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The Essentials of Engagement

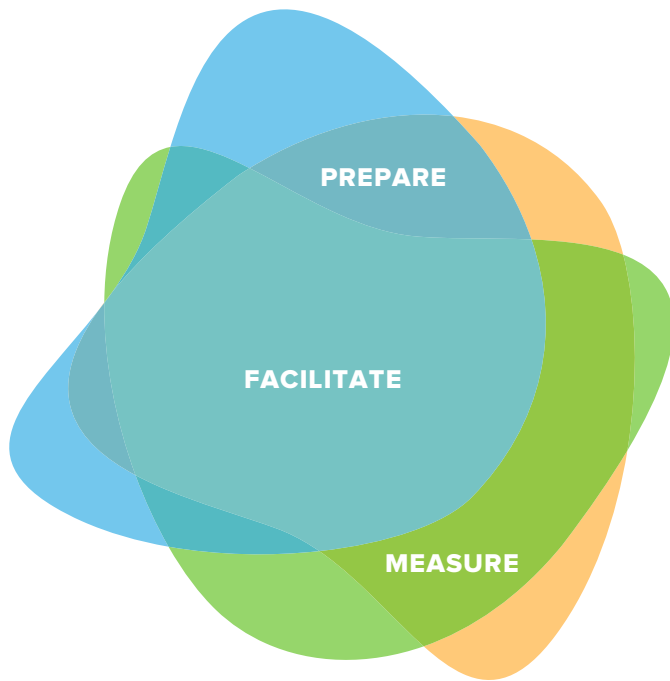
The Ultimate Guide for Online Facilitators

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INTRODUCTION

You've finally rolled out that corporate learning experience you've been slaving over for months. You've made custom videos, got buy-in from all of your key stakeholders, and even told your friends about it. But as soon as it launches your engagement is low and learners are dropping like flies. What are you missing? The answer is **engaging** and **effective facilitation**!



As Learning Experience Designers at NovoEd, we are huge fans of online facilitation. Not only have we trained countless L&D professionals to become effective facilitators, but we also hone our skills in our free online **Foundations of Learning Experience Design (LXD)** course, which is run once a quarter. Each LXD iteration leads to higher global enrollment and increased completion and engagement. In our most recent LXD cohort, for example, we had learners from 36 different countries spanning 6 continents!

In this e-book, we share some of the key strategies we use to plan, facilitate, and measure engaging and successful online learning experiences. First, we address how to **prepare** to make your experience as engaging as possible. Then, we discuss the different personas you can adopt as you **facilitate** your live course and how to balance time investment and impact. Finally, we review the metrics you'll need to **measure** success and plan for future iterations of your experience.

FREE CERTIFICATION COURSE

Foundations of Learning Experience Design

Learn how to create effective learning experiences using digital pedagogy and instructional design best practices.

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PREPARE TO ENGAGE

While online learning can offer great opportunities for self-directed learning and flexibility, sometimes you need to have a human (or a team of humans) on the other side to encourage, guide, and create opportunities for connection and deeper learning. This is where facilitators come in.

As online facilitators in NovoEd's LXD course, our main goal is to get learners into the course more frequently and for longer periods of time. On a typical day of facilitating we may be giving thought-provoking assignment feedback, responding in discussion boards, or measuring engagement data.



Plan for Success

As the famous basketball coach John Wooden said, “By failing to prepare, you are preparing to fail.” In this way, facilitation of online course is no different than coaching a great game of basketball.

The best facilitation experience begins with a detailed plan, with clear roles and responsibilities and a timeline created weeks before the course launches. For LXD, we even draft out all of our course communications before any learners set virtual foot in the course.

A few key questions you’ll want to ask yourself while you are planning for facilitation include:

- ✓ **What training will your facilitators need?**
- ✓ **How many hours will you be devoting to facilitation each week?**
- ✓ **How will you measure the effectiveness of your facilitation?**

“

By failing to prepare, you are preparing to fail.”

John Wooden
Former UCLA Basketball
Coach



Balance Time and Impact

As busy professionals in the L&D world, we are constantly strapped for time. That's why it is crucial to implement the facilitation actions that lead to the biggest increase in learner engagement. One thing we have found through facilitating the LXD course is that high facilitator engagement during the first-week skyrockets learner engagement throughout the remainder of the course.

Pull Out Your Facilitation Big Guns in the First Week

- ✓ **Host a webinar**
Host a live event to increase energy and clarify course expectations, timeline, and to address any concerns.
- ✓ **Use course-wide communications**
Keep your learners on track by guiding the community with reminders of pacing, pointing out exemplary student work, and addressing any misconceptions about your material.
- ✓ **Send intervention emails**
In a classroom, you can see who's on their phone or sleeping. In our online world, we need to use data to see who is falling behind and reach out to encourage engagement.

