

Potter's Engagement Taxonomy™

What It Is

Potter's Engagement Taxonomy™ guides you through seven levels of learning engagement — each with a clear focus, practical techniques, and outcomes that drive action. Cognitive levels are ordered from simple to complex, and from concrete to abstract.

Built on learning science and real-world facilitation best practices, it is a strategic framework for designing learning experiences that go beyond information delivery.

Inspired by models like Bloom's Taxonomy, this framework shifts the focus from what learners *know* to how they *engage*. It's a tool for trainers, instructional designers, and content developers who want to create sessions that feel personal, interactive, and purposeful — from the opening moment to on-the-job application.

Who It's For

- Trainers & Facilitators looking to boost interaction and impact in the hybrid classroom
- Instructional Designers seeking a practical engagement planning model
- Content Developers designing courses that lead to action and retention
- L&D Teams scaling meaningful, learner-centered programs

This taxonomy is uniquely positioned at the intersection of hybrid facilitation, instructional design, and digital learning technology, offering an actionable system that transforms passive delivery into dynamic engagement.

What It Covers

Because modern learning is hybrid, engagement must be intentional.

Potter's Engagement Taxonomy™ gives you a clear path to structure sessions that start strong, stay interactive, and lead to real behavior change.

Each level includes four essential elements to guide engagement and learning:

- **Engagement Focus:** The learning intention or goal
- **Techniques & Strategies:** Facilitation methods that work
- **Learning Outcomes:** What learners walk away with
- **Apps & Tools:** Suggested digital platforms to support engagement

It's more than a framework — it's a foundation for designing learning that **sticks, scales, and sparks action**.

Why It Works

Grounded in learning science, cognitive load theory, and real-world facilitation practices, the taxonomy guides facilitators in designing purposeful engagement — step by step, without overwhelm.

Rather than overloading learners with content, this framework aligns with the **three types of cognitive load**:

- **Extraneous Load** – The distractions and poor design that hinder learning
- **Intrinsic Load** – The complexity of what's being learned
- **Germane Load** – The mental effort that supports meaningful learning and schema-building

Organized into seven progressive levels, the taxonomy supports:

- Minimizing distractions and poor design (extraneous load)
- Pacing content to match learners' cognitive readiness (intrinsic load)
- Encouraging deep processing and insight (germane load)

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Level	Engagement Focus	Techniques & Strategies	Learning Outcomes	Apps
Connect	Establish psychological safety, presence, and connection among learners	Use personal welcomes, chat icebreakers, informal polls, intentional onboarding, tone-setting music	Learners feel seen, ready, and safe to engage	Zoom, MS Teams, Mentimeter, Spotify, Padlet
Motivate	Capture attention, spark curiosity, and highlight relevance	Leverage provocative questions, animated visuals, bold opening stories, digital whiteboards, gamified entry	Learners understand the session relevance and feel motivated to learn	Kahoot, Canva, Miro, Slido
Engage	Co-create meaning through active participation, contribution, and real-time feedback	Incorporate chat waterfalls, live reactions, breakout group discussions, on-mic shares, co-annotation	Learners actively participate and co-create meaning	Breakouts, Slido, Reactions
Apply	Enable hands-on practice and contextual skill application	Design branching scenarios, guided simulations, real-play exercises, live tool walkthroughs, peer coaching	Learners demonstrate skills in real or simulated contexts	Mural, Google Docs, Twine, Loom
Reflect	Encourage reflection, perspective-taking, and insight generation	Ask metacognitive questions, use reflection journals, structured debrief prompts or templates, compare multiple perspectives	Learners internalize insights and evaluate application	Google Docs, Padlet, Otter.ai, Poll Everywhere
Create	Empower learners to generate original content or frameworks	Use whiteboards, collaborative docs, learner-led how-to demos, idea sprints, co-design activities	Learners synthesize knowledge into original outputs, responses, tools, and ideas	Whiteboard, Canva, Google Slides, FigJam
Transfer	Enable long-term skill transfer and application beyond the session to sustain impact	Send post-session action plans, host follow-ups, schedule spaced practice and nudges, create peer accountability	Learners apply learning to the workplace and track results	Google Forms, Trello, Email, Notion

IN-PERSON TRAINING

ENGAGING, COLLABORATIVE, IMMERSIVE

VIRTUAL TRAINING

FLEXIBLE, SCALABLE, ACCESSIBLE

