THE AI EDUCATOR:

Using artificial intelligence to transform manager development

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“Now with generative AI, you don't have to do that on a small scale... The models can perform some of that coaching towards mastery because they have so much access to so much knowledge, because you can prompt them in real time to take on different roles.”

HELEN EDWARDS
Co-founder of AI research and services firm Artificiality

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Introduction: Why now?

Learning agility has become an essential workplace skill. With generative AI reshaping the way work gets done, as well as continued economic uncertainty, both individuals and organizations have a stake in building a learning culture. For organizations, learning agility means building a resilient and adaptable organization that can weather change. For individuals, it means having the resources to refresh old skills and learn new ones to stay current.

"The half-life of skills keeps going down, and I believe we haven't hit rock bottom," Kian Katanforoosh, CEO and founder at skills platform Workera, points out, citing an IBM report showing that workplace skills are becoming obsolete faster than ever before. "If you are not skilling your organization, then you are slowly dying as a company," he warns. Among workers, 71% want more frequent opportunities to update their skills, and 80% want to see their companies invest more in upskilling and reskilling, according to a 2024 report from talent management system TalentLMS and HR platform Workable.

Traditionally, workplace learning and development (L&D) professionals have had to compromise the idea of personalized learning for all but a few. The vast majority of L&D spending goes toward formal training rather than experiential learning, says Matt Beane, an assistant professor of technology management at University of California, Santa Barbara (UCSB). "Over a hundred years, if they have ten bucks, $9 or $9.50 is going towards formal training." For Beane, that's a mistake: "Reading the rules to Monopoly does not equip you to win," he argues. "It equips you throw the dice and then look left and look right and be like, 'Wait, okay, what happens next?' The way you actually learn to win Monopoly is by playing the game."

DIG DEEPER:

Beane's new book, *The Skill Code: How to Save Human Ability in an Age of Intelligent Machines*, is an in-depth look at how to apply the lessons of learning science during a time of rapid technological change.

For Helen Edwards, co-founder of AI research and services firm Artificiality, part of the reason for this imbalance in L&D spending is the inherent tradeoff between personalized, mastery-based learning and scalability. "Taking someone through this process of mastering a skill hasn't really scaled into large-scale learning and development," she says. "Now with generative AI, you don't have to do that on a small scale." says Edwards. "The models can perform some of that coaching towards mastery because they have so much access to so much knowledge, because you can prompt them in real time to take on different roles."

The opportunity

Using AI for mastery-based learning allows individuals to mirror the context of their everyday experience, tailored to an individual's needs and learning styles. Edwards compares the process to a professional athlete's practice schedule: "When you play the real game, you've practiced for hundreds of hours first. You've done drills, so when you play the game, you're in flow. That analogy doesn't really exist at work. You are always on the playing field, and it's only learning and development that gives you the opportunity to practice these skills," she says. "Generative AI flips that around... you can spend more time practicing with generative AI as a coach and partner and teacher."

Already, many workers have turned to generative AI chatbots like ChatGPT to develop learning plans, receive coaching and tutoring, and practice skills through role-playing scenarios. Ethan Mollick, a Wharton associate professor and author of a popular newsletter about AI, has written extensively about how individuals can use tools like ChatGPT to learn new skills and content. In a conversation with Charter, he pointed to a recent research experiment that gave Kenyan entrepreneurs access to AI coaching through ChatGPT. Among the best performers, the intervention boosted profitability by 20%. He noted that AI coaches can be effective in helping individuals gain many workplace skills, including how to "be good managers, how to communicate with people, how to run sessions like pre-mortems where you imagine how a project might fail in advance and then you go through it."

DIG DEEPER:

Check out the chapters "AI as Tutor" and "AI as Coach" in Mollick's book, *Co-Intelligence: Living and Working with AI*, for a deep dive on best practices for using ChatGPT and other tools to help individuals learn.

Leaders now have an opportunity to build on individual experimentation within their workplaces by rolling out an organization-wide learning strategy powered by AI. Acting on an enterprise level

reaps the benefits of individual, personalized learning while adding institutional support and guidance to best use new technologies, which is particularly meaningful for groups of workers who may feel less comfortable experimenting on their own.

In our survey of L&D leaders and managers, we asked respondents how more personalized learning or coaching would affect their effectiveness at work. One respondent shared that it would help them understand their responsibilities more quickly, retain learning material more effectively, and make their work more personally meaningful. Another shared with us that, if given access to an AI coaching tool, "I'd use it to enhance decision-making skills, develop leadership strategies, and receive personalized feedback to continually improve performance."

In short, generative AI offers the chance to return to an apprenticeship model, learning by asking questions, receiving context-specific ideas and suggestions, having advice tailored to a rich knowledge of the user, and getting feedback on real scenarios.

Our focus: Managers

In this playbook, we focus on manager development as a case study for investing in learning cultures. Time and time again, research has shown that managers have an outsized effect on employee experience, job satisfaction, and productivity. But with unsustainable workloads and limited organizational support, many of today's managers are struggling to have a positive impact on their teams.

Only 48% of managers strongly agree that they currently have the skills needed to be exceptional at their job, according to a 2023 Gallup report. Some 46% of managers said that it was likely that they would quit their job within a year due to work-related stress, according to a 2023 survey from UKG. In our own survey data, managers' top barrier to learning new skills or material in their jobs was "no available time." By investing in upskilling managers, organizations have an opportunity to support a crucial segment of their workforce and see cascading positive effects across their organization. And with generative AI, it can

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In our own survey data, managers' top barrier to learning new skills or material in their jobs was "no available time."

be easier to close the manager skills gap with personalized, contextual learning necessary to succeed in a changing business environment.

Our recommendations in the following chapters are based on a review of academic and industry research, interviews with experts and practitioners, and an original survey fielded in April 2024. In Chapter 1, we discuss best practices for workplace learning, based on what we've heard from managers and relevant findings in the field of learning sciences. In Chapter 2, we cover how to apply these concepts, with a focus on AI as teacher across our L&D menu, a framework for considering AI applications in learning strategies. In Chapter 3, we turn our attention to implementation and rollout, including the benefits of adopting a product mindset when revamping your learning strategy.

01 Best practices for workplace learning

Illustration by Charter

What L&D professionals and other managers are saying

In April 2024, Charter fielded a survey about workplace learning and AI tools, with a targeted sample of 152 L&D professionals (individuals whose roles include learning and development, leadership development, and/or learning and enablement) and other managers across the US.

