Learning & Motivational Preferences

The Learning & Motivational Preferences Assessment is an essential way for the coach to understand how to most effectively communicate with and motivate the client. It helps the coach zero in on the specific language a client uses that conveys their preferred way to learn and understand information, what motivates them to take action and how they relate – and see themselves relating – in the world.

While this tool is primarily about you the coach educating yourself about how best to be in relationship to your client and how to listen and communicate most effectively, it can also be used with the client as a self-assessment tool as a way for them to create an understanding of their own natural learning, processing and communication styles and what their motivational preferences are.

The Value of the Learning & Motivational Preferences Assessment

For the client it gives them an inner edge on knowing how they learn and process information so they can leverage these strengths in any aspect of their life. For the coach knowing how a client processes information and learns makes it easier to shape how to communicate, motivate and work with the
client by meeting the client at their best – using their language and ways of learning.

Learning Styles Inventory:
Learning Styles refer to the way in which someone best brings in information through their senses, processes that information and then communicates with others.

1. Sensory Systems
A person's sensory system describes how they best absorb information, retain and reiterate it. Typically people are visual, auditory or kinesthetic learners or a combination thereof. Although for some people they may be olfactory (smell) or gustatory (taste) oriented as well.

- **Visual Learners** – “SEE” – Associate and learn through images, color, moving pictures, visual aides, written information and instruction, maps, books, videos, etc. They process by what they SEE.

- **Auditory Learners** – “HEAR” – Learn through auditory input such as oral instruction, verbal information, lecture, audio sources, discussion, conversation, explanations, words, tone. They are better at oral instructions than written, prefer to listen, spell out loud (they hear the thinking). They process by what they HEAR
• **Kinesthetic Learners** – “FEEL” and “DO” –
Learn via experience, by participating and doing. Experience by what can be felt or sensed. Learn by doing, using body, hands, writing things down. They prefer to be active, touch things, get their hands on things. They process by what they FEEL and/or DO.

A person can operate in one or more of these styles. For example a person might learn visually but know their truths kinesthetically – how it feels in their body. A person’s learning style can also change by context or over time.

It is extremely helpful for the coach to use the correct language and support systems based on the styles above to help the client best absorb information and for the client to be self-aware on how to leverage their natural way of learning as they work on their goals, etc. If the coach were to ask a client about a particular experience in the past or is creating a preferred future with the client, phrasing it in the client’s own learning language will best support them in that process. Some examples: “how do you see that coming together” – for a visual learner; “what did you hear people saying” – for an auditory learner; “what did you feel” or what did you experience” for a kinesthetic learner.
Option I: Listen & Learn: listen to the client’s language for cue words or language that helps you to recognize their learning style or ask them what resonates more to how they feel that they learn:

- **Visual Person** – will speak in visually descriptive terms, and use language like “I see, I’m visualizing, I’m envisioning” that tells you they are painting or drawing a picture in their mind’s eye.

- **Auditory Person** – will speak in auditory descriptive terms, and use language like “I hear, I’m listening, It sounds like” that tells you that they are listening to internal or external sounds as a point of reference.

- **Kinesthetic Person** – will speak in kinesthetic descriptive language and use language such as “I’m feeling, I’m sensing”, or speaks about activities or sensations that they are engaged in. They feel or are in motion as they learn.

Option 2: Share the different descriptions of VAK (visual, auditory, kinesthetic) Learning Styles and let the client tell you what they feel most resonates with them. And then pay attention to future conversations and listen for Learning Style cues as they speak.

**Helpful Hints:** If you notice, for example, that your client is primarily visual, you might use visual words to motivate them around their desired goals, such as
“What will you see when you get there?” If, on the other hand, you have a kinesthetic client, you might ask, “How might you try on this experience?” or for the auditory client, meet them in their language with “What will you hear or what do you hear yourself saying?”

It is not uncommon for individuals to have more than one primary sensory channel. They may be visual learners, say, but know their inner truth by feeling it. Or they initially need to hear the information and then to physically do it for it to sink in.

2. Big Picture vs. Detail Oriented

This continuum describes clients’ natural tendencies when it comes to how they focus their attention and communicate: some focus on high-level or general concepts, the big picture, while others like to dive into the details. The second continuum is how they organize information – in a linear format vs a relational map.

