

GETTING STARTED WITH AI AGENTS IN ENTERPRISE L&D

A Practical Guide for Learning Leaders

AI agents offer significant potential to enhance enterprise learning and development—from personalized learning paths and intelligent content curation to automated support and insightful analytics. But moving from potential to reality requires a thoughtful evaluation of **organizational readiness** as well as operational execution. Given the rapid pace of innovation, it's likely that the evaluation and planning for AI-specific initiatives is relatively new to both you and your team.

What is an AI agent? The tech is so new that the definition is still in flux and will vary depending on context. You might think of an AI agent as a more specialized application of generative AI—a smart digital helper that can help learners by answering questions, personalizing practice, or offering just-in-time support. There are use cases for virtual coaches or tutors, performance support, and learning in the flow of work.

Although there are many different **applications for AI within learning and talent development**, the opportunities for AI agents (also referred to as agentic AI) are accessible today to the majority of enterprise L&D teams. And so, for practical purposes, this guide focuses specifically on agentic AI and ways of **getting started** that need not feel as overwhelming as full-scale AI transformation.

QUESTIONS ALLENCOMM CAN HELP YOU ANSWER

- How do I select the **right starter or pilot project**?
- How do I estimate the **investment** in terms of budget, resource capacity, and expertise?
- Where can I get the **support** I need to get past the inevitable hurdles?

SELECTING THE RIGHT PROJECT

Choosing the right project for early-stage adoption of emerging technology such as AI—whether a **proof-of-concept or pilot**—depends significantly on your organization's current comfort with AI technologies. Some of your team members may already be familiar with **prompt engineering** and may be experimenting with AI agents to enhance their work efficiency. You can leverage that informal R&D. It's crucial to gauge the **current state** of your team's expertise and readiness when selecting a project, ensuring alignment with your strategic goals and desired future outcomes.

We recommend looking at these **five areas** when selecting the right project:



1 STRATEGIC ALIGNMENT & LEARNER USE CASE



2 DATA READINESS



3 TECHNICAL FEASIBILITY



4 TEAM READINESS (CAPACITY & EXPERTISE)



5 GOVERNANCE & ETHICS

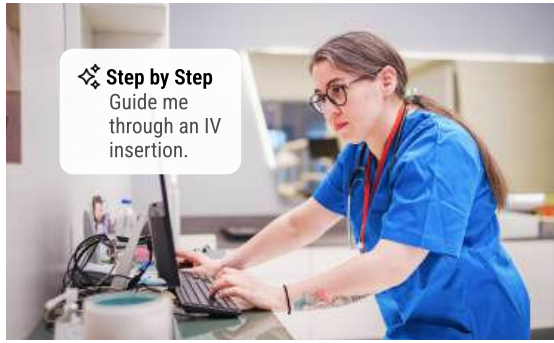
Careful consideration of **strategic alignment and specific use cases** is essential to ensure the successful implementation and integration of AI agents within your organization's learning and development framework.

LEARNER USE CASES FOR AI AGENTS



1 READY REFERENCE

Provide reference content in the moment of need—content for which learners benefit from real-world application (onboarding, compliance, skills dev).



2 JUST-IN-TIME JOB AIDS

Replace traditional job aids for tasks with prescribed steps or workflows with an agent that scaffolds or models the cognitive task to be done (compliance, skills dev, onboarding).



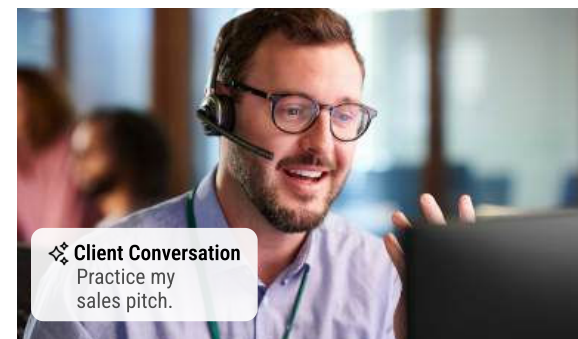
3 IN-FLOW INSIGHTS

Accelerate learning in the flow of work with curated insights personalized to the task at hand, supporting learners based on their prior and working knowledge.



4 GOAL GETTER

Help learners to set personalized goals and align their daily tasks and projects to achieve those objectives, accelerating both planning and integration with real work.