We asked which tools have helped them learn something new in their jobs within the past year. Their most frequent selections were for content-based learning: formal learning and development programs, such as coursework or guided training (31%), as well as material from online-learning platforms (27%). This was followed by AI-powered coaching, described as generative AI chatbots that are trained to provide reflection questions, advice, and follow-up nudges for a digital coaching experience (11%), and individual experimentation and practice (11%).

See chart on the next page

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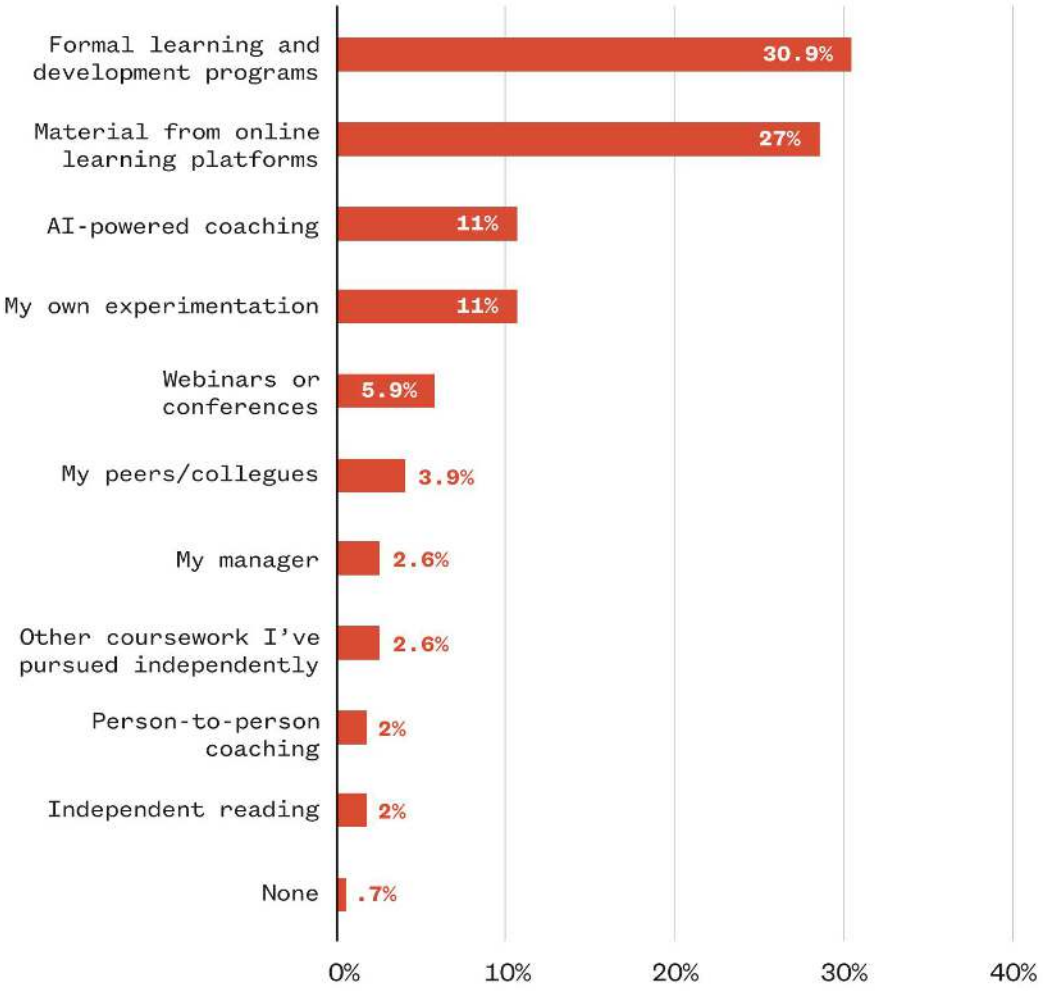
Formal learning opportunities and online learning were the most used skill-building sources over the past 12 months

Question: Over the past 12 months, which of these has helped you learn new skills or material in your job? Please select all that apply.



Source: Workplace learning survey by Charter and Valence, April 2024. n=152.

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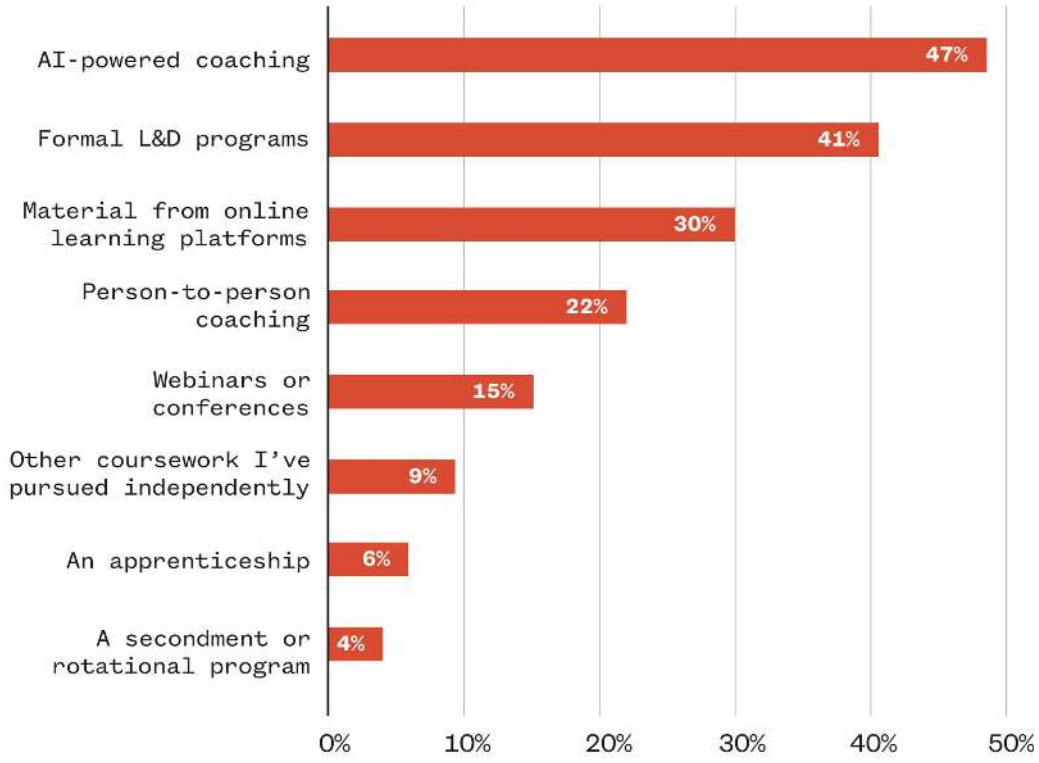
When prompted to identify types of learning that would make the most meaningful difference to their work quality, some 47% of managers ranked AI-powered coaching in their top two, compared to just 22% who listed person-to-person coaching. After AI-powered coaching, the most frequent responses were formal learning and development programs (41%), and material from online-learning platforms (30%).

