

**Learning Uncut Episode 149**  
**Improving performance with an AI coaching bot – Dan Redman**  
**Hosted by Michelle Ockers**



**Michelle Ockers:**

Welcome to another episode of Learning Uncut. In the spirit of reconciliation, I'd like to acknowledge traditional custodians of country throughout Australia and their connections to land, sea and culture. I'd like to also pay respect to elders past, present and emerging. Today, we've got another great story that is AI related. We've got Dan Redman joining us to talk about the body of work he has performed in his recent time at HSBC. Welcome, Dan.

**Dan Redman:**

Hi, Michelle. Thank you very much for having me. Really, really excited to come on and, and chat about AI and what we've been doing in the bank.

**Michelle Ockers:**

It is exciting. And of course I came across this story through the AI and L&D from talk to action report that Donald H. Taylor and Egle Vinauskaite joined me on Learning Uncut in episode 146 to talk about. And yours was one of the fabulous use cases in this case about an AI coaching tool being used in your contact centres. I would be surprised if we had listeners who didn't know who HSBC was and what you did, but just so we're all on the same footing, can you give us a brief introduction to HSBC and where you fit in to the organisation?

**Dan Redman:**

Yeah, sure. So HSBC, is one of, or I like to think, one of the biggest banks in the world. We're kind of globally across the UK, across America, across Asia and all over really. I don't know where we're not. Big kind of global bank. My role specifically, I sit in the UK and I develop the onboarding training and help people with their development in our UK contact centers and branch networks. So, you know, more of the customer facing colleagues who, who come in and support our customers and I help train them to do their job.

**Michelle Ockers:**

And Dan, what are some of the key challenges from a learning and development perspective in that environment?

**Dan Redman:**

Yes, it's really challenging. It's really interesting. You have a lot to learn in a short space of time really and you're very time poor when you're kind of particularly in the contact center because you have, obviously you can imagine quite a few calls coming through with people wanting to do certain things or ask questions and so on and so on and you can get a range of a real range of different questions and queries so variety is really huge as well. And, you know, contact centers are really quite high turnover compared to other areas and other businesses. So you have a lot of people coming through the door and you have to try and make sure it's all consistent, make sure it's to the same level. So there's quite a few challenges in trying to make sure that the customer service is right.

**Michelle Ockers:**

Yeah, there are. So in terms of then the potential to use AI as a coaching tool in that context, you know, were there specific challenges that you were trying to address or specific objectives you were trying to achieve?

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### **Dan Redman:**

Yeah, so I think it kind of goes back to trying to think where we are about two years ago now. We were just coming out of COVID and what COVID had done to us is obviously put everybody at home. Everybody was working from home. We weren't in offices anymore. So it meant that we had to recruit at home and it meant we had to recruit virtually. But none of our training was really designed to be delivered virtually. So we were looking to redesign our training. And what we wanted to do was we wanted to have a tool that would bring things to life a little bit more. Wanted to give people the opportunity to practice in a really safe environment. And we wanted to kind of take away that burden from our, from our people. So previously a tool like this would be, well, the tool has come in to replace things like role plays. So you might have somebody just run through a particular scenario, a call scenario with, with one of our existing agents, and then they'd give them coaching and feedback and so on and so on. And there's lots of different things that are good about that, but there are also lots of different things that can be improved on with that. So we wanted to make sure that people had this safe environment where they could practice. It was a little bit more realistic than perhaps trying to do things with somebody else. I'm sure, you know, your listeners will, I'm sure, agree that role plays can be a little bit, you know, a little bit like drama in high school or something. You can start giggling straight away and it kind of takes the edge off a little bit. So we really wanted to find a tool.

### **Michelle Ockers:**

It can be hard to get them authentic, right?

### **Dan Redman:**

Yeah definitely with some of your more challenging conversations I think if you're thinking about a customer I mean don't get me wrong I'm sure complaint calls are fine, I'm sure lots of people have no issue whatsoever just kind of screaming at someone for 10 or 20 minutes and getting something off their chest but if you if you think more about you know, maybe a bereavement call or somebody who's suffering and is slightly more vulnerable. Those things are really hard to replicate and really hard to replicate well. So we wanted to bring a tool in that would enable us to do that because we really don't want our people, for both our people and for our customers, to go through a conversation like that for the first time live on the phone. That's just, that's not really fair to anybody. So we wanted to kind of create a tool that helped us to provide that environment.