- **Big Picture** – speaks and thinks in more general terms. Broad stroke, large scale, vision level, often lacks detail
- **Detail Oriented** – small chunks, finite details, specifics, focused rather than large scale
Example Language:

- “I envision a large-scale community with like-minded people living and working in harmony”

- “Here’s how we should lay out the streets and the lots.”

Listen & Learn: Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

Helpful Hints: If you are working with a bigger picture person, you might find yourself speaking in more global or generalized terms so you are meeting them in the style they most relate to. When it’s time to help them move forward you might be inviting them into a more detailed look at where they are heading and the steps they might take as this is not their natural strength and they may struggle or feel lost trying to break it down into actionable steps. This happens by using big picture language and then employing questions that invite them to think in smaller and smaller chunks. For example: Now that you have the whole picture in front of you, how might you break this up into smaller chunks?”
For the detailed person, you might find yourself being more specific and detailed in the way you communicate with them so they can relate. And at times you might be helping them to see the big picture above the details, especially when they get lost in them. For example “Now that you’ve mapped out all the details, what is it going to be like to have this dream accomplished? What do you see yourself doing in the bigger context of your life with this accomplished?” In this case you are linking them to the bigger result beyond the details.

As a coach it is important to recognize that your style, big picture vs. detail, may be different than the client’s, so remember to meet them where they are, not where you are.

3. Linear vs. Systems (Relational)

This continuum describes people’s natural tendencies when it comes to how they organize and process information and how they communicate that. Some people prefer to process or accomplish things in a linear or orderly fashion whereas others like to have a lot of information in front of them to see how it all relates or comes together in a systems view.

• **Linear** – likes things to go step-by-step, in order, in sequence
• **Systems** likes to organize thoughts around how things relate to one another, systems, or interrelatedness

**Example Language:**

• “I love having an organized format so I can see the steps I need to take.”

• “When I write a book I like to see how all the concepts fit together to make the whole.”

**Listen & Learn:** Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

**Helpful Hints:** If you are working with someone that is linear, you meet them in this style and support this preference by the kinds of questions you ask and the way you organize the session and the coaching process: a linear person is likely to enjoy knowing where they are going and the steps along the way.

A relational or systems thinker will tend to want more of the full picture and to be able to see the whole, before going down a pathway or needing specific steps. As you might guess, someone that is Big Picture is likely to be more of a systems thinker, and a person who is more detail oriented might be more
linear, but not always the case. Think about it as the CPA or Attorney vs. the Artist or Visionary. Of course everyone has the capacity to exhibit all four of these processing styles (big picture, detail, systems, linear) at any given time, and can learn any of them even if it’s not natural to them.

4. Speed of Change

This continuum describes people’s natural tendencies when it comes to the speed of making changes in their lives. It is also indicative of their level or risk tolerance.

- **Traditionalist** – moves at a very slow pace. Stays in the same industry of job for most or all of their career. Slow to make change and will make it in their own time. Typically lower level or risk tolerance.

- **Evolutionary** – moves at a medium pace. May jump industries. Typically a constant pace forward. Medium level of risk tolerance.

- **Revolutionary** – tends to move faster. Tends to be achiever, entrepreneur types - rapid changes, high risk tolerance.
Example Language:

- “It takes me a long time to commit to a change, but when I do I stay on my new path.”
- “Small strong steps forward are the best way to proceed.”
- “Step it up. Faster! Faster!”

Listen & Learn: Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

Helpful Hints: Essentially the speed at which someone is willing to make a change is often related to their comfort with risk and/or change. Be mindful if someone likes to move at either a slower or faster pace than your own. Stay in time with the client’s speed of change by validating with the client that the progress they are making is at the speed and depth they are looking for. A client that may be more of a traditionalist might feel pressure from a coach who is more revolutionary in their approach, and this could cost rapport and trust and, vice versa, if the pace of the coaching and work accomplished feels underwhelming the client may lose interest.
5. Time Reference

This continuum describes people’s focus in relationship to time: past, present or future. The time perspective someone lives in or draws upon.

• **Past** – draws upon the past to understand their present and future.

• **Present** – lives in the present moment in-time, little or no attention to future or past

• **Future** – lives in the future, often in imagination

**Example Language:**

• “I remember when…”

• “Today is a great day for what I am doing…”

• “I’m looking forward to the day when…”

**Listen & Learn:** Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

**Helpful Hints:** If a client tends to be oriented to their past, invite them into the present moment to think about what it is that they want in the here and now. Although the past can be a great place to draw
upon when it comes to proven strategies and success formulas, it still is the past and is unchangeable.

