

THE **e**LEARNING DEVELOPERS' JOURNAL

Strategies and Techniques for Designers,
Developers, and Managers of eLearning

JOURNAL™

THIS WEEK — DESIGN STRATEGIES

What Is Personalized Learning?

BY MARGARET MARTINEZ, PhD

It is probably safe to say that most designers and developers are considering or exploring new perspectives on designing Web learning instruction and environments. Many recognize that conventional classroom designs may not always work for online learning. This can be especially true when an instructor is not around to stimulate motivation and continual learning progress.

How do you put personalized solutions similar to those that worked for classroom instructors into your online designs?

This article explores how to create a blueprint for more personalized online learning. Additionally, we will introduce an adult learning model to help you understand sources of the online learning differences that are the basis for the blueprint.

This model focuses on the dominant factors that impact self-motivation, self-directedness, and learning autonomy. It is based on research into the neurobiology of learning and memory, and incorporates the dominant impact of emotions,

intentions, and social factors, as well as cognitive issues. The model explores design of the online learning environment, online presentation of instruction, the role of the instructor, and expected outcomes. It also describes strategies to help learners improve online learning ability as they become more self-motivated, self-managed, independent learners.

The Online Learning Ability Gap

The transition of instruction from classroom teacher-directed to online user-

Continued on next page

The Learning Orientation Model is an adult learning view of the key sources for individual learning differences. The model portrays how three construct factors interact, and it suggests specific strategies for accommodating learning needs for online audiences. The model provides a missing link in the instructional design perspective — an understanding of the impact of emotions and intentions on how individuals want or intend to learn differently.

directed has not always been smooth. In the traditional classroom, students learned to depend (often too much) on instructors for their motivation, direction, goal setting, progress monitoring, self-assessment, and achievement.

In contrast, online learners find that they need to take greater responsibility for their own learning. But too many are unprepared or unwilling to do so. Perhaps this is because as adult learners their learning skills are the product of years of development and habituation in the classroom.

Designers must remember that most learners have had little time to acquire and perfect a satisfactory online learning ability. It is not surprising that completion rates in online courses are low, since the majority of today's solutions rely on traditional classroom design perspectives. Satisfying learners online and ensuring that they will capably finish courses, achieve objectives, and acquire new knowledge and skills is today's online learning challenge.

Whole Person Perspective

Meeting this challenge requires a better understanding of the psychological sources that influence an individual's online learning ability and how a learner may want or intend to learn. Specifically, the search for more sophisticated learning theories requires a better understanding of how the brain works.

In the past, explanations of differences in the ways that people learn have focused on cognitive factors having to do with thinking and information processing, such as learning styles. However, now several areas of research point towards the important effect of emotions on successful personalized learning. This research supports better designs because it addresses a more comprehensive (whole-person) set of key psychological factors. Consequently, you as a designer can determine the issues that may particularly frustrate or encourage your learning audience.

However, information processing, knowledge and skill building are still important considerations in the design of instruction. These primarily cognitive aspects support more traditional approaches. Learners who are more dependent on the teacher-pupil relationship benefit from having an instructor to promote learning and manage needs (e.g., emotions, intentions and social issues). Hence, it is important for the learning process both to address fundamental learning needs and to specifically promote self-directed and self-motivated

learning. The whole-person perspective accomplishes this.

Recognizing the online learning ability gap and providing solutions that consider the whole-person perspective are two key steps toward helping students become successful, self-directed online learners. As designers decide on new directions and next-generation e-Learning alternatives, it is important that they also learn to identify, understand, and harness the dominant power of emotions and intentions.

Personalization

Successful instructors and trainers know that they can make a huge difference in the classroom with personalized attention, particularly in recognizing and tapping into how individuals may need to learn differently. As good instructors, they intuitively manage key human factors (e.g., passion, happiness, dislike, fear, striving, will, frustration, satisfaction, and anger) to promote learning. Online these factors may be overlooked.