### **Michelle Ockers:**

Yeah. With that role play based approach, how were you going about getting consistency or trying to get consistency? Because that's, you know, you've got a brand, you've got a customer experience you're trying to deliver. You've got people in contact centers and or sitting at home even harder to get support from peers and colleagues. How do you find getting consistency? in the practice and feedback so that people are doing things in a similar way, delivering a similar customer experience with the role play approach?

### **Dan Redman:**

Yes. I think with role plays before, when it was kind of human to human, so to speak, it was, you know, you'd get a script and that would probably be as close as you can get because each individual will then play that role differently. They will do things to a different level. The coaching will be different because That's just naturally the way things are and the way people see things, you know, benchmarking sessions are hugely important, but we know that from benchmarking sessions and coaching, people always come with different ideas and different approaches. So you will always get a slightly different outcome. I think with the AI tool that we've introduced, not only do we get the same role play, time and time and time and time again, and obviously you can create a number of different role plays. So you get

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that consistency of, of the customer first and foremost, and the reality of that interaction. But you'll also get the consistency of the feedback. So the tool will interrupt you if you don't do something procedurally correct, though a really obvious and probably straightforward exercise, I'm sure everybody knows that, you know, when you phone up, typically you'll be asked your date of birth as part of security or something like that, you know, if you don't ask that then the system's going to interrupt you and it's going to try and help support you from a procedural point of view if you don't show empathy so much you know the system's going to kind of give you a score on that or maybe even interrupt you if you don't do it at all so you're getting a consistent level of feedback. I'm sure people might kind of be wondering, well aren't you just creating robots out there? It's like well no, not really because of the way that we've built the tool to pick up on certain things it doesn't matter how you show empathy in a in a sense but we definitely want you to show empathy. So the way that the tool works and the way that we've been able to build our stories in the background means that we're able to still get that human kind of element from our people.

#### **Michelle Ockers:**

Okay. You started talking about the way that we've built it. Well, tell us a little bit more about how you've created and implemented an AI coaching tool.

#### **Dan Redman:**

Yeah, so from my experience so far, AI is all about the rules in the background and how you instruct things to work and how you build things to work. So we have very much built our AI tool in line with our procedures, which means that if people don't get things right in the procedures, as they work through their role plays or through their scenarios, then they will be interrupted first and foremost, but then also we've kind of built our AI around a set of skills which we expect people to demonstrate, and on almost how we score our calls like how we observe calls ourselves and say, yes, that's a great call, no that's not all, that one needs a little bit of work or you could do with a bit of coaching here. So the rules in the background enable us to guide people and gear people towards a certain way of interacting with people and showing those certain skills and also the tool itself. So the tool breaks it down in different types of scenarios. So you'll have a guided version first which will kind of almost guide you with what to say and I think we learned a lot about that early on like people start to use that as a bit of a memory game so we've had to nip that in the bud pretty quick but after that you then do it on your own and you'll be like I say you'll be interrupted if you kind of don't follow the best practices and things. So it takes a little while to kind of get it right, I think, particularly when you're trying to just figure out what it is you want the rules to be. But yeah, setting the standard of rules in the background enables us to really kind of bring out the best in our people.

#### **Michelle Ockers:**

So this is different from generative AI, obviously. And that's kind of the thing that has received a lot of attention since chat GPT was launched, but this is conversational AI. And I think the calibre of the tools available to for conversational AI have been available, like they've been around and ready for use for some time. So tell us a little bit more then about. how conversational AI differs from generative AI, or just if it makes sense, just what conversational AI actually is and how it works.

#### **Dan Redman:**

Yeah. So conversational AI is a little bit more scripted. So we will write a script in the background. So similar to how you would write a role play anyway, we'll write a script and we'll kind of include the customer element and that will include what we expect our agents to say. And we'll feed that into the tool and the tool will also pick up on the different ways of saying things. So if I come back to our question earlier around security and what is your date

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of birth. Not everybody asks that in exactly the same way. So conversational AI, whilst not generative, and obviously generative AI is a little bit more free flowing, is a little bit more on the spot. Conversational AI is a little bit more structured, but also allows you to kind of have a little bit of freedom in there, a little bit of movement. I think both tools are really interesting. So I've definitely seen versions of the tool that we use that uses generative AI. There was no particular reason we went with this one as opposed to others. We just kind of, this was the one that we came across and we really liked. So I think both are really, really good and will work differently depending on what you need from it. But yeah, conversational AI, a little bit more structured and a little bit more just back and forth. It picks up on what people have said and have they said that right? Are we expecting, you know, have they said what we've expected them to? And if not, we'll pick them up on it. And if they have, have they said something ever so slightly different and so on and so on.