5 PERSONALIZED PRACTICE

Provide personalized practice by simulating an interpersonal dialogue where AI can role-play and coach (leadership, sales enablement, skills dev).

- What specific **L&D objective** will this AI agent support, and how does it align with prioritized business outcomes?
- What do you envision as the **KPIs** relative to these needs? (Reduce time-to-proficiency? Increase engagement with compliance training? Provide on-demand performance support?)
- Are there specific **learner use cases** that you have identified as candidates for learner AI agents? Or will you need expert guidance on how to identify or select those use cases?
- Are there any **gaps in learner experience** that you have identified in key initiatives for leadership, compliance, onboarding, etc.?
- What **content or topic area** is most dependent on internal expertise or what content area changes very quickly? What would provide the most value to learners in the **flow of work**?



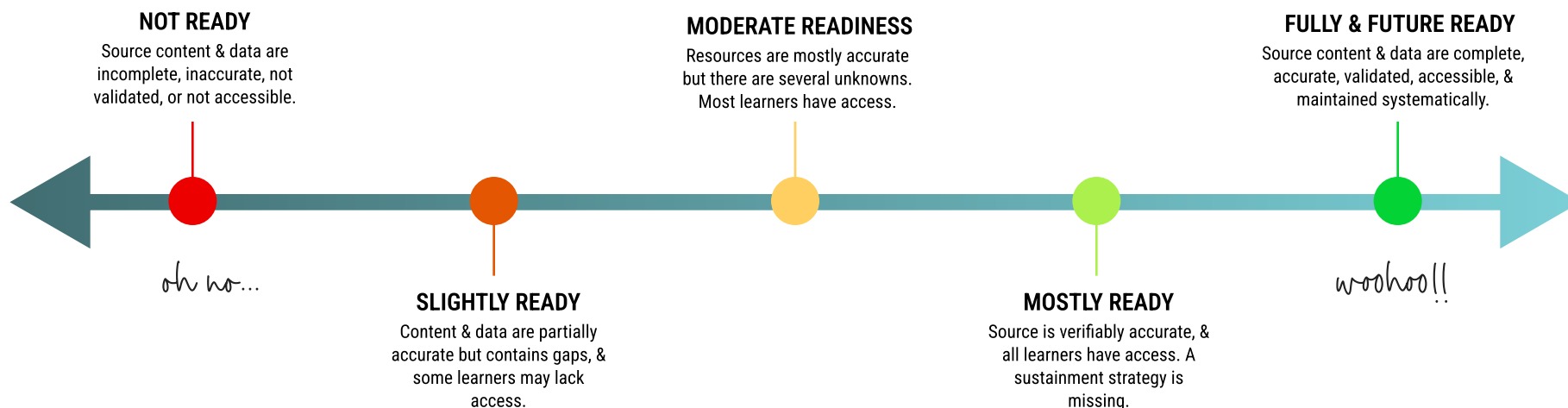
2 DATA READINESS

Assessing your data readiness is crucial to ensure that your AI agent can deliver accurate and reliable insights. Data can originate from a variety of sources, including the web, internal databases, specific curated assets, and directories. It is essential to identify these data sources early on to ensure that your AI agent has access to the necessary and relevant information to perform its tasks effectively. Also, please note that this area is closely connected to **governance**, the questions for which are outlined later in this guide.

- What types of **content resources** do you have available to your learners?
- Which of these resources are already available via **other, more general AI tools** (such as Microsoft Copilot, ChatGPT, or Google Gemini)?
- What restrictions or limitations exist in terms of access or **IT policy** for the various groups in your learner audience?
- Does the available content accurately capture **the expertise of your subject-matter experts** (relative to the desired learner user case)?
- What data might contribute to **outdated, inaccurate, or inexpert answers** from an AI agent?

CONTENT & DATA READINESS FOR LEARNER AI AGENTS

AI agents are dependent on content structure, metadata, and the data sources. The content can include internal documents, databases, curated assets, and directories in addition to external Web sources. The **accuracy and value of an AI agent** is usually dependent on these sources.





