



# **5 HIGHLY EFFECTIVE STRATEGIES FOR CREATING ENGAGING E-LEARNING**



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Your supervisor drops two hundred pages of workplace safety rules and regulations on your desk. On top, you find a cheerful note that reads, “Please turn this into online training for our accident investigators, pronto. And try to make it interesting!”

If you want to run for the hills, you’re not alone.

We asked 3,100 e-learning developers about the biggest challenges they face in their jobs. More than half said it’s hard for them to make dry information engaging to their learners. And learners have noticed. We surveyed 530 learners on their e-learning experiences, and nearly 40% said, “I get bored.”

When you consider how important engagement is to the learning process, that’s a pretty big problem. After all, we learn and remember what attracts our interest and attention.<sup>1</sup>

Plus, who wants to create tedious courses? No one!

For years, only people with programming skills had a prayer of overcoming this challenge. That’s no longer the case. With recent advances in technology, every e-learning developer can create courses that engage learners. That’s worth repeating: **Every e-learning developer can create courses that engage learners.** And you don’t need a huge budget to do it.

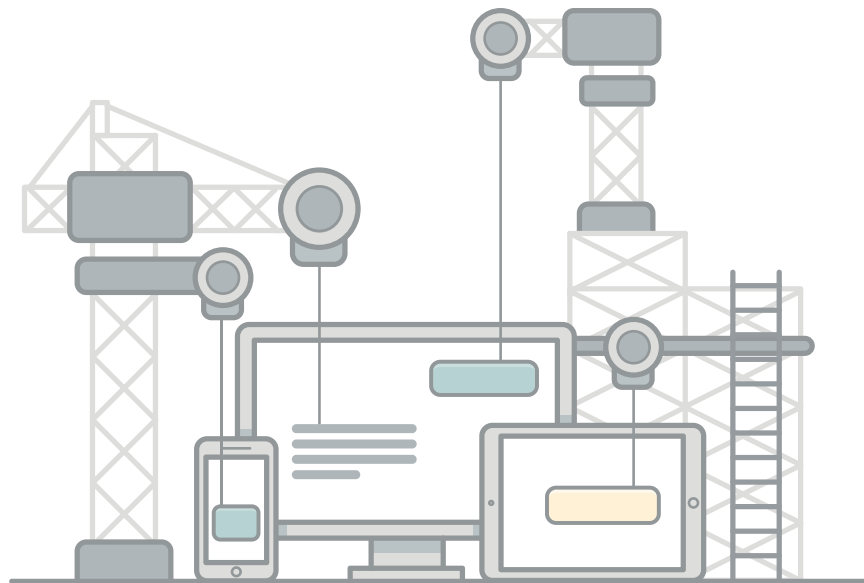
<sup>1</sup> U.S. Department of Education: [Learning: Engage and Empower](#).

You can create e-learning experiences that engage learners by following these five highly effective strategies:

- Build a compelling visual experience.
- Add meaningful interactions.
- Let learners “pull” content.
- Engage more senses with video.
- Add fun gaming elements.

Ready to learn how to do it all? Let's go.

# How to Build a Compelling Visual Experience



You've heard the old adage, "Don't judge a book by its cover." It's true that the most tattered, sorry-looking book can hold delightful, exciting stories inside. But it takes a big act of faith to crack that worn book open. Given a choice, most of us would grab a gorgeously designed hardcover instead. We can't help but infer that the quality of the design reflects the quality of the content. As much as we'd all like to think that we don't judge on looks, we do. And we do it in an instant.

That's not to say that we can't or shouldn't strive to overcome our prejudices. Of course we should. Can't you just hear your mother reminding you that the oddball in your class could be the coolest person you'll ever meet?

But you don't want to make your learners cross their fingers in hopes that your content will be good—despite its awkward appearance. In fact, you want to do the opposite: use appealing visual design to entice your learners. You want them to think, "Wow, this course looks really cool."

The truth is that even if your content is Pulitzer-worthy, your learners will find it difficult to be engaged if your course doesn't appeal to their visual senses. You wouldn't believe how many learners tell us that a majority of their organization's courses look unappealing and uninviting. They also admit that when courses look bad, they seem like a waste of time. In short, they judge the content by the design.

Now the good news: you don't have to be a visual designer to build beautiful courses. Let's look at the key ingredients to good visual design—color, contrast, repetition, alignment, and balance—and how you can apply them to your course.

### Color

Colors can evoke feelings, sometimes quite powerfully. As the famous artist Paul Klee noted, “Color is the place where our brain and the universe meet.” It's one of the first things we notice when we encounter something new, even if only subconsciously. A cerulean sea can slow your heartbeat. A red light can speed it up, yelling at our brains: “Pay attention to me!”

We also associate different things with different colors, and this can change by cultural context or personal experience. While you don't need to be a color scientist or psychologist to wield color effectively, you'll want to consider the importance of color in your course design, asking yourself what emotions or images your color choices may conjure for your learners.

To choose your course color scheme, consult a color wheel or tool like [Kuler](#). These make it really easy to select a palette that works well together. For example, you can create a sense of balance and harmony by choosing analogous colors, which are colors that sit next to each other



on a color wheel. Or, you can use colors opposite one another on the wheel for a contrasting (yet still complementary) color scheme.



### Complementary colors

On opposite sides  
of the color wheel



### Analogous colors

Next to each other  
on the color wheel

If you like the minimalist look, try building a monochromatic color scheme, which is composed of one base color and its shades. Monochromatic schemes are easy on the eyes, simple to create, and will never clash.

While a color wheel or a tool like Kuler is really all you need to build a coordinated color scheme, if you'd like to learn more about color theory, check out [worqx.com](http://worqx.com) or read [Understanding Color: An Introduction for Designers](#).

## Contrast

One of the hallmarks of good design is well-executed contrast. Using contrast can help you separate disparate parts, aid navigation, and direct a viewer's eye to what's most important. Without contrast, it's hard to know where to look, and that's both disorienting and unpleasant to viewers.

The most important rule to follow when using contrasting elements is to make them *really* different. The contrast should be immediately obvious. If elements are *almost* the same, but not *exactly* the same, it'll look like a mistake.

There are some really fun ways you can use contrast. Some are obvious, such as small shapes versus large shapes. But you can also contrast other elements of your design.

For example, try contrasting fonts. Perhaps use a sans-serif font for the text on navigation, and a serif font for text on your slide. The characters in serif fonts have small lines called serifs at their ends. Times Roman and Courier are well-known serif fonts. Sans-serif fonts don't have serifs, and include popular fonts like Arial and Helvetica.

You can also contrast patterns and colors. Try adding a pattern to some elements, while leaving other elements "smooth." To contrast color, you can use complementary colors, or contrast things such as dark, middle,

## Whitney Medium (47px)

A sans-serif font is perfect for clear headlines

## Archer Book (26px)

A serif font is easier to read, making it suitable for longer paragraphs

# Agreeing on an Agenda

It's not always easy to agree on an agenda. Sometimes everyone will want to have his/her say in a limited period of time.

As the meeting organizer, it's important that you prioritize the agenda items to make sure the most important things get discussed.

Using different font styles together creates contrast.

and light color values. You can even contrast intensity by choosing some pure colors and other muted colors. And, some colors are warm and some are cool. Play around with having one of each in your course color palette.



## Repetition

We've all seen courses that look like they were assembled from spare parts of 10 different PowerPoint presentations. Our e-learning guru, Tom Kuhlmann, calls them "Frankencourses." Each slide uses different fonts. Colors and images vary widely. Backgrounds are all over the map. You get the idea. It makes for a pretty chaotic learning experience. In fact, it can be so distracting that learners have a hard time engaging with the material. Not to mention that it breaks a fundamental design principle: repetition.

It's important to repeat design elements throughout your course. Repetition creates a sense of order and unity. A course with repeated elements will look and feel cohesive, while one with new elements on each slide will look and feel disorganized and chaotic.

Imagine a slide that has six different fonts, some similar, some widely different. Yikes! Now pare that back to two contrasting fonts. Perhaps one serif and one sans-serif. Much better.

So, before you start building out your course, define your key design elements—then make sure you consistently apply them. Choose your fonts, sticking to just two or three max. Use them in the same way throughout your course. So, for example, make all headlines the same font of the same size and weight. Then make sure every single headline in your course follows this style.



### A Chaotic Design

The elements on this slide use lots of different shapes, fonts, colors, and sizes, and are not aligned to each other. The design shares nothing in common with previous slides in the same course.

Do the same thing for color choices. Once you've picked a harmonized color scheme for your course, carry it through your course consistently. And don't use another color unless you've done so from the beginning.

You'll also want to decide on a style for graphics, images, icons, and other design elements. So things such as boxes, buttons, and arrows should share a style. Images and backgrounds should have the same feel.

If you're using clip art, make sure you use the same style to maintain consistency. It'll make your content look like it all belongs together.



## Consistent Style

All elements share colors, fonts, and a clean, flat design with subtly rounded corners.



## Inconsistent Style

Although some of these elements might look good in isolation, the different styles do not work well when used together.