EXAMPLE OF AN INTERVENTION EMAIL WE USE IN OUR LXD COURSE



Hello Jessica,

Our LXD course has now been open for one week and is full of great activity from our learner community! **But we haven't seen YOU yet!**

It's not too late to join us. Even if you just want to come and say hi :)

Here's a few ways to engage:

(2 minutes) Explore the [course home page](#) to see the course outline and learning journey or [explore the teams](#) that have formed in the first week.

(7 minutes) Dive into the [Week 1 materials](#) to see how we've structured content, discussions, and assignments in the course. Or just check out the [assignment gallery](#) with hundreds of assignments already submitted by our learners.

Hope to see you in the course soon!

Drew



Start Gathering Data

Collecting and analyzing data is incredibly important to the success of any project, including running an online course! In the first week of LXD we focus on two key metrics that are most closely linked to maximum engagement and ultimately course completion.

✓ **Signing in**

The most important metric by far is logging in! It's a necessary prerequisite for, well, everything. We monitor this closely each day during the first week of the course.

✓ **Completion of the first assignment**

One of the best indicators of a learner's level of commitment to the course is if they submit their first assignment on time. Ideally, this assignment is low-stakes and gives learners a real sense of progress toward a learning goal.



DISCOVER YOUR FACILITATOR PERSONA



You've made a great facilitation plan, trained your facilitators, and defined your success metrics. Your course is live! Now you have to actually facilitate, but what does that mean?

Whether your course is a multi-week, cohort-based learning experience with teams and projects or a lighter and shorter self-paced course, basic facilitation is a requirement not an option. Depending on your team's time availability and size, your ability to facilitate a course may be limited. However, we've seen from our own experimentation in our LXD course that a greater time investment in facilitation results in a higher completion rate and Net Promoter Score (NPS) from participants.



The Four Personas of a Digital Facilitator

There are four key facilitator personas you can try out that we've found to result in fantastic learner experiences. Depending on whether you only have a couple of hours to spare or you have multiple full-time facilitators, you can find a persona that works for you—personas range from the low-involvement Train Conductor to the high-involvement Coach. In our framework, the strategies for each persona progressively increase the level of facilitator involvement and also the expected level of learner engagement.

Basic facilitation is a requirement not an option.

Which persona will you adopt for your next facilitation opportunity?



Train Conductor



Tour Guide



Camp Counselor



Coach





Train Conductor

2 HOURS TOTAL TIME INVESTMENT

Like a **Train Conductor**, this facilitator's main responsibility is to get the learning experience in motion and help make the ride smooth by laying a clear path forward (like a track). At the simplest level of facilitation, a Train Conductor can set up learners for success by investing some time before the course launches to build a framework that supports success.

Starting Out: Be a Train Conductor

✓ **Automate your communications**

Use the “set it and forget it” approach to create a sense of support by pushing your learners with automated communications. Let them know what is expected once they begin, including time commitment, ultimate learning outcomes, and due dates.

✓ **Send intervention emails**

Along with these automated messages, be sure to also include great intervention emails. These sorts of emails can be programmed to target specific learners at given times to ensure there are continually reminders to re-engage in an encouraging way.

If you have more than a few hours to devote to facilitation and want to kick it up a notch, you can channel your inner **Tour Guide** by adding a couple of additional actions to the Train Conductor Persona.



Tour Guide

1-2 HOURS PER WEEK

If you've traveled to an unfamiliar place, you know the joys of having a knowledgeable, funny, and welcoming **Tour Guide**. They don't have to be funny, but it's better when they are. They keep you engaged in the experience, point out key landmarks, and help you gain a better understanding of your surroundings. Becoming a great Tour Guide is an easy way to take your online facilitation skills to the next level.

From Train Conductor to Tour Guide

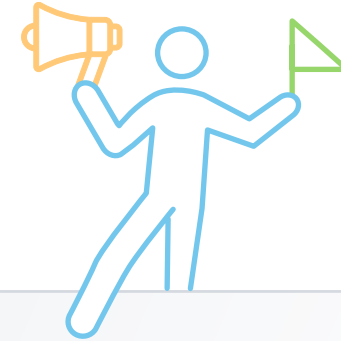
✓ **Craft reflective emails**

Instead of simply keeping learners on track, dive deeper and really engage with participants. One way to do this is to publicly shout out great activity (discussion responses, assignment submissions, etc.) from the learners to keep everyone motivated.

✓ **Answer learner questions promptly**

A great Tour Guide answers questions as they come, ready and waiting to provide support. In an online learning experience, participants should have a direct line to an expert to help them. Setting up a support email address or a frequently monitored discussion board ensures that learners have a lifeline if they need it.

And while a Tour Guide can provide a better experience than a Train Conductor, both of these facilitators can struggle to create the best sense of community. That is why it's time to explore our next facilitator persona.



