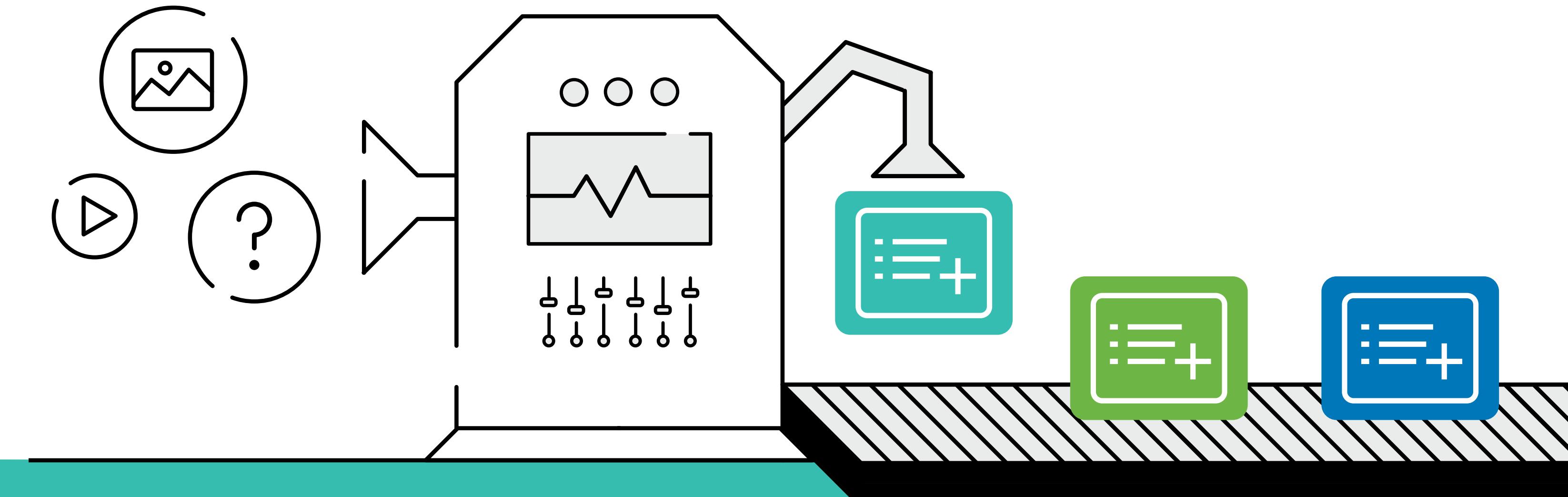
## CURATION ACROSS SYSTEMS

While curation works perfectly well on one system, it really comes to life when it has access to content from your entire platform.

As we saw in the Discovery section, integrated platforms allow people to discover content from your LMS. But curation takes this a step further. Employees can specifically direct people to content and resources they recommend, whether they live inside or outside your system.

With Totara Engage, employees can select courses and resources from your Totara Learn instance and seamlessly pull them into a playlist, alongside content from elsewhere online, such as YouTube videos, blog articles or links to ebooks. This has the added benefit of giving you a comprehensive insight into

the exact activity taking place across your systems, such as how frequently courses are being included in playlists, how many “likes” resources are receiving and which employees drive the most engagement with their playlists. Armed with this data, you can make much smarter, better-informed decisions.



## **Things to consider when creating playlists**

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If you want to introduce the creation and sharing of playlists in your organization, there are several things to consider before the functionality goes live:

- CREATION RIGHTS** - Who can create playlists?  
Does everyone automatically have the ability to do so, or is it only available to some users?
- SHARING SETTINGS** - Who can see each playlist?
- RESHARING SETTINGS** - Can users share playlists, and if so, to whom?
- LIKES** - How can people express appreciation for playlists?
- COMMENTS** - Can people leave their feedback or thoughts on the playlist?
- TAGGING** - What system will you use to help people find your playlists  
(such as hashtags or filtering systems?)
- TIME** - Will you indicate how long a playlist will take to work through?
- SAVING/PINNING** - How can people save your playlist for easy access in the future?
- REPORTING** - How do people report inappropriate playlists, or inappropriate content within playlists?



# 3

## COLLABORATION

### WHAT IS "GOOD COLLABORATION?"

Research by Slack<sup>10</sup> found that views on what collaboration looks like differ the most between generations rather than between companies of different sizes or sectors.

18-24 year olds:

*"Trusting colleagues to do good work"*



45-65 year olds:  
*"Communicate with colleagues easily"*



25-44 year olds:

*"Having clear responsibilities"*

It's clear, then, that organizations need to balance the expectations of all generations in the workplace. Generation Z, who are a few years into the workforce, prioritize trust in their colleagues. This means opening up communication channels, highlighting great work and building strong working relationships.

For slightly more experienced employees, it's important to clearly establish who is responsible for what, which could mean labelling or tagging subject matter experts to clarify their areas of expertise. For the most experienced members of the workforce, easy communication is the top priority.

In truth, all three views of collaboration are important to all employees. A comprehensive and flexible employee engagement system can help you address these together.



<sup>10</sup> Good collaboration, bad collaboration 2019, Slack

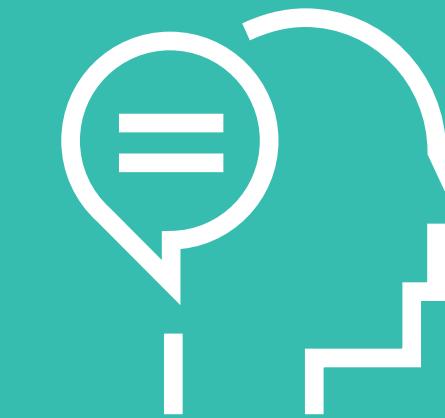
<sup>11</sup> Learner Experience 2019, Brandon Hall

## OPENING UP CHANNELS FOR COLLABORATIVE WORKING

# 50%

of learning professionals say that a lack of collaboration features is the main weakness of today's learning systems.<sup>12</sup>

If you've ever had multiple members of a team trying to work together on locally saved documents, you'll know what a hassle it can be. Each colleague downloads the same Microsoft Word document, makes edits and reuploads it, meaning someone has to collate all these ideas, many of which will conflict with one another, and shape the document into something everyone is happy with.



*"When studying alone, people typically remember 28% of what they learnt after two days. When you use this information, question it and discuss it with others, this figure increases to 69%."*

*Josh Bersin, 2019<sup>13</sup>*

Online tools such as Google Docs have made it easier to collaborate online, but it's still not perfect. If everyone on your team isn't extremely disciplined about maintaining a folder structure, then you'll soon find yourself wasting a lot of time searching through the system for missing files. Other social tools like Microsoft Teams or Slack can be useful, but conversations move quickly, and important information can quickly become buried under the chatter.

When creating Totara Engage, we wanted to help solve this common problem. Our answer? Workspaces. Workspaces give employees a dedicated space to work together, and may be created for teams, projects, roles, learning cohorts or something else entirely. They provide a more permanent space for employees to discuss projects, processes and problems, and the more people contribute and engage, the more valuable they become over time.