Another way you can give learners a sense of order is to repeat patterns for organizing or presenting information. It gives learners visual cues

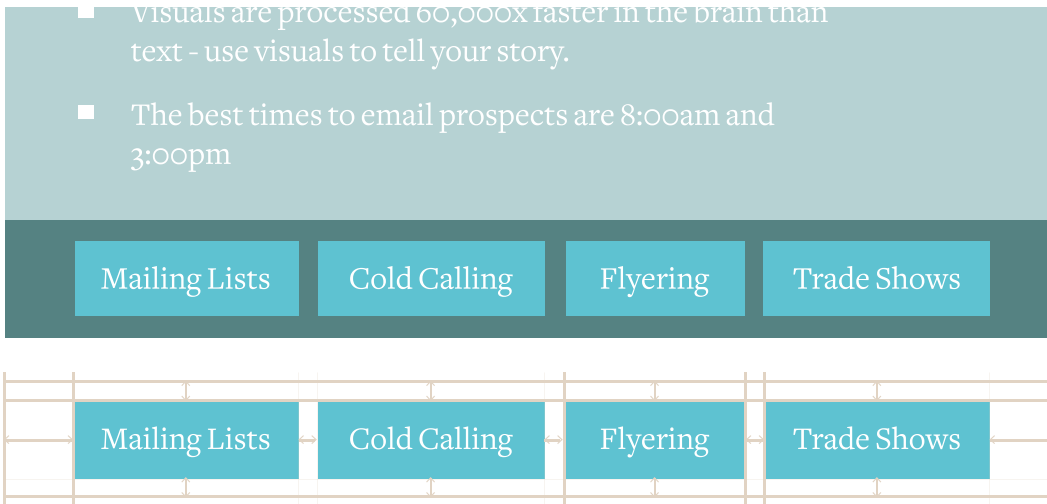
that help them understand how the course content fits together. So, for example, if you always use bold headlines to indicate a section and underlined text to represent lessons within that section, learners will begin to build a mental map of how the course is organized and what topics will be covered. And that gives them context for what they're learning.

## Alignment

If you're someone who can't walk by a crooked picture without straightening it, you're a step ahead when it comes to alignment, a critical design principle.

To create alignment, you not only want elements on your slide to line up, they should also be equidistant. That's not to say that every shape or thing on your slide should be placed in one line, but you do want to line elements up with *something*. They shouldn't be randomly spaced on your slide.

For example, say you place five tabs along the bottom of your slide to act as navigable menu items. You'll want to align your tabs horizontally and vertically on the bottom of the slide, with the same amount of space between each. If they're off by even a little bit, your navigation will look all wrong.



## Proper Alignment

The tabbed navigation looks right because everything is consistently aligned and spaced.

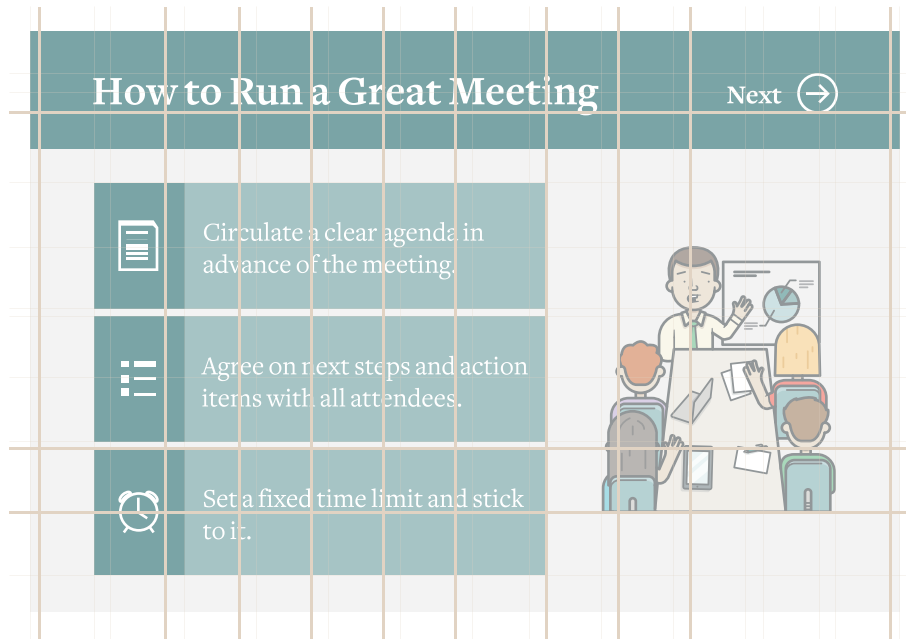


## Misalignment

Even though the second tab is just a little taller, lower, and further to the right than it should be, it instantly looks wrong.

And don't trust your eyes to line things up. Use drawing guides or a grid to check the alignment and spacing of all of the elements on your slide.





**The layout is based on a 12-column 960px grid.**

Note how the items also have consistent vertical alignment and spacing.

## Balance

Another critical principle you'll want to consider when building a slide layout is balance, which is the equal distribution of visual weight.

A lot of things can determine an object's visual weight. Some are obvious, such as size. A large object feels heavier than a smaller object. It can get tricky, though. A small object can actually balance out a larger object, depending on their relative positions. You can balance a large object near the center of your slide with a smaller object placed near the edge of it.

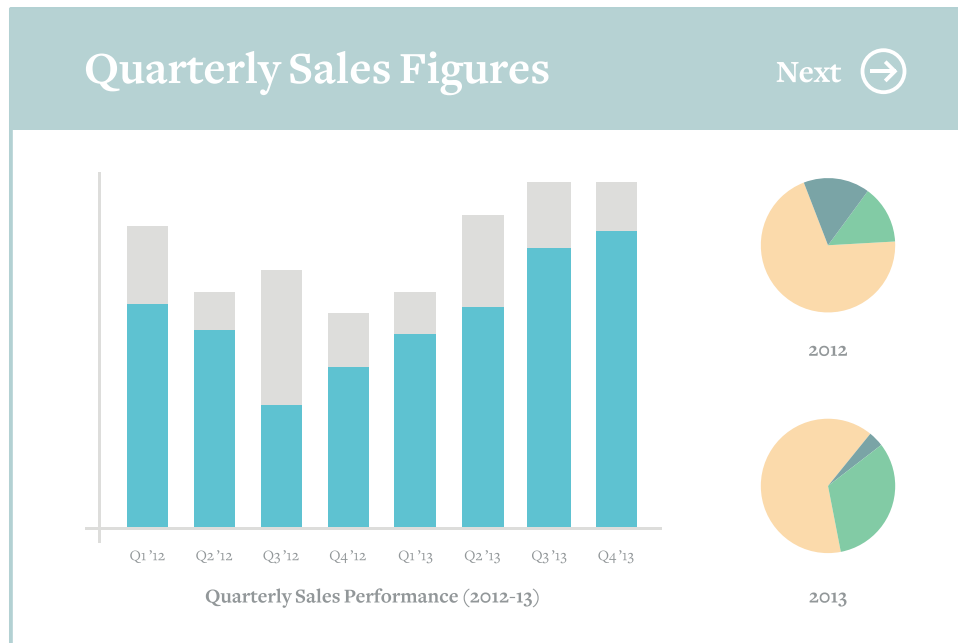
Color, value, and texture also play a role in visual weight. Brighter, more intense colors feel heavier, as do elements with complex texture. Dark objects are heavier than light objects, and a bunch of small objects can balance out one larger object.

You can balance elements on your slide in a couple of different ways. Balance items symmetrically by dividing your slide in half and then repeating the same exact compositional elements on each side, like a mirror image. Or, you can achieve radial symmetry by placing elements equally around a central axis (clocks and sunbursts are radially balanced). While easy to build out, symmetrically balanced designs can feel a bit boring. If every slide in your course were symmetrically balanced, you'd start to lose your learners' attention a few slides in.

You'll build a much more visually engaging course if you include plenty of asymmetrically balanced slides, too. Asymmetrical balance is much more interesting and gives you lots of creative freedom.

Instead of doing carbon copies of each element (like you do with symmetrical balance), you achieve asymmetrical balance by balancing different elements that have the same visual weight. So, for example, if you have one large shape on one side of your slide, you might place several smaller shapes on the other.

Play around with how differently sized, shaped, colored, textured, or spaced objects impact visual weight. You'll want to build layouts that not



## Assymmetrical Balance

The large chart on the left is balanced by the smaller pie charts to the right.

only are balanced, but that direct a learner's attention to what's most important.

## Style

We've covered the basic principles of good design, but how do you build an engaging design that fits your course's topic or industry? Chances are, you probably already have an idea of what it should look like.

Imagine that you're hired to develop a western movie poster. By the time you finish reading this sentence, you'll probably have a picture in your mind of what that poster should look like. And everyone who reads this

e-book probably conjures a pretty similar mental picture. Western font. Lots of brown. Cowboys and horses. Cactus and tumbleweeds. Not far off, right?