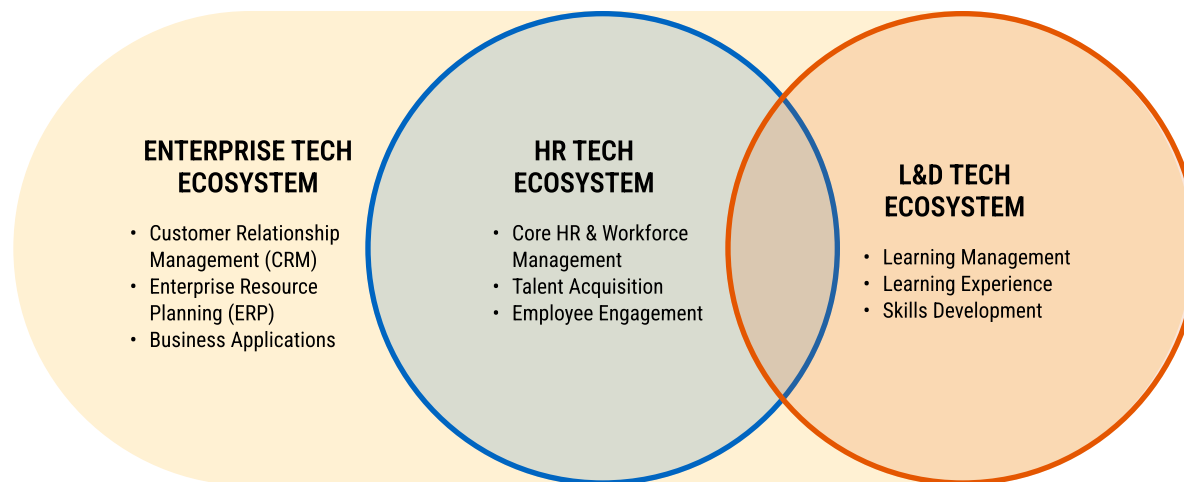
3 TECHNICAL FEASIBILITY

There are **several unknowns** when it comes to forecasting the **learning tech ecosystem of the future**. Will AI displace learning-specific SaaS platforms? Will AI be centralized for the organization? Because many of the answers to these technical questions will be changing over the next several months and years, we advocate for an **incremental change** rather than a big bang.

For example, many enterprise organizations **already** have access to a variety of AI technologies, which can streamline operations and enhance productivity. For example, Microsoft Copilot is a widely prevalent technology with the potential to bring AI capabilities directly into business workflows. Because the Microsoft technology may already have been **adopted by IT or governance committees**, it's worth considering how to leverage the tech (even when it doesn't come preconfigured for use by L&D).

TECH ECOSYSTEM CROSSOVER

Consider the value of an integrated approach to generative AI that aligns with the organization's overall approach to AI adoption and leverages tools your learners may already use.



✦ A shared strategy for AI adoption that spans these ecosystems is not only possible but may also streamline adoption.

- Which AI technologies **have already been adopted** in your organization? (See governance later in this guide.)
- What have you tried or **experimented with in learning and talent development**? What was your experience or lessons learned?
- Is there a **road map** for AI technology adoption that puts AI technology at the fingertips of your employees for other use cases not related to training? (If so, that's likely how we get into the **flow of work**.)
- What **existing systems** (LMS, LXP, HRIS, SharePoint, etc.) might a learner AI agent need to interact with? Are necessary **APIs** available and documented for these systems?
- How much support and what resources might be available to you internally in terms of **IT collaboration** on your initiative? Is this sufficient priority to justify their involvement?

“Many learning leaders think they need specialized AI products without considering the value of learning services that would help them to align their L&D strategy with the AI and tech ecosystem of the larger organization.” —Ron Zamir, CEO, AllenComm



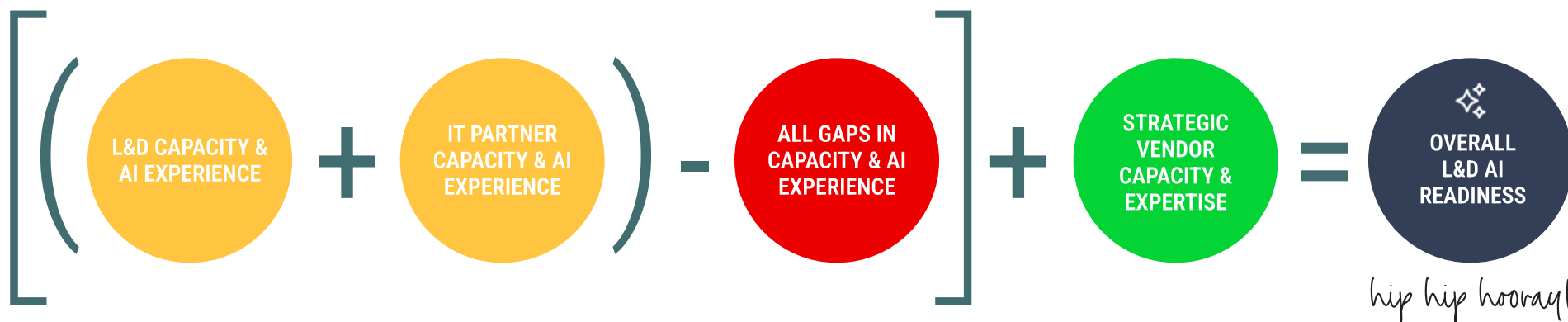
4 TEAM READINESS (CAPACITY & EXPERTISE)