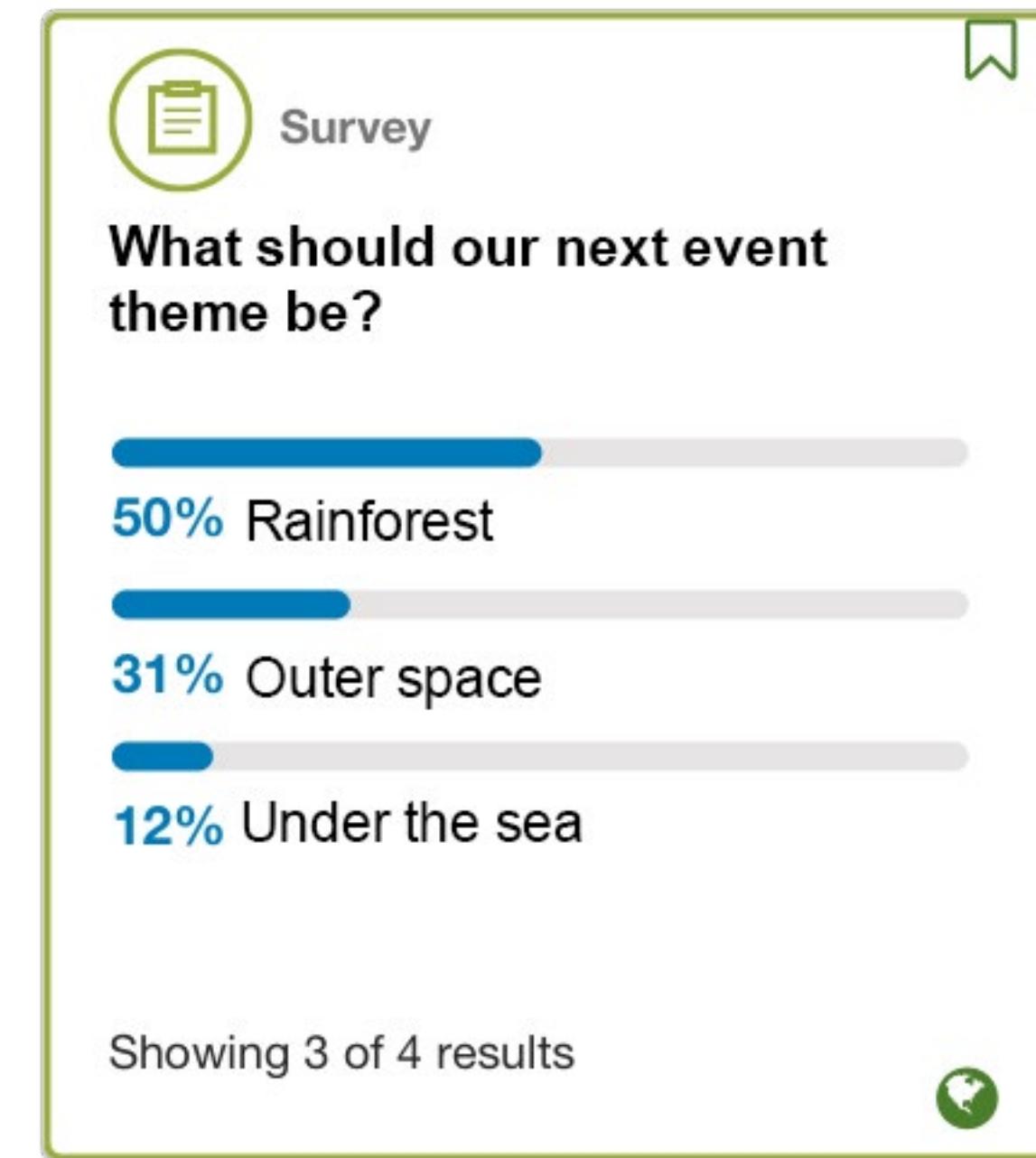
### **So what's the answer?**

<sup>12</sup> The State of Learner Experience, Engagement, and Solutions 2020, HR Research institute

<sup>13</sup> The Power of Collaborative Learning: More Important Than Ever, 2019. Josh Bersin.

## WHAT BELONGS IN A WORKSPACE?

The beauty of workspaces is that they can be tailored to meet the needs of each team. Some teams may just need a space to post and respond to ideas, or to vote in polls to decide on a course of action for a project. Others, however, may have much more complex requirements, in which case the workspace may consist of wikis, forums, surveys and multiple content playlists. Everyone in the workspace will be able to contribute, comment and “like” posts, giving everyone the opportunity to have their say, and it becomes easier to peer review others’ work.



Most people in the workspace will probably be regular users, perhaps with a dedicated moderator, and possibly one or more subject matter experts, indicated by a badge or label. These roles should be clearly stated somewhere within the workspace to ensure that all users know who to speak to if they encounter an issue.

## MAINTAINING A SAFE SPACE

While it will hopefully be rare, there may occasionally be a time when some inappropriate content appears in the workspace.

To ensure this is dealt with quickly and efficiently, all users should have the ability to report inappropriate content, which will then be reviewed by a moderator. This moderator should then review the content against the established guidelines, and decide whether or not the content breaches the rules. If it does, it should be removed, and the original poster should be warned. If it does not, the reporter should be informed of the decision, but encouraged to report any future questionable content.



Importantly, the role of the moderator is not to “police” the workspace. This will very quickly shut down activity and engagement, as people won’t feel comfortable sharing their thoughts if they worry that they will be vetted. Instead, the moderator’s role is to keep people feeling safe and comfortable, and to maintain the smooth running of the workspace.

## LEVERAGING SUBJECT MATTER EXPERTS

Subject matter experts play a crucial role in collaborative workspaces. Other employees will turn to them for advice and guidance, and they can help plug the gaps left by formal learning. They can effectively take on an informal mentorship role, and more efficiently share their expertise with others in the community. Using an online space to share knowledge has the added benefit of allowing others to watch the conversation and benefit from the questions others are asking.



## ***Things to consider when facilitating collaboration***

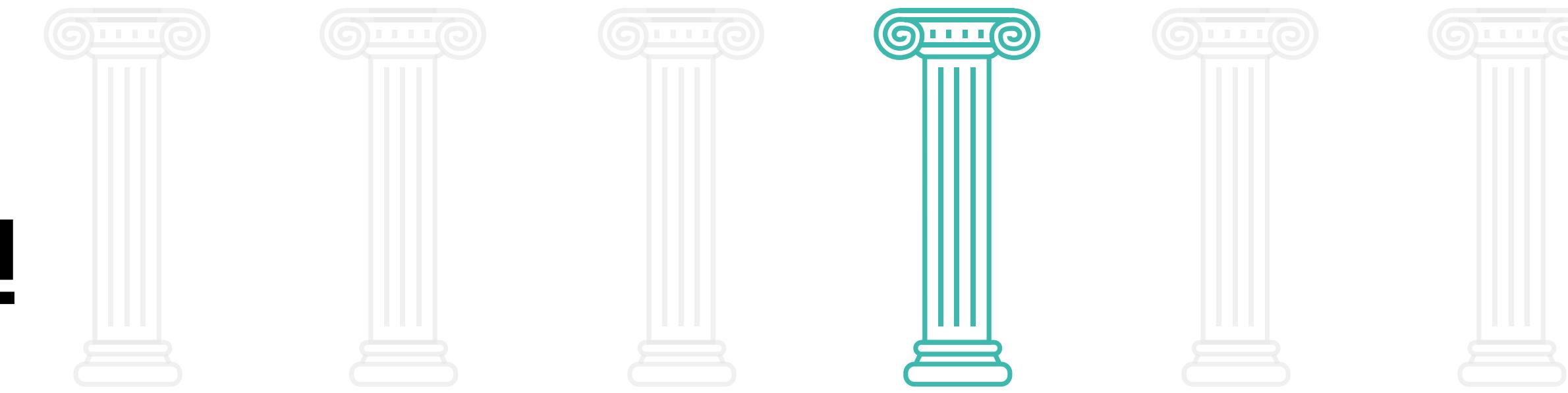
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- Who should be in each workspace?
- Who can see each workspace (is it visible to all or just the participants)?
- Who will moderate the space? How many moderators do you need? What are their responsibilities?
- Will you have a moderator's guide?
- How will you keep the conversation going?
- What types of content do you need to support?
- Will you have regular topics/themes (e.g. Motivational Monday, Thoughtful Thursday) to prompt fresh conversations?