### **Michelle Ockers:**

Okay. So you're looking for a certain structure, the AI tool is looking for a certain structure, but allowing for human variation almost in how some aspects of the structure of the conversation are expressed.

### **Dan Redman:**

Yeah, yeah, absolutely. Yeah, the, you know, what's your date of birth kind of example, or if it's an empathy example, I'm going to try and try and remember things or come up with something on the spot now. But say, for example, you have a relative who is not very well, or has been in hospital or something, we want you to kind of pick up on that. There's so many different ways you could kind of pick up on that and use empathy in that situation so we have to think of the way that we would want people to say it first and foremost, it's kind of like a best practice if you like, but then the tool will come up with various different ways of how you might interpret that or how you might say that in in different styles and we have complete control over that as well so it's not just kind of like loose on its own in terms of it can say whatever you want, we can go in and have a look at the different offerings and kind of say yes that's fine or you know that's maybe a little bit too out there for us or whatever it might be or no that's just not empathetic at all we don't like that one so we can kind of manage that and kind of just have that little bit of ownership around the best practices that we want people to use.

### **Michelle Ockers:**

So how did you go about developing kind of these scenarios or stories for the AI tool and working with the AI tool almost to help it to learn what good looks like within the scope of the scenario or storyline of the script that you were laying out for it to use?

### **Dan Redman:**

Yeah. In a word practice. Yeah. So, you know, we run a little bit of a session or probably about a six months period where we were just testing stuff. We would create stories and we still do it now. So if we come across a new topic, I'm sure we'll talk about the different versions of topics you can have. But when you first start writing a conversation, it's a really bizarre experience to write a conversation. And that might sound a bit weird. But like when you kind of write anything, they'll say this, and then they'll say this, and then they'll say this, actually, that doesn't necessarily always happen. You have to kind of have a little bit of learning time and build your conversations then practice them and so on and so on, and just test and test and test. The company that we've worked with, Zenarate, are really great as well in helping us to train the tool, they'll be a lot more knowledgeable about how they do that than me, but we spend a little bit of time kind of understanding as we test what went well and what didn't. So yeah, just a huge amount of time testing things and practicing and

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making sure that we understood how to build the stories and then that the tool understood how they worked as well.

### **Michelle Ockers:**

In terms of building up your own skills, did they kind of train you up on how to work with the tool in order to then allow you to create the scenarios, to train the tool on how to run the scenarios and so on? What did that look like for your team?

### **Dan Redman:**

Yeah I think again, there's a bit of a partnership like we've worked really closely with them we've had regular meetings with them to understand what's working what isn't working and feedback where we don't think it's worked and then they might come back to us to say actually no you've got that wrong so you know it's a real partnership around what works for both sides and how this will work. The more that we've worked with them, we spent more time learning how to build stories where we can, we can kind of almost do it on our own now entirely through the tool. And they've given us the freedom to do that and the ability to do that as well, which has been great.

### **Michelle Ockers:**

Yeah. What have you learned along the way over that two years about creating effective content for AI powered coaching?

### **Dan Redman:**

First and foremost, how to use it. We had an idea of what we wanted to use the tool for, and we were pretty sure it was going to work, but we didn't know for sure. So we obviously like to learn how to use the tool, how to use the tool effectively. And that just takes time. It takes practice. It takes testing, all of your standard learning elements where you've got to, you know, prove your ROI and all of this sort of stuff. But I think just wider than that as well, we've learned so much around potentially how people view AI and the challenges that faces. You know, you have your kind of standard challenges around cost versus what are you seeing in your output. There's a little bit as well of kind of the same type of thing. If you're implementing any kind of tool, you'll get the same challenges. But I think with AI, it's definitely come with a bit more of a higher profile than anything else that we've tried to implement before because of those two little letters. So yeah, we've definitely had to have conversations with people and kind of try and just generally prove that this is working and this is kind of the future because it will only get better from here. It's a great tool now. Is it perfect? No, probably still some things to make it unbelievably lifelike, like kind of seeing iRobot and all those different types of movies, but it's definitely well on its way and it's really exciting.

### **Michelle Ockers:**

So let's talk about that user experience or the employee experience for your staff. If I'm being onboarded, if I'm starting as a contact centre team member with HSBC, what's my onboarding experience and where does this fit into it?