By considering the impact of emotions and intentions, educators can better understand how and why individuals learn differently. For example, some learners are happiest learning in collaborative, facilitated environments with learning tasks accomplished in a structured or linear fashion. Other learners thrive in competitive learning environments that focus on specific details, tasks, and projects. Some learners are passionate about exploring new challenges and taking risks, and they enjoy using learning to achieve long-term personal goals. Finally, some learners are formally or situationally resistant to any kind of learning that appears to have little value or benefit to them.

Few "one-size-fits-all" online learning models consider these important distinctions between learning types and, when necessary, try to manage these differences. Translating this kind of psychological information into learning strategies helps designers create learning situations that work best for the intended audience.

As we put more learners online, we expect them to take on more responsibility for their learning, raise their online learning achievement, and improve their ability over time. We will begin to see how each person may or may not need additional or reduced support. At the same time, key success attributes and patterns will emerge that identify gaps in people's readiness to engage in online learning. Understanding learning differences allows

us to tap into key psychological factors that will help people to learn online successfully.

Four Learning Orientations

The Learning Orientation Model is an adult learning model that considers key sources for individual learning differences. In the last ten years discoveries in the neurosciences have revealed the extraordinary complexities of brain activity when interacting dynamically with the learning environment and situation. These discoveries highlight more than the cognitive element. They explore the dominant power of emotions, intentions, and social factors on learning, and the very human variability of learning. The challenge is to use this research for instructional design, and create methodologies and strategies to personalize learning. To achieve this requires adapting and providing online learning that supports individual differences economically and efficiently.

The Learning Orientation Model portrays characteristics, influences, and relationships between three key construct factors: (1) conative (emotions) and affective (intentions) intrinsic motivational aspects, (2) self-directed strategic planning and committed learning effort, and (3) learning autonomy. Combined, these three factors greatly influence an individual's general approach to learning. This model offers explanations for fundamental learning differences, and suggests specific strategies for accommodating learning needs for audiences differentiated by learning type.

The Learning Orientation Model describes four dominant learning types. The four learning orientations are (a) transforming learners, (b) performing learners, (c) conforming learners, and (d) resistant learners. Learning orientations are an effective way to segment the audience according to higher-order psychological factors (e.g., affective, conative, and social outlooks). These factors foster how we develop, manage, and sometimes override our cognitive learning preferences, strategies, and skills.

Profiles or archetypes have been developed for these orientations to describe their emotions and intentions with respect to learning and performance. These profiles provide specific scales for measuring common learner-difference attributes (e.g., high-to-low motivation, self-directedness, and autonomy). The learner-difference profiles can also guide analysis and design of instruction and environment. The result is

a set of tailored solutions that help raise learning ability and that improve the learning experience. Table 1 summarizes these profiles.

Transforming Learners

Transforming learners have sophisticated learning skills. That is, they are highly self-motivated, self-directed, self-assessed, and independent. These skills are likely to make them successful as online learners. Transforming learners use their self-direc-

tion, strategic planning, and holistic thinking to apply great effort toward achieving long-term goals. These learners are generally risk takers, innovators, and passionate, highly committed learners. They most often:

- Place great importance on self-managed learning, committed effort, independence, and long-term vision.
- Depend less on the environment, and focus on change, innovation, and transformation.

- Appreciate high performance, risk-taking challenges, and exploratory, high-learner-controlled environments.
- Use personal strengths, ability, persistence, challenging strategies, high standards, learning efficacy, and positive expectations to manage learning successfully.
- Lose motivation or become frustrated or resistant in environments or conditions that interfere with their aggressive learning patterns and challenging goals.