# 4

## RECOGNITION



It should come as no surprise that people like it when their contributions are recognized. Acknowledging work well done boosts morale and motivation levels, and can help raise output and standards across the board when others recognize that their work will be valued.

This is just as relevant when we think about employee engagement. If you want to get people posting, contributing, liking and sharing, recognizing and rewarding them for their efforts will go a long way to embedding this method of communication and knowledge sharing into the workflow.

### **WHEN TO OFFER BADGES**

Badges can be awarded automatically by your employee engagement platform, or awarded by a human moderator.

Initially, your recognition may not even focus on the quality of contributions - it may simply recognize that people have gone to the effort of sharing their thoughts or content in the first place. For instance, a user may receive a "First contribution" badge once they have shared their first post, with smaller increments leading to further badges to encourage them to get into the habit of sharing content upfront.

Once employees are used to sharing regularly, this is where a human moderator might step in. At this point, they may start awarding badges based on valued posts (though these might still be automatically awarded by the system based on likes, comments or other engagement metrics), ensuring that particularly trusted contributors have their efforts recognized.

Other users will then be able to identify the right people on the platform for their various questions. For instance, a moderator may award someone who regularly posts interesting content about customer service with a "Customer Service Expert" badge, marking them as an SME who can advise others on similar topics.

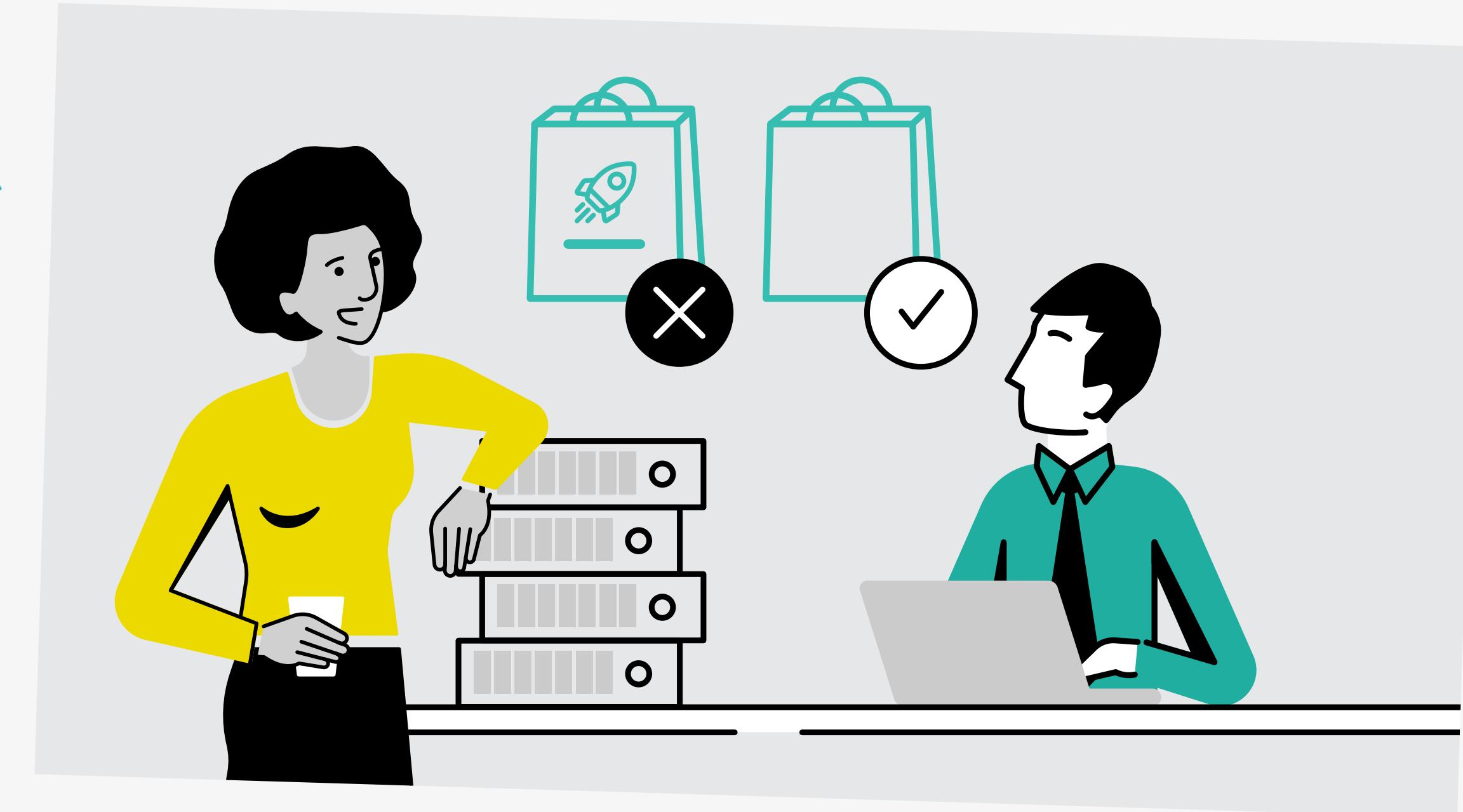
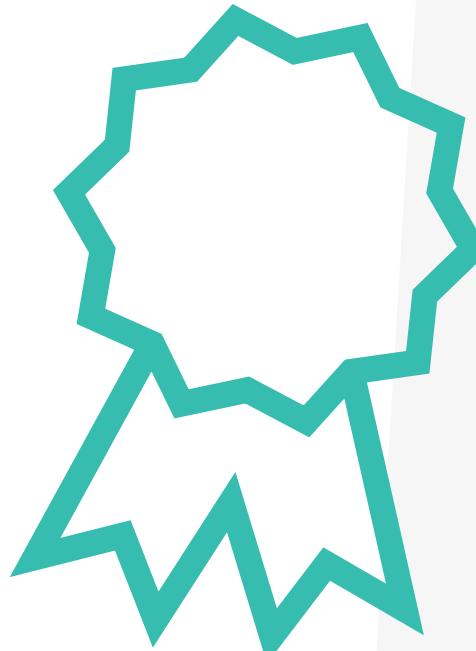


*Watch our webinar recording about peer recognition in discussion forums in the Totara Community.*

## RECOGNIZING AND REWARDING WITH POINTS

Points systems enable organizations to both recognize and encourage certain behaviors, and these desired behaviors can be rewarded to gamify the process. People become go-to experts when their contributions are well received, so make sure you acknowledge their efforts.

If an organization wants to get people sharing their knowledge on its employee engagement system, it may decide to offer different levels of points for different activities. For instance, starting a forum topic may get 10 points, whereas commenting on someone else's post may get five points.