### **Dan Redman:**

Yeah. So for us, it is that opportunity to practice as part of your onboarding experience. You'll go through plenty of learning content that kind of gives you the theory behind everything. And this is like your practical. So I always try and compare our onboarding journey, rightly or wrongly to a driving test and learning to drive because you'll kind of go through all your theory. You'll, you know, you'll learn what signs mean and you'll learn how to use roads and which side of the road you should be on and all of this sort of stuff. But then the AI coach is when you're getting in the car and you're driving around and you're putting

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everything that you've learned in your theory into practice. So we use it as that opportunity to practice in a safe space. We kind of mentioned that safe space a couple of times. It's so important for our learners but also for our customers right because within a bank, we have so much at stake for people, we have so much at risk for people in terms of it's their money, it's their livelihoods, everything. So in order for us to really practice and give our people that safe space, we are protecting our customers as well. It does so many different things for us in terms of just bringing all of that learning to life and giving people a safe space, a safe environment. As a learner, I can practice as many times as I want. I can send as many different scenarios off to my manager to get feedback and to get coaching as well. It's that real kind of development, that next level learning for them.

### **Michelle Ockers:**

So is the AI coaching tool available on demand for people to practice as much as they want, you know, or do they have to do a certain minimum number of sessions with the AI coaching tool?

### **Dan Redman:**

In a sense, yes, they kind of do have to do a certain amount because we actually use it to assess whether they can do the job. So we'll kind of use this tool and understand, are you following the procedures? Are you able to have that interaction with the customer? Are you able to bring everything together? So in a sense, yes, they have to do a minimum amount because we need to see that from them, but there's no maximum amount that they can practice. They can go on as many times as they want. We kind of create stories and, you know, there are a huge, limitless number of scenarios that you might find yourself in. So have we got every scenario? Not yet. We're kind of slowly getting through that, that kind of huge pile of stories. And we have a number of stories for people to just go on, log on, practice whenever they want onboarding, but it's also coaching as well. So we're starting to develop into other areas where it might be shorter snippets of coaching. So, you know, somebody who's been in the role for two years, doesn't need to know how to do an entire call. For example, they probably just need to learn a little bit that maybe they're not too, not too sharp on right now, or maybe they're just suffering a little bit of confidence in.

### **Michelle Ockers:**

So how many stories would you have? Like, is it like a library if I log on to the tool? Is it like I've got a big menu to pick from?

### **Dan Redman:**

Basically, you can log on and choose a topic and kind of go from there. And we try to build topics around different subjects, but also different elements of your job and different elements of your call. I think we're up to about 150 or something at the moment in the grand scheme of things. It's not that many, but yeah, it's a lot of stories for you to go on and just practice and get the opportunity to mess around with. More role plays than we've ever had, I suppose, is probably a good way of looking at it.

### **Michelle Ockers:**

Yes. And you mentioned that someone can ask for, I think you said manager feedback as well on an interaction they've had or a practice session they've had using the AI conversational tool. What is that experience like for the manager? What do they get to look at and provide feedback on and how do they provide that feedback?

### **Dan Redman:**

Yeah, so at the minute they will record the session, they'll save it and then they can choose an option to send that to the manager and the manager will just get an email into their inbox.

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Manager can then click on a link that will take them straight to the tool and they can listen to the call. They'll be able to see when an agent has been interrupted, for example, if they have. I'm assuming if they've sent it to the manager, they haven't been interrupted and they think it's a pretty good call. But they'll be able to see all of that and they'll be able to see kind of an empathy score as well. So each interaction kind of has a bit of a score between one and five as to how empathetic or neutral or unempathetic that was. And they'll be able to listen and then they'll be able to add comments and that will go back to the learner to sort of say, you know, yeah, I really, really liked this and this was good. Maybe have a look at this going forward. And it just brings back, you know, we're talking about an AI coaching tool, it kind of brings back that human element of coaching as well.

### **Michelle Ockers:**

How does the feedback from the managers tend to compare with the feedback from the AI tool? What's similar? What's different?

### **Dan Redman:**

Well, I think the AI tool will set a kind of a best practice standard, and then the manager might pick out things that they've noticed or give their opinion on things. So again, coming back to that slightly different variation of what people see when they kind of coach a call or when they when they mark something they might pick out something ever so slightly different. So the AI coach is there to set a standard and then the team managers might just kind of add their own kind of flavor to things as well and maybe even if they're looking more towards for example a different goal that's been set outside of the standard that we set within the AI tool, the manager can feedback on that as well.