Now what if you saw a poster for a western movie that completely defied this mental picture? Say it used a modern-looking font, made ample use of pinks and yellows, and featured children wearing leotards. Your mind would rebel: “That’s not a western movie!”

The trick is finding a look for your course that fits your learners’ expectations. You want to set the stage appropriately for what they’re about to learn.

Your course will look like *something*. It’s your job to figure out what that something is. Tap into your own ideas of what a particular topic or industry “looks like.” Ask yourself, What colors do I associate with this topic? What types of fonts come to mind? What do the characters look like and what are they wearing? What kind of environment makes sense? Are there certain props, scenes, or images that are common to this topic or industry?

You can test yourself by pretending that you’re building a workplace safety course. What design elements do you think of as being safety-related? Now imagine that you’re building a course on IT security. How would those design elements differ?

If you're still not quite sure what look you want, look for inspiration. The web puts amazing design right at your fingertips. Visit ad agency and graphic design sites, and peruse the portfolios of leading designers on [Dribbble](#). Check out e-learning courses developed by firms known for their design excellence, or look at templates designed for specific industries or topics. You also might want to visit [E-Learning Heroes](#) regularly, as e-learning pros in every industry regularly post inspirational examples there.

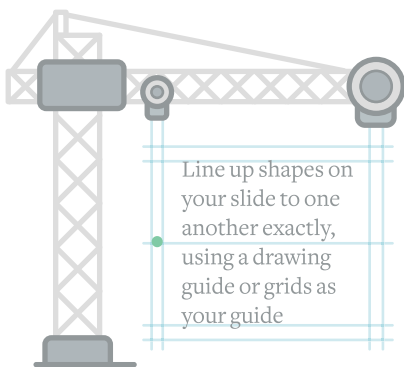
In your quest to build beautiful courses that delight your learners, beware the temptation to throw in images just because they look pretty. Everything on your slide should support course objectives. Decorative graphics that don't reinforce the concepts you want to convey can actually impede the learning process—and potentially confuse learners.

## VISUAL DESIGN TIPS

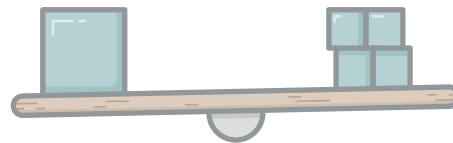


- Use a color wheel to choose your course color palette
- Colors next to each other on the wheel create balance and harmony
- Choose colors opposite one another for a contrasting color scheme
- Use a monochromatic color scheme for a clean minimalist feel

- Contrast shapes, fonts, and color values to separate disparate parts, aid navigation, or direct a learner's eye in a particular direction
- Make sure contrasting elements are really different; contrast should be really obvious
- Repeat design elements—fonts, colors, graphic styles—all the way through your course



- Create balance by repeating elements in a mirror image on both sides of a slide
- Achieve asymmetric balance by balancing different elements with the same visual weight; for example, balancing one large shape on one side with several small shapes on the other



- Check out the course examples on E-Learning Heroes to get inspired

# How to Add Meaningful Interactions



You've hooked your learners with compelling visual design. Now how do you keep them? You give them opportunities to actively interact with the screen throughout the course. They'll have a hard time staying passive when they're physically interacting with the content.

## Discovery

Entice your learners to take action by inviting them to explore. Not many of us can resist the urge to poke around a new environment; humans are naturally inquisitive. What do we do when we walk into someone's house for the first time? We take a look around to get a feel for what the person likes, how the person lives, and what we might have in common with them. Most of us wouldn't feel comfortable peeking inside a friend's cabinets without good reason. But we might be tempted to look because we might find something interesting or unexpected.

Build interactions that your learners want to explore, that entice them to discover content out of curiosity. For example, instead of presenting multiple slides full of bullets, create a single tab interaction that lets learners dig into content in any order they want. Not only do tab interactions invite exploration, they're great for consolidating a lot of information on a single slide. Would you rather click around on this screen mimicking an iPad application's interface or slog your way through a bunch of slides?



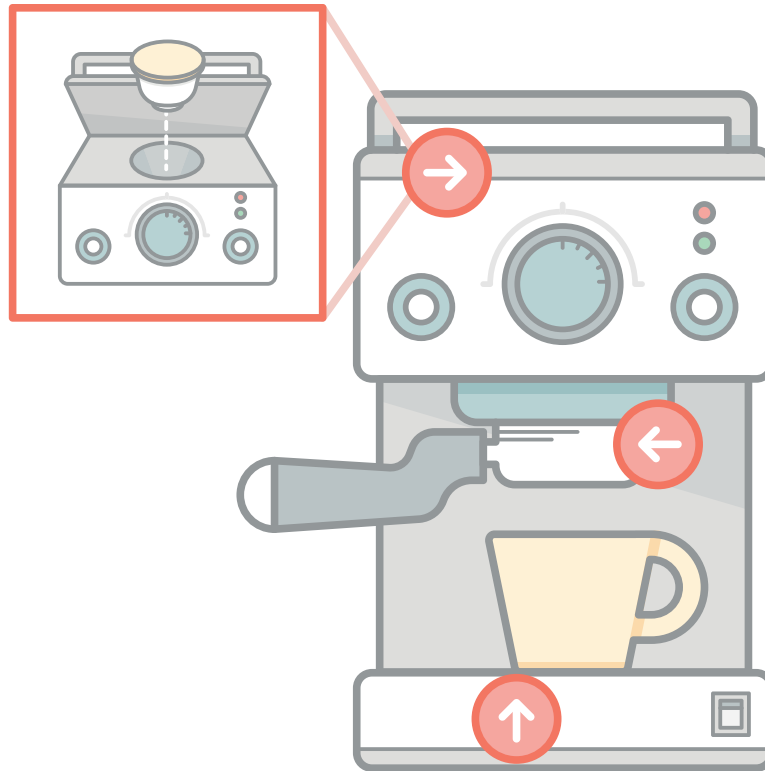


## Encourage Exploration

Learners click on the app-like tabs in this interaction to reveal content.

With the right e-learning authoring software, you can turn any image into an experience of discovery. For example, you could have items pinned to a bulletin board or sticky notes on a desk that reveal additional information when learners hover over or click on them. Or, if you need to train your sales team on a new product, you could add clickable icons to a product image like the one on the next page.

There will be times when you want to pair information with media to provide visual context. Or sometimes a video or photograph isn't the context, it's the main point. But perhaps you need to augment it with text. Media interactions make it easy to convey your message while keeping learners active, engaged, and inquisitive. You can build a media



Clickable icons make it easy for learners to get more information about elements on an image.

panel or media tour that learners click through in a guided way. Or, try [creating a media gallery in a lightbox](#) they can view without interrupting the flow of the course.

If you need to walk learners through a process, workflow, or procedure, process interactions are a great alternative to bullets or paragraphs of text. With a process diagram, you reveal steps one at a time, letting learners consume the information in a sequential way. They control when they're ready to move from one step to the next.

### How to Make a Winning Sales Call

Step 2 - Greetings

Greet the customer by name.

Make a connection - ask about them, their company, their family etc.

Establish context - remind the customer of their current relationship with our company.



Hi Elaine, it's Matt calling from Widget Co. How's your day going?

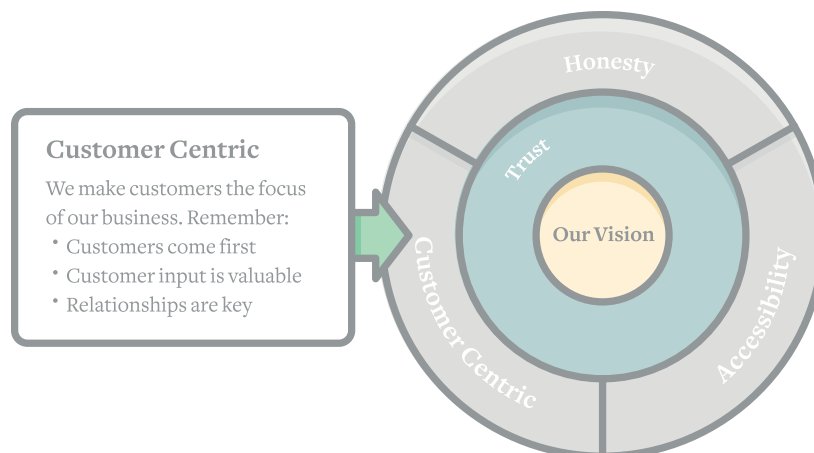
1 2 3 4 5

PREV NEXT

## A Sample Process Interaction

Information is broken down into a sequence showing one step at a time.

And to convey relationships between concepts, try an interactive diagram. For example, you might use a segmented pyramid that lets learners explore hierarchical relationships or a circle diagram that lets them investigate interrelated ideas.