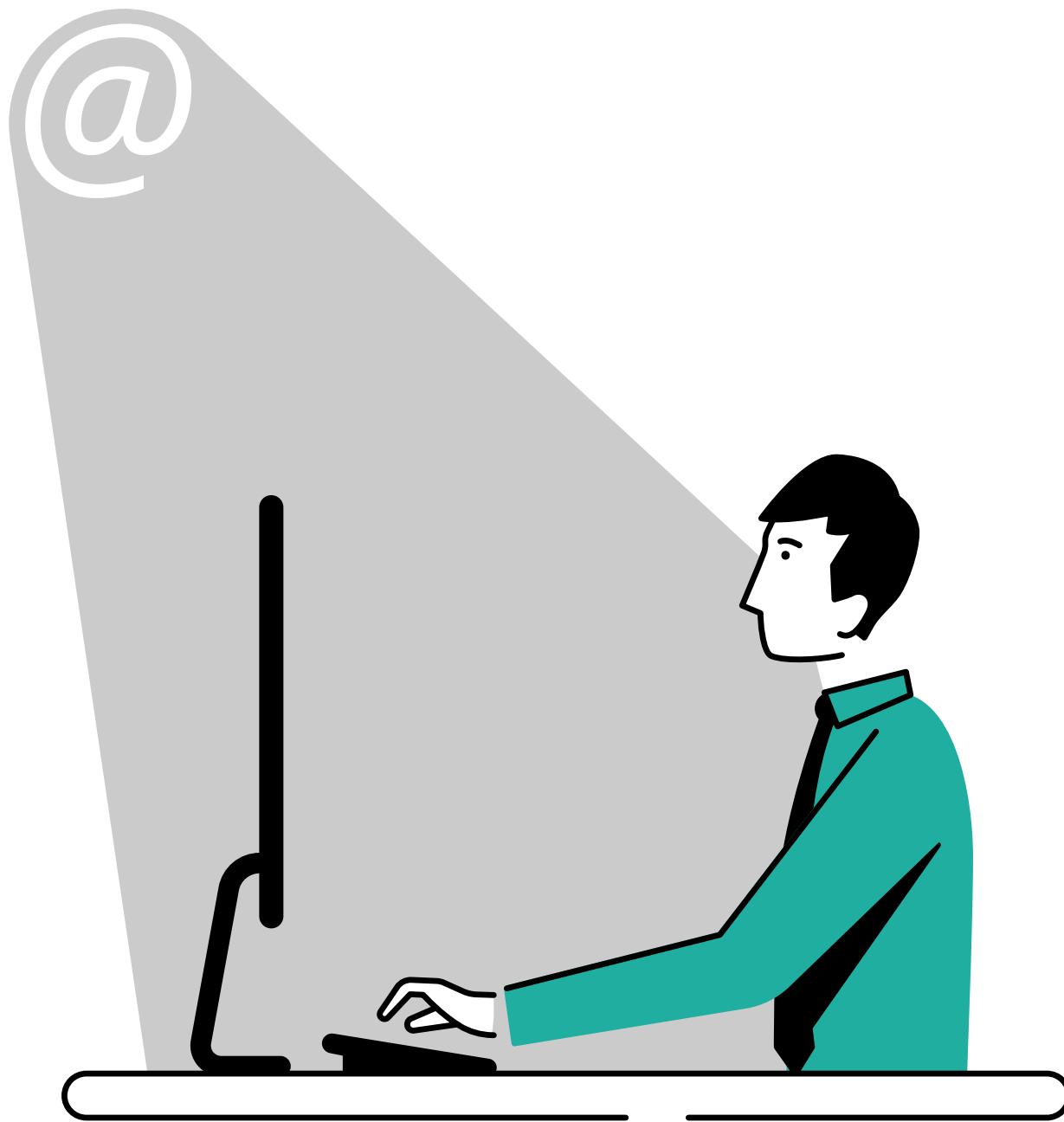
**EXAMPLE:** *A retail organization was exploring the idea of rewarding workplace performance to improve engagement. Initially, the leadership team wanted to give out company-branded items (such as picnic blankets and flasks) as rewards. However, a conversation with employees revealed that they would be much happier to receive non-branded rewards. This simple conversation ensured that the organization didn't waste money on a reward scheme that was doomed to fail, and employees benefited from a catalog from which they could choose their own rewards in a points-based system.*

## FIND YOUR ADVOCATES

No rewards system will work without leveraging your most-engaged employees. Identifying employees at all levels of the organization, from the management level to employees across departments, helps to keep momentum going and get people posting on the engagement platform.

At first, you may want to ask your advocates to post and contribute content on a regular schedule. This might mean creating weekly polls, posting “conversation starters” or responding to all relevant posts in a group.

Generally, others will feel more comfortable “joining in” rather than being the first to post, so these advocates are invaluable for getting the conversation started. They should also be recognized with special badges or labels so that other users know who to approach with questions or issues, and should be rewarded for their extra responsibilities.



**TIP:** Encourage users to @mention each other in your employee engagement system. This will notify them that they have been mentioned, and significantly increase the likelihood that they will respond. This is especially useful when people are reluctant to contribute, as being specifically mentioned is much more likely to prompt them to answer.

## A WORD OF WARNING...

Of course, when rewards are involved, it's easy for the focus to shift from "sharing great content" to "ticking boxes to get rewarded." While this may be the ultimate goal for some of your users, everyone will benefit from increased sharing of quality content.

One way to ensure that the promise of rewards (whether that's extra days off, monetary bonuses or gifts) doesn't usurp the overall objective of better, increased employee engagement is to build this recognition into the performance management process. For instance, if you have monthly check-ins with employees, you may consider acknowledging their contributions and sharing how they are helping others.



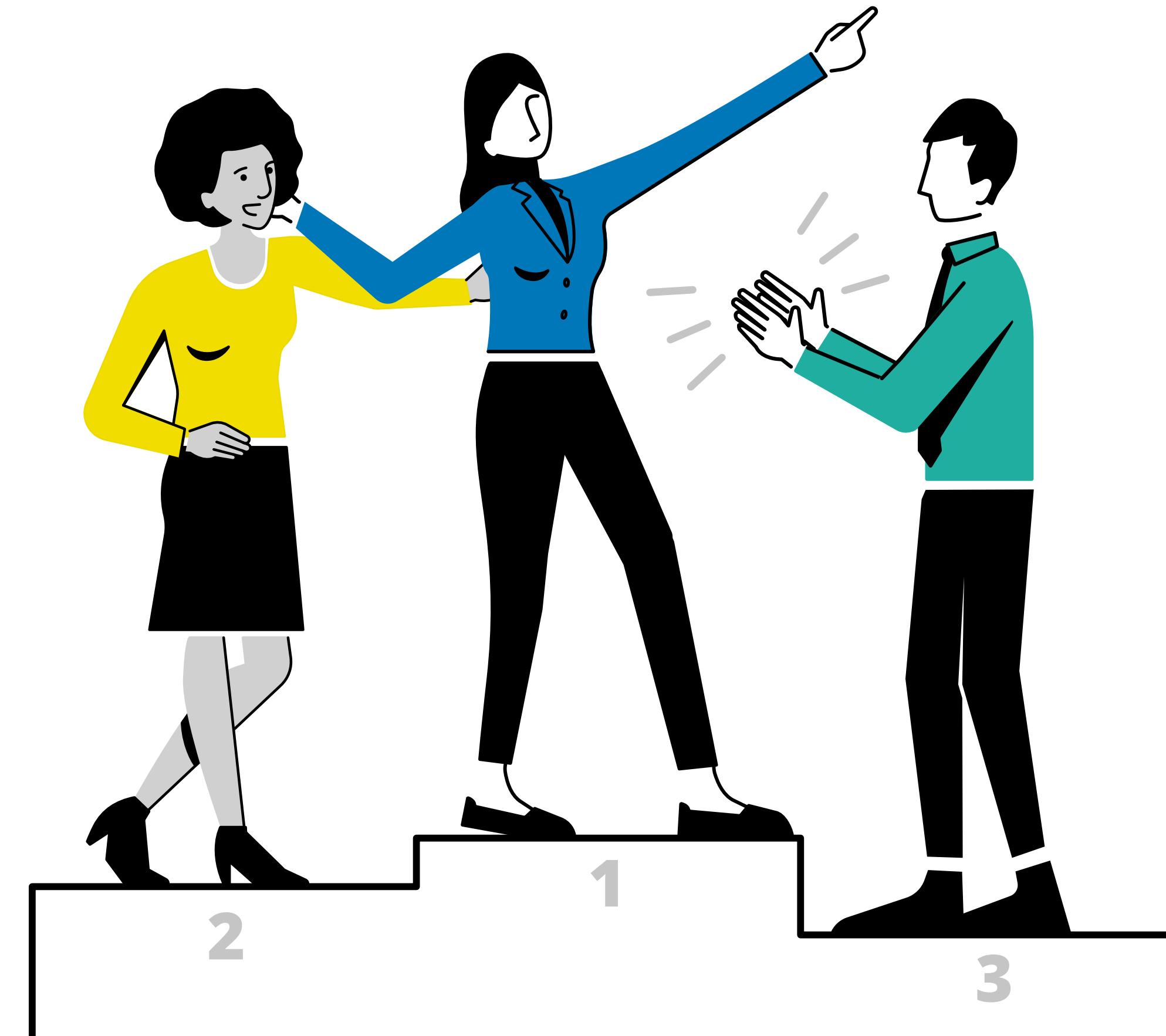
**A SCENARIO:** *Last month, Felix shared a post in his team's workspace asking for tips for mastering a new IT system. His teammate Emily commented with a playlist of useful resources. Felix feeds back to their manager that Emily's content helped him master the new system, and their manager shares this information with Emily in their next performance check-in, and encourages her to continue doing this.*