Ensuring team readiness by evaluating **capacity and expertise** is critical to the success of a first or starter agentic AI pilot. A **well-prepared team** can effectively implement and manage AI technologies, identify and address potential challenges, and maximize the benefits of AI integration. By **understanding the team's strengths and gaps**, organizations can allocate resources efficiently, provide necessary training, and make informed decisions about the right level of external partner support, all of which contribute to a smoother and more successful AI adoption process.

- What is the **current capacity** of your L&D team to manage new initiatives?
- What **expertise** does your team have in terms of AI and the use cases for learning and talent development?
- What might be needed to **upskill the team**, and what consideration has been given to this investment?
- What additional capacity and expertise are available from **other teams** (assuming the right prioritization of your initiative)?
- How do you rate the maturity of your team when it comes to their overall **technical and data fluency**?

CALCULATING YOUR READINESS

Consider the current strengths, any known gaps, and your strategic partnerships.



WHAT IS A LEARNING ENGINEER?

Instructional experts with a **specialization in AI technologies** are sometimes referred to as *learning engineers*. Over the last few years, learning engineering has increasingly been used to describe the work of using AI tech and other systems to enhance **learning experience (LX)**. According to the *Learning Engineering Toolkit* (2023), learning engineering is “a process and practice that applies the learning sciences, using **human-centered engineering design** methodologies and **data-informed decision-making** to support learners and their development.”



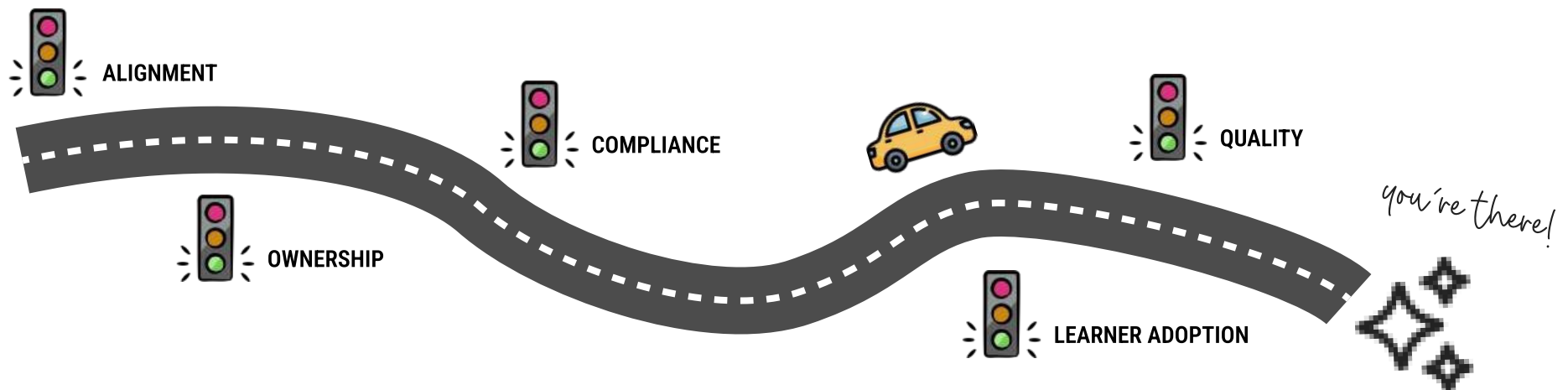
5 GOVERNANCE & ETHICS

Establishing clear governance policies and ethical guidelines is **an enabler for the success of AI initiatives** within learning and talent development. Unlike the introduction of other types of new technology, AI requires careful consideration and planning that goes above and beyond conventional applications and previous tech innovations.