## Questions

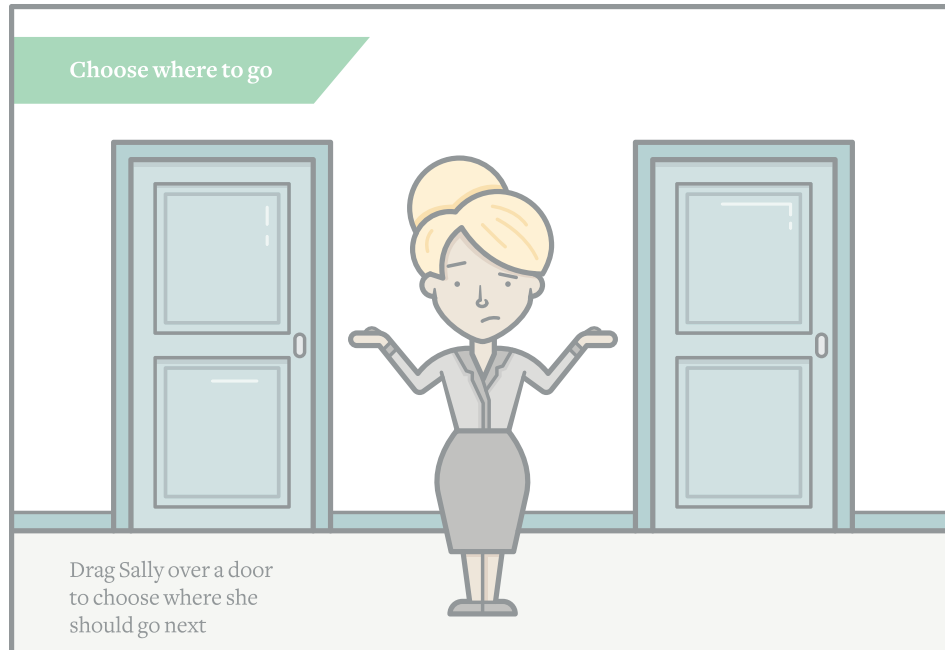
Ask any expert conversationalist and they'll tell you that the secret to engaging people is asking them questions. (Don't you wish you knew that trick when you were 14?!)

By asking learners questions, you connect them to the content. What do you think, learner? What do you want to do? How would you solve this? Now they're personally involved.

You can use questions in any number of ways to lure learners. You can ask questions that impact what content the learner sees next. Add a knowledge check that reinforces key concepts. Or ask them to do an activity that lets them practice new skills.

Depending on your authoring tool, you'll have a range of assessment types to choose from. We love freeform interactions—such as drag-and-drops—because they let you turn pretty much any objects you want into a question.

For example, it's easy to use a drag-and-drop interaction as a navigation/branching tool. Ask a question like, "Which department should Sally visit to learn more about our company's new data security policies? Drag Sally over a door to choose where she should go next."



Or you could use a drag-and-drop to ask learners how they'd solve a real-world problem—or do an activity required in their jobs.

For example, a course for hospitality professionals could include a table-setting exercise where learners place utensils and other items where they belong on a table. [Watch this short video tutorial](#) to learn how to create an interaction like this with Articulate Storyline.

With the right course authoring tool, you can add interactivity to any objects, media, or characters you want to create any type of interaction you can imagine. But resist the urge to add interactivity for novelty's sake. While gratuitous interactivity might engage them the first time they see it, if your course is filled with unnecessary clicks, drags, and mouseovers, learners will start getting frustrated.

## Problem-Solving

One of the ways you make interactions feel meaningful—and not just gratuitous—is to make them relevant to the learner’s job or experience.

Remember, many of your learners don’t choose to take your course. It’s more likely that they’re required by law, corporate policy, or an academic program to complete the e-learning module (with flying colors, of course). And, let’s face it, you might be asked to create a course on material that’s not inherently exciting. And no interaction on its own can make up for that.

So, how do you draw in reluctant learners, especially when the content isn’t naturally stimulating? Ask your learners to solve problems that they might actually face. They’ll need to think about the information they’ve learned, and make decisions based on their new understanding. And if you introduce new facts throughout the scenario, they’re more likely to retain them because the information is immediately meaningful. Pepper your scenario with interactivity that’s natural to the situation, and presto! You have a winning combination.

## Contextual Relevance

Create a problem that’s contextually relevant to your learners, so that they’ll feel like they have a stake and will be motivated to solve it. And, if you can, add an emotional component. The key is to tap into the reason

the course content is important to the learner. What's in it for them? Why do they need the information? What do they have to gain? Or, what's at stake if they don't learn it? In short, what's the personal impact of this kind of decision?

For example, say you're developing anti-discrimination training for managers at a bank. Instead of a bunch of bulleted slides, what if you presented a scenario where an employee reports a troubling interaction with a colleague in another department? Perhaps the bank just settled a discrimination suit for hundreds of thousands of dollars, so management's feeling particularly sensitive about missteps. With this type of realistic (and high stakes) situation, you can help learners internalize why the training matters.

Keep in mind that any scenarios you use should tie directly to your learning objectives. What do you expect learners to know—or be able to do—by the end of the course? How will you know if they've met those expectations? If you're not clear on the performance requirements, you can't create scenarios that help learners meet them.

## Decision Points

Once you've defined the circumstances of your scenario, you'll need to create interactive activities and decision points where learners can apply what they've learned—or learn what they need to know to solve the problem. Each decision should force understanding, or the need to gain it.

This is where subject matter experts can help. Ask them to share different experiences and possible outcomes. The more nuanced and loaded the situation, the more your learners will need to think through how to apply information. In the real world, decisions are rarely clear-cut and correct choices aren't always obvious. Sometimes there isn't a correct choice at all, just different consequences. So when you're building a decision point, offer realistic, nuanced choices that actually force the learner to think.

While you don't want to try to trick learners, you can throw in some choices that are somewhat right and somewhat wrong, and ask the learner to pick the best one. You can then address nuances in the feedback. And when you don't have a clear-cut right decision, you can create other situations that highlight what's wrong with each choice.

For example, for that anti-discrimination training, you could ask managers to decide what action to take immediately after learning of the incident:

- Notify the human resources (HR) and legal departments of the potential problem.
- Research the incident further and discuss a course of action with the accused's supervisor.
- Try to facilitate a resolution between the two employees.



None of these is wrong. But none is totally right, either. So learners must think through the potential outcomes of each, which keeps them completely engaged.

### Consequences

If you've ever read a *Choose Your Own Adventure* book, you already know how compelling it is to play the hero. Because you make the decisions that determine the outcome, you're invested in learning what happens next. You're drawn into the story.

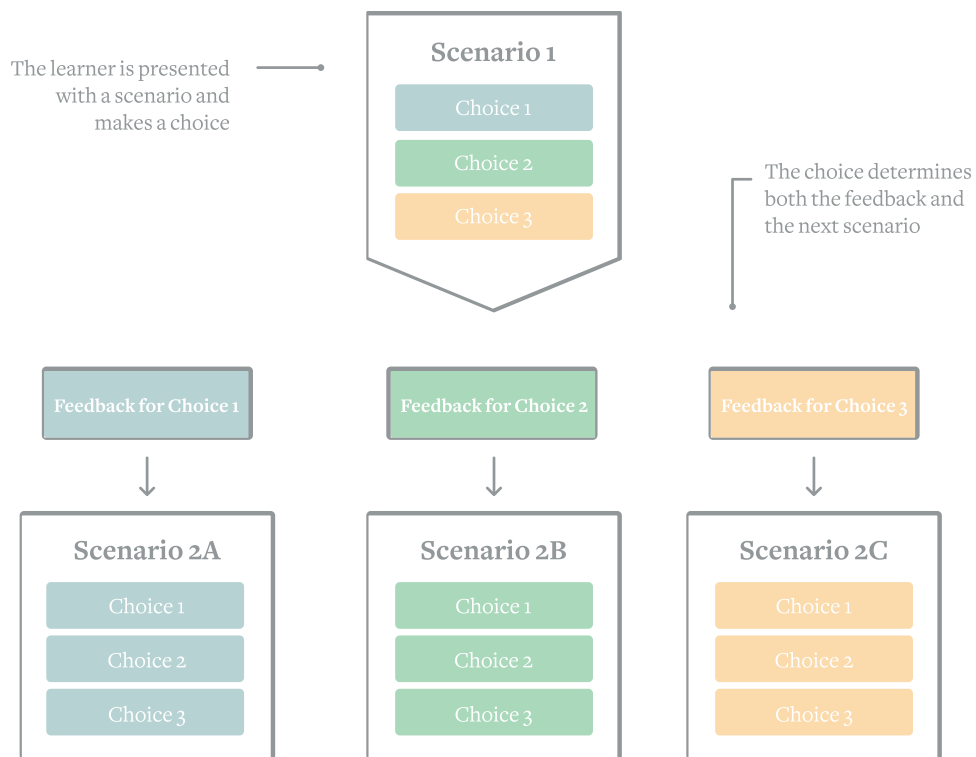
The same is true for decision-making scenarios. They let learners explore the consequences of their actions and wonder, "What happens if I choose this?" The point isn't for learners to get it right the first time. It's to let them explore consequence, to "play" with what might happen if they get it wrong.

With each choice they make, you can provide feedback that deepens their understanding of the material or reinforces key concepts.