TABLE 1: Four Learning Orientations by the Three Critical Learner-Difference Attributes

EMOTIONAL/INTENTIONAL MOTIVATIONAL ASPECTS	SELF-DIRECTED STRATEGIC PLANNING & COMMITTED LEARNING EFFORT	LEARNING AUTONOMY
A Transforming Learner (Innovator)		
<ul style="list-style-type: none"> • Focuses strong passions and intentions on learning. • Is an assertive, expert, highly self-motivated learner. • Uses exploratory learning to transform to high, personal standards. 	<ul style="list-style-type: none"> • Sets and achieves personal short- and long-term challenging goals that may or may not align with goals set by others; maximizes effort to reach important, long-term personal goals. • Commits great effort to discover, elaborate, build, and apply new knowledge and meaning. 	<ul style="list-style-type: none"> • Assumes learning responsibility and self-manages goals, learning, progress, and outcomes. • Experiences frustration if restricted or given little learning autonomy.
A Performing Learner (Implementor):		
<ul style="list-style-type: none"> • Focuses emotions/intentions on learning selectively or situationally. • Is self-motivated when the content appeals. • Meets above-average group standards only when the goal/benefit appeals. 	<ul style="list-style-type: none"> • Sets and achieves short-term, task-oriented goals that meet average-to-high standards; situationally minimizes efforts and standards to save time. • Will reach assigned or negotiated standards. • Selectively commits measured effort to assimilate and use relevant knowledge and meaning. 	<ul style="list-style-type: none"> • Will situationally assume learning responsibility in areas of interest but willingly gives up control in areas of less interest. • Prefers coaching and interaction for achieving goals.
A Conforming Learner (Sustainer):		
<ul style="list-style-type: none"> • Focuses intentions and emotions cautiously and routinely as directed. • Is a low-risk, modestly effective, extrinsically motivated learner. • Uses learning to conform to easily achieved group standards. 	<ul style="list-style-type: none"> • Follows and tries to achieve simple task-oriented goals assigned and guided by others, then tries to please and conform; maximizes efforts in supportive relationships with safe standards. • Commits careful, measured effort to accept and reproduce knowledge to meet external requirements. 	<ul style="list-style-type: none"> • Assumes little responsibility, manages learning as little as possible, is compliant, wants continual guidance, and expects reinforcement for achieving short-term goals.
A Resistant Learner:		
<ul style="list-style-type: none"> • Focuses on not cooperating. • Is an actively or passively resistant learner. • Avoids using learning to achieve academic goals assigned by others. 	<ul style="list-style-type: none"> • Considers lower standards, fewer academic goals, conflicting personal goals, or no goals; maximizes or minimizes efforts to resist assigned or expected goals either assertively or passively. Chronically avoids learning (apathetic, frustrated, unable, discouraged, or disobedient) 	<ul style="list-style-type: none"> • Assumes responsibility for not meeting goals set by others, sets personal goals that avoid meeting formal learning requirements or expectations.

Note: In determining orientation, we must allow for the possibility of “situational performance or resistance.” Learners may temporarily improve, perform, or resist in reaction to positive or negative learning conditions. For example, in different situations transforming learners may also temporarily respond in a performing, conforming, or resistant manner. Similarly, a performing learner may temporarily respond in a conforming or resistant manner, and a conforming learner in a resistant manner. Upward movement (e.g., conforming to performing learner) is more difficult since this requires a deep-seated psychological change.

To be more successful, these learners should focus more on process, implementation, and details to ensure task and project completion and practical application of theories and concepts.

Performing Learners

Performing learners are skilled online learners who are typically self-motivated and self-directed in learning situations that they value. Otherwise they need support from instructors or coaches to set goals for them or they need extrinsic rewards to provide motivation for accomplishing objectives. Typically, these learners are short-term, project-oriented thinkers who systematically and capably achieve average to above-standard learning goals and tasks. They may:

- Minimize or streamline learning effort by meeting only the stated (clearly acknowledged) objectives, getting the grade, and avoiding exploratory steps or effort beyond the requirements of the situation and learning task.
- Lose motivation or may even get angry if too much effort is required and the rewards are not enough to compensate for the perceived effort.
- Depend to some extent on their environment, and selectively focus on managing or improving areas that they value.
- Prefer interactive (hands-on), competitive or team environments.
- Take less control and responsibility for their learning and often rely on others (external resources) for coaching, motivation, goal setting, schedules, and direction.