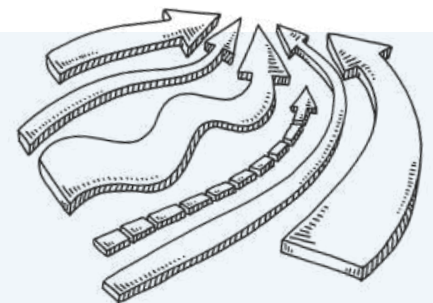
The integration of AI technology calls for meticulous governance to address the unique challenges it poses, such as **data usage, privacy, security, and bias mitigation**. Additionally, the overlap in technology stacks between L&D, HR, and the primary performance of the business necessitates greater strategic alignment to ensure success. In certain industries, the regulatory environment and compliance requirements add inherent risks, making robust governance essential to mitigate these risks and maintain accountability. Including governance in the **planning stages** of agentic AI implementation ensures that all outputs are fair, unbiased, and aligned with the organization's goals and regulatory requirements.

EFFECTIVE GOVERNANCE GIVES YOU THE GREEN LIGHT

We tend to think of governance in terms of obstacles, but proactive AI governance can be an **enabler** and an **accelerator**.



- Has your organization established **governance policies specific to AI adoption**?
- **Is L&D fluent** in these policies so that you understand where you can act and where you cannot?
- Are there HR or **L&D-specific guidelines** with respect to AI technology?
- Are learner needs adequately addressed (privacy, bias mitigation, transparency, “safe” practice, etc.)?
- Is there clarity on who owns key decisions and on the **decision-making process** for something like agentic AI adoption by learning and development?
- What types of controls, metrics, or **reporting** might be required to monitor AI agents?



ESTIMATING THE INVESTMENT

Determining the **investment** required for launching AI agents can be challenging due to the rapid change of the technology and the broad spectrum of implementation options available. For example, **no-code** platforms allow for quick deployment, while **low-code** and **pro-code** solutions may be better for customized needs or highly specialized applications, depending on the cost and level of complexity. Additionally, instructional designers (IDs) may need to upskill on learning engineering to effectively **design** these AI agents. Furthermore, the **source content** that feeds into the AI system must be curated to ensure relevance and accuracy. These considerations make it difficult to provide a precise estimate of the investment without careful evaluation and planning.

Here are **4 key areas** to analyze when estimating the investment required for your learner AI agent pilot or proof-of-concept:



1 COMPLEXITY & APPROACH



2 TIME & DURATION



3 EFFORT (PEOPLE & RESOURCES NEEDED)



4 OTHER COSTS



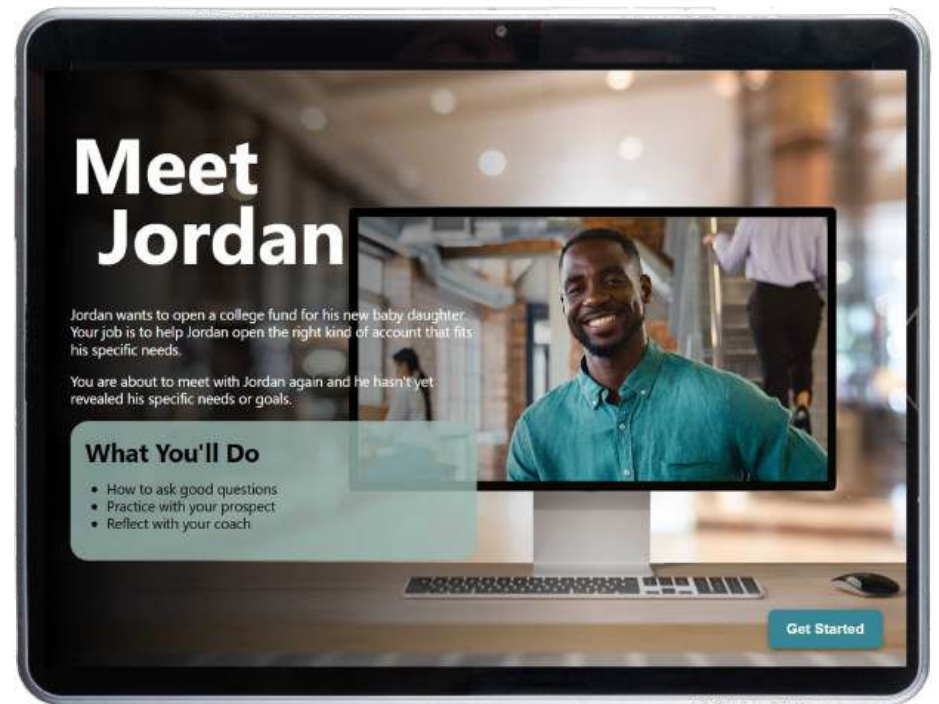
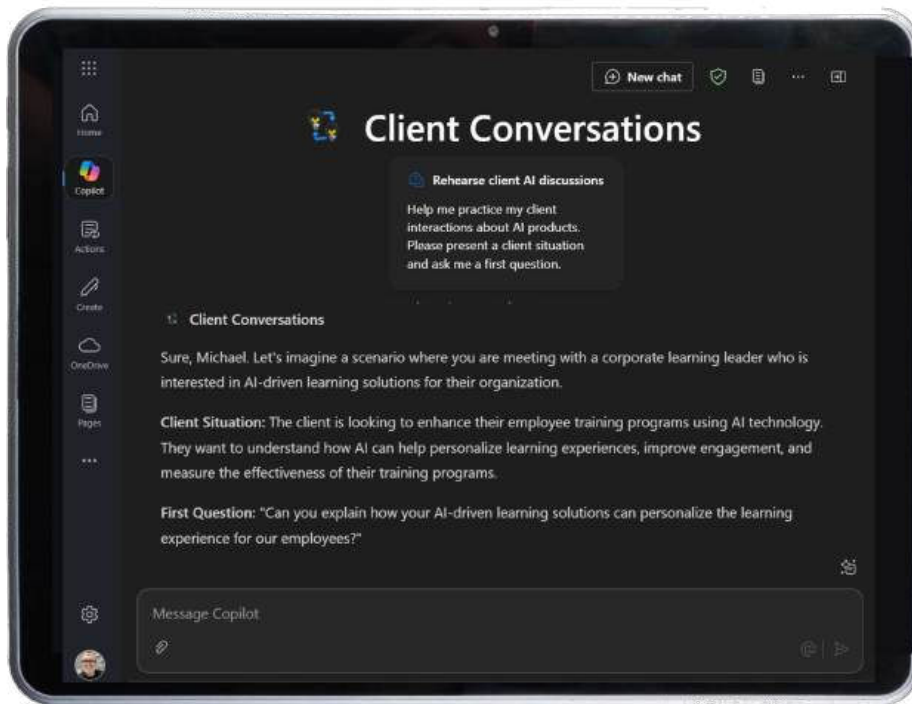
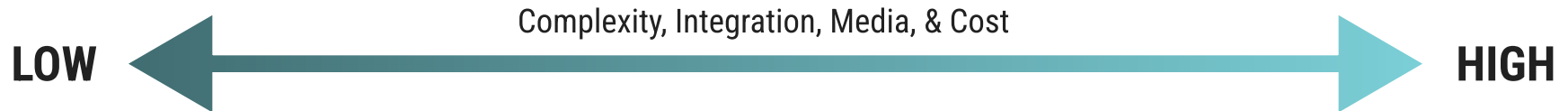
1 COMPLEXITY & APPROACH

Understanding **the complexity of the AI agent** to be produced is critical for estimating the investment because the scope and sophistication of the AI solution can greatly influence resource allocation, timelines, and overall costs. Unlike standardized technology, AI agents can range from simple, rule-based chatbots to advanced machine learning-powered systems. This variability means that each AI implementation **must be tailored to specific organizational needs**, requiring different levels of expertise, development effort, and integration. Without a clear understanding of these factors, organizations may significantly underestimate the resources and time needed, leading to potential project delays, cost overruns, and unmet expectations.

- If you have a sense of the **use case** for the agent, how much guidance do you envision it providing? **How many steps** and what logic?
- Can you estimate the number of **unique prompts or instructions** to achieve the desired learner interaction/outcome with the AI agent? (This can often be done by looking at the current training, tools, or job aids.)
- **Is the prescribed behavior or “right action” for learners repeatable** and applicable in most situations? (These conditions typically make the best starter agent for pilot purposes.)
- Does the proposed learner use case require the agent to **respond using media** (video, voice, etc.) or merely via text?
- What sort of requirements may exist in terms of AI responses? (For example, is there a requirement to **reference the various sources** used by the AI in their response?)
- How essential is accuracy? How much investment is justified to **eliminate erroneous responses**? Would learners easily recognize these errors?