If someone is living into and focusing on the future, again you might draw them into the present moment to work with what is in the here and now to create that future. Ultimately as a coach you’ll be inviting the client’s attention into all three of these directions. The past for success stories, strategies and uplifting moments; the present for discovering what is true and where actions can happen, and the Future to establish milestones and desirable outcomes to work towards.

6. Perspectives
This continuum describes the perspective people tend to take when considering things or viewing situations. How someone views and relates the world.

- **Self** – tends to view things from their own perspective first. Independent
- **Other** – views things from other people’s points of view. Other referenced
- **Observer** – views things neutrally, doesn’t tend to see from only one perspective
Example Language:

• “What I’m seeing…”
• “I wonder what they are thinking about this?”
• “There are multiple viewpoints to consider.”

Listen & Learn: Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

Helpful Hints: A good rule of thumb with perspectives is to invite the client to draw upon all three perspectives as much as possible. In the event a client is focused only on their own perspective, you might encourage them to broaden their viewpoints, especially when they are fixated on creating changes in others. If a client frequently takes the position of the observer, you might try inviting them to step more into their own thoughts, feelings and perspectives through the coaching process.
7. Relationship Styles

This continuum describes the level of interaction people seek or desire inside relationships. How someone likes to relate with others.

- **Soloist** – prefers to be alone and treasures their alone time. Means that they could be more reflective, potentially introverted.

- **Bonder** – likes to have a close friend or two, intimate relationships or bonded pairs or triads

- **Socialist** – loves bigger groups, more interaction.

**Example Language:**

- “I’m a hermit at heart.”
- “I love spending time with my best friend. I love my alone time with my husband.”
- “I love parties and being at big events. I love the social scene and can’t wait to go out at night.”

**Listen & Learn:** Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.
Helpful Hints: When working with a soloist it is likely they may be fairly self-reliant. In the event your client needs help, they may struggle to ask for that support from others. If your client is more of a bonder, it is likely that they will connect to others for support and rely on others to make important decisions and life changes. If you are working with such a client you might be inviting them to step more into their own needs at times. If a client is a socialist they are probably going to be more motivated to make change or take action when many others are involved.


This continuum describes people’s way of creating change: people who know what they do want and are motivated to move toward it vs. people who know what they don’t want and are motivated to move away from it. How someone creates change.

- **Seeker/Toward** – prefers to focus on what they want and moves toward what is desired. May not recognize what isn’t desirable. Tend to be motivated by pleasure and move toward it.

- **Avoider/Away From** – prefers to focus on what they don’t want, trying to get away from – they know what they don’t want, but haven’t identified what they do want. Tend to be
motivated by pain and move away from it.

**Example Language:**

- “I just want to get out of this situation.”
- “I’d like to create a new life by doing this instead.”

**Listen & Learn:** Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

**Helpful Hints:** When working with someone who tends to know more about what they don’t want (away from), there are a couple tricks that can help them to move toward what they do want. The first is to have them list what they don’t want and then go back to each item and have them identify the opposite of what they wrote down.

Another possibility to go back to the list and ask if what they didn’t want was taken care of what would they then want.

The idea is to meet them in their own language and then invite them to consider what they do want. For those that are “toward” (they know what they do want), they can easily get caught with too many
options and no action. If you have a client that fits this description you might invite them to consider what they don’t want as a filter or way to get to their best options or desired outcome.

This continuum describes people’s reference point in relationship to their choices, decision and life in general. It describes how they “know” if a decision is right for them.

- **Internal** (Self Referenced) is internally driven by own needs, thoughts, opinions and desires. May prefer to lead rather than follow.

- **External** (Other Referenced) prefers to hear or feel into what other people want or think before making decisions. May prefer to follow rather than lead.

**Example Language:**

- “I know what I need even if others don’t agree.”

- “Let me check with my partner to see how she feels about me doing this.”

**Listen & Learn:** Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and
ask them what they feel is true to the way in which they learn or process information.

**Helpful Hints:** Although there is no “right” way to be in terms of a reference point, if you are working with a client who tends to be internally referenced and is struggling to work or communicate with others, you might invite them to step into an external point of view. For those who might be more externally referenced, you might be inviting them to consider their own viewpoint outside of others.