Question: If offered by your employer, which types of learning would make the most meaningful difference to your work quality?

Please select up to two.



Source: Workplace learning survey by Charter and Valence, April 2024. n=152 L&D professionals and other managers.

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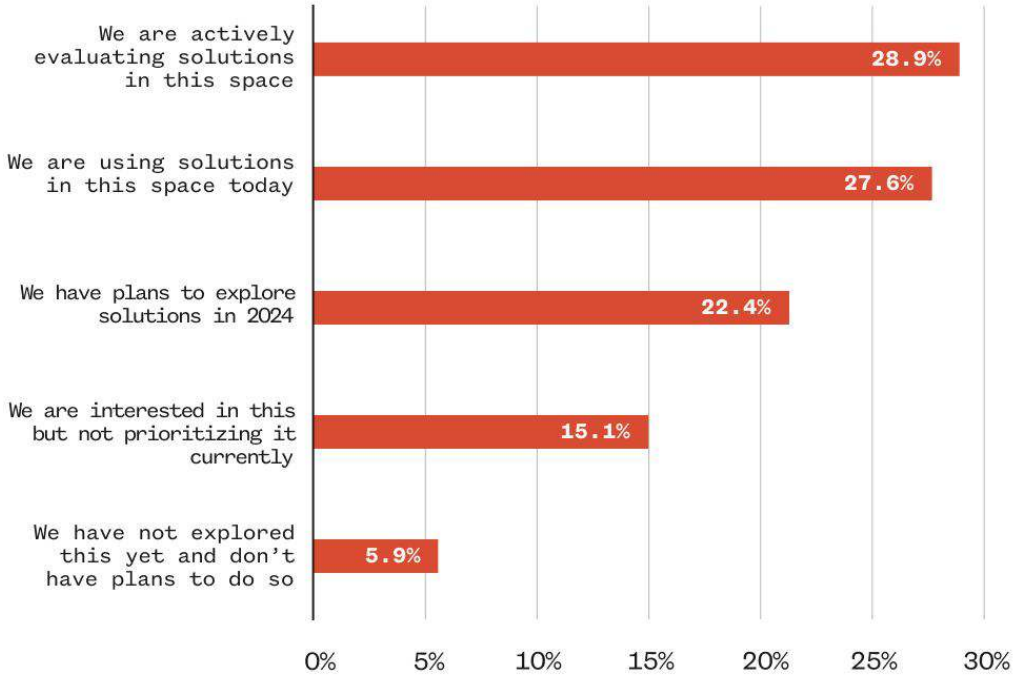
charter

We also asked about L&D leaders' progress in exploring AI-powered learning experiences. Some 28% said that they were already using them today, 29% said they were actively evaluating options, and 22% said that they have plans to explore AI learning tools in 2024. Just 6% said that they have not explored this yet and have no plans to do so. Taken together, it's possible that three in four respondents will have implemented AI-powered tools in their L&D strategy by the end of the year.

Most organizations are shopping for AI-powered learning experiences or have plans to evaluate options

Question: To what degree is your organization exploring AI-powered learning experiences?



Source: Workplace learning survey by Charter and Valence, April 2024. n=152.

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The science of learning: A cognitive apprenticeship model

For UCSB's Beane, the idea of bringing novices and experts together has always been at the center of learning, as far back as early civilizations inventing the bow and arrow. "That bond is the thing that allowed us to create the bow, the first stored-energy weapon in the history of humanity," says Beane. "There's archeological evidence that shows that people worked across the expert-novice divide to do that." Within the study of organizational learning, much of the research on the novice-expert connection focuses on cognitive apprenticeship, a mental model that undergirds both formal apprenticeship programs and more informal coaching relationships.

Early research on apprenticeship identified three main components of an apprenticeship relationship that produces effective learning:

- **Modeling**: An expert demonstrates a skill or task for the novice to observe.
- **Coaching**: The novice attempts the skill, and the expert offers guidance and feedback based on their observations.
- **Scaffolding**: The expert scales up challenges as novices become more proficient, assigning more and more difficult assignments and/or slowly reducing the level of structured guidance to encourage independent work and mastery on the part of the novice.

While traditional apprenticeship has been an effective way to learn physical skills and processes throughout history, researchers note that there are three additional steps for cognitive apprenticeship, a process for learning more abstract skills:

- **Articulation**: An expert or coach prompts the novice to verbalize their thinking process, from their understanding of basic concepts to their problem-solving process while practicing the skill.
- **Reflection**: The expert encourages the learner to compare their work to that of peers, mentors, or the expert themself.
- **Exploration**: The expert leaves the learner to independently apply their skills to new situations.

The key to cognitive apprenticeship is to slowly build proficiency and independence over time while providing consistent support, says Laura Ball, director of learning science at apprenticeship platform Multiverse. From traditional instructional models, it requires "a real shift in instructors or coaches moving from that 'sage on the stage' to 'guide on the side.'"

For example, a more experienced manager might help a new manager learn how to give better feedback using the cognitive mentorship model:

- **Modeling**: The senior manager gives the first-time manager examples of what good feedback looks like, based on best practices and existing scripts.
- **Coaching**: The two managers practice the skill through role-playing opportunities or by brainstorming how to phrase feedback for the more junior manager's reports together.

