

Learning Uncut Episode 160
Playbook – Artificial Intelligence in L&D
Hosted by Michelle Ockers



Michelle Ockers:

AI has become a powerful force in learning and development, transforming how we solve problems, innovate, and support workplace performance. Yet with all the hype and rapid change, many L&D professionals are asking, how do we move beyond the buzz to create real value with AI? That's why I've created this special episode of Learning Uncut, the AI playbook for Learning and Development.

Through my conversations over the past year with practitioners who are actively working with AI, I've identified five key themes that can guide your journey, whether you're just starting to explore AI or looking to scale your current initiatives. This playbook draws from 2024 podcast conversations with guests who generously shared their experiences. Donald H. Taylor and Egle Vinauskaite walked us through their industry research findings. Courtney Blackman shared how her legal firm is innovating with AI. Dan Redman explained HSBC's AI-powered coaching implementation. Pauline Rebourgeon and Peter Sheppard opened up about experimentation at Ericsson, and Brad Hodge discussed embracing AI in higher education. You'll find links to each of these full episodes in the show notes if you'd like to dive deeper into any of their stories.

To help you to apply these insights in your own context, I've created a reflection and discussion guide. You can use this to explore how these themes relate to your work and spark valuable conversations within your team. You'll find a link to this guide in the show notes as well.

As you listen to this episode, I encourage you to consider your own AI journey. What resonates with your current challenges? What approaches could you adapt for your context? These practical insights from your peers in L&D might just help you take your next step with greater confidence. Let's explore the first theme in our playbook. Start with business problems. In the rush to adopt AI, it's tempting to start with the technology to grab the latest tool and look for ways to use it. However, the most successful implementations take a different approach. They begin by clearly identifying the business problems they need to solve. Let's explore how learning leaders are putting this principle into practice. Donald Taylor's research into effective AI implementations revealed a fundamental principle that sets successful projects apart.

Donald Taylor:

The key thing we learned was to answer the question, what are the right things to use AI for? And that's just, it's obvious when you think about it, but of course, despite the fact of being obvious, so many people ignore it and jump in with a tool, trying to find something to use it for, rather than finding what the problem is that is best suited to solving with AI.

Michelle Ockers:

This focus on problems before solutions is exactly how Pauline Rebourgeon approaches AI at Ericsson.

Pauline Rebourgeon:

So it's really about bringing back to what problem are we trying to solve? What are the use cases that we need to identify where where we can have the best impact? And then start testing with around these use cases and see how this can be scaled across the business.

Learning Uncut Episode 160 Playbook – Artificial Intelligence in L&D

Michelle Ockers:

Brad Hodge brings an important reminder that amid all the technical possibilities, we must stay focused on the human challenges we're trying to address.

Brad Hodge:

I think the lovely thing about Gen AI, this question around Gen AI and the role, is we don't know. You know, I talk to colleagues and they go, oh, you know, we need a policy and procedure manual, we need instructions, I need to be shown how to use it. I'm like, well, the people who created it don't know how to use it. How are you going to do that? So for me, I see it as this incredible opportunity. I feel like it's a bit of a superpower. But also, at the end of the day, we've got to know what question we're asking. What's the human problem that we're solving? And then how might AI solve that problem?

Michelle Ockers:

Of course, identifying problems isn't enough on its own. Egle Vinauskaite emphasises the importance of understanding your organisational context to ensure that AI solutions can actually succeed.

Egle Vinauskaite:

And then the final one is business context, the organisational context, understanding how your organisation works, how AI can support organisational learning, not as individual learning, and what your business goals are and how the organisation is structured to actually make any impact with various AI technologies. Because in some cases, there might be institutional blockers of like, there's just no way that we would be able to use this piece of AI, just because of the nature of the company, and the perhaps the conservative culture in the company, there are some things that we won't be able to do. So I think for L&D to realise the promise of AI, there is a lot of both upskilling, but also, I guess, mindset change and being realistic about your context.