For last week's assignment, you either found or created resources that would effectively support your learners' ability to accomplish the learning objectives in your module. We'd like to highlight a few particularly interesting/high-quality submissions.

Last week's assignment submission shout-outs:

- Nice job Christine [who utilized both a curated video as well as blogs](#) to use as the content resources for her course on customer personas! Thanks to Michele for the great feedback as well.
- Virginia also did a nice job [giving clear instructions and a variety of media](#) for customer service representations in solving customer problems.
- And finally, well done Gursharn who [created an infographic as well as utilized a video and article](#) for his learners.

AN EXCERPT FROM A REFLECTIVE EMAIL





Camp Counselor

4 HOURS PER WEEK

Have you been to summer camp? Do you remember being motivated to play a game, sing a silly song, or run around with a bunch of other kids you didn't even know? You likely wouldn't have done this on your own—not without the guidance of a great facilitator. The **Camp Counselor** brings an energy that creates safety, fun, and community.

From Tour Guide to Camp Counselor

✓ **Use data to drive actions**

A Camp Counselor has a strong sense of how her campers are doing. Facilitating a course requires this same level of understanding of your learners, which you can do by monitoring data. Consistently checking out survey results, activity completion metrics, and engagement in teams allows facilitators to take action to support struggling learners, and make changes on the fly.

✓ **Run engaging live events**

In online courses, the use of live events are catalysts for connecting the course community. For learners who have lost interest, a live call is a chance to reconnect, get excited, and feel like they are not learning alone. Don't forget to make these live events engaging by incorporating polls, chat, and some fun games!

The Camp Counselor helps the community connect and have a good experience. Yet, sometimes, due to the size of the community, they may not be able to invest personally in each participant. This is why the highest level of facilitation is what we call the **Coach**.





Coach

5+ HOURS PER WEEK

The epitome of great facilitation is the **Coach**. They can take a learning experience from “that was a good course” to “that course changed my life.” Coaches do this by not only ensuring the whole “team” (in our case, the learning community) is successful, but also supports the development of each player individually. In our Foundations of Learning Experience Design course, we have found that learners who opt-in to a coach are 56% more likely to complete the course because of the personalized attention they receive.

From Camp Counselor to Coach

✓ **Provide individualized assignment feedback**

Some of our course experiences feature deliverables that can result in a learner's job promotion, certification credits, or digital badges. To ensure a high level of competency, our coaches provide individual feedback on learner assignments. Learners feel supported by working with an expert to guide them. You can even get creative and submit your feedback through video or audio!

✓ **Keep learner motivation high**

Coaches not only provide feedback for learners to improve their skills, but also make sure they stay motivated and on their game. One way you can do this in online courses is by providing continuous personal check-ins where you can ask your learners to reflect on their challenges and successes of the past week.





MEASURE WHAT MATTERS

The time is here. After thoroughly planning your facilitation, choosing your facilitator persona and actively engaging with your learners, you've finally reached the most fun part of the facilitation cycle: asking "was my facilitation successful and how can I improve for next time?"

Our students aren't the only ones who learn during a course experience. Whether you've done a little facilitation or devoted a whole team to it you can focus on three key metrics to determine the effectiveness of your facilitation: completion, learner engagement, and learner satisfaction. And remember, great digital facilitation is a cycle! While learning more about the metrics below, use the data to inform your facilitation plan for version 2.0 of your course experience.



Course Completion

A high course-completion rate is a coveted metric among learning and development professionals. If learners aren't completing your course they aren't making any behavior changes! Even basic facilitation of your online course can lead to an increase in your completion rate by increasing learner motivation and accountability. How can you improve yours?

Course completion by itself is an important metric, but it can also be illuminating to get more granular by digging a bit deeper.

Even basic facilitation can increase learner motivation and accountability.

Key Course Completion Metrics

- ✓ **Course completion and progression**
How many people completed your course in the allocated time? How many people made it to each stage of the experience? Sending targeted communications or allowing extensions may nudge people along to completion.
- ✓ **Percentage of non-starters**
How many people were “non-starters” and never engaged with the material even after automated emails? Sending out some individualized intervention emails can help here.
- ✓ **Response to intervention emails**
Did you see spikes in course progression and completion after you sent out certain communications?



Learner Engagement

High course completion rates don't happen magically. They are usually driven through high learner engagement and motivation—what facilitation is all about! Depending on the structure and content of your course, there are many ways you can measure the engagement.

Key Learner Engagement Metrics

- ✓ **Community interaction**
Was there more community interaction (discussions, comments, questions asked during the live events) each week? How did these interactions compare to the last course run?
- ✓ **Assignment completion rates**
Did learners continue to complete the assignments each week?
- ✓ **Event attendance**
Did you have high attendance to your live events?