A RANGE OF LEARNER AI AGENTS



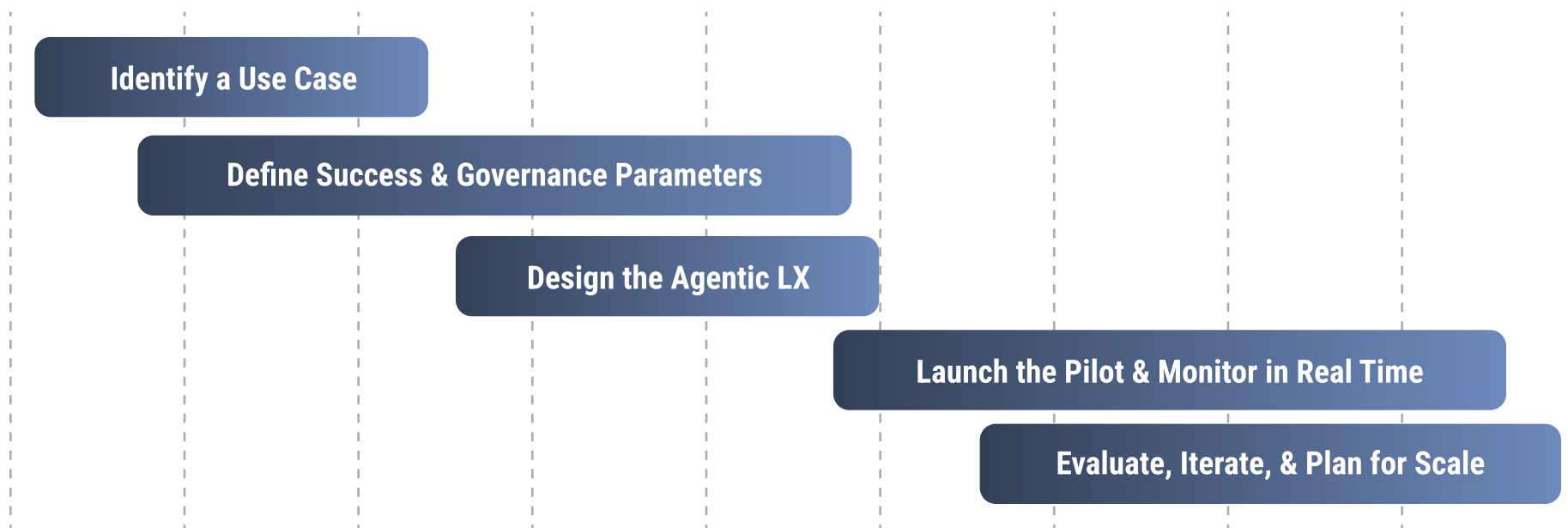


2 TIME & DURATION

Discussing **time constraints and tradeoffs** is critical when scoping AI agent design and development, as it directly impacts the success of the project. This includes not only the time needed for **design and development** but also the time required for **implementation**. Key drivers of time constraints include the complexity of the AI agent, the integration with existing systems, data preparation, testing and refinement, and training for end users. These factors influence the proof-of-concept or pilot's **success criteria** by determining the feasibility, efficiency, and effectiveness of the AI agent. An AllenComm AI expert can help you to understand these time-related factors upfront to **avoid potential delays** and ensure that the project meets its objectives within the allocated timeframe.

OPTIMIZING TIME TO VALUE

Balance the extent of your prep for an AI pilot with any needs for a timely outcome.
What would be minimally viable as a proof-of-concept or pilot in your organization?



- What is your preferred duration for the **initial pilot launch and testing** for the AI agent?
- What is your desired timeline for **implementing an AI agent** into an L&D program? What needs are behind this desire? How much flexibility might there be?
- Have you identified any **critical deadlines or milestones** with stakeholders that the team needs to keep on the forefront of planning?
- **How much time is available** for key team members to dedicate to the initiative? (And for collaborators such as IT?)
- Are there ways to free up time by **outsourcing or delegating** lower priority initiatives?

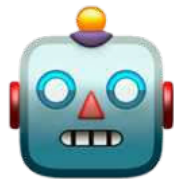


3 EFFORT (PEOPLE & RESOURCES NEEDED)

Asking detailed questions about **effort** is pivotal when planning for AI agent design, piloting, and implementation. It is essential to recognize that this endeavor will not only require the **allocation of team members**, but also the **upskilling of the current workforce** to meet the demands of AI technology.