10. **Navigation Style: Choices vs. Procedures**

This continuum describes people’s way of learning and navigating life: those who prefer an abundance of choices or options vs. those who want structure.

- **Choices or Options Oriented** – prefer to find out all possible options before making a choice or decision. May feel constrained by structure and resist being forced down a specific path.

- **Procedures or Process Oriented** – prefer to follow a process, are less concerned with option and want a specific route to follow.
Example Language

- “I really like having my options open. I’ll figure it out along the way.”
- “I really like reading and following instructions.”

Listen & Learn: Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

Helpful Hints: Regardless if the client tends to be more options or process oriented, if it helpful to recognize when this preference is working for them and if it isn’t to invite them into more structure or more options accordingly.

11. Navigation Style:
   Implementer vs. Intellectual

This continuum describes people’s preferred style of thinking: those who learn by being in action vs. those who think about it ahead of time.
• **Implementer / Doer (Active)** - prefers to get into action and learn as they go. Can sometimes get ahead of themselves by not thinking things through first.

• **Intellectual / Thinker (Reflective)** – prefers to contemplate, be strategic and plan before taking action. Can sometimes get stuck in the thinking and not get into action.

**Example Language**

• “I figure it out along the way by just trying it on.”

• “I’d like to think about this for awhile to make sure it’s right for me.”

**Listen & Learn:** Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

**Helpful Hints:** Although most people are both an Implementer and Intellectual, it’s important to recognize when a client is caught in one or the other. For example if someone is always in action and not producing the results they are seeking, it might be time to invite them into thinking more strategically or reflectively so they “think before they act” and produce different results. On the other hand if someone is caught just thinking about everything
and not taking any action, it might be time to invite progress by either lowering the bar or creating smaller action steps to get the client into motion.

12. Personal Preferences

This continuum describes people’s preferences in terms of what will motivate them the most: people, places, knowledge, experience or reward.

- **People** – You are someone who deeply values people and loves doing things with others. You are more interested in ‘who’ is going to be there or be involved vs. the details of what you are going to do.

- **Place** – You are someone who loves particular environments or settings and is less concerned with what you’ll be doing or who will be there but more so with what the space will feel like or allow you to do or be.

- **Knowledge** – You are someone who loves to learn and your focus is on the learning rather than the people or the place.

- **Experience** – You are someone who loves to experience things first hand, try things on. You love activities.

- **Reward** – You are someone who likes recognition or rewards – recognition for your strengths or accomplishments, trophies, awards, etc.
Example Language:

- “When I go to an event I’m always looking forward to who is going to be there.”
- “What’s most important is the environment and how I feel in it. It matters less who is going with me, but that the space and experience will be beautiful or feel serene.”
- “I have trophies from all of my years in baseball and they bring me great joy as I remember those experiences. I love getting certificates.”
- “I’m a life-learner, in fact I spend most of my time attending workshops and value what I am learning.”
- “I’d rather just go out and learn in action. Just do it!”

Listen & Learn: Listen to the client’s language for cue words or language that helps you to recognize this learning style or share with them the examples and ask them what they feel is true to the way in which they learn or process information.

Helpful Hints: As you notice your client’s preferences it can be helpful to incorporate them into the coaching by asking them questions and or helping them to
design action steps that honor these preferences. For example if someone were going to go back to college and their #1 preference was rewards – you might ask them what would be most rewarding to them about going back to school or where they feel they’d get the results they are looking for? You might even ask what school would bring them the recognition they’d like to have.

With each of the styles, you as the coach can decide whether it’s useful to share these assessments and have the client self select or if you prefer simply to listen to the client’s language and use what you learn to best inform how you coach the client. By using the client’s preferences (rather than your own) you help the client stay in the process and moving forward. By having an awareness of these preferences, you have the ability to shift easily to a different perspective with a client if the perspective you are using isn’t working. Some examples:

- A client who is “away from” may be completely lost when you are trying to help them envision a future (something to move toward).

- A client who is Big Picture may get lost when you ask a bunch of detail questions

- A client who is a Soloist and internally referenced may not resonate when you ask them what others think.
In recognizing that you are not connecting with the client in your approach, you can now easily shift into a different perspective to meet the client in a way that they can see, hear and understand. This can be helpful when giving homework or other support as well. These tools give you the coach greater flexibility in the dance and flow of coaching!