

Strategically Leveraging Learning Technologies for Sustained Employee Engagement and Performance in Professional Service Firms

(Executive Summary)

Organizations invest heavily in AI-enabled learning platforms, yet fewer than 30% realize measurable results (BCG, 2024; McKinsey, 2022). The assumption often points to a lack of employee motivation, time, or content. This study challenges those assumptions. Through interviews with 15 organizational leaders and analysis guided by the Clark and Estes (2008) knowledge, motivation, organization (KMO) framework, the summary distills the insights. It surfaces actionable patterns and recommendations for future enhancement (see Figure 1). The findings categorize the promising opportunities as procedural, relational, and contextual.

1 What Employees Need to Learn Effectively

1.1 Autonomy and Direction

Assumption: Autonomy alone drives adult learning.

Finding: Employees sought an **integrated** experience that offers autonomy and flexibility, along with proactive nudges to remind, recommend, and consult on learning opportunities.

Quote: "I only go back when I'm genuinely interested, but a well-timed nudge helps me act."

Reflection: Employees wanted **autonomy** to explore, yet they also relied on timely, personalized **nudges** to direct attention. Learning systems that combine "**pull**" (self-directed exploration) with "**push**" (contextual prompts) reduce cognitive load and increase discovery. This instructional collaboration blurs the traditional line between learner agency and system support, pointing toward shared agency between humans and AI. The future partnership between human agency and **AI agency** could transform the experiences from prescriptive to predictive.

Leadership Action: Invest in platforms that blend self-discovery with timely, personalized nudges.

1.2 Right Format, Right Moment

Assumption: Employees lack time and are not engaged to learn.

Finding: Employees described a **dynamic** timing relationship and emphasized that cognitive availability **fluctuates** with workload cycles. They disengaged even during downtime when content lacked relevance, and engaged during peak periods when learning met immediate needs.

Quote: "I learn best when I can access what I need, when I need it—on my phone, between meetings."

Reflection: Employees do not need more time; they need to learn **at the right time**. Learning must fit real work moments through various channels, be blended, and use practical resources. Time pressure is a situational, design-solvable constraint. The decisive factor was **task-technology fit**, whether content aligned with real work moments. Fundamentally, this alignment reinforces a shift from "more time for learning" to "learning in the flow of work."

1.3 Clear, Simple User Experience with No Friction

Assumption: Low motivation causes low adoption.

Finding: Employees expected easy-to-use platforms with **minimal learning curve**, guided support, and micro-practices. Employees were motivated but **slowed** by micro-frictions: unclear steps, confusing navigation, and excessive cognitive lift.

Quote: "If it takes more than two clicks, I'll skip it."

Reflection: Procedural friction, not motivation, derailed engagement. Employees could articulate why to learn, but hesitated because they lacked the how. There is a tendency to overestimate motivation gaps and underestimate the cognitive barriers embedded in **platform design**. Leaders consistently underestimated the impact of these micro-barriers, while Employees described them as the primary reason for disengagement.

Leadership Action: Eliminate unnecessary steps and processes; provide quick guides, walkthroughs, and peer demos.

2 What Drives and Sustains Engagement

2.1 Helps Me Perform Better (Performance Orientation)

Assumption: Career development messaging is sufficient.

Finding: Employees engaged when learning **solves real problems** and when learning improves client delivery, technical accuracy, or error reduction, more

than abstract skill ideas or tasks. They are willing to invest in learning when there is a direct job relevance to support performance and career growth. Some Employees valued human-led coaching, while others preferred AI-enabled micro-coaching for anonymity, immediacy, and psychological safety.

Quote: "If it helps me deliver for clients, I'll use it."

Reflection: Performance utility outweighed aspirational messaging. This understanding serves as a **cultural imprint**: learning must integrate into client service, risk mitigation, or technical excellence; otherwise, employees deprioritize its relevance. **Performance-goal orientation** rewards tangible output and short-term performance contributions. **Efficiencies** between costs (e.g., time and effort) and the attainment value become key measures and influencing factors in decision-making.

Leadership Action: Tie learning outcomes to business KPIs and client impact.

2.2 Small Wins Build Confidence

Assumption: Confidence grows with expertise and successful learning.

Finding: Confidence grew when employees **trusted** the platform's recommendations and credibility. There are clear correlations between technology trust and visible micro-successes, not just skill mastery. Confidence in digital proficiency also grew when witnessing positive outcomes in their own or colleagues' experiences.

Quote: "Seeing a colleague succeed with the platform made me try it."

Reflection: Early success and **peer examples** build confidence. Digital confidence came from observing colleagues succeed with the platform. Peer examples created vicarious trust, influencing willingness to try features more than did formal training. Influence of **social persuasion** and peer recommendation co-exist with **trust & doubt** of technology.

Leadership Action: Showcase micro-wins and peer stories; recognize progress, not just completion.

2.3 Strong Signals from Leaders

Assumption: Platform quality shapes learning behaviors.