- **Scaffolding**: The more experienced manager encourages the first-time manager to move from role-playing to giving feedback to reports in real time, slowly scaling up from in-the-moment feedback on small projects and behaviors to more intensive feedback conversations, like performance reviews.
- **Articulation**: The mentor encourages the new manager to discuss their experiences giving feedback: What was your goal for this feedback conversation? What went well? What would you do differently next time?
- **Reflection**: The mentor might offer their recommendations for how they might structure feedback conversations, or examples of how other managers have approached feedback conversations in their organization.
- **Exploration**: The senior manager continues to check in with the new manager in one-on-one meetings, encouraging them to apply their new skills to give continuous feedback to their reports.

DIG DEEPER:

Read our interview with Lisa Barrett, former head of learning, innovation, and operations at Multiverse, for her views on how apprenticeships can better prepare people for work than universities do.

As a model of on-the job learning, apprenticeship has been shown to quickly and effectively equip workers with new skills, increase labor force productivity, and support individual career growth. In the United States, these programs remain limited in spite of public support. One OECD report from 2017 summarizes the main costs that employers face, including program and administrative expenses, recruitment and compensation of trainers and apprentice supervisors, and a tradeoff between “productive tasks” and “non-productive activities” like feedback, learning exercises, and guidance sessions.

While there are tactics to reduce these costs in even traditional apprenticeship programs, many financial and logistical hurdles of providing this kind of personalized learning to all employees through human-to-human interactions remain. In the next section, we’ll cover the ways that AI-powered tools can make learning through cognitive

apprenticeship more accessible to more workers by supporting human coaches and offering guidance directly to workers.

WHAT WE'RE HEARING:

In response to our survey, some of our respondents were unsure about the utility of AI in their learning. "I honestly don't know," said one leader, in response to our question about how they'd use an AI-powered leadership coach. "I'm a little skeptical about the use of AI." Others had a clear idea of how they'd put AI coaching to use: "I'd use it to fine-tune skills I already possess, look for more efficient ways to perform tasks, learn new things to get ahead, and stay on top of new and emerging technologies," said one respondent.

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Bringing apprenticeship learning to life

Team tools for busy managers

Valence began in 2018 focusing on **teams** - helping managers and team members to interact and collaborate better, to understand how their working styles affect performance, and to build more effective habits.

For the past five years, we've been privileged to work with dozens of Fortune 500s, from **CocaCola** to **Nestle** to **AstraZeneca** to offer these tools at scale and support tens of thousands of their managers and teams.

The Power of Gen AI: Personal, Meet Scale

People learn when they are faced with a challenge, and get guidance on how to tackle that challenge. And that guidance might be an idea or framework, it might be encouragement, it might be a nudge - but it must be immediately relevant to the challenge someone faces.

This is the heart of the Apprenticeship learning model that we've been discussing with Charter. It's **personalized learning and guidance** - specific to someone's context, preferences and realities.

Gen-AI gives us a chance to offer this support at scale, and to fundamentally rethink how we support people's learning and growth at work.

> *We've been working with Valence since an early pilot in 2019, and when I saw the AI coach, I got giddy thinking about how we could transform learning, taking it beyond a single program to reinforce ideas that matter to the manager.*
>
> ***Bill McNabb, former CEO of Vanguard:***

An AI-Powered Leadership Coach That Brings Apprenticeship Learning to Life

At Valence, we saw the potential of GenAI to offer a brand new experience, and have spent over a year building out a sophisticated, enterprise-ready coaching platform.

It's powered by voice, and starts with the manager, who can ask the AI coach anything, in any language, at any time. It will then begin a dialog, asking thoughtful questions, suggesting a framework or approach, and helping the manager make progress.

Managers love how this helps them in the flow of work. They are busy, so they bring it their problems. They get suggestions, they get role-modeling. They can role-play a conversation, and get guidance on creating safe to fail experiments. They get email follow-ups, text messages of support.

And the AI Coach remembers their conversations, their preferences, so it gives them better advice over time.

It's built with this apprenticeship model at its heart, and it's already transforming learning.

An AI Coach deployed and live in dozens of Fortune 500s

It's deployed in dozens of our existing and new customers, and is already turning traditional approaches to learning on their head.

Companies love that it can weave in a company's leadership framework or values, it can be programmed to be integrated into the flow of existing programs, and that they can get rich (anonymous) insights about the general topics on people's minds.

And they love that their managers appreciate the sense of investment in them, in their wellbeing:

> *I've never seen adoption like it, it had 100% uptake within an hour of launching... we offered it to over 50 managers as a first pilot, and the NPS score came back in the 90s, and managers are using it many times a week.*
>
> ***Lesley Wilkinson, Chief Talent Officer, Experian***

Most companies are exploring 2-3 different use cases, but here are a few highlights:

- At **Agco**, they emailed their entire 20,000+ workforce with a link to sign up — their view was this could support ICs as much as managers, and they have been delighted with the uptake.
- At **Experian**, they are exploring it across their whole range of talent programs, including building their entire 1500 person mid-level manager program around it.
- At **Nestle** it's helping them bring their new Nestle Values to life, and it's fully integrated in each module of their New People Leader's Program, helping participants make the concepts real in their day to day
- At **General Mills**, it's powering their change program, helping over 1500 managers think differently about change.

We're in the early stages of being able to offer a leadership coach, copilot and helper to each leader, manager & employee.

We're excited to be co-creating this world with our customers, and partners like Charter, who are bringing leading thinking to how the world of work is changing.