Totara Engage integrates seamlessly with Totara Perform, a flexible, customizable performance management system, ensuring that you can incorporate an employee's engagement level into performance conversations and reviews. And it works both ways - if an employee doesn't seem as engaged as they should be, you can set a goal for them to share their expertise in the forums, and pull this engagement data into their performance record.

## ***Things to consider when recognizing engagement***

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- What behavior warrants a badge?
- Will you use a points-based system?
- Can people nominate their peers for badges?
- Who is responsible for administering badges?
- Where are badges displayed?
- Are some badges limited to one user?
- What are the benefits of earning badges?
- What reward system will you use?
- How will you choose rewards?



# 5

## INTEGRATION

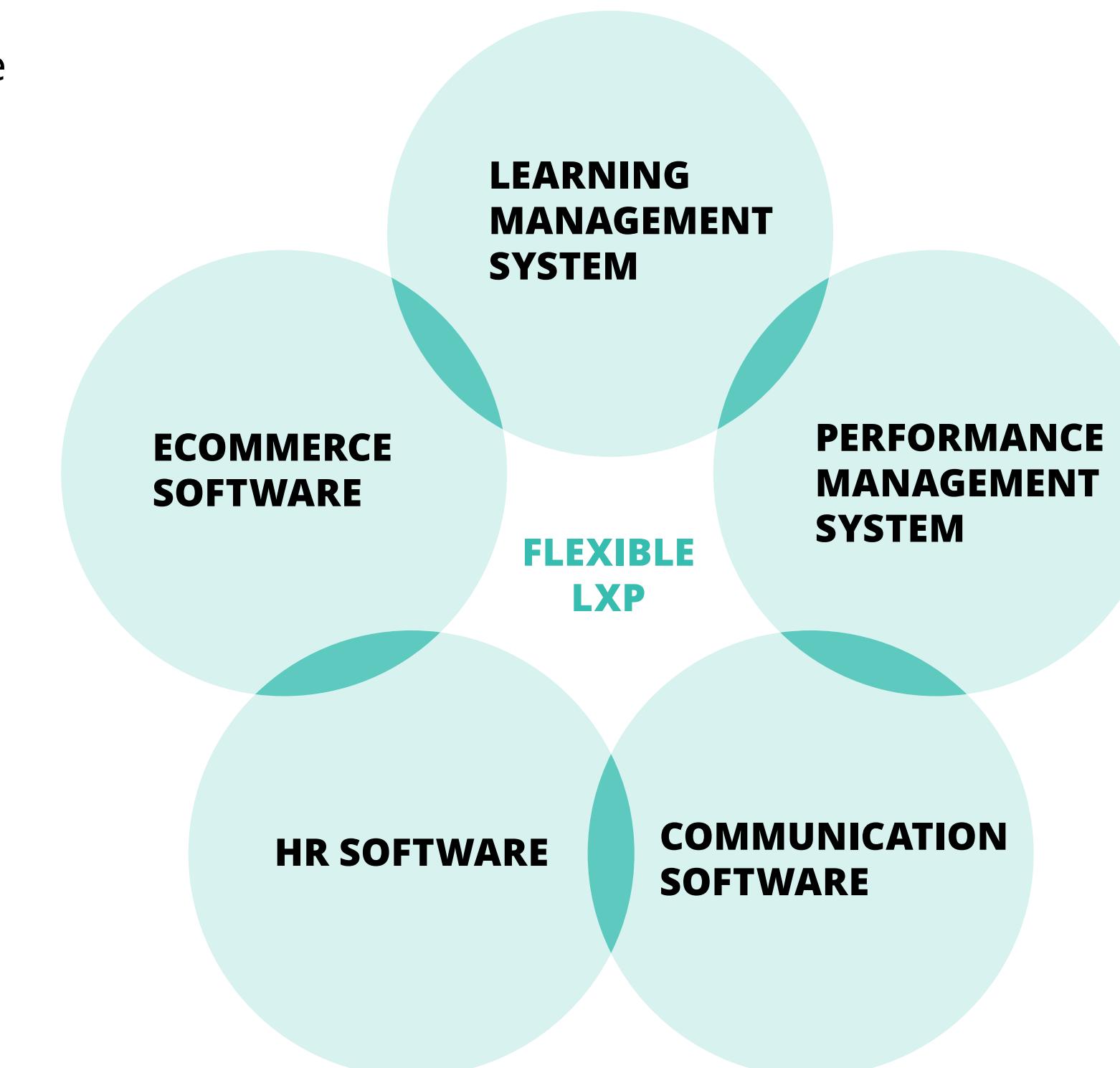
While an LXP can be used on its own, it's at its best when it's integrated with other systems like an LMS or a performance management system.

**83%**

of organizations want their next learning platform to integrate better with other systems.<sup>14</sup>

One important element of employee engagement is building it into the flow of work. If forum posts, blogs, surveys and polls can be pulled into the systems that employees already use, they will be much more likely to engage with them, rather than having to specifically seek this content out.

<sup>14</sup> Learning Technology 2019, Brandon Hall.

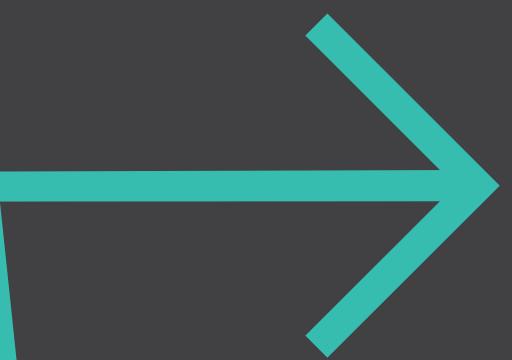


### **WHICH INTEGRATIONS SHOULD YOU BE THINKING ABOUT?**

If you have an open, flexible employee engagement system, you will have the freedom to integrate it with the other systems in your technology stack through APIs, plugins or extensions. A flexible LXP also makes it easier to change just one of your systems in the future, meaning you don't have to rebuild your entire platform to accommodate changing a single system.