Michelle Ockers:

These practitioners highlight that success with AI starts well before we choose any tools. It begins with a clear understanding of our business problems, organisational context, and the human needs we're trying to address. This foundation helps ensure we select and implement AI solutions that deliver real value. Let's move on to our second theme, embrace experimentation and iteration. There's no established playbook for implementing AI. It's too new and the technology is evolving rapidly, but that's not stopping progressive L&D teams from making progress. They're finding success through purposeful experimentation and learning. Let's explore how they're approaching this. Don Taylor emphasises that we need to balance learning about AI with hands-on experience.

Donald Taylor:

What I would steer against and warn against there is the idea that, and this is something which L&D is very prone to, the idea that you have to know everything before you start. Well, you can't know everything before you start, so don't try. I would rather feed voraciously as much as you can on as many of these courses as possible, but always be working on experiments probably at the same time. So don't regard them as a precursor, but regard them as something which you do at the same time. Ross Stephenson in the UK does a very good job of saying, look, to get a handle on what you can do with this, choose a handful of tools and one problem, try to solve the problem with the tools and then move on. There's something else as well in the experimentation phase, which is important to do, which is to absolutely be in touch with other people who are doing the same and similar things in L&D. And it might be locally or it might be via LinkedIn. There's a tremendously rich conversation going on at LinkedIn amongst L&D people about what's happening. So don't suffer in

Learning Uncut Episode 160 Playbook – Artificial Intelligence in L&D

silence. Just say to the world, look, on a scale of 1 to 10, I'm a 2. I need help getting to a 3. What are you doing? Let's get together and talk about it.

Michelle Ockers:

Brad Hodge shows us this experimental mindset in action, testing AI's potential in a low-risk way with his university students.

Brad Hodge:

I'm just about to download a whole bunch of student assessment tasks and the feedback that markers gave them and the mark and see if AI will give me similar marks and if it relates. I can do that without any implications for students. I can check whether it relates. I'm just going to give it a go. I don't know whether we can actually implement this, but I'm going to give it a go to see if I've got a case. So being experimental is important.

Michelle Ockers:

At Ericsson, Pauline Rebourgeon's team found value in testing AI for translation, a practical use case that proved surprisingly impactful.

Pauline Rebourgeon:

Translation is not the sexiest experiment to do. So I was very interested to see, you know, is translation going to be something that could be improved, the translation process, with the help from generative AI? We know that translation, automated translation, is not the best quality with more traditional tools. You know, what happens with GPT? We've decided to bring into the community, the Learning Next community, and get volunteers to test as many languages as possible. Actually, we took the list from our previous compliance training, and we looked for volunteers who were native in these languages. And the results of this proof of concept was that actually for most of the languages, it was either excellent or very good translation, and will require a very minimum editing by your reviewer. And so with the success from this proof of concept, we are now running a couple of pilots in parallel to see is that, does that still stand for real life programmes.

Michelle Ockers:

Dan Redman shares how his team at HSBC learned through doing, recognising that experimentation reveals both technical and organisational insights.

Dan Redman:

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, 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 that faces.

Michelle Ockers:

At Lander and Rogers, Courtney Blackman's team created a structured approach to experimentation through their Co-Pilot Champions program.

Courtney Blackman:

We brought Microsoft Co-Pilot into the firm and we're piloting it at the moment. So we've got almost 150 people across the firm that we're calling Co-Pilot Champions. So we've sort of charged them with testing it, experimenting with it, breaking it, kind of pushing the boundaries of how they can use the technology. And then we'll roll it out more broadly. Well, we do very frequent sessions to kind of pick their brains and see what they're getting out of

Learning Uncut Episode 160 Playbook – Artificial Intelligence in L&D

it. We've built something that everyone has access to in the firm where they can come up with ideas of how to use Copilot to solve problems. And it's a shared resource. And then we have people in our AI lab that they might say, yes, that can be served, you know, with Microsoft Copilot. Here's how you do it. Or they might say, that can't be, you know, you can't do that with Microsoft Copilot and here's why. And then we get people to also share, like, what they've used it for. How have you used it that's unique that maybe you can see other people on your team or more broadly throughout the firm use it.