To be more successful, these learners should acquire more long-term, holistic thinking skills to expand their interests and to find reasons to self-motivate and self-direct more challenging efforts.

Conforming Learners

Conforming learners are less successful online learners because they depend largely on the quality and amount of support from the environment and social relationships. They prefer to rely on explicit guidance and simple steps provided by an instructor. Complex online learning environments will frustrate them. These learners are concerned with safety, security, and acceptance. Conforming learners generally:

- Are less skilled learners.
- React strongly to external influences.
- Depend on supportive, structured environments.

- Have less desire to control or manage their learning or initiate change in their jobs or environment.
- Take fewer risks.
- Have difficulty learning in open learning environments, which focus on high learner control, discovery or exploratory learning, or complex problem solving.

To be more successful, these learners should acquire more independent thinking and risk-taking skills that will enable them to trust themselves and take greater responsibility for their own learning.

Resistant Learners

Resistant learners lack certain fundamental beliefs that are typically part of the other orientations. For example, they may doubt the value of achieving learning objectives set by others. They may be unable to accept and enjoy achieving goals set by others. Finally they may not believe that academic learning and achievement can help them achieve personal goals or initiate desired changes. A resistant learner's personal goals strongly conflict with learning goals set and supported by others. Too often resistant learners have suffered repeated, long-term frustration from painful mistakes, academic failure, lack of success, and disappointing situations. These learners may not believe in formal education or academic institutions as positive, necessary, or enjoyable influences in their life.

Resistant learners as a group are a complex mixture. The group includes individuals across a range of extremes: skilled and unskilled, motivated and frustrated, passionate and apathetic. They may present as indifferent or as aggressively disobedient or even as passionately assertive non-learners because they follow their own values, beliefs and objectives. Individuals who would otherwise fall into one of the other orientations may be short-term resistant learners in situations where they see little value in the immediate learning experience.

To be more successful, these learners should find a reason to value and pursue learning goals set by others. They should seek to understand the benefits of learning and seek support when needed.

Motivation Strategies Using the Whole-Person Perspective

Today, online learning is most often the choice of people who are already highly self-motivated and ready to learn and finish

a course. For the rest, if instructional design strategies for increasing motivation (similar to any instructor's task) are not considered, then learner motivation may suffer and require additional face-to-face interaction and support from an instructor or other students.

The learning orientation research suggests that learners can be intrinsically driven (self-motivated to some degree) or extrinsically influenced, supported, or rewarded (externally motivated to some degree). Nevertheless, this research also suggests that we generally place too much emphasis on extrinsic motivation and not enough emphasis on fostering intrinsic or self-motivation toward learning more successfully. For example, transforming learners are generally very self-motivated to learn and manage their own learning. They have a lesser social dependence on the environment or external resources. They naturally foster their own drive to set and accomplish goals, expend learning effort, and improve or innovate. Giving them an environment that they can control, explore, and manage as they like in order to learn best, greatly nurtures their intrinsic motivation. In contrast, conforming learners are less self-motivated to learn and transform their environment. They have a greater dependence on the environment or external resources for their self-motivation or drive to learn. Giving conforming learners a more transforming solution may overwhelm or frustrate these individuals since they prefer a safe and secure environment that provides simple solutions.

Steps Towards more Personalized Learning

You recognize that your learners like to be supported as individuals, but how can you do it effectively online? Here is a simple 3-step approach to help you with your audience analysis and to provide personalized attention online.

The first step is to identify the critical success attributes that are important to your learning audience. This means determining and understanding the common values and emotions that will motivate your audience to learn (that is, define the common deep-seated psychological factors that drive your audience).