02 Artificial intelligence as teacher

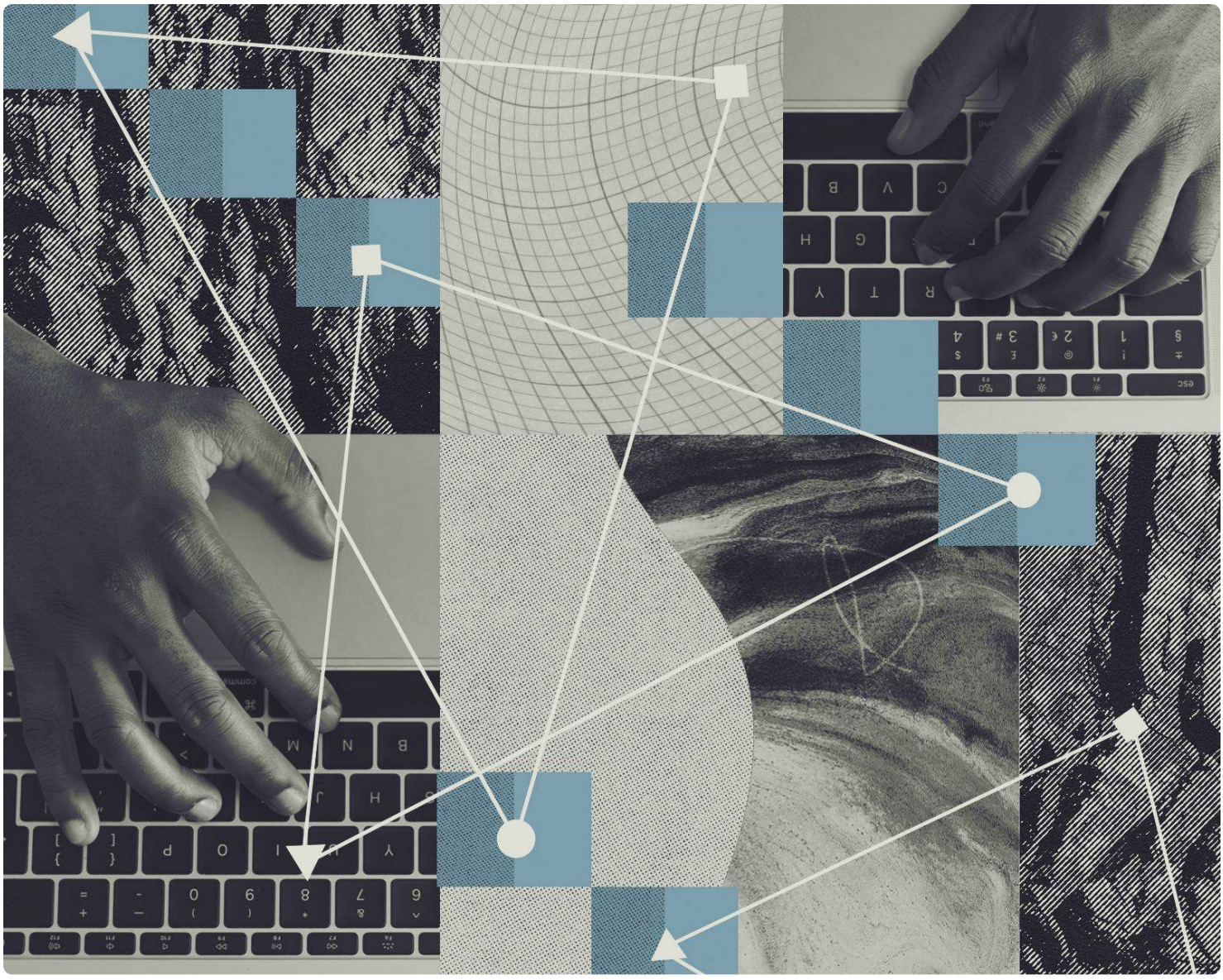

Illustration by Charter

Focus on AI and apprenticeship

Integrating generative AI in L&D processes offers a new opportunity to make apprenticeship accessible to more workers. With an AI coach serving as the expert, the logistical burden of administering a formal mentorship program shrinks, from making time to match apprentices with coaches to designing learning activities and providing timely feedback.

DIG DEEPER:

Read our research report on what we know now about remote and hybrid mentorship, based on original survey data.

WHAT WE'RE HEARING:

"More personalized learning or coaching could enhance effectiveness, making me more adaptable," one survey respondent told us about the potential benefit of more personalized learning. "I feel this will affect my enthusiasm for work, making learning easier and getting started simpler," another said.

The L&D menu: How might employers use AI as a teacher to support manager learning?

For Egle Vinauskaite, co-founder of AI learning consultancy Nodes, the key to integrating AI as a workplace teacher is the same as AI adoption in any other area of the business: "You map out your process and you find the parts of it that are time consuming and resource consuming." As L&D leaders continue to experiment and iterate with generative AI, there has been an explosion of new use cases. We've organized some of the most promising ones below, with examples and case studies to implement for individuals or teams.

We focus on a few key areas:

- Curriculum development
- Skills practice
- AI tutor and content enhancement
- Mentorship and connection
- Skills assessment

See the diagram below for how they relate to the framework of cognitive apprenticeship described in the previous section.

Areas for AI implementation in learning		**Steps of cognitive apprenticeship**
Curriculum development	AI-powered curriculum development can help L&D managers **model** new skills using existing content that guides learners through new processes or frameworks.	✓ **Modeling** Coaching Scaffolding Articulation Reflection Exploration
Skills practice	The best AI coaches mimic the most adept human managers. They can **model** an example of a skill or process, **coach** the user by providing feedback in the moment, **scaffold** learning with new challenges and guidance. They can also prompt users to think about their own learning by asking them to **articulate** the steps of their problem-solving process, **reflect** on their work in comparison to peers or other experts, or assign additional assignments for independent **exploration**.	✓ **Modeling** ✓ **Coaching** ✓ **Scaffolding** ✓ **Articulation** ✓ **Reflection** ✓ **Exploration**

AI tutor and content enhancement	An AI tutor can enhance content-based strategies by **scaffolding** individual learning, whether through in-the-moment guidance to better understand a lesson or by assigning additional exercises that gradually build challenges.	Modeling Coaching ✓ **Scaffolding** Articulation Reflection Exploration
Mentorship and connection	AI tools can strengthen novice-expert connections by matching workers to potential mentors or providing AI-generated summaries and action items based on in-person sessions.	✓ **Modeling** ✓ **Coaching** ✓ **Scaffolding** ✓ **Articulation** ✓ **Reflection** ✓ **Exploration**
Skills assessment	When integrated into a larger learning strategy, AI skills assessment provides a foundation for learners to **articulate** what they've learned and **reflect** on their progress and competency levels.	Modeling Coaching Scaffolding ✓ **Articulation** ✓ **Reflection** Exploration

Curriculum development

For Dave Edwards, co-founder of Artificiality, one of the biggest opportunities for using generative AI more broadly is synthesis: "You can synthesize complex and conflicting information. That's really helpful when you're trying to say, 'I've got all of these different documents. They could be research reports, so they could be like, take your entire library of security documents and I need to synthesize all this, bring it all together, find out where things are aligned, find out where things aren't.'" At organizations that already have a built-up library of professional development content, AI assistants can be a helpful partner in summarizing and synthesizing existing content into a

personalized syllabus, organized by skill level or themes. It can also help L&D leaders mix and match existing content and repackage it as a new course for a specific audience or learning goal.