Or, instead of providing feedback and stopping there, you can let each decision drive a new twist in the scenario. Let's look at the anti-discrimination training again.

If learners choose to immediately notify the HR and legal departments of the potential problem (and thereby delay addressing the issue),

you could present a second scenario in which the harassed employee becomes frustrated at the inaction and threatens suit. Learners then must navigate another set of challenges.



The experience adapts to the learner's choices.

If they choose to research the incident, you could escalate the situation. Perhaps the incident starts infecting office culture as both parties start soliciting support from other colleagues. Suddenly, there are multiple people taking sides, each sidetracked from their core jobs. What should learners do next?

Also, if learners try to facilitate a resolution between the two employees, they could find themselves in hot water with both HR and legal.

Now what?

Just be careful not to make the scenarios so difficult that they give up. It's no fun to feel like no matter what you do, you'll never get it right. And remember to build realistic scenarios and consequences so that learners can see how they connect to their own jobs.

In this [well-done decision-making scenario by Elearner Engaged](#), Sam is on the verge of quitting his job because his co-worker Emma won't stop acting inappropriately with him. As the learner, you have to decide how Sam should respond to Emma with each new overture. What could be wrong with opening a jar of pickles for her? As Sam discovers, one thing can lead to another, and before he knows it, Emma's cornered him into an after-work drink. Unable to deal with her, Sam decides to quit a job he otherwise loves. Make different choices for Sam, and he'll set clear boundaries with Emma that let him find peace in the office—and keep his job.

The scenario expertly presents nuanced choices, then shows the consequences of each decision Sam makes. Because the scenario is so emotionally fraught and you're put into the driver's seat, it's impossible not to be fully engaged. And if you get the sad result that Sam quits, the course invites you to try again, letting you explore how different choices impact the outcome.

## Overcoming Objections

If your subject matter experts or clients question whether scenario-based learning is an effective way to convey voluminous content, you can assure them that there are many ways to share key material in a scenario-based course. You can:

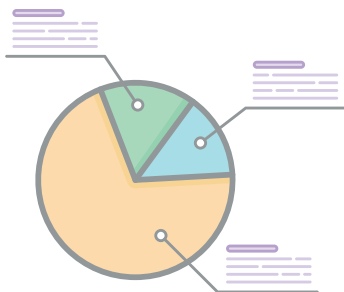
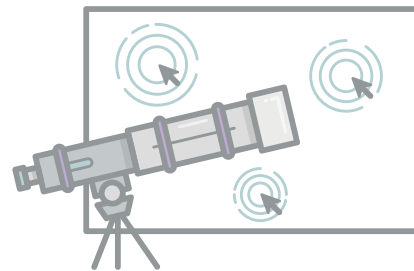
- **Create information-rich, decision-making points.** For the anti-discrimination training, you could provide details on a relevant anti-discrimination law when you set the stage for the scenario. “In 1991, the U.S. government passed a civil rights law that states...”
- **Add resources or help links that learners can access if they need more context or information to make decision.** For example, you could provide links to a FAQ on your course player that detail key portions of anti-discrimination laws.
- **Use characters to provide helpful information.** So you could let learners click on an HR manager to hear audio or watch video of a real person explaining what behavior is considered discriminatory.
- **Create a virtual guide.** This could be a character or simply an interactive element you make available throughout the scenario. Learners could click on it to get tips and clues any time they need help.

- **Respond to decisions with content.** When learners make a choice, it's an opportunity for information-sharing. When you provide feedback on their decisions, you can add content that underlines why each choice is a good one—or why it falls short. “That’s not a good choice because the current law requires...”

Whenever you build scenario-based learning, remember to “keep it real.” The most engaging scenarios are those learners can relate to in a personal way. If you’re not sure whether the situation you envision is realistic, poll learners and subject matter experts about how and when they’d use the course content.

## INTERACTION TIPS

- Let learners explore content on a slide in any order they want
- Use tab interactions to consolidate a lot of info on a single slide
- Use interactive diagrams to let learners explore hierarchical relationships
- Create interactions that let learners solve realistic problems they might actually face



- Turn images into experiences of discovery by adding click-and-reveal interactivity
- Try process interactions to walk learners through a process, procedure, or workflow
- Connect learners personally to the content by asking them what they think or would do

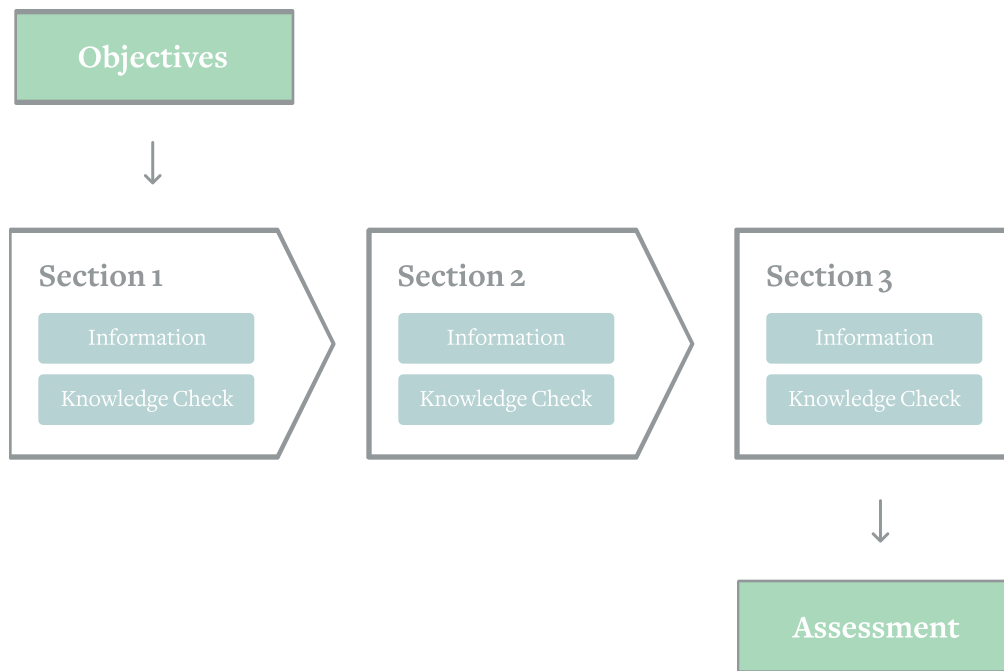
- Create realistic decision-making scenarios using free-form and drag-and-drop interactions
- Give learners nuanced choices when building interactive scenarios, and use feedback to reinforce key concepts
- Create scenarios that are realistic and have high stakes
- Sequence decision-making interactions so learners face additional challenges or consequences for each choice they make



# How to Let Learners Pull Content



Many e-learning courses follow the same structure. They start with an introduction that explains the course objectives. Then they'll have a few sections of content, sometimes with a knowledge check at the end of each section. And at the end of the course, there's a final assessment. It's a very linear, perfectly logical structure. It's all about pushing information to the learner, then testing to make sure they got it.



A typical course structure.

It's a serviceable approach, especially if you're not tying any real performance requirements to the course. That is, you need learners to know something, but you don't expect them to apply it in any particular



way. For example, let's say your company is rolling out a new sales compensation structure and you're building a course that details the specifics for the sales team. You don't need them to do much more than just "get" the information. You might include a quiz at the end only to make sure sales folks actually complete the course. It doesn't really matter whether they truly understand the material. They won't need to use what they've learned in their jobs, so that's okay.

This kind of course is all about pushing out information. The focus is on the information itself. The best courses of this type have compelling visual design, good content, and smart interactivity that keeps learners engaged. But unfortunately for learners, they're often tedious.

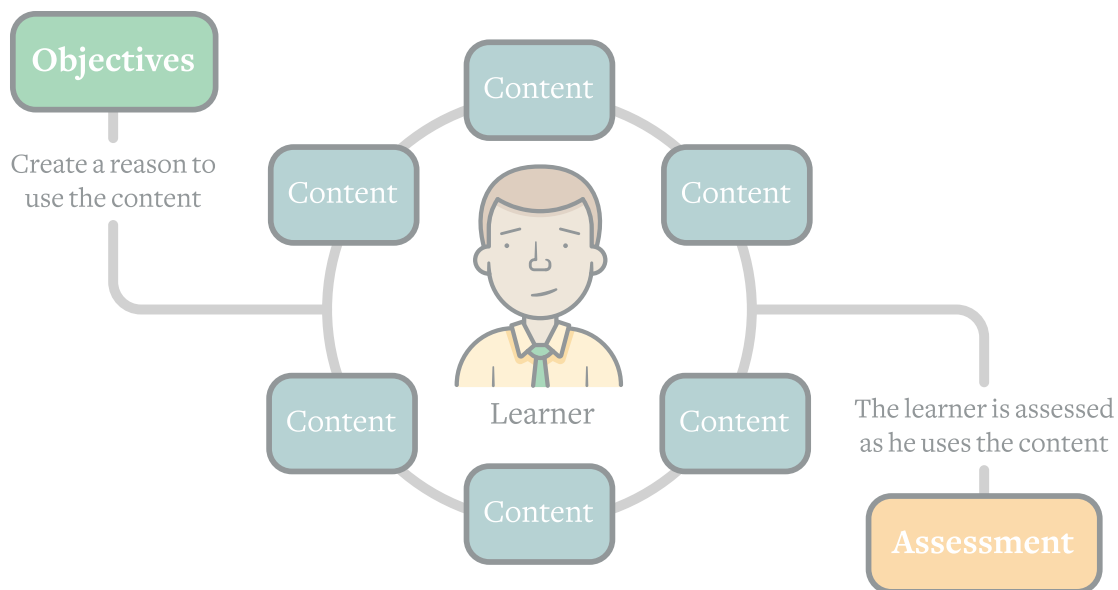
## The Pull Structure

Luckily, there's a more engaging alternative. Don't give learners any upfront information. Yep, that's right. Just throw them into a decision, and let them explore to find what they need. In many cases, this approach will challenge learner assumptions and misunderstandings, which is always a good way to make them think and keep them engaged.