The second step is to examine your common learner types using a framework that considers at least four key design elements:

1. learning environments
2. presentation of instruction

TABLE 2: Instructional Blueprint

Key Design Elements to Consider	LEARNER TYPE 1 An Assertive, Low Maintenance, Self-Directed, Holistic, Independent Learner (e.g. Executive)	LEARNER TYPE 2 A Focused, Medium Maintenance, Project, Detail, Hands-On, or Task Oriented Learner (e.g., Manager)	LEARNER TYPE 3 A Dependent, Low Risk Learner who depends on external resources and support.	LEARNER TYPE 4 A Resistant Learner who is not interested in what “you” have to offer; it conflicts with their values
	Transforming	Performing	Conforming	Resistant
Learning Environments	A. How can I independently explore and discover meaningful information to accomplish my goals? B. Specify Objectives and Activities:	A. How can I interact and get specific information that I can practice and apply to create meaningful projects? B. Specify Objectives and Activities:	A. How can I practice and work through the tasks in a guided, structured environment with continual feedback? B. Specify Objectives and Activities:	A. What is in it for me? B. Specify Objectives and Activities:
Presentation of Instruction	A. Make it quick and give me the Big Picture first, minimize the details until I need to know them. B. Specify Objectives and Activities:	A. Make it quick and give me the details and procedures, i.e., spare me too much of the Big Picture and theories. B. Specify Objectives and Activities:	A. Make it step-by-step with explicit instruction and repetitive tasks. Please minimize the risk-taking and problem solving. B. Specify Objectives and Activities:	A. Why should I learn this? B. Specify Objectives and Activities:
Social Relationships	A. I like low involvement, unless I am with fast or passionate learners that learn like me. I like mentoring relationships. B. Specify Objectives and Activities:	A. I like competitive, team- or project-oriented involvement in my area of interest with coaching relationships. B. Specify Objectives and Activities:	A. I like group involvement with learners that learn at a similar, stepwise pace. I like to depend on guiding, supportive relationships and explicit feedback. B. Specify Objectives and Activities:	A. Why should I interact or collaborate? B. Specify Objectives and Activities:
Expected Outcomes	A. I like to focus on achievements that show improvement, a challenging degree of difficulty, and holistic, and complex problem solving. B. Specify Objectives and Activities:	A. I like to focus on achievements that show a hierarchy of completed tasks and projects, and some external rewards. B. Specify Objectives and Activities:	A. I like to focus on achievements that show visible progress, simple next steps, and social rewards. B. Specify Objectives and Activities:	A. I like to focus on tapping into values that may encourage my involvement in any future learning activities. B. Specify Objectives and Activities:

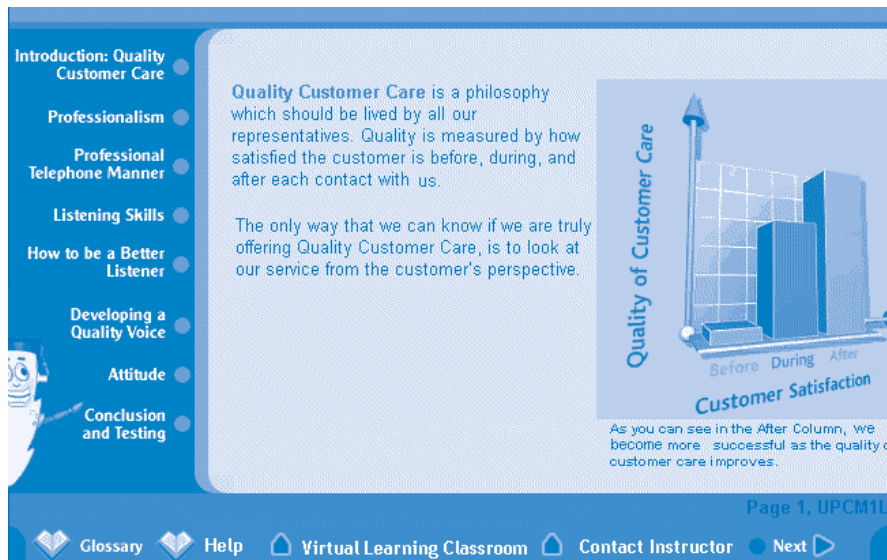


FIGURE 1 Conforming Learning Presentation.