Michelle Ockers:

These examples show us that successful AI implementation isn't about getting everything right first time. It's about creating space to experiment, learn, and adjust based on what works. Whether it's small individual tests or structured organisational programs, the key is to start somewhere and build from there. Let's explore our third theme, which is to prioritise relationship building and collaboration. When it comes to implementing AI effectively, technical expertise isn't the only success factor. In fact, it might not even be the most important one. Our conversations revealed that relationship building and collaboration are crucial enablers for AI success. Don Taylor's research highlighted an unexpected but consistent finding about successful AI implementations.

Donald Taylor:

The extraordinary thing that I found was common across all the successful implementations was not technical expertise, but guess what? Networks and relationships. The people who are the best at doing implementations were the people who had the best networks, or they'd come into an organisation and quite deliberately set up networks as one of the first things they did and joined the organisation. And if you start planning implementation without the knowledge of what you're trying to do with it, then you're destined to fail.

Michelle Ockers:

Don also emphasises the importance of building relationships that give you access to crucial business data.

Donald Taylor:

AI works off data, and the data that's important isn't the data in your learning management system, it's the data in the business systems. So in order to start working with that data, you need the relationship where you can go to somebody and ask the question, hey, we think we could do something useful with this, can we have a look, please? The more I think about the spectrum, which is Egle's spectrum or scale, and it's really, but it is fundamental if you want to use AI to its full extent.

Michelle Ockers:

At Ericsson, Pauline Rebourgeon found that creating a community accelerated their AI journey.

Pauline Rebourgeon:

The Learning Next community actually was not really a community when it started, and it actually started before my time at Ericsson. It used to be more of a program. The ambition was already there, was to really drive innovation within learning and development, but it consisted of a few learning and development professionals from different teams who would gather together, work on an agenda, and then explore experiments with different technologies. And it used to be a lot around XR, so what we call virtual reality, or augmented reality. So after a bit of time, I've decided to opening up a bit more to create a community rather than a program because I realised that not everyone had the same interest in the different technologies that we were exploring. We run what we call the Learning Next Forum,

Learning Uncut Episode 160 Playbook – Artificial Intelligence in L&D

which takes place every month and is a place to for everyone in the community to share about their work, their projects, their ideas, and inspire others to then innovate.

Michelle Ockers:

Peter Sheppard shares how external partnerships complement internal capabilities.

Peter Sheppard:

Michelle, another decision for us is around whether we have partners that can help us in the sort of builds and buys. So an example, and you know, of course, I can't resist bringing something in to do with skills. We are currently experimenting, running a test with an aggregated and inferred skill profile utiling AI. So we looked and explored that capability that our partner has because they have the abilities in this direction, the algorithms and so on that can make this work. Then that becomes a decision, OK, this is worth building with this partner.

Michelle Ockers:

Lander and Rogers took collaboration even further, partnering with the university to explore AI's potential, as described by Courtney Blackman.

Courtney Blackman:

We run clinics with universities in our AI clinic. It's a partnership between Lander and Rogers and top research university, Monash. And that came into being last year, so in 2023. And Dr. Jacqueline Weinberg, who leads the Monash University Law Clinical Program, and I were having a discussion about what we could do together that was a bit new and exciting. And it was just as that media hype cycle was gaining momentum around AI. So we thought a legal clinic focused on AI would be an incredible way to explore the technology and especially how it would affect the legal industry for both Lander and Rogers as a firm, but also for the law students who are about to enter the job market.

Michelle Ockers:

These examples highlight that AI implementation isn't a solo journey. Success comes from building strong networks, both within your organisation and beyond. Whether it's accessing data, sharing learning, or combining capabilities, relationships and partnerships create the foundation for effective AI use. Now, let's turn to our fourth theme, which is to balance short-term wins with long-term gains. Implementing AI effectively requires a delicate balance. While it's important to demonstrate quick wins, we also need to lay the groundwork for longer-term transformation. Let's explore how L&D teams are managing this balance. Peter Sheppard chairs Ericsson's framework for evaluating AI initiatives.