### **Michelle Ockers:**

Okay. And is the feedback, if I were using it as a staff member, is the feedback I'm getting only able to be specific to one call or could the AI tool track my progress over time and be able to compare my performance over a series of conversations and give me feedback as to how I'm developing and the patterns it's seeing?

### **Dan Redman:**

I think you can, you can probably largely pull that out, but it might be a bit manual. I think this is kind of one of those areas where, you know, the tool is, is really developing. It's really developing quickly. So we're seeing a lot of great things coming down the line. Yeah. It's probably one of those areas where you start to then go, okay, so we've got this amazing tool, but what's next? What do I, what do I take on next? And, and how do we kind of make the next improvement in the next level?

### **Michelle Ockers:**

All right. And we will explore that before the end of the conversation. I want to stick with the employee experience for a little bit longer. Let's talk about acceptance of this method and the tool being used for practice and coaching. What's the range? Because I imagine it's not just everybody responds in the same way. What's the range of responses been like over this two year period? to the use of AI and people practicing with an AI tool and how, if at all, has that shifted over that two year period?

### **Dan Redman:**

I think you almost go through a little bit of a change curve in a strange sense. So, you know, there's a little bit of excitement at the very, very start when people hear AI tool and this kind of thing and people really, really get excited about it. We have then had a range of experiences and people liking the tool. Some people will get on with it. Some people won't. You know, I think that's learning in general. You'll kind of have people that will enjoy

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sessions and they won't enjoy others. So there has definitely been people who have really struggled with it and have really kind of not grasped the concept of what it is and that type of thing. And that's okay. That's not to say that they can't do the job, but it's definitely a conversation to have. But then there'll be other people who are really, who just fly with it and they get everything right straight away. And they kind of, they love using the tool and they go and they start practicing things we've not asked them to do yet. So you get a huge range of emotions in terms of people using the tool and people's feedback kind of mirrors that, you know, some people will come back and say, I didn't really like it. I didn't really get on with it. And other people who are, who are kind of saying, yes, this is amazing. This is, this is absolutely the future. So I think we're in a period of time where that will probably continue for a little bit. I'm assuming until kind of AI and the use of AI in this kind of way becomes the norm. But it's, it's really interesting because. I think we kind of already use it sometimes and we just don't necessarily realize that. Or maybe it's even the same experience, right? Because if you think when you ring up a company like a bank or like another utilities company, for example, you'll talk to an AI there and they will try and get you to the right person. So, and some people get on with that and some people don't. So, yeah, it's really interesting. I think we're still in that period where it hasn't quite landed with everybody just yet.

### **Michelle Ockers:**

Has the way you kind of messaging it like from a change management perspective is the way that you are talking to people about the fact that they're going to be practicing with an AI tool has that shifted over time and what does that look like now?

### **Dan Redman:**

We've maybe just kind of calmed down a little bit so I think you know maybe we got a bit excited at the start as well and we're kind of like yeah you're going to use this AI tool this is really cool and now we kind of have to add a little bit of context and how it helps you and so on and so on and again that might seem like a really obvious thing to do right but like when you kind of first pick up this tool and it's really exciting and it's amazing to watch it you kind of get caught up in the in the glamour and in the lights and things so yeah I think we've definitely had to kind of tailor it a little bit and temper it a little bit to kind of say or almost just treat it like it's anything else, because at the end of the day it is it is just a learning tool that helps support the learning journey, it wouldn't be able to do it on its own, your learning journey can't do it without the AI coach. So yeah, I think we've had to kind of just stop treating it so special and just merge it in with everything else.

### **Michelle Ockers:**

Are you still using human role plays alongside the AI coaching?

### **Dan Redman:**

No, only for things that we've just not been able to get to yet. So there might be some particular stories that come out or particular things like change, for example. So we're trying to kind of keep up with the pace of change or get to that, there might be times where we're able to get a story built for it, but it might also be where sometimes the change is so massive that we can't create the number of stories or the complexity of those stories quick enough to support that change. So for the most part, particularly in onboarding, no, we don't use it at all. But in other things, yeah, we might still have the odd role play for those types of things that we've not got to yet.

### **Michelle Ockers:**

Okay. So how have you gone about, you talked earlier on way back at the beginning of the conversation about, you know, some of the challenges around demonstrating value of the



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approach and switching from role play to AI for practice and coaching of that practice. How have you actually measured the impact demonstrated the value?