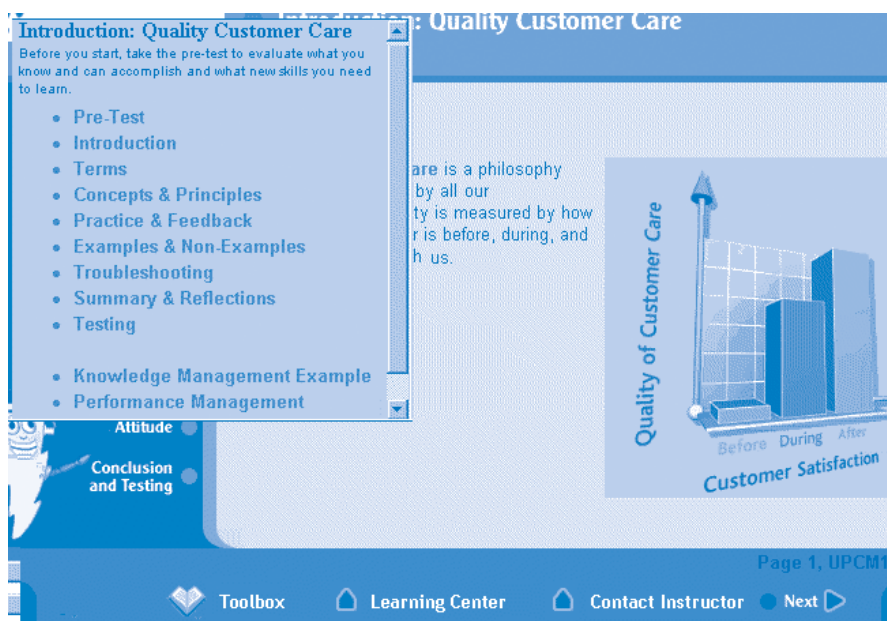


FIGURE 2 Transforming Learning Presentation.

3. social relationships
4. expected outcomes

Use the four elements to identify key attributes for your learning audience. That is, you determine underlying values and then use this information to find drivers that will match an individual's emotions and increase motivation and intentions to learn.

Once you identify what drives your audience (i.e., common learner types), you can begin to specify objectives and activities that will continue to drive your audience towards improvement and continual success. With this blueprint, you can evaluate how well you accomplished your objectives after the learning takes place.

Table 2 shows the four learner types (top row) and four design elements (left column) for a hypothetical learning audience. The designer fills in the blank boxes to specify objectives and activities that work towards enhancing learner motivation. The key is to tap into the common values that drive your audience.

Practical Strategies and Applications

The following figures illustrate strategies and technology uses for individualized learning. The technology is a combination of HTML, XML, and JavaScript programming. The content is stored in a SQL database. The intent is to demonstrate how,

once you identify the key attributes that may influence your learning audience, you can use this information to adapt your presentation of the environment, instruction, social relationships, and expected outcomes.

In Figure 1, a hypothetical designer has identified a group of conforming learners and determined that they need a simple, menu-driven (linear) environment. The instructional presentation is explicit and the learner has access to additional supportive tools, including an online classroom and the instructor (e.g., provides supportive feedback and interaction). The glossary and help icons are also readily available for additional support. The Virtual Learning Classroom (Learning Center) and Contact Instructor buttons offer additional learning support with instructor and peer collaboration.

In Figure 2, our hypothetical designer identified a group of transforming learners. She found that they need more learner control and exploration and that they can handle more sophisticated tools for self-directed learning. Clicking on the Learning Center button enables them to activate a popup window that greatly increases learner control (e.g., goal selection and task sequencing) and provides full access to the content and additional capabilities.

Instruction for these learners is less explanatory and more concise than for the conforming learners. For example, content presentation for the transforming learner is actually a subset of the larger, more explicit set designed for the conforming learner. This is illustrated by the absence of the second paragraph in the center and the caption for the graphic (lower right). While the environment is more sophisticated, the presentation of content is more inferential and less comprehensive since the transforming learner can sequence tasks and process information more quickly.