Instead of force-feeding or pushing all the information every possible learner could ever need, build interactions that give learners control over what they see. If they don't need the content, they won't pull it. How much better for them! They're not forced to sit through something they already know. You're letting them explore in a natural, inquisitive

way to find what they haven't yet learned. And you're giving each learner a unique learning experience; one that they shape based on what they know, and what they don't.

With this approach, your course structure might look more like this:



The learner pulls the content

In some cases, the learner might not choose to pull all of the content. Let's say you're training a team on using the latest version of PowerPoint to speed their production times, and you have three videos that walk through a few key time-saving tips. In the "push" model, you'd make learners watch each one (and in a specific order), whether they need them or not.

But if you take the “pull” approach, you don’t force learners through a defined path. They determine the value of the information and control its flow. And it doesn’t matter if they don’t always pull the right information, or the information that would help them most, because you can give them the right information through feedback.

## Meeting Learning Objectives

To build a course where learners pull information, you need to first understand how they’d use the information. And how do you figure that out?

It’s actually pretty simple. Look to your learning objectives, which are simply the knowledge and skills you want learners to gain as a result of taking your course. If you don’t have any yet, create them before you do anything else. Not only are they helpful for building a pull structure, they’re essential to creating a course that delivers the results your client wants.

You can define learning objectives in three easy steps. First, think about (or ask your client) what learners need to be able to do with what they learn. Avoid vague words like “know” or “understand” and instead describe the tasks or actions you want them to perform after completing your course.

Next, identify your learners. Are they managers? New employees? People in a specific department or role? Target your audience as narrowly as possible.

Finally, define the knowledge or experience learners need to take your course. This is the instructional starting point. Knowing this helps you avoid missed assumptions about what learners already know or need to know.

So if you're creating a course for mortgage company employees on how to properly process FHA loans, your main objective might be: Teach loan officers (your learners) how to process FHA documentation to acquire proper loan qualification (the specific task they must be able to perform post-training). You might note that you expect loan officers to have experience processing other types of loans.

From here, you might have sub-objectives such as:

- Train loan officers to identify correct documents required for FHA loans.
- Train loan officers to identify credit requirements for FHA loans.
- Train loan officers to identify employment requirements for FHA loans.

Once you have really specific, performance-oriented course objectives, it's easier to design a pull course structure. Your primary job is to design

reasons for learners to pull the content they need to meet the learning objectives. And in your learning objectives, you've already defined what specific tasks learners need to be able to perform.

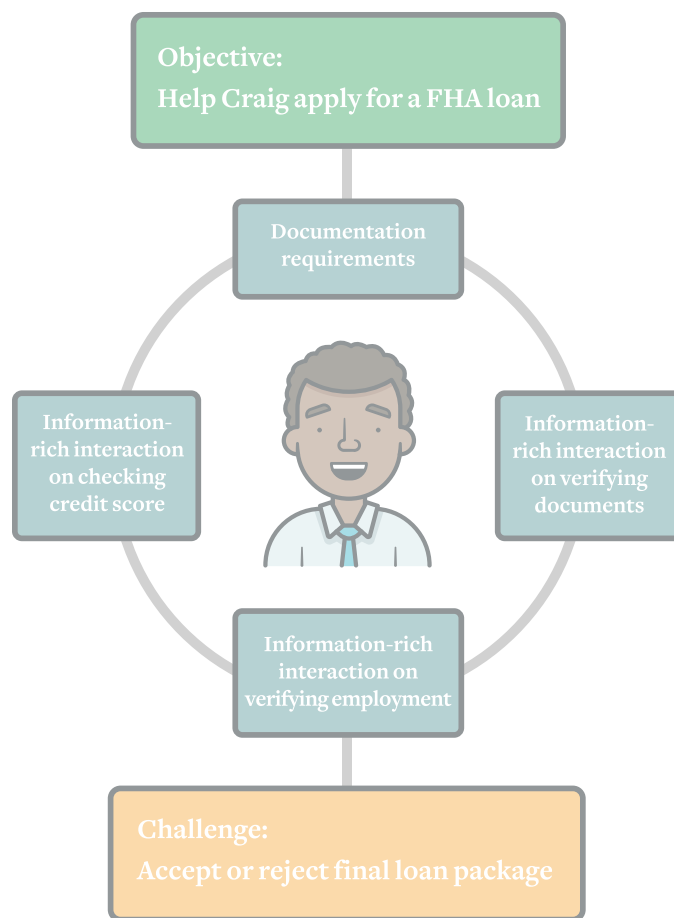
So why not build a case study or realistic scenario based on this task? If your learner doesn't know how to do a step in the tasks, they'll pull the content they need to complete it.

Let's go back to our FHA training example. Remember, the learning objective is to teach loan officers to process FHA documentation to acquire proper loan qualification. Our sub-objectives are to train them to identify correct documents, credit requirements, and employment requirements.

To create a pull course structure around these learning objectives, simply build a scenario that mimics what loan officers would do in their real jobs to process an FHA loan application. You could build interactions for critical steps in the loan application process, where learners would need to do things such as:

- Identify questions to ask the loan applicant
- Label required elements on a document
- Run a credit check and decide whether the score meets requirements
- Fill out an employment verification checklist

For each interaction, you'd include opportunities for learners to pull information they need to complete the task. For example, you might include a link to a lightboxed FHA employment requirements FAQ on the employment verification checklist interaction.



## Locking Navigation

You might be thinking, “Wait a minute! If I let learners pull whatever content they want instead of locking the navigation in a linear path, how will I know they’ve met the course objectives? How will I know they’ve seen all of the content?”

You’ll undoubtedly hear this objection if you go down the “pull” path. And there’s a great answer to it.

The ultimate goal isn’t forcing learners to look at slides. It’s making sure they can do something or understand something. So you don’t lock the navigation. You lock decision points where learners demonstrate their understanding. Thus, they’re free to move around the content however they want, but they can’t get past that decision point until they prove they have a firm grasp of the material.

## COURSE STRUCTURE TIPS

- Find out who your learners are and what tasks they must be able to perform (learning objectives)
- Create a scenario that mimics the tasks defined in your learning objectives
- Drop learners into the scenario without any upfront information
- Build interactive tasks that let learners pull information if they need help
- Don't make learners consume every piece of content on a slide before moving on
- Lock navigation at decision points to assess learner mastery of content





# How to Engage More Senses with Video



If you have kids between the ages of 6 and 12, you know all about the Rainbow Loom. It's a kit consisting of a plastic pegged board, a hook, and hundreds of teeny rubber bands that little fingers transform into colorful bracelets—and then slip onto every available wrist they can find. When your kids master bracelets, they move to peace signs, flowers, spiders, beetles, panda bears, turtles, coke bottles.... you get the idea. And what do they do when they want to learn how to create something new? They watch a YouTube video.

There's no doubt that it's much easier to learn how to weave a caterpillar on the Rainbow Loom by watching a video than it would be to read an instruction manual, even one with pictures. In fact, it's probably the prevalence of such videos that's helped stoke the Rainbow Loom craze. Videos make it simple and fun to learn new things.

Once upon a time, creating a video for an e-learning course would have been cost-prohibitive and time-consuming. But that's no longer the case. If you have a fairly new smartphone, chances are you can shoot HD video. You can record screencasts for free on sites like [Screenr](#). And you can download free, simple-to-use video editing software. You no longer need a gaggle of experts and months of production time to create engaging videos and screencasts.

How-tos aren't the only lessons better given by video. If you need to teach a soft skill—such as collaborating with people who have different points of view—words on a slide simply don't suffice. They can't convey

the subtleties of body language and facial expressions that play such an important role in human interactions.

Video is also a great way to hook your learners emotionally. Humans are social creatures, so we're more invested when we learn from another person. Personalize your content with a real person, and you'll have an easier time keeping learners engaged. This can even work for things like software training. Imagine [recording webcam video along with a screencast](#) using a tool like Articulate Replay. You could then personally guide learners through the software.

## Equipment

Now let's talk about how to produce a good video. The first thing you'll want to do before you start recording a single frame is invest in an [external microphone](#), because bad audio will ruin the best video ever produced. That doesn't mean it needs to be expensive. You might even already have one: your smartphone.