### **Dan Redman:**

We actually launched the tool at the same time as we launched the new onboarding program which looking back if I was to do that again I probably wouldn't do that. That meant that we couldn't demonstrate that the tool was effective from a quality point of view on its own purely straight away. So we've had to do different kinds of experiments and different tests that do prove that and run different pilot groups to say, this group's been using the tool, this group hasn't. At the end of the window, whatever it is, two months, which group is better? And we've been able to prove that the team who are using AI Coach on a regular basis to improve have improved. But I think you can look at it from other different ways as well. I think one of the things that people will have in their mind is, well, this is an AI tool is going to be expensive, right? It's definitely not a cheap tool to use. I will say that for sure. But I think it's about how you see and how you think about your cost savings. So actually what we've been able to do by using an AI tool is put everybody who used to do human role plays back into the business. So they're either now back on the phone or they are, you know, helping coach or they are doing some, so we've been able to move resource around. which actually benefits our customers. And there's a bit of an indirect cost save there. So we've kind of looked at it from that point of view as well and been able to go, well, yes, it costs this much, but actually, maybe you're not recruiting as many people because we put more people back on the phone or put more people back into the coaching environment. So it's about how you see your savings as well, I think.

### **Michelle Ockers:**

Have you been able to gauge any shifts in either speed to competency and or customer satisfaction and customer service levels since introducing the tool?

### **Dan Redman:**

So yes, both have gone up. That was also largely part of the onboarding program as well though. So I can't purely put it down to AI coach as we sit here and speak. However, what I would say is that I, I would be pretty confident to kind of bet my career on yes, it has had an impact on both of those things. I think the ability to have that safe place to kind of practice and practice as many times as you want means that people get it quicker and there's not as much pressure on them to perform as quickly as they need to maybe, if that makes sense. And then yeah, from a quality point of view, because we are introducing a standard and that standard is consistent across the board, where our people are starting to pick up best practices and they are starting to do things that they maybe weren't before. So based on that, I would be confident to say that yes, those two things have improved.

### **Michelle Ockers:**

Yeah. And I think part of when we're talking about evaluation, particularly when it comes to evaluation of impact of things on business metrics, just being able to have a better quality conversation with looking at data together with the business is really what we're aiming for rather than directly demonstrating causal correlation beyond any shadow of a doubt. So if you're focusing on those business metrics and having good quality conversations about here's the things we're doing and what we're seeing and what else might be affecting them in the workplace, I think you're looking for improvement, developing a closer relationship with the business and having conversations based on business data, which has got to be a step forward for us.

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### **Dan Redman:**

Absolutely. Absolutely. And I think, you know, we definitely knew what we wanted to achieve by using the tool. I think we were just maybe a bit excited to use it. So we weren't able to kind of separate that out so much at the start. We've definitely been able to kind of add that though, since then kind of proves that proves that value.

### **Michelle Ockers:**

So you, you talked about some other things you've got in mind for the tool. Do you want to talk about where to next for the tool?

### **Dan Redman:**

Yeah. So at the moment we use the tool for obviously onboarding and coaching. And at the time, as we speak, it's currently predominantly used for our frontline kind of colleagues that are interacting with our customers day in, day out. We're now starting to look at it from a slightly different view and put different lenses on it. So we want to include it in leadership conversations, which again are really, really interesting from a conversational AI point of view, from a generative AI point of view, these might actually be easier, who knows. But from a conversational AI point of view, that's really interesting trying to balance what you write and how that conversation might go and just trying to incorporate all the little things that come with leadership conversations. But I think then it's kind of where could you go with it? I think there's no, the way that I see it anyway, there's no reason why you wouldn't be able to have if I can do a practice call now, there shouldn't really be any reason why you wouldn't be able to plug an AI tool into your call listening session. Obviously, I'm talking contact centers purely really here. But there isn't really a reason why you wouldn't be able to plug an AI tool into your call listening system or software and have that mark your calls, which would give you unbelievable amount of data in terms of how well your people are performing and what they're really struggling with and how you can help them. And then I think if you keep going down that kind of that line of thought, you're then kind of getting into, okay, so once you've got that data, what happens next? Well, we already have a tool that keeps coaching people on different call types and call scenarios. So it almost becomes a bit of a loop where, you know, you then start to play that back and okay, if you're struggling in this particular area, here is a set of calls that you can go and practice and you close the loop off. So, you know, I think the ideas are out there and we're starting to see them and it's starting to get there. It's just a matter of time. And then outside of that, you know, where do you go from there? I mean, I think certainly within the experiences that I've had, people talk a lot about interviews as well. And, you know, if you get to a point where you know, the AI is doing your interview for you. It takes out all, pretty much all your, all your unconscious bias and, and provides kind of a score on the interview.