Hypothetically, both learning types would achieve the same objectives but in different ways. Most likely the transforming learners would complete the objectives sooner than the more methodical conforming learners who are learning in a more stepwise fashion. However, it is possible that, given the chance to explore and discover, the transforming learner may create additional, personal, learning objectives and take longer to complete the course.

In the Figure 2 example, the learner also has access to an online learning toolbox that can provide additional resources and tools (e.g., for assessment, progress moni-

toring, note taking, transcripts, etc.).

These tools are more sophisticated and may overwhelm the simpler needs of a conforming learner, for example. Nevertheless, recall that a secondary goal is to help learners increase their online learning ability. Here, the designer wants to help the conforming learner use these tools over time. When they are ready for a more sophisticated set of learning tools, these will be available.

The business or organizational benefits are that learners receive just enough skill and knowledge to meet their needs and to accomplish their objectives, thereby saving valuable time and resources. The additional learning benefits are that individuals also experience the emotional advantages of having individualized solutions that help them learn the way they best like to learn, thereby also saving them valuable time and resources.

Finally, it is important to remember that each learner has some level of online learning ability that can be improved over time. Online solutions should not only help learners achieve learning objectives, but should also help them close the gap in their skills and become more successful learners. These solutions require setting increasingly challenging goals, encouraging more holistic thinking and solving more complex problems. They also involve using greater levels of task sequencing, and enhancing self-reflection, self-assessment, and monitoring of learning progress.

Mass Customized Learning Environments


Most research suggests that individualized learning solutions or personalized environments will have a positive impact on learning. Use Table 3 to identify which type of environment may help your learners succeed and best match how they learn. Keep in mind that you will want to consider learning in an environment that matches learner needs today but that also will help them improve online learning ability over time. It is important to note that we are not suggesting the development of three different environments for each learning orientation. Rather, with today's technology, we can more precisely present parts of one environment to match the needs of the different learning orientations (e.g., conforming learners may get a more linear subset of the larger, more exploratory environment for transforming learners).

TABLE 3: Descriptions for Mass Customized Learning Environments

LEARNING ORIENTATIONS	MASS CUSTOMIZED ENVIRONMENTS
Transforming Learners	For transforming learners, provide environments that are sophisticated, discovery-oriented, and mentoring. Provide loosely structured, flexible environments that promote challenging goals, holistic planning strategies, complex concepts and problem solving, and self-managed learning. Use environments that allow learners to be assertive, challenged by exploration, and able to control, self-direct, and self-assess learning and progress to achieve objectives and related higher-standard, long-term goals.
Performing Learners	For performing learners, provide semi-structured, interactive (hands-on) environments that stimulate personal values, encourage teamwork, and provide details, tasks, processes, and project completion. Create task oriented, energizing, competitive environments that provide coaching, practice, and feedback to encourage self-motivation, problem-solving, self-monitoring, and task sequencing — while minimizing the need for exploration, extra effort, and difficult standards.
Conforming Learners	For conforming learners, provide safe, low-learner-controlled, structured environments that help learners achieve comfortable, low-risk learning goals in a linear fashion. Use environments that are simple, scaffolded, non-risk environments that use explicit, careful guidance and collaborative learning tools that help individuals learn comfortably in an easy, step-wise fashion.

Summary

We are still very much in the experimental stage of creating Web instruction and learning environments. Much still needs to be learned, both technically and pedagogically, about designing successful learning solutions. Nevertheless, the Web offers a useful technology and environment for individualized learning, especially because learners can be uniquely identified, content can be mass customized, and subsequent progress can be monitored, supported, and assessed — even cost effectively.

Technologically, researchers are making progress in realizing the personalized learning dream. The missing link is the instructional design perspective that understands the impact of emotions and intentions and embraces a truly personal understanding of how individuals want, or intend, to learn differently. 

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