Finding: Learning feels essential when **leaders** talk about it, share progress, and make space for it. Employees trust more when leaders share their learning

stories. Meanwhile, team leaders tend to underestimate their influence and need **substantial support** to serve as advocates.

Quote: "When my manager shared their learning journey, I felt encouraged to do the same."

Reflection: Leadership **modeling** legitimizes vulnerability and reduces risk. Leader behavior was the **strongest predictor** of engagement, more influential than system features, content quality, or incentives. When leaders shared their learning stories, employees perceived learning as legitimate and low-risk.

Leadership Action: Leaders should share their own learning stories and set the tone.

3 Organizational Conditions That Enable Learning

3.1 Psychological Safety Over Compliance Pressure

Assumption: High completions in compliance training signal engagement.

Finding: Employees completed the required learning to **avoid penalties**. They learn more when they feel safe to try, ask questions, and make mistakes. Compliance is a **proxy for engagement** but produces false positives.

Quote: "I'm more likely to try new things when I know mistakes are okay."

Reflections: **Growth-oriented** climates encourage exploration; compliance-heavy environments reinforce avoidance. The avoidance approach decreases in **psychologically safe** environments, where employees can ask questions, make mistakes, and explore. This change in organizational climate challenges long-standing **compliance cultures** in professional services.

Leadership Action: Balance the measurement between mandatory and growth-oriented learning, and adjust compliance-only messages.

3.2 Recognition for Effort and Application

Assumption: Completion rates indicate value and impact.

Finding: Employees responded to **effort recognition**. Recognition for effort, experimentation, and application increased engagement and adoption more than recognition for completions or outcomes. Small learning efforts matter.

Quote: "A simple thank you for trying something new goes a long way."

Reflections: These findings reverse typical **performance logic** in professional services. Employees valued acknowledgment of trying, which signaled leader attention and reduced perfection-driven fear.

Leadership Action: Reward, not penalize, learning. Celebrate small wins and show genuine appreciation.

3.3 Accelerate the Role of Technology

Assumption: Learning platform functions as a content library.

Finding: Employees expect the platform to be an **intelligent guide** and dynamic learning companion, offering guidance, pattern recognition, and predictive support. They viewed the experience platform as an **implicit** learning partner, not a tool.

Quote: "I want the platform to know what I need before I do."

Reflections: This represents a conceptual shift: technology is no longer infrastructure but an agentic **collaborator** and socio-technical system. Reframing AI from "system" to "**partner**" encourages adoption. This reframing can potentially soften resistance to change, recognizing that the success of a learning platform requires tech design, digital proficiency, and leadership support.

Leadership Action: Invest in agentic AI-driven personalization and seamless integration.

4 What the Patterns Reveal Beyond the Expected

The study revealed several patterns that cut across individual, team, and organizational levels. These insights challenge long-standing assumptions in professional-service learning and point toward a new strategic logic for how learning technologies create value. The implications of the findings highlight the shifts leaders should consider when shaping an organizational learning ecosystem.

4.1 Learning technology functions as a strategic enabler, not a training tool

- a) Leaders consistently frame learning technology as part of the firm's **capability infrastructure**, not just a content repository, a shift rarely documented in current learning platform adoption studies.
- b) This perspective reflects an emerging belief that technology "**strengthens performance**, accuracy, and risk mitigation through technology-enabled

learning," not merely "delivering" training, signaling a conceptual modernization in leadership thinking.

4.2 Collective and team-based learning sustains capability-building

- a) Leaders emphasize that **team-based learning** nurtures **collective upskilling**, amplifying the value of the network and human connections. Teams sustain momentum when Employees engage together, share examples, and reinforce application
- b) Team-based learning created accountability loops that individual learning models could not generate. **Shared accountability** fosters collaboration and knowledge exchange, reinforcing learning as a **team sport** rather than an individual pursuit. This shift reframes learning as a structural practice embedded in teams.

4.3. Curiosity, not compliance, fuels engagement

- a) Curiosity emerges as the primary **catalyst** for learning adoption, a pattern not commonly highlighted in traditional adoption models. This organizational trait challenges conventional reliance on mandatory training as a lever for engagement. The intrinsic attainment reveals a motivation mechanism often overlooked in corporate learning
- b) Compliance created activity but not learning. Compliance-driven engagement can offer valuable behavioral insights. Leaders see opportunities to **convert enforced participation** into voluntary, curiosity-driven learning, and from avoidance to approach and mastery orientation

4.4 Time is not the real barrier; misalignment is

- a) Across interviews, leaders note that Employees demonstrated a willingness to learn even during peak workloads, when learning is relevant or solves an immediate need, but don't engage during downtime when it doesn't. This insight moves the conversation from "giving employees more time" to "designing learning that fits the work."
- b) Time pressure is not the barrier; poor relevance and weak design are the **underlying issues**. The real barrier was misalignment between content, timing, and work demands.

4.5 AI is most effective when framed as a learning partner

- a) Leaders observe a **shift** toward viewing AI as a **learning partner** rather than just a search or recommendation engine. Employees expressed

greater trust and willingness to use AI when it acted as a guide, sounding board, or pattern-recognition partner.