### **Michelle Ockers:**

So yeah, I think the unconscious bias, is that because it's a different, it's not generative AI, because there's, you know, you hear a lot of noise about generative AI and the fact, because it has been trained on existing data, it's just picking up biases that are out there in society, be they gender biases, cultural biases, any other sort of bias.

### **Dan Redman:**

Yeah, maybe. I think, I mean, I'm not that clued up on the generative AI side, but I think from the way that I can kind of piece things together or the simplicity in my mind is if you set the rules in the background correctly and you kind of put in those parameters, I think you can probably rule that out at some stage. I'm certainly not saying it's available now. I don't think it is, but I think we're probably not far away from someone working out how to do that. And then it will take away that unconscious bias and so on and so on. And then again, like what's next? Right. And so on and so on.

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### **Michelle Ockers:**

So I think it's really exciting. Have you experimented with the tool for analyzing and providing feedback on live calls at this point or not?

### **Dan Redman:**

It's something that I think we are looking to do and certainly something we want to explore whether the capability is there yet or not. I don't know. It's certainly something that's worth exploring. It's certainly something that's worth seeing whether we can do it right. Because I think that will, it will, it will automate a huge process that at the moment is very, very manual. You know, you're thinking about kind of TMs or managers or whoever listening to calls to people and then. Providing a score and all this sort of stuff. And, you know, that, that type of thing, if you're able to automate that, then I think it provides you with a huge opportunity to then really put your focus where it's needed in the, in the development and the coaching of your people and so on and so on. So yeah, definitely something that I think is worth exploring.

### **Michelle Ockers:**

Anything happened along the way that was unexpected or surprising?

### **Dan Redman:**

Not necessarily unexpected or surprising. I think I would say I didn't think we or I didn't realize we were where we are so, I think you know, the tool itself maybe was a bit unexpected or a bit surprising because I remember thinking before we saw the tool that we use, it would just be amazing to have wouldn't it. And that's kind of where I was right and then this tool appeared in front of me and I was like, so it seems like a long way off, but it wasn't. And then it came, it kind of dropped on my desk about a week later or something like that. It was crazy. So, yeah, I think that was that was surprising itself. And I think, you know, a lot of people maybe in the same boat. I've been really fortunate to kind of come on this journey for a couple of years, but other people may, may not have kind of found that. And I think you made a point right at the start of the, of the conversation around, you know, we use AI to, for content creation. And I think that's where a lot of the focus has been. And for, you know, there's good reasons behind that, but I think there's so much more we can do that just enables us to really push to the next level of L&D.

### **Michelle Ockers:**

Absolutely. Absolutely. So at this point of your exposure to and experience working, certainly with conversational AI, what, if anything, have you either had to embrace or to let go of or rethink?

### **Dan Redman:**

I think one thing that I would say I've learned, not necessarily let go or embrace, I think is more just, it's been a really quick journey for us. It's been a real kind of really, really fast paced 18 months. And I think sometimes it would just be to slow it down a little bit and just kind of take the time. I mean, I mentioned that we rolled out with an onboarding program, and I wouldn't do that again, if I was looking, I think we just got kind of caught up in the excitement. So I think, yeah, to let go maybe of that excitement and just go, right, what's the best way that I can use this tool? How do I really prove that it's going to have the impact that I want it to and work through it slowly. I think we were maybe a little bit too quick out of the blocks to just start using this tool and therefore we kind of missed our opportunity to you know, say, yes, it should be to competency or by adding it into our onboarding program or, you know, whatever the metric might be that we were looking to achieve. I think we'd kind of

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rolled it all into one. So yeah, maybe let go of the excitement, embrace the slow speed and embrace the kind of journey.

### **Michelle Ockers:**

So apart from the improvements in the way you evaluated the impact of the tool and being able to separate that out from other things that you were improving at the same time. What other benefits do you think there would have been for you slowing down a little bit with the development and implementation of the tool? How might that have helped you and the workforce?

### **Dan Redman:**

We kind of went on this really, really quick journey about how we kind of imported this tool. But, you know, we also just brought this tool in and people around the business were a bit like, Oh, what's going on here? You've got what? And so on and so on. So, you know, I think it would have helped other people because it is, you know, those two big letters that are around everywhere at the moment and everybody kind of has their, you know, for right or wrong reasons as to whether they like it or they don't and so on and so on. I think, you know, bring everybody on the journey. And it would have it would have helped us a lot, lot more. And I think it would have it would have helped us embrace it a lot, lot more as a business. So, yeah, I think that's probably a key learn for me as well.