- Learning management systems, such as Totara Learn
- Performance management systems, such as Totara Perform
- Communication software, such as Microsoft Teams or Slack
- Ecommerce software, such as PayPal or Shopify
- HR software, such as Bamboo or Natural HR

**USE CASE #1:** *Rosie is a bartender at a large hospitality chain. She has completed a new e-learning module on Totara Learn which taught her how to make three new cocktails on the menu. She posted videos of herself making these cocktails on Totara Engage, and created a playlist to share with other bartenders. These videos received a lot of engagement, and have been included on other people's playlists too. Rosie's manager Ingrid recognizes Rosie's contributions in their next performance check-in, and makes a note of Rosie's positive engagement in her performance notes.*



**USE CASE #2:** *Robin is a technical support assistant for a telecommunications provider. He is scrolling through the technical support team's Microsoft Teams channel, and spots that a colleague has shared a new product training course they found on their LMS. The visual course card appears automatically within the channel, and Robin clicks through to get started right away. Within 10 minutes, Robin has completed the short module, and now has extra knowledge about a new product that will allow him to provide better customer service.*

## ***Things to consider when setting up integrations***

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- Which other systems does your LXP need to integrate with?
- Have you set up your integrations between Totara Engage and Microsoft Teams?
- What technical actions will your IT department need to take?
- Can your IT infrastructure and/or devices support your proposed integrations?
- Have you set up a process with your HR and learning department to show how your different systems can work together?



# 6

## REPORTING AND ANALYTICS



Reporting should always be at the heart of every HR strategy. Great reporting can drive informed decisions, help teams understand how and where to invest their budget and what's working. But just 3% of organizations<sup>15</sup> say that their tracking of metrics for informal learning is very effective - so how do the other 97% know that their informal learning is working?

Only 57% of organizations<sup>17</sup> use employee engagement as a way to measure the success of learning programs, and just 40% look at the rate of knowledge transfer. That's a lot of valuable data that's being missed - especially when we consider that, whether you plan for it or not, informal learning comprises a significant part of the learning taking place in your organization.

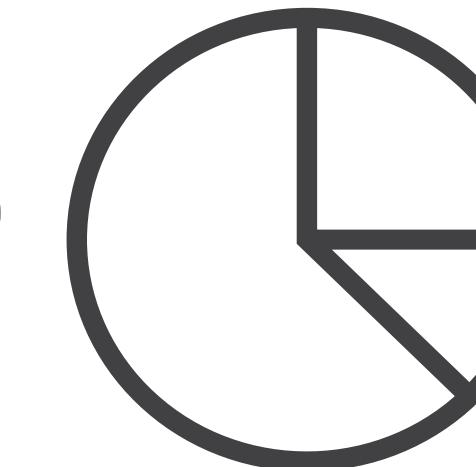
Most of us are familiar with the type of reporting that goes hand-in-hand with formal learning, including course completions, time spent on a course, quiz attempts and the number of people who have gained a certification. So how do we extend this into our informal learning?



**51%**  
of organizations don't  
measure engagement at all.

When they do,  
use basic classroom  
attendance metrics.<sup>16</sup>

**65%**



<sup>15</sup> Learning Measurement 2019, Brandon Hall.

<sup>16</sup> The State of Learner Experience, Engagement, and Solutions 2020, HR Research institute.

<sup>17</sup> Learning Measurement 2019, Brandon Hall.

## WHAT TO REPORT ON

When you're using an LXP, there are three types of data you'll want to capture:

- Information about the users of the system and their actions
- Information about the content flowing through the system
- Information about the performance of the LXP itself

Collecting information about learners is straightforward. You can run reports to find the most-engaged and least-engaged users, based on their contributions to the platform. You could drill down into the number of resources or playlists they create and share, comments on other people's posts and activity level in workspaces.

You can also discover which content is the most and least engaging based on the number of likes, shares and comments they generate. This is very similar to the information a social media manager might gather about their brand's social media posts - they will be guided by the data to post more of what's working and tweak, or ditch, what's not. Digging deeper, you can also look at the *type* of content that is particularly resonating - one team may particularly enjoy short microlearning modules, while others may engage more with video content. This will be invaluable not just for growing engagement in your LXP, but also for ensuring that your learning team is creating the right content for each team.



Content Engagement: 13 records shown										
		Search by								
User's Fullname <small>i</small>		contains								
Visibility <small>i</small>		is any value		Private						
		<input type="button" value="Search"/> <input type="button" value="Clear"/>								
Creator	Resource <small>v</small>	Playlists	Likes	Comments	Shares	Workspaces	Views	Visibility	Created Date	Topics
Admin User	How to improve your sales	18	396	137	513	3	128	Public	28 June 2020, 10:02 PM	Sales
Admin User	Employee performance	21	228	108	349	8	259	Public	15 June 2020, 1:16 PM	Performance, Growth
Admin User	Mental well-being in the workplace	13	204	96	234	2	182	Public	09 June 2020, 8:02 AM	Wellbeing, Mental health
Admin User	How to deal with bullying	14	350	104	154	3	196	Limited people can see	08 June 2020, 4:34 PM	Wellbeing
Admin User	Tips on using 3d printer	23	186	64	28	7	38	Public	28 May 2020, 8:45 AM	Productivity
Admin User	What you need to know about your customer	34	143	23	91	6	413	Public	15 June 2020, 1:02 PM	Sales
Admin User	6 Habits of Super Learners	28	123	34	76	3	74	Public	13 April 2020, 1:35 PM	Learning
Admin User	UI Design Principles	18	118	61	119	3	29	Public	13 April 2020, 3:01 PM	Design

Your LXP should also provide you with valuable data about which parts of the system itself are working and which are not. You can find this information by looking at activity levels in the workspaces. If workspace A has 200% more engagement and activity than workspace B, you can dig deeper into why that might be. Does workspace A have more engaged subject matter experts? Are people in workspace B more reluctant to share what they find? Having this data is a vital first step to continuously improving your LXP over time.

Administrators (and moderators) should also have access to a report about the inappropriate content being flagged in the system. What is the nature of the content? Is it offensive? Is it irrelevant? Is it spam? Reviewing this report monthly will help you clarify your system's rules over time, and ensure that the quality and relevance of content improves as you weed out the content that shouldn't be there.



## **WHAT DO I DO WITH THIS DATA?**

*One of the most important things you can do with the data from your LXP is to build it into performance management conversations. Bolstered with this social learning data, you'll have a much more holistic view of employees' learning and knowledge sharing activities.*

### **Some of the ways in which LXP reports are beneficial include:**

- Helping HR professionals spot talent, in terms of who is contributing, adding value and proving their expertise
- Informing managers of their most-engaged employees, as well as those who are not engaged and may need extra support
- Feeding into performance management conversations about who is supporting their peers or making use of others' advice
- Measuring the impact of change initiatives, such as measuring how busy workspaces are and the level of engagement across the platform
- Collecting a mixture of qualitative and quantitative feedback for an insight into both performance and emotional reflections

These insights make your organization more competitive, flexible and resilient. The more data you have about each of these areas, the more effectively you can invest your learning budget and discover what's resonating (and what's not.) It's useful to see not just what people are completing under duress, but also what is piquing interest and sparking debate.