Peter Sheppard:

The bottom line is business impact and readiness. And we took a very clear decision that we wanted to be more planned about things and create both an XR and an AI strategy. What has been our guiding light on that is around what really makes a difference in the business and delivers business impact. But then we also need to be kind of cognisant of what we can achieve and what we can't achieve and how quickly we can achieve it. So going for something where we have technical capability to deliver but makes a difference in the business is how we decide what to go for or not. Now, if the business impact is high, but actually it's going to be quite difficult to execute on, then that may be a long-term bet.

Michelle Ockers:

Egle Vinauskaite explains how AI implementations often progress from simple to more strategic applications

Learning Uncut Episode 160 Playbook – Artificial Intelligence in L&D

Egle Vinauskaite:

But when you start going towards the right of the scale, so then you start having instances such as skills bots, the performance support, data analysis, personalisation, up to skills management. That's when you actually have to start interacting with the business because you need either additional skills to make these things happen or technologies that you need to partner with the business to either acquire or that they are somewhere else in the business, the most sophisticated use cases and the most holistic and strategic use cases of AI and L&D have pretty much without a fail, they required integration and strategic thinking along with the business.

Michelle Ockers:

Dan Redman's experience at HSBC offers a valuable lesson about the importance of pacing how you implement new initiatives so that you can effectively measure impact.

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 kind 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.

Michelle Ockers:

At Ericsson, Pauline Rebourgeon's team balances quick productivity wins with longer term learning transformation.

Pauline Rebourgeon:

This is, I would say, part of our short-term wins. You know, it's not really changing how people might learn, but it's changing how, you know, helping us create content faster, less budget, sometimes maybe with better quality and be making us more productive. So we have a couple of use cases that we're exploring without work streams. We are in parallel working on work streams that I find even more interesting, which is around how is this going to impact how we learn at Ericsson?

Michelle Ockers:

Pauline emphasises starting small in order to build momentum.

Pauline Rebourgeon:

Right. What I would say is it's really about start exploring, start looking at some of these tools that you hear about. And if you have already done so, try to find how is that actually going to make my life easier or what kind of use cases could I apply them to my role, to my team, to my organisation. And then the key thing here, maybe it could be as well, start small. It doesn't need a big budget, doesn't need budget at all sometimes to experiment with, you know, starting small and having the right objectives in place. could be quite powerful and start a beautiful journey.

Michelle Ockers:

These experiences show us that success with AI isn't about choosing between quick wins or strategic impact. It's about finding ways to achieve both. Starting small and showing value helps build support for more ambitious initiatives, while keeping sight of longer term transformation goals ensures we're building toward meaningful change. Let's explore our final theme, which is to keep the human element central. While AI brings powerful capabilities to L&D, at its core, our work remains fundamentally human. The most successful

Learning Uncut Episode 160 Playbook – Artificial Intelligence in L&D

implementations recognize that AI is a tool to enhance, not replace, human connection and judgment. Brad Hodge captures the unique value of human interaction in learning.

Brad Hodge:

The importance of having a human in the room is ridiculously important. And I think AI can supplement that. But there's magic in dealing with humans. A couple of weeks ago, I was sitting with a group problematic, you know, some problematic issues, one particularly disengaged. And I made some kind of carefully calculated comment. And just magically, it shifted things just a little bit in a way that nothing else had worked, you know, AI was never going to do that. So I think understanding the importance of being a meaningful human in a human space is super important.

Michelle Ockers:

Courtney Blackman emphasizes the critical role of human oversight in AI use, which Lander and Rogers has embedded in one of their principles for the ethical use of AI in their legal firm.

Courtney Blackman:

Fourth one is accountability, and that's just the human oversight. So making people very aware that information shouldn't always be trusted by AI. It can produce some funny things sometimes. If you are working with clients and you're producing information or advice to them, then you have to have that element of human oversight and be accountable for the work that you're producing.

Michelle Ockers:

Dan Redman shows how AI and human coaching can work together effectively with their contact center staff having an option to send a recording of an AI coaching session to a manager for additional human input.