- b) Viewing AI as a **collaborator** rather than an evaluator reduced reluctance and opened new pathways for digital confidence and skill development. **Integrating learner agency** with **AI agency** transforms the experience, reducing skepticism and unlocking value beyond traditional platform functions.

The Strategic Implication for Organizations

Learning technology will continue to evolve (see Figure 2). It delivers value when relevance aligns with real work, systems intentionally remove procedural friction, leaders model learning, organizations embrace psychological safety, recognition reinforces effort and application, and AI agents act as learning partners that extend human capability. When it is simple, relevant, and reinforced by leadership, technology becomes a driver of performance, pairing with human connection, curiosity, and meaningful support.

These conditions shift organizational learning in the age of AI from a transactional activity to a strategic capability that strengthens performance, agility, and long-term organizational resilience.

Figure 1: Influences Shaping Learning Technology Use and Recommendations for Future

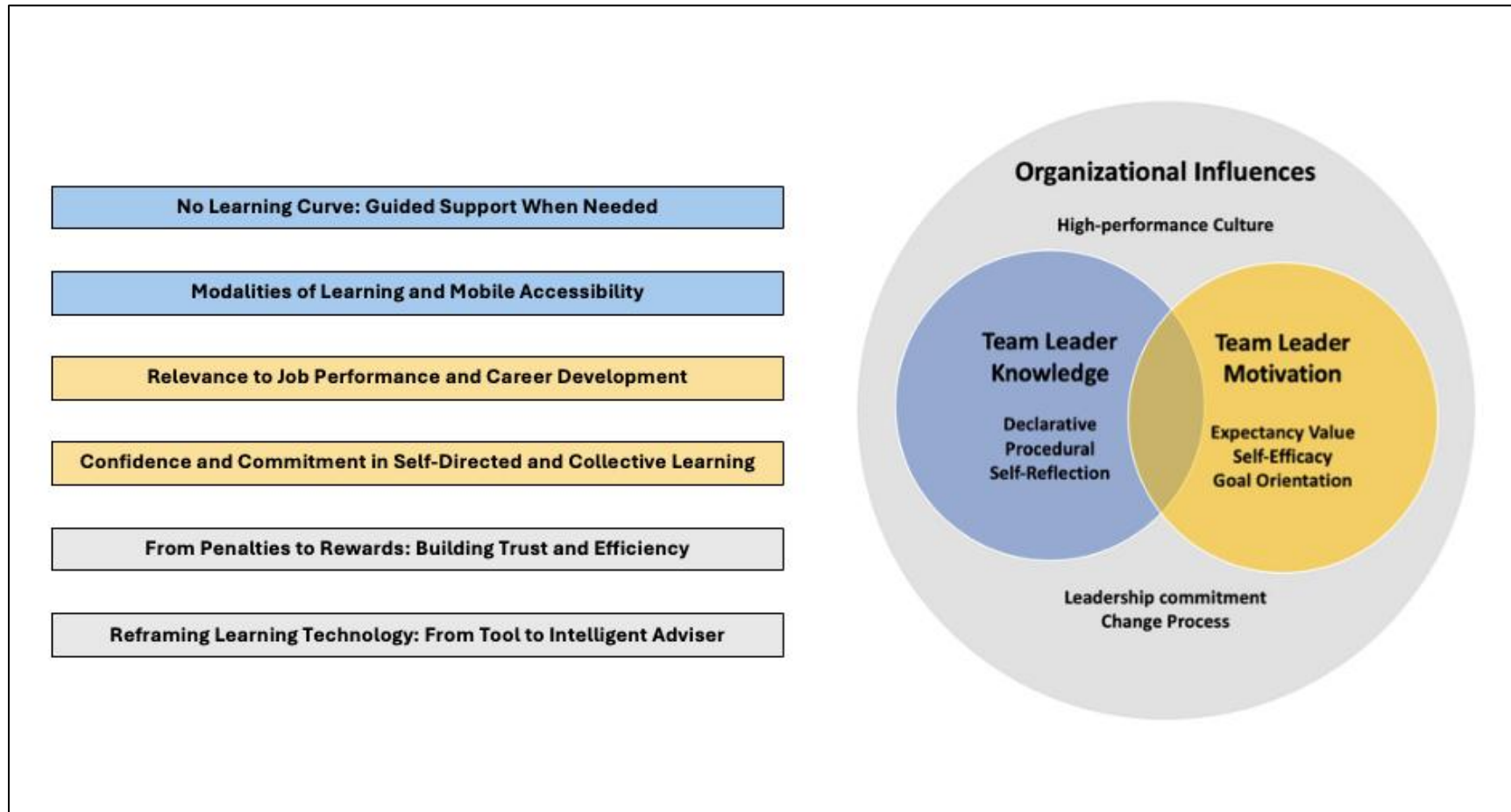


Figure 2: Comparison of Learning Technology Roles: Current and Future