You can also use your [iPhone](#) or other smartphone with an HD camera as a camera. Just be sure to clip it steady so you don't record shaky video. If you're recording webcam video, then invest in an external HD-quality webcam. You can easily buy one for under \$100.



We use gray background paper for many of our videos. It instantly gives your videos a pro feel. You can buy a roll of seamless solid color background paper for under \$50.

Last, but not least, you'll want to invest in some lighting. You'd be amazed at what a difference it makes. Don't worry, you don't need to start calling video supply stores. You can [find everything you need at Home Depot for under \\$100](#). If nothing else, turn off any overhead lights and use three other well-placed light sources instead.

If you want more tips on producing great video, watch [these short, entertaining, and super helpful videos](#) from Wistia.

## Environment

In an ideal world, you'd record in a studio or other controlled environment. But, in reality, most of us don't have access to a dedicated recording space. So here are some tips for creating your own recording space.

- Turn off A/C and fans, office machines, and notifications on your computer if you're recording on a webcam.
- Film in a conference room or an office with a closed door.
- Avoid empty rooms, though, as sound can bounce around and create unfortunate echoes.
- Don't sit in a squeaky chair.
- Turn off anything that rings or flashes lights. Better yet, remove them from your environment altogether.

If you're doing a screencast, you'll want to do a dry run to make sure that all of your screens are set up. If you need to jump from one application to another, you'll want to have them all open and sized to the recording window. And if you plan to add assets or files during your screencast, make sure they're in a single folder that you can access with a few clicks.

## Preparation

You've set up the right equipment, your environment is ready. You're ready to roll, right? Not quite. Do you know what your message is? Do you know how you'll tell the story? While you don't need to memorize a script word-for-word, you should have an outline of the main points you want to cover. If you're filming someone else, you can prompt them with questions to cover the right points. If you're recording webcam video, try taping a bulleted outline to the side of your monitor so that you can see it while you're recording.

Finally, loosen up. The best videos look and feel natural, as if the camera isn't there at all, and we're just having a conversation. Some people have no trouble acting natural in front of a camera, but most of us turn into mannequins as soon as we know the camera's rolling. If you're going to be the one on camera, banish the editor in your head and try to just have fun with it. Be yourself. People like authenticity. And if you let yourself just be you, it'll come through. If you're filming someone else, do what you can to make him/her laugh and take the whole thing less seriously.

## Special Tips for Screencasts

Not all videos involve people. In fact, in e-learning, you often just need to record onscreen actions, like you see in software training. These are called screencasts. Whether you're using [Screenr](#), [Articulate Replay](#), or

some other screencasting tool, here are a few tricks you can use to record better screencasts.

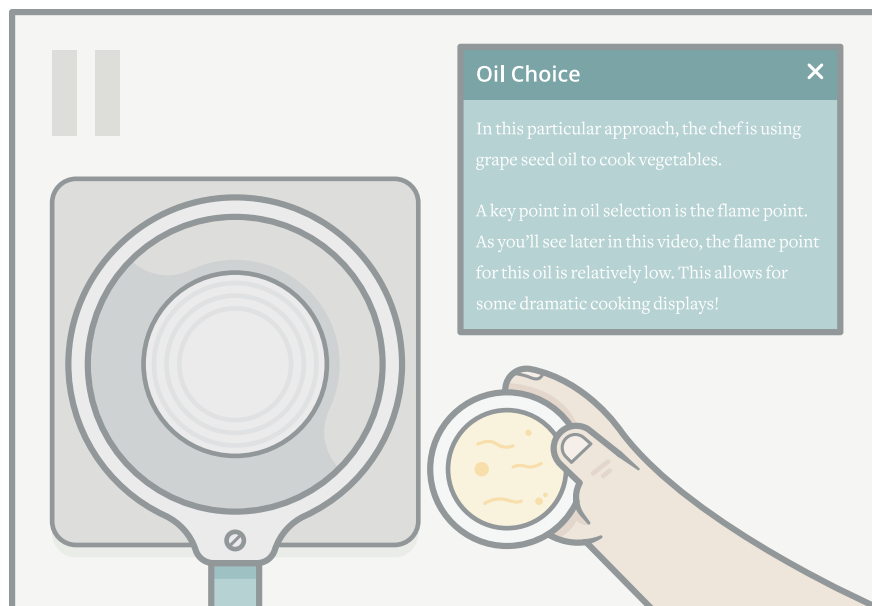
- **Tell your learners where they should be looking.** Don't just assume they'll follow your mouse. Explain each action as you take it. For example, "Now I'll insert a new slide by going to the menu and clicking 'Insert' and then 'New File.'"
- **Restrict the visual field.** Frame your recording window so that you're only showing what you need to show. Everything else is just a distraction.
- **Hide personal and proprietary information.** The easiest way to do this is to create another user account on your computer that you use only for screencasts. That way, you don't need to worry about hiding personal information such as folders or toolbars in your browser. Choose a solid background color for your desktop. Photographs and other images will just distract the learner.
- **Keep your mouse "quiet."** You don't want to inadvertently move your cursor all over the screen while you're talking. It's distracting and annoying to the learners. When you're not deliberately showing something, your mouse should be still. The best way to keep your mouse quiet is to remove your hand from it when you don't need it.
- **Select the right aspect ratio.** Screen recorders such as Articulate Replay and Screenr will let you choose the aspect ratio for your video. You should match the aspect ratio of your course slides.

- **Use the pause feature to create a better flowing video.** If your screencasting tool allows it, pause your recording if you have to click on buttons and open other screens during your demos. It'll let you set up your screens without distracting learners and will look more polished.

## Interactive Video

Videos are great by themselves. But what if you could add explorable content to your videos? Even better! By adding interactivity, you turn a passive activity into an active one. You deepen your learners' engagement—and create opportunities to go deeper into the content.

For example, say you've developed a video that demonstrates cooking techniques. You could add icons to the video at various points, letting





the learner click to pause the video and read additional information on the topic.

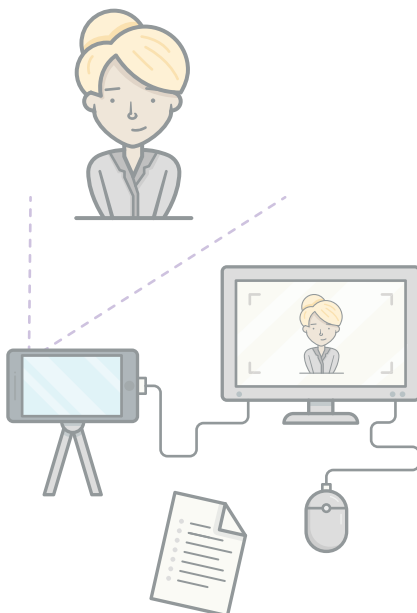
Or, if you've developed a video that shows a problematic interaction between co-workers, you could use interactive buttons to point out key points. "By citing Mae's age when criticizing her performance, Debbie not only puts Mae on the defensive, she breaks the law."

The video lets learners see what's happening, and the interactive elements let them drill into the topic if they need or want to. And if they don't need additional information, they can ignore the buttons or icons and just watch the video. This is a great way to provide two different experiences for learners with different levels of understanding. Experienced people can watch the video, while those with less experience can click on the interactive buttons to learn more.

So the next time you need to show learners how to do something, try creating a video with interactive icons instead of showing a slide of bullet points. [Watch this short video](#) to learn how to add interactive elements to videos using Articulate Storyline.

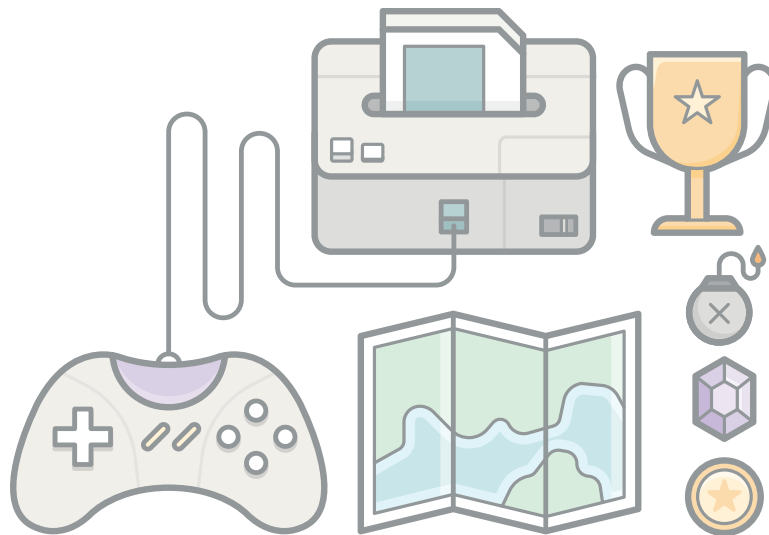
## VIDEO TIPS

- Prepare your speaking points before you record
- Buy an external microphone or use your smartphone
- Invest in an external HD-quality webcam (under \$100) or use your iPhone
- Use background paper to give videos a pro feel (under \$50)
- Invest in lighting; you can get everything from Home Depot (under \$100)
- Turn off environmental noise (fans, machines, computer notifications, etc.) before you hit record
- Use video for how-tos, software training, soft skills, or to simply connect learners emotionally