WHAT ENGAGEMENT MIGHT LOOK LIKE OVER TIME



Learner Satisfaction

Learner satisfaction in online courses is intimately tied to how likely a learner is to apply what their new skills to their jobs. Great online facilitation should increase this metric. To measure this, there is nothing more valuable than a well crafted survey. Give your learners permission to tell you how you did. When crafting facilitation effectiveness survey questions, think back to the facilitator persona you chose and the specific actions you took.

Survey Questions to Measure Learner Satisfaction

- ✓ **How would you rate the effectiveness of the teaching team's emails? (1-10)**
- ✓ **What did you find most valuable about the community and what could use improvement? (text field)**
- ✓ **How valuable did you find the live events? (1-10)**
- ✓ **What enabled or prevented you from reaching your learning goals? (text field)**
- ✓ **How likely are you to recommend this course to a friend or colleague? (1-10)**

“

What gets measured, gets improved”

—
Peter Drucker
Management Guru

What Did You Learn?

As management thinker Peter Drucker says “what gets measured gets improved” and online facilitation is no different. In addition to the metrics you gather once your course is complete, make sure you take time for some self reflection as well. Were there certain activities you really had to coax people to complete? Did your facilitation plan run smoothly? Did you put in as much time as you wanted to?

Remember, facilitating is an iterative experience. Each time you facilitate an online course, find ways to experiment—come up with a new plan, try a different facilitator persona, or find new metrics to measure. Just imagine how successful your learning experience could become!



CONCLUSION

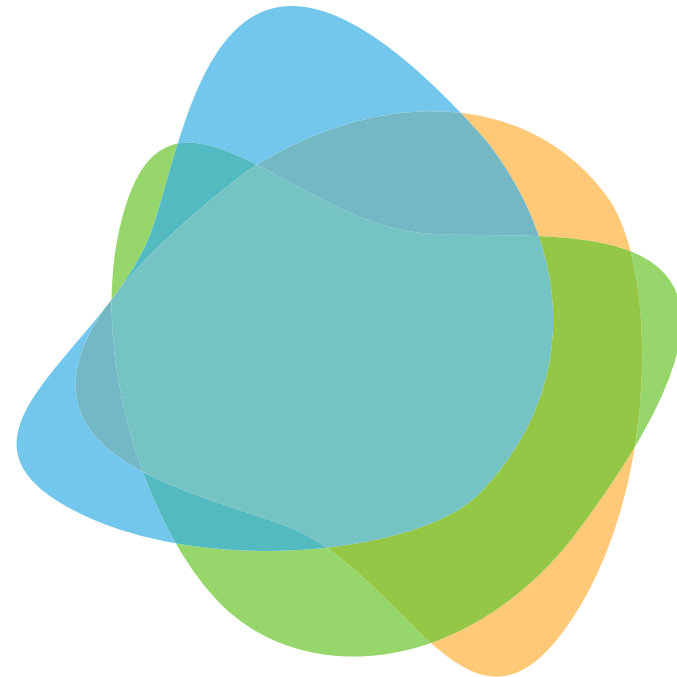
In this guide, we've shared some of the strategies we use in facilitating our Learning Experience Design course to increase engagement and create a sense of community among our learners. We hope they help you design and facilitate your next learning experience, no matter how much time you have to devote to the effort.

Great engagement starts with **planning**. Before your course begins, you make key decisions about how much facilitator involvement will be required for the learning experience and how you plan to get your experience off to a flying start.

While your course is running, you will be **facilitating**. We've suggested four facilitator personas based on level of involvement that can guide your time commitment and the activities you will be engaged in.

Finally, **measuring** engagement through key metrics that include course completion, learner engagement, and learner satisfaction can help you reflect on the time investment you made and plan for improvement in your next course iterations.

Above all, have fun and experiment! No two facilitated online learning experiences are the same and there's always room to learn, improve, and grow.



RESOURCES

Learning Design Best Practices

We regularly write about learning design best practices on the NovoEd blog. In addition to our insights on learning experience facilitation, we discuss topics including learning design strategies, collaborative learning, engagement, and community building.

[Visit NovoEd](#)

Free LXD Certification Course

Over the past 3 years, NovoEd's **Foundations of Learning Experience Design** course has helped close to 10,000 learners create engaging learning experiences using digital pedagogy and instructional design best practices. This comprehensive course includes 10+ hours of training, assignments, peer-to-peer learning, and more to help you craft a high-impact learning module by the end of this course.

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About the Authors



Drew Remiker leads the Learning Experience Design team at NovoEd and has contributed to course designs with many organizations including CEMEX, Comcast, Future Workplace, Nestle, The Presentation Company, and even designed his own course for Instructional Designers featured on NovoEd. He completed his B.S. at UCLA and his M.Ed. from City College of New York.



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