This can also trigger some higher-level considerations, such as whether or not your entire existing learning program is working well or whether it's time to try something new. In short: *are you getting the maximum benefit from your learning strategy?*



## ***Things to consider when setting up engagement reports***

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- What do you want to report on?
- Who should have access to these reports?
- Should these reports sync up with your LMS reports?
- Are you focused on which learners are proactive and which learners may need more support?
- Have you reviewed who is adding the most content?
- Have you reviewed which topics are the most popular?
- Which content is the most highly rated?



# HOW TO BUILD A BUSINESS CASE FOR AN LXP

For many organizations, the prospect of introducing an LXP to the business can feel daunting. Common concerns are that people will become distracted from their tasks and it will become a time drain, or the reverse - that any investment will be wasted, as the engagement platform sits untouched. Others worry that they don't understand LXPs well enough and that it won't resonate in their organization.

But really, LXPs are there to support employees in the flow of every day work, meaning you want people to use it to enhance their effectiveness and productivity, both individually and collectively. A fully optimized LXP with lots of content and activity should enable people to dip in, find the content they need quickly and get back to work without spending too much time hunting down information.



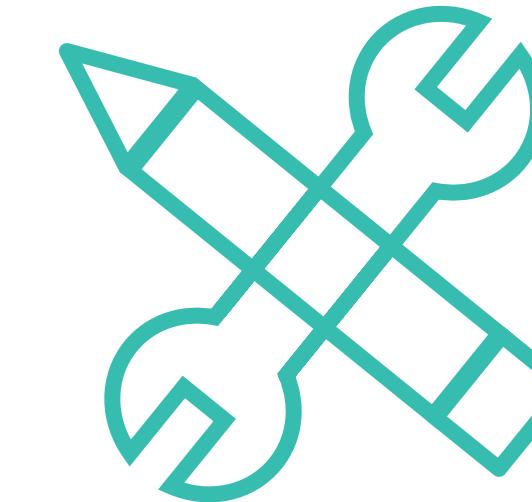
**17%**  
Engaged employees are 17% more productive than their disengaged colleagues.<sup>18</sup>

And regardless of what you may think, social learning takes place in your organization every single day. Outside a dedicated platform, these conversations are happening already - in the office kitchen, via instant messaging or in team meetings - and this information is rarely consolidated and made available to others in a permanent location. An LXP gives you the power to harness the expertise across, and outside, your organization, reducing duplication of efforts and making the knowledge sharing experience more efficient.

<sup>18</sup> State of the American Workplace Report 2017, Gallup.



But as with any new technology investment, it can sometimes take a little effort to get everyone on board. So how do you build a business case for an LXP to ensure that employee engagement is prioritized in your organization?



## 1 STATE THE PROBLEM AND ITS MEASURABLE IMPACT

Low employee engagement levels leads to a lack of productivity and motivation and high staff turnover rates, which is a huge business cost.

## 4 OUTLINE BENEFITS

Organizational benefits include increased commitment, loyalty and performance from employees, the development of skills across the business, greater synergy and productivity from teams and a more positive, collaborative working environment.

## 2 PROVIDE SOLUTION

An LXP is a cost-effective way to leverage and consolidate the expertise in your organization, creating a centralized informal learning platform populated with user-generated content.

## 5 PROVIDE A TIMELINE

Opting for a user-friendly open source LXP like Totara Engage should allow you to be up and running very quickly, depending on the complexity of your requirements.

## 3 OUTLINE THE SOLUTION'S COSTS

An open source LXP will provide the best value in terms of flexibility and adapting to new and changing business needs, and enables you to integrate it seamlessly within your talent ecosystem.

## 6 PROPOSE CHANGE MANAGEMENT

Set out plans for your LXP launch campaign to ensure it becomes integrated into the day-to-day workflow. Identify your internal ambassadors and explain how you will maintain momentum and ensure that there is a constant flow of fresh, quality content into and around the LXP. You should also cover off any "quick wins" to get your initiative off the ground and build momentum, such as nurturing already-engaged employees and encouraging the leadership team to lead by example.

## **WHAT TO DO AND WHAT NOT TO DO**

If you've never considered engagement beyond the surface level, we've put together some tips for what to do - and what not to do. Keep these points in mind when you're designing an employee engagement strategy to help you facilitate peer-to-peer learning and knowledge sharing and uncover the hidden experts in your organization.

**70%**

of employees say that they are most engaged when senior leadership continually provides updates and communicates company strategy <sup>19</sup>

Genuinely try to understand why people are or are not engaging, and then take steps to improve the situation

Be honest and transparent - your employees know when something is wrong

Ensure involvement at all levels and across all departments of your organization

Ask! Most people will be willing to share their thoughts, and your assumption may be completely wrong

Conduct surveys sparingly. Run engagement surveys once a year at most, and keep regular pulse surveys short and relevant

Get your organization's leaders involved. Frequent, open communication from leaders and senior management significantly improved engagement



Turn engagement into a box-ticking exercise

'Spin' the results of your engagement surveys

Limit engagement efforts to senior management

Assume what people are thinking

Over-survey, leading to survey fatigue

Trap knowledge or information in silos



<sup>19</sup> The impact of employee engagement on performance, Harvard Business Review.



## **ENGAGEMENT MATTERS** **MORE THAN EVER BEFORE**

It is an understatement to say we live in times where uncertainty reigns. Whether this is societal upheaval, the impact of technology and innovation, or volatile markets, in order to maintain resilience you need to have your people on your side. Engaged employees will ride these waves of change with their employers.

Sustaining engagement is therefore a priority within leading organizations. A clear statement of shared purpose, coupled with the permission and resources to learn, relearn, show initiative, take calculated risks, collaborate and share openly are common characteristics of businesses that are innovative and successful.