Learning platform Coursera recently introduced Course Builder, an AI-powered tool that allows users to specify their learning goals and generate custom courses from existing content on the Coursera platform and external sources. Internally, Coursera used it to design a two-hour training session during a recent company leadership summit. “Finding all that content and building that course probably would have taken us, I would say, eight weeks to three months beforehand,” says Trena Minudri, Coursera’s chief learning officer. “With Course Builder, we had that course ready in probably two days.”

DIG DEEPER:

Read more about how Coursera encouraged and supported employee experimentation with AI across the organization, from less formal approaches like prompt libraries and a company hackathon to more formal ones like AI-focused objectives and key results and internal training on ethical AI use on the company’s own platform.

For L&D leaders wanting a more DIY approach, this might look like generating new training scripts based off of an existing library of training content, asking generative AI chatbots to create a syllabus for specific learners based on learning goals and an existing library of courses, or analyzing existing content libraries for larger themes or missing links.

Skills practice

Helen Edwards points out that AI chatbots can be a low-stakes platform to practice skills like having difficult conversations, giving feedback, or crisis management. “You can role play,” she says. “You can have it test things. You don't have to go out into the wild and make mistakes in real contexts.”

For example, a manager might want to practice having a tough performance conversation with an employee. With generative AI, they could practice giving feedback in a safe, low-stakes environment. The AI could play the role of the employee, responding to the manager's statements and questions in a realistic way. The manager could try out different approaches and get immediate feedback on what works best, with a variety of different scenarios to prepare for different reactions the employee might have. By the time they have the real conversation, they'll feel much more confident and prepared.

While L&D managers can encourage individual managers to have these conversations with chatbots like ChatGPT and Anthropic's Claude by providing example prompts, a number of AI coaching companies have emerged to provide tailor-built platforms for this feedback, including Valence (the sponsor of this playbook). These platforms can help individual users identify relevant skill gaps or problem areas, model best practices, encourage reflection and practice through right-sized challenges, and follow through on these conversations with additional nudges and prompts. "An AI-powered leadership coach offers a chance to weave together all these apprenticeship leadership principles and offer the kind of bespoke learning that works," says Parker Mitchell, Valence CEO. "It can be affordable enough to offer at scale, and personal enough that managers feel like they are getting the right support, at the right moment, and without taking time out of their busy days."

AI tutor and content enhancement

While new AI-powered tools are allowing many L&D teams to move away from their traditional reliance on content libraries, they can also help existing courses, videos, and learning materials come alive. AI can help make recommendations for course material based on a user's learning goals, as well as serve as a live tutor during the lesson or after the fact.

Some 300,000 employees at Infosys, a digital services and consulting company, have access to an internal version of the company's learning platform, which recommends courses similar to how Netflix

recommends shows. The platform has an AI tutor that can answer employee questions during lessons—and it can respond in a manner consistent with the user's pedagogical preference, such as Socratic or storytelling.

Priscila Bala, CEO at learning platform LifeLabs Learning, notes that individual learners can use platforms like ChatGPT and Claude to enhance content even on platforms without a built-in AI tutor. She gives some examples of ways managers might use chatbots to apply lessons learned in a session about manager skills:

- Create a 30-day plan to increase trust within a group, based on the best practices shared in the session.
- Use the course's template for checking in with reports on autonomy, inclusion, and certainty, and brainstorm opportunities throughout the week to embed small check-ins into regular communication.
- Craft agendas and questions for one-on-one check-ins based on the instructor's recommendations.
- Analyze meeting notes from all one-on-one meetings and highlight key opportunities for development, recommendations, or resolution of outstanding questions.

Mentorship and connection

Experts we spoke with, while optimistic about the potential for AI-based learning, highlight that there is no replacement for human connection. While 47% of professionals and other managers who Charter surveyed indicated that AI-powered coaching would make a meaningful difference to their work quality, 22% indicated that person-to-person coaching would also generate improvement, suggesting that these types of coaching should co-exist. Beane points out that maintaining mentorship relationships is key to "building the trust, respect, and warm connections that allow for people to reach out for help to say they're overloaded... because if you burn out, the organization suffers." But he notes that there are new frontiers for AI to facilitate mentorship connections within organizations. For example, "What if you had a different mentor for different kinds of work, and an AI system notified you that you're about to go do that work, then

checked and found an available mentor in your network and matched you two together so you could co-work?"

Vinauskaite shares a case study from a US-based telecommunications company that used AI to build on an in–person session with senior leaders. After the event, an AI assistant generated summaries of the discussions, with major themes and action items. Rather than letting the in-person event become a one-off opportunity, the insights became "something that can actually be brought into the real world," she says. For individuals, that might look like asking an AI notetaker to generate transcripts and summaries of mentorship or networking meetings, then using a chatbot to generate potential takeaways and action items.

Skills assessment

Workera uses its own product internally to assess skill levels and personalize skill acquisition for its employees. Its platform uses generative AI to break projects down into the skills necessary to complete them, to create assessments to verify whether employees have those skills, and to create short lessons to help employees fill in skills gaps.

There's a unique advantage to using AI to assess managers' skills, argues Katanforoosh. "Because of the half-life of skill getting shorter and shorter, we need to update our assessments more frequently because skills change," he explains. "AI helps us author and calibrate assessments faster so that whenever something comes out in the market, we can turn it into a validated assessment and serve it to the community as fast as possible."

It's worth noting that historically, workers are more likely to reject rather than adopt new technology when "AI is managing or assessing individuals' performance, rather than coaching them," as we explained in our research playbook on AI and worker dignity. Integrating AI into assessment tools will require a sustained effort on the part of L&D leaders around building employee trust. In particular, they should be transparent about guardrails against bias in assessment and highlight

the continued importance of human judgment in any decisions about hiring, promotions, and dismissal.

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Other factors we identified that make workers more likely to reject new technologies:

- The technology is forced upon workers without their consultation.
- The rollout and use of the technology is extractive, racist, or otherwise dehumanizing.
- It is used primarily for the purposes of surveilling them.
- Use cases focus on increasing productivity rather than positively addressing problems that impact routine work.
- Workers' bodies or mental wellbeing are further stressed or put at risk.