### **Michelle Ockers:**

So there's some change management advice in there. What other advice would you give to other L&D professionals who are considering or wanting to improve implementation of AI powered coaching?

### **Dan Redman:**

I think really kind of think about what you want to use it for. I don't think it works for everything. We definitely learn as we kind of went along how to use the tool in different certain situations. And perhaps we got a little bit lucky with some of that at times. But I think, you know, definitely know what it is you want the tool to achieve for you and kind of go after that. Like then, you know, go after, do your testing, do your piloting. proof of concept, all of that jazz. I'm pretty sure I said that in the wrong order, but all of that sort of stuff. And really make sure that it does what you want it to. We had this idea already of what we wanted it to do, so our journey has been relatively painless. However, I think if you, if you're just trying to, you just want to use an AI tool and, you know, don't get me wrong, I can absolutely see why. I can absolutely see why people would want to bring an AI tool in or want to just kind of start using AI and get on that journey, but it won't solve every problem at the moment and it won't solve everything. Definitely have an understanding, a clear understanding of what it is you want it to do and go through all of your kind of standard steps. It's not, you know, yes, it's the big thing at the moment, but at the end of the day, it's still just a learning tool. So treat it like one.

### **Michelle Ockers:**

Yeah. So it is just another piece of technology in many ways, albeit a very powerful piece of technology, but as always, don't, don't go with the tech and try to shoehorn it in and find a way to use it. Look at what, you know, what, what the, what the opportunities and needs are that you're trying to fulfill and then look for the best solutions to support.

### **Dan Redman:**

Exactly that. Yeah. Much better, much better than what I just said.

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### **Michelle Ockers:**

Very wise advice, Dan. So is there anything else you'd like to add to the conversation around AI-powered coaching?

### **Dan Redman:**

I just, from my point of view, I'm really excited to see what the next kind of couple of years bring. We were talking about it at the Learning Tech Conference that Donald hosts in London and the guys I was on the stage with, we kind of had a little bit of a quick conversation with ourselves before we got going. And it was kind of like, where do we think this conversation is going to be in a year? You know, where is this conversation going to be in two years? And, and we're not saying the standard, where's it going to be in five years? This is like, where's this going to be in a year? So I think it's just really exciting at the moment. And to just keep an eye out, because I think something will definitely come across your desk that you that you can use. It's just a matter of time, I think.

### **Michelle Ockers:**

Yeah, the change cycle happens really quickly, doesn't it? Or quicker all the time. I mean, you are probably too young to remember this, but there was a time in my lifetime where you would have to go to the bank on a Friday afternoon before three o'clock when it closed in order to make sure you had cash so that you could survive the weekend because there were no ATMs. We didn't all carry cards around and pay on cards. And now you can't imagine life without ATMs, without online banking. We can't imagine life without the internet, but I remember dial up internet back in the good old days. And I think it won't be too much longer before we can't imagine life without AI, both personally and professionally.

### **Dan Redman:**

I completely agree. I completely agree. Yeah.

### **Michelle Ockers:**

Yeah. So thanks, Dan. I know you are moving on from HSBC in the near future, but if anyone, I'm sure because of the experience that you've had with this particular piece of work, if anybody wants to get in touch with you to find out more about it, we'll pop a link to a LinkedIn profile in the show notes. So thank you so much, Dan, for sharing your work and insights with us. And, you know, in other ways that you've shared, you talked about a conference presentation you've given. So I'm a firm believer in the power of sharing our work so that everybody gets to improve through it. Thank you for being part of that, Dan.

### **Dan Redman:**

Thanks for having me.

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Learning Uncut are learning and development consultants that help Learning and Development leaders and their teams become a strategic enabler so that their businesses can thrive. We work in evidence-informed ways to drive tangible outcomes and business impact and are strong believers in the power of collaboration and community. We specialise in helping to build or refresh organisational learning strategy, update their L&D Operating Model, enable skills development, and conduct learning evaluation. We also offer workshops to shift learning mindset and practices for both L&D teams and the broader workforce – as well as speaking at public and internal events.

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### About your host, Michelle Ockers



Michelle is the co-founder and Chief Learning Strategy at Learning Uncut. She is an experienced, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*



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