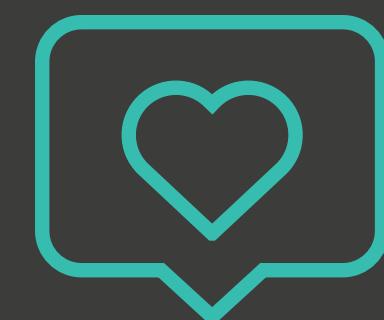
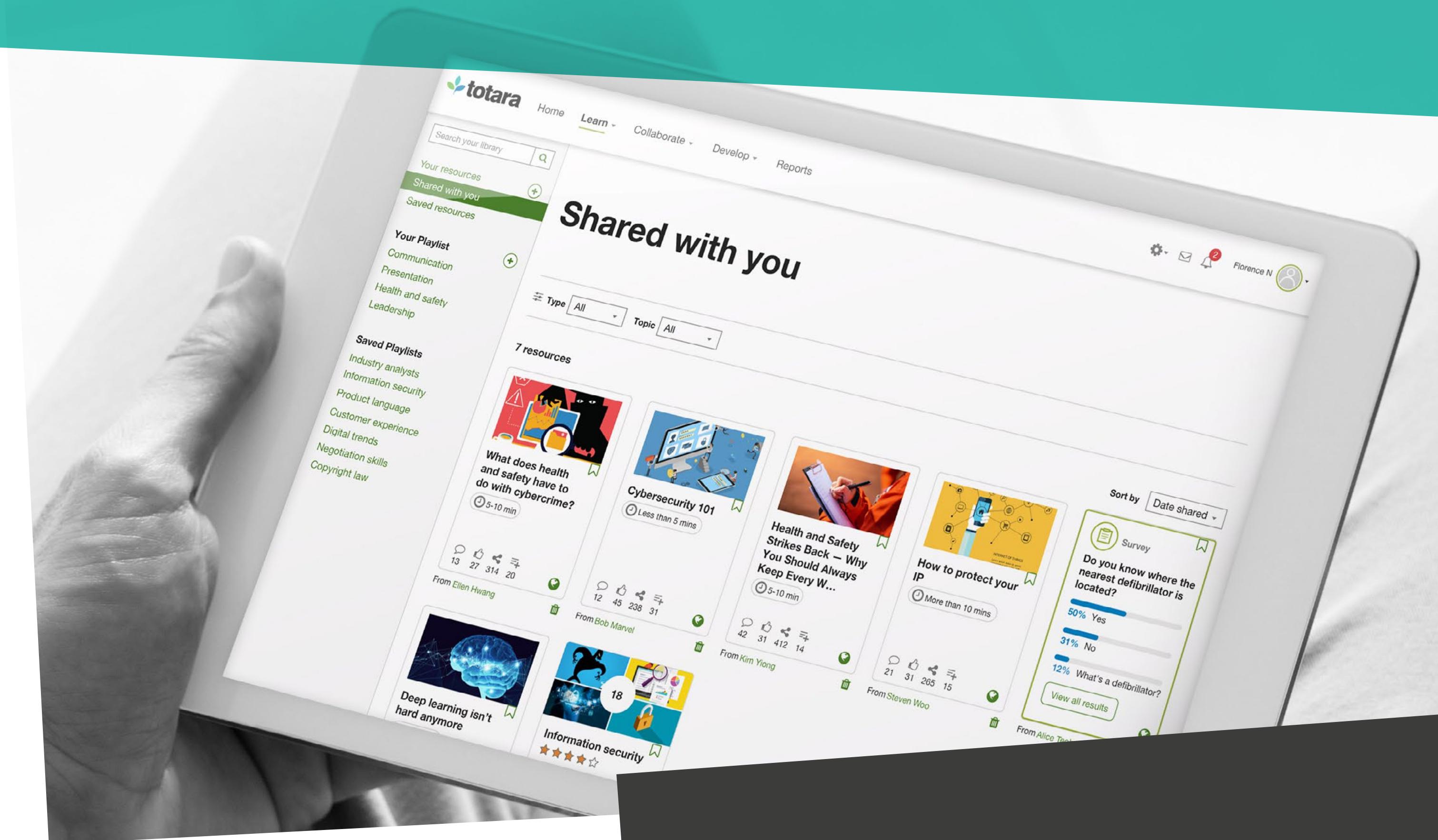
This type of culture requires deliberate action from leadership, managers and all staff throughout the organization. One of your first actions should be to ensure your technology infrastructure, tools and workflow processes are flexible and supportive and do not introduce unnecessary friction. Instead, you should aim to delight your people with the smooth and supportive nature of their working environment.

# **READY TO ENGAGE?**

*Transform your workforce with Totara Engage, your integrated learning experience platform (LXP).*

A highly engaged team is the difference between organizations that thrive and organizations that struggle to survive. Engaged employees work faster, harder and more effectively because they like what they do.

Totara Engage empowers your people to collaborate, connect and share expertise with each other – lifting the collective productivity of your organization.



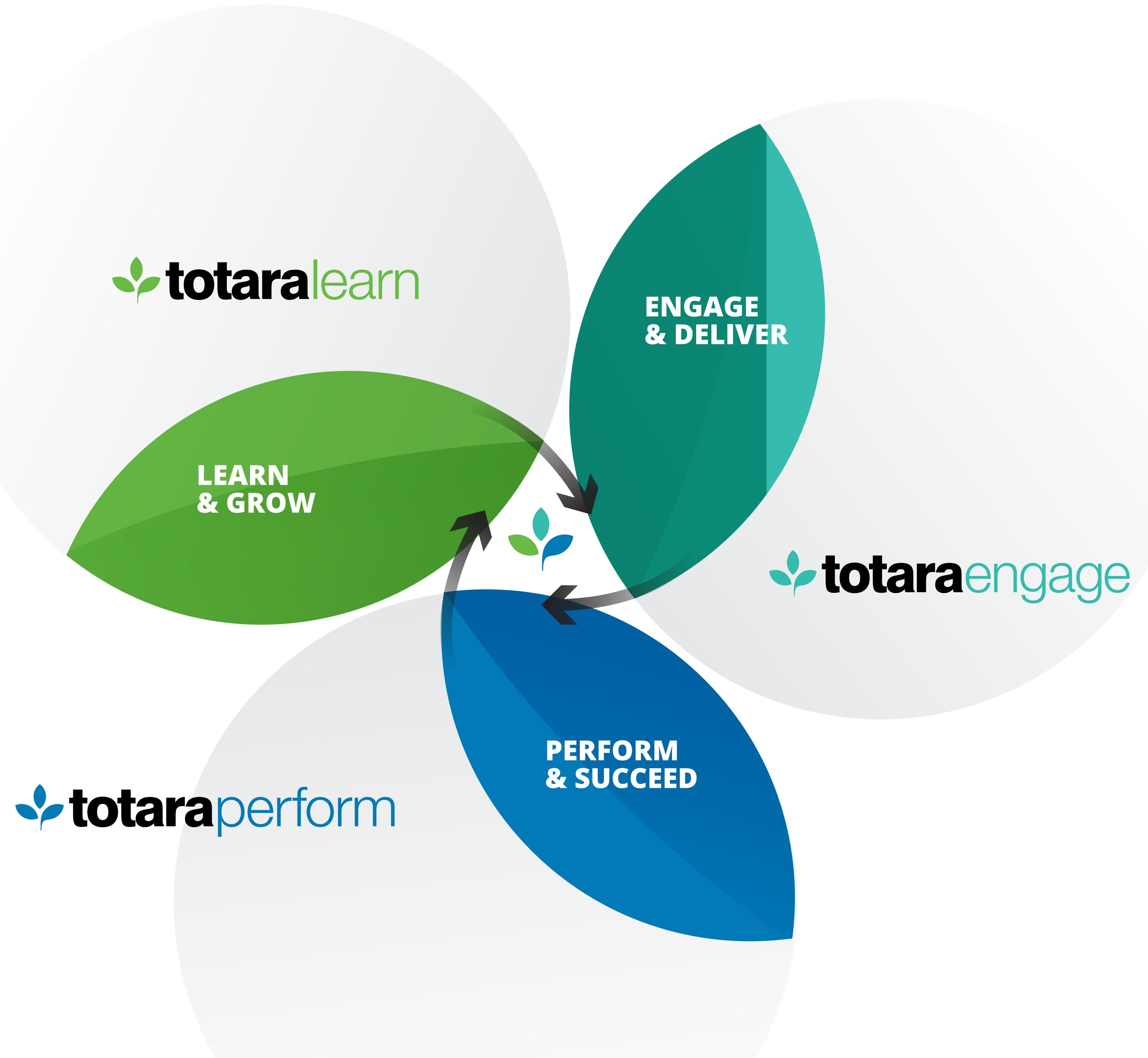
**REQUEST A DEMO TODAY**  
to see Totara Engage in action and  
find out how it can help you improve  
employee engagement for good.



## **ABOUT TOTARA**

Totara builds employee engagement, learning, and performance management technologies that enable large multinational corporations, government entities, and mid-market companies to deliver enterprise-level talent and workforce experiences. **Totara's Talent Experience**

**Platform** unifies a transformational **learning management system** (LMS), a user-centric **learning experience platform** (LXP), and a comprehensive **performance management system** under a single and highly adaptable architecture. Totara's flexible architecture gives organizations the freedom to innovate, the freedom to choose, and unlocks critical resources for reinvestment into where it really counts.





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