Spotlight: Assessing and addressing AI risks

Two top concerns for workers and leaders alike when it comes to AI adoption are instances of hallucination—inaccuracies and discrepancies in AI-generated content—and bias. Researchers have flagged multiple instances of racial and gender bias in AI tools. One study, for example, found that when asked to make hypothetical decisions about people based on the way they talk, LLMs were more likely to recommend that speakers of African-American English be assigned less prestigious jobs.

The problem with both hallucinations and bias, says Gary Eimerman, chief learning and product officer at Multiverse, is that AI is "not good at sharing what its confidence level is in the answer that it's providing you," he says. With hallucinations or bias, AI models can confidently state an inaccurate or biased reading. The solution, he says, is "building in secondary models to help remove that for a given situation."

Here are some guardrails to guard against potential biases or hallucinations in AI technologies:

- **Don't let AI make personnel decisions on its own:** For Nickle LaMoreaux, IBM's chief human resources officer, keeping AI accountable means preserving human decision making for decisions around hiring, firing, and promotions. She told Charter about the company's approach to AI in hiring, which currently doesn't involve using AI to screen applicants.

  "For me, an ideal situation is how do you marry both?" she said. "Is there a way for AI to sort resumes, prioritize them, but ensure that you've got humans over the top of it ensuring that sorting is appropriate." In a learning strategy, that might look like using AI assessment tools to help individuals and managers gain a sense of current skill levels to benchmark and guide future learning, but stopping short of using AI assessments to promote or dismiss workers.
- **Audit potential vendors.** As you evaluate tools for organization-wide adoption, it's worth asking sales representatives how the organization has designed the platform to reduce potential bias or hallucinations and respond to any existing problems:
  - What secondary models have you built in to check for bias or hallucinations?
  - With AI coaches or chatbots, how does the platform respond to questions it doesn't have the answers to based on coaching data? Will it say it doesn't know or fabricate information to provide an answer?
  - What measures are in place to prevent future biased evaluations based on gender, race, and other demographic factors?
  - Are there systems in place for reporting and responding to instances of bias or inaccuracies?

DIG DEEPER:

Read our interview with IBM's chief human resources officer about their AI adoption framework of "Eliminate, simplify, automate."

03 Rollout and the role of leadership in supporting manager learning

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When it comes to adopting AI in learning strategy, “There is no substitute for experience, says Helen Edwards. She notes that many workers and managers are already experimenting with AI in their learning, which can be a basis for organization-wide programs. In our survey, 11% of professionals indicated that their “own experimentation/ putting new information into practice” has helped them learn new skills or material in their job in the past 12 months.

We encourage leaders to actively learn from these individual experiments rather than ignoring them. Leaders can draw from worker experience to quickly launch pilot programs, then continuously learn from worker feedback to iterate and improve learning products. For the best results, task the development and rollout strategy to a single leader or team that is able to learn quickly across functions and access the resources necessary to roll out any pilot programs.

DIG DEEPER:

Read about how Accenture used a product mindset to develop Proposal Builder, an internal tool for writers on staff—known as the “pursuit” team—to create sales proposals, using a custom version of ChatGPT.

Adopting a product mindset for learning experiences

Step 0: Ideation and research

Like any product development process, adopting a new learning strategy starts by assessing the current state of play. As Charter has covered in our previous playbooks on AI adoption, the level of AI usage at work depends on a number of factors, including demographics, functional areas, and organizational policy. Start by assessing the experimentation and practices already adopted in areas of your business, and talk with peers at other companies to assess potential strategies and vendors. Perhaps as part of a larger project on surveying workers on their current AI use, ask the question, “How are

you currently using AI to learn in your role?" The answers, along with the case studies and recommendations above, will form the seeds for your strategy.

Step 1: Project launch

For many teams, the project launch is when product development kicks into high gear. Accordingly, any effective AI implementation project begins with a conversation with workers across the organization, according to Helen Edwards. "The very start of the conversation is, 'Are you really worried about this or are you really excited about this?' If you can't have that conversation, particularly the really worried bit, you can't realistically move forward," she says.

This initial conversation is an opportunity to set the tone around AI and learning. If done well, Helen Edwards explains, workers and leaders will emerge with shared expectations about the future role of AI and the beginnings of a shared vision of what adoption might look like. More concretely, it's an opportunity to share the findings from the ideation and research stage, as well as invite input from employees across the organization. Consider the following template a project launch agenda, based on Helen Edwards's advice:

- State of play
  - Existing learning goals and progress
  - Current state of learning technology
  - Ongoing and previous experiments currently underway internally
- Promise and perils
  - What do employees (and the organization) stand to gain from building AI into learning?
  - What are potential pitfalls or concerns? And how are we addressing them?
- Visioning and prioritization
  - What are our goals for the short term, medium term, and long term?
  - What are our initial projects and priorities, and how will they affect the way learning gets done?

- Temperature check and introducing ongoing feedback mechanism
  - What are initial reactions to vision, priorities, and goals?
  - What are ongoing ways employees can share their feedback on pilots launching in the wake of the project launch?

Step 2: Ship a minimum viable product (MVP)

The goal of this stage is to roll out initial pilot programs to test potential approaches, based on the most promising strategies revealed in the previous two steps. Rather than setting permanent policies in place, pilots allow individuals and organizations to learn about which tools best promote organization-wide learning. To help individuals make the best use of the new tools (and to glean the most useful learnings for the organization's overall learning strategy), make sure employees are equipped with the resources and support to embed AI tools into the flow of their work. In Charter's recent guide, we shared a few ways to offer employees guidance to use AI tools, with a range of methods to suit every employee's learning style. Consider the checklist below, based on our recommendations:

- ☑ **Documentation and FAQs**—Have a searchable page with step-by-step instructions and frequently asked questions for those who prefer text-based support.
- ☑ **Small-group guidance and support**—One-on-one coaching, small group sessions, or office hours can help employees work through questions or issues in real time with colleagues who they trust and respect.
- ☑ **Internal peer-to-peer learning networks**—Whether it's a shared prompt library on the team intranet or a Slack channel to ask for and receive advice, create platforms for employees to learn from each other.
- ☑ **Live and recorded walkthroughs and tutorials**—Roll these into team meetings, and share screen recordings in an easily accessible library.
- ☑ **Reward and recognize learning**—Successful adoption of any learning strategy requires supporting a culture of continuous learning. Encourage workers to prioritize learning by spotlighting use cases in internal channels, adding regular L&D check-ins to managers' one-on-one meetings with reports, and including a question about how employees have invested in their own learning and growth in performance reviews

Recent research suggests that these support strategies are essential to encouraging individual AI use. Deloitte surveyed employees in the tech industry and found that, while senior women in technical roles have adopted AI tools at greater rates than their male peers, junior women and women in non-technical roles still lag behind their male colleges. The report's authors identified "confidence in their own AI skills" as a key factor keeping many employees from exploring AI tools and encouraged employers to invest in upskilling programs and internal communications to build confidence and competency around AI tools.