- Prepare your speaking points before you record
- Be yourself; people like authenticity
- Set all your screens up before you start recording a screencast
- Tell learners where they should be looking if recording a screencast
- Restrict the visual field to only what you want to show
- Hide personal or proprietary information
- Keep your mouse still unless you need it to show something
- Select an aspect ratio that matches the aspect ratio of your course slides
- Add interactive icons to videos to increase engagement

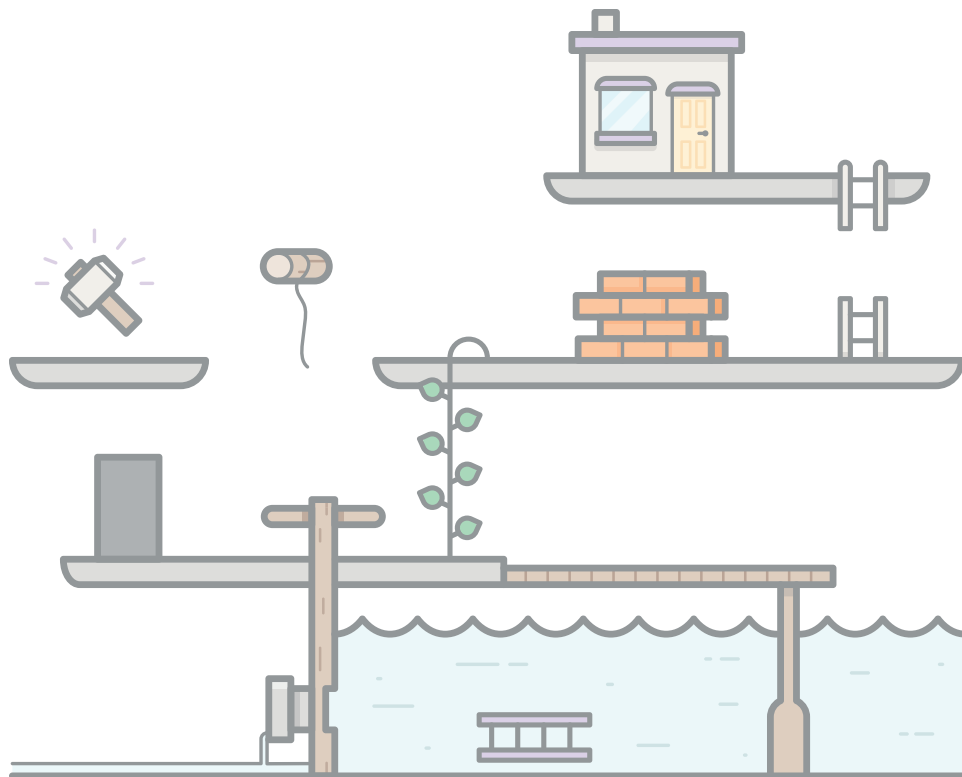
# How to Add Fun Gaming Elements



It's no small wonder that the gaming market is nearing the \$100 billion mark. People like games. They're fun!

But what about adding game-like elements to e-learning? Can they really keep learners engaged with the material, or do they distract focus from what really matters? Do they actually help people learn, or are they simply fun, throw-away activities? Is e-learning gamification a fad, or is it here to stay?

Depending on who you ask and what you mean by "game," you'll likely hear a range of answers. But no matter where you fall in the gamification debate, there's no doubt that games can help keep learners engaged.



Karl Kapp, author of [The Gamification of Learning and Instruction](#), explains that gamification involves crafting an experience where a **player** engages in a **challenge** and uses **interactivity** and dynamic **feedback** to make **decisions** and work toward a specific **outcome**. Sounds a lot like what we've been talking about throughout this e-book!

You don't need to build the next Minecraft to get your game on, which is a good thing since most e-learning developers don't have an army of artists, animators, and programmers at their disposal. E-learning authoring tools like [Articulate Storyline](#) make it easy for even neophyte e-learning developers to build everything from [simple word games](#) to [gamified scenarios](#).

## The Secret Formula

To gamify your course—or some element of it—you need to first develop a challenge. Most video games require players to solve a large problem by completing smaller challenges. Games, like life, are a series of puzzles and decisions. Break up your e-learning curriculum into small segments and gamify those segments with various decision-making activities. The best challenges tie back to your learning objectives. For example, in this [gamified course](#) on safety management systems (SMS), learners can only defeat the dragon by demonstrating knowledge of SMS.

Then, you need to give learners feedback. When players do something (anything, really) in a video game, their actions immediately result



in some type of consequence. Incorporate this idea into your online courses by letting learners know whether they're on the right track whenever they make a decision or complete an activity. If you're building a [gameshow-like course](#), a simple score is enough. You can add motivation by requiring them to “win” before they progress to the next level. Just like in video games, learners should take a hit when they get something wrong. People will play the game over and over to top their own scores—and they'll talk about what scores they got with co-workers in the hallways. Yes, they really will.

If you're presenting a scenario-based challenge, you can provide a much richer learning experience by explaining the consequences of a decision or branching learners to new challenges caused by their decisions. It's better to forgo scoring if you want to encourage learners to explore and take more risks. They're more likely to try things just to see what

happens—and that can let them uncover pockets of knowledge they wouldn't otherwise discover.

Finally, games reward players when they do well. In this simple [math game](#), they're rewarded by the monkey reaching the bananas. For a gamified scenario, they might be rewarded by reaching a particular outcome, such as saving their company from a massive fine.

Adding a game-like feel to the learning experience can be as simple as switching up the setting. Turn scenarios into quests, challenges into missions. Unleash your inner storyteller, and create some high drama. Throw learners into a crisis where the stakes are high, then let them discover a path to resolve it.

In multi-player games like World of Warcraft, players are encouraged to engage with others to complete quests and challenges. This makes the players feel like they're interacting with others and participating in something. Try creating a cast of characters that your learners can interact with throughout your course. Keep it interesting with a wide variety of characters, outfits, and poses.

You could even follow the video game practice of hiding secret codes and other “Easter eggs,” and send your learners on an Easter egg hunt. For example, when you first introduce your learners to the course, let them know there are 12 Easter eggs buried in your course and there will be a reward for the first learner who finds them all. Your Easter eggs can

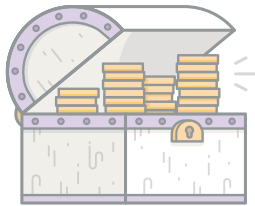
be earned for something as simple as getting all the answers right on a quiz. And your reward can be anything from a free lunch at the corporate cafeteria to a free copy of an e-book.

And don't be afraid to have fun. Which will your learners prefer: a click-the-next-slide course peppered with bullet points or an interactive mission to save the world?



## GAMIFICATION TIPS

- Break the course up into a series of challenges they must “win” to proceed
- Develop challenges that tie to learning objectives
- Give learners feedback every time they make a decision
- Use scoring to encourage repeat engagement with your course

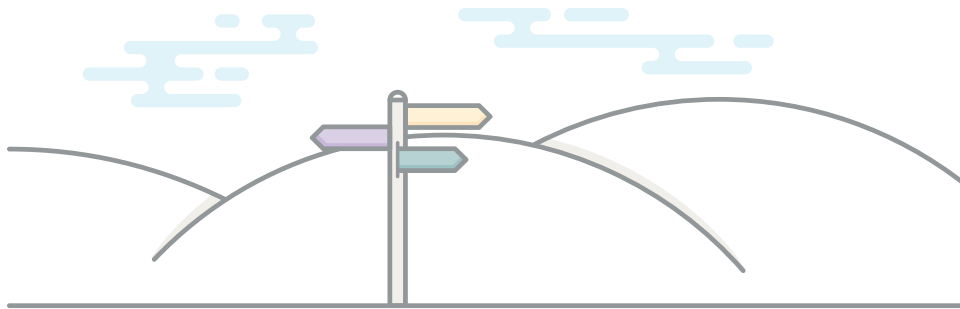


- Don't score learners if you want to encourage exploration and risk-taking
- Reward learners when they do well
- Use game-like settings: turn scenarios into quests, challenges into missions

- Throw learners into a crisis where stakes are high
- Add fun characters learners can interact with throughout their challenges
- Hide “Easter eggs” and give tangible rewards to learners who find them



# Where You Go from Here



We've covered a lot of material on how you can create more engaging learning experiences. We hope it's given you a good foundational understanding of where to start.

But we know that once you get into projects, new questions and challenges rear their pesky heads.

That's why we created [E-Learning Heroes](#), our community site of more than 100,000 e-learning developers. Visit often to find great articles, discussions, downloads, and other resources on everything e-learning.

If you enjoyed this guide, please feel free to link to it from your own site or [share this link](#) on social networks.

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