Dan Redman:

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. 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 liked this and this was good. Maybe have a look at this going forward. And it just, it 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:

Peter Sheppard reminds us that human skills remain crucial for L&D.

Peter Sheppard:

I think actually, when you look at the skills to succeed with AI, it's not necessarily for L&D teams, the technical skills that helps, But it's not the detailed technical skills that necessarily make the difference. It's the ability to connect with people and bring people into this community and get everybody behind this. So, you know, to be clear, we are, I would love to have a team of 100 people focused on all of this, but we haven't. It is Pauline driving a community. and that connecting people across Ericsson and getting people enthusiastic

Learning Uncut Episode 160 Playbook – Artificial Intelligence in L&D

about a topic because what you are focusing on is making a difference to the business. So a lot of this, to some extent, is some of the old L&D capabilities and skills like performance consulting, like the ability to manage stakeholders, the ability to connect person A to person B,

Michelle Ockers:

These insights remind us that AI's real power in L&D currently comes from augmenting human capabilities, not replacing them. The most effective implementations find ways to combine AI's analytic power with human judgment, empathy, and relationship-building skills. As we bring this Learning Uncut AI playbook to a close, let's reflect on the journey ahead for L&D. Our guests have shared valuable insights about implementing AI effectively, from starting with business problems and embracing experimentation, to building strong relationships and balancing quick wins with strategic goals, all the while keeping the human element central. Let's hear some final thoughts from our guests to inspire your next steps. Don Taylor emphasizes the value of learning through action, followed by Pauline Rebourgeon reminding us that small steps can lead to significant progress, and Egle Vinauskaite offering practical advice for getting started.

Donald Taylor:

Well, you can't know everything before you start, so don't try. Ross Stevenson in the UK does a very good job of saying, look, to get a handle on what you can do with this, choose a handful of tools and one problem, try to solve the problem with the tools and then move on. And he says to do this for like six weeks or so. And it's terribly basic as a piece of advice, but actually I'm pretty sure it works because by restricting your choices, you force yourself to really focus on what's possible.

Pauline Rebourgeon:

Start exploring. Start looking at some of these tools that you hear about. Starting small and having the right objectives in place could be quite powerful and the start of a beautiful journey.

Egle Vinauskaite:

If you're starting out with AI and L&D and a lot of, first of all, know that you're not alone. A lot of organisations are just at the starting stages of it. But also that I would encourage you not to think of in a way that puts AI first and thinking, okay, so we have AI, what do we do with it? But think about just like you've always done, what are you trying to achieve and how can AI help you achieve that?

Michelle Ockers:

Finally, let's close with Don Taylor's inspiring perspective on the opportunities ahead.

Donald Taylor:

I just wish that I was 25 again, because this for me is the ramping off point, the taking off point of L&D for the future. It's going to be fabulous. There are issues for sure, but I think the promise of what we can do with it, if we let our imaginations go, is just immense.

Michelle Ockers:

The future of L&D is evolving, and AI will play a significant role in shaping it. But as we've heard, success with AI isn't about having all the answers. It's about being willing to explore, experiment, and learn. Whether you're just starting out or already implementing AI initiatives, I hope these insights from your peers help you to take your next step with confidence. Remember, you can find links to all the source episodes in the show notes, along with the reflection and discussion guide to help you and your team think through how to apply these

Learning Uncut Episode 160 Playbook – Artificial Intelligence in L&D

themes in your context. Thank you for joining me for this Learning Uncut playbook. Until next time, keep pushing boundaries and unlocking possibilities in learning and development. And of course, if you're finding Learning Uncut valuable, please take a moment to rate the podcast and leave a review comment. We really appreciate your help to ensure that as many learning professionals as possible have an opportunity to listen to and learn from the work of our guests.



About Learning Uncut

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.

Learn more about us [at our website](#).

About your host, Michelle Ockers



Michelle is the co-founder and Chief Learning Strategy at Learning Uncut. She is an experience, 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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