WHAT WE'RE HEARING:

"Encouragement and support is extremely useful," said one respondent, in response to a question about employer involvement in on-the-job learning. "It gives you confidence to perform better." Another echoed that sentiment, replying, "A ton of support is going to play a huge factor, as lack of support could cause delays in the progress of both the company and the employees."

Step 3: Feedback and iteration

As employees get more comfortable using their new learning platform, it's important to continue soliciting feedback and continuously improving the offerings. Launch a survey or focus group focused on learning and development. Consider these questions as a start:

1. In the past three months, how many times have you used our new platform, if at all?
    a. What are the top barriers to you using the tool more frequently?
    b. How would you rate your own comfort and knowledge level with using the tool itself?
    c. Would you recommend the tool to a colleague?
2. How have you put the tool to use so far? (Provide options like role-playing a scenario, practicing a new skill, evaluating my own learning, etc.)
3. How has the tool impacted your learning? Your day-to-day work?
4. Describe any concrete skills or knowledge you have gained from using the tool.

Spotlight: Evaluating vendors amid a rapid pace of change

As new products and technologies launch, it can be overwhelming to evaluate potential vendors in the AI-powered L&D space. The key, says Dave Edwards, is to focus on partners that prioritize flexibility, adaptability, and transparency. “You're going to want to make sure that you've got the ability to move as things shift so quickly," he advises. That means choosing a broader tool that can adapt rapidly for changing conditions, or a suite of tools with built in flexibility. When evaluating a specific tool, he recommends two key questions: "Have they created anything that allows them [or] that would disallow them from adjusting to new changes in technology? Are they completely dependent on a single tool, a single foundation model?"

In this fast-paced environment, making a long-term commitment to one provider can be risky. "It's just not settled enough today," Dave Edwards warns. "Things might change so quickly that you've made a big decision and you've made a big purchase and you're shifting your whole L&D program to something, and then within a few months something changes" To mitigate this risk, look for vendors who are transparent about the evolving nature of the technology and are committed to learning and adjusting alongside their clients. "A vendor who can stay flexible with technology changes would be key. And a vendor that actually is quite upfront and honest about the fact that we're all learning and they're planning on adjusting along with everybody else is great," Edwards suggests.

Conclusion

As you consider the ideas and strategies within this playbook, we encourage you to consult the following principles to guide AI adoption in L&D. They include our principles for human-centered AI adoption, with ideas for how to apply them to a learning strategy powered by AI.

Recognize that discourse around AI can be exclusionary, and set a more inclusive tone.	Partner with employee resource groups (ERGs), affinity groups, and other diverse groups of employees to test out your language around new learning initiatives and reach out to employees across the organization.
Involve workers as stakeholders in the design, selection, and implementation of AI technology.	As we wrote in the previous section, soliciting feedback at each stage of rollout is a key part of implementation and iteration. See our advice on surveying employees for more.
Learn how your organization's workers and managers want to be developed.	In addition to soliciting feedback on learning initiatives, as covered in the previous section, figure out the most in-demand way to learn how to use AI-powered learning platforms. Consider offering multiple resources, including: • Live office hours with L&D leaders. • Video walkthroughs using Loom or another screen-recording app. • An internal communications channel to ask questions and share suggestions, like a Slack channel called #ask-AI-coaching for questions about an AI coaching platform. • Workshops and learning sessions to practice prompting and circulate best practices.
Focus on lower-skilled people who could see greater gains	Engage in targeted outreach to first-time managers, and consider integrating any AI-based learning into a broader support structure for this cohort. For example: • Mentorship program pairing first-time managers with more senior leaders. • A first-time manager toolkit, with scripts, FAQs, and policies in one searchable database. • Peer support networks, like a manager Slack group or peer mentoring program, that encourages peer-to-peer learning.

Prioritize inclusive AI engagement by involving people in groups that are least likely to be using AI today.	Survey your workforce to understand the state of AI adoption in workplace learning and their daily work. Do targeted outreach if you notice any gaps based on function, demographics, or seniority.
Communicate to employees how AI could change their roles (without making sweeping decisions and predictions.) Frame AI usage in terms of raising the quality of work and workers' autonomy, instead of efficiency and cost-cutting.	Launch AI learning initiatives with clear goals and priorities, such as having more personalized learning opportunities and increasing accessibility of learning experiences. Give concrete examples of how individual workers can use these tools across functional areas.

DIG DEEPER:

Download our playbook, "Using AI in ways that enhance worker dignity and inclusion," for more on our AI adoption principles and the research behind them.

About

This playbook was brought to you by Charter and Valence.

Thanks for reading, and please feel free to get in touch with questions, reactions, and ideas for future playbooks at hi@charterworks.com.

About Charter

Our mission is to transform every workplace and catalyze a new era of dynamic organizations where all workers thrive. Charter does this by bridging research to practice—giving people the tactical playbook for what work can and should be.

Charter is a next-generation media and insights company. We publish a free email newsletter, original research, and articles about work on TIME.com. Charter Pro is a premium membership that supports owners of the people agenda in executing their highest-value initiatives, quickly. We also host events for workplace decision-makers and work with organizations directly.

About Valence

The Hope of Democratization

At Valence, we're nerds, and sometimes describe the world we'd like to see in equations. A popular one is: Potential >> Credential

A world of potential is one in which everyone has access to the learning that matters, which happens at work. That's where you become a better manager, a better leader, a better executive — through hard-earned challenges, and often a few bruises.

But the bespoke support that accelerates that learning - coaches, guidance, intense investment - is only offered to a select few.

So Valence's mission involves democratization - developing magical products that capture the wisdom of coaches or facilitators and distill it into simple, fun and friendly tools that **any manager** can access.

Visit our website to learn more about how Valence can deliver AI-powered leadership coaching for your team.