This process is an evolution of your legacy capacity and expertise model, demanding **continuous adaptation** as the AI transformation of learning and talent development progresses. By thinking strategically about the effort and human capital required, you can ensure a successful pilot and readiness for longer-term adoption of AI agents into your L&D programs.

TEAM CAPABILITIES TO SUPPORT LEARNER AI AGENTS



AI LITERACY

First-hand understanding of the different types of AI, experience with the possibilities & limitations of today's tech.



DATA ANALYSIS

Ability to analyze & interpret learner data to derive actionable insights—crucial for personalizing the LX & improving outcomes.



HUMAN-AI COLLABORATION

Skills to optimize human use of AI tools & systems; integrating AI in workflows for more productivity & better outcomes.



AI GOVERNANCE

Understand the why behind compliance; advocating for learner needs; protecting against misuse of AI tech.

- Have you identified your **biggest gaps** in terms of both capacity and expertise? What are the top concerns?
- Assuming you need some sort of support on your journey, do you have the **vendor partnerships** that could fill those gaps?
- What **mix of internal and external expertise** will be most advantageous?
- Have you identified the **early adopters** on your team? Does it make sense to enlist them in this effort?
- What restructuring or **redefinition of roles** on your team will support not only the pilot but longer-term adoption?
- What might be the logical phases to progress to the future state?



4 OTHER COSTS

To ensure a comprehensive approach to your AI integration project, it's crucial to consider several key factors across different domains. As you navigate the uncharted waters of AI implementation, recognize that **the market for services** related to AI agents is still in its nascent stage. This means that standardization is minimal and **options vary widely**, which directly impacts costs, needs, and expectations. Specialized L&D product offerings will emerge, alongside **learning services that aim to leverage the existing AI technologies within your organization**. Therefore, it's imperative to rethink how you have approached cost considerations in the past, ensuring that you discuss all these variables in context to align your strategy with the evolving landscape.

- Is there a **budget range** established for the pilot or proof-of-concept? Do you need advisement to arrive at such a number?
- Are you already responsible for **AI licensing costs** as part of the L&D tech ecosystem? For what platforms and use cases? How will these be leveraged as part of your strategy for agentic AI?
- Have you established decision-making criteria for when you will **buy or license versus when you will build your own** (or get support in building your own solutions)?
- Do you have a working **business case** for learner AI agents? (Perhaps for some of the starter use cases?)
- Has any consideration been given to the **total cost of ownership** for such solutions compared to the projected value of the outcomes? Do you need support with benchmarks and forecasts?



NO CODE

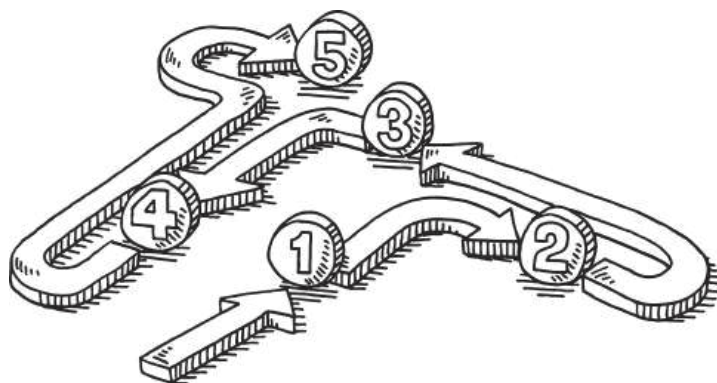
Leverage AI capabilities with existing tools & interfaces without any custom programming; use basic automation & data curation at less effort & costs.

LOW CODE

Balance ease with customization, combining visual tools with minimal coding for more advanced functionality at moderate effort & cost.

PRO CODE

Create highly complex & feature-rich AI agents.



GETTING SUPPORT

Given that AI technology is still maturing, getting **the right support** through strategic partnerships—both **internal and external**—can be essential in terms of both execution and risk mitigation. Almost any project related to AI agents will necessitate a larger coalition than is typical for L&D. This broader coalition introduces potential risks such as bureaucracy, inaction, and distributed accountability, any of which could derail your efforts. Enlisting a **learning services partner like AllenComm** could accelerate your timeline, reduce costs, and increase the likelihood of success. Because they work with so many enterprise organizations, AllenComm has **firsthand experience** with a variety of approaches to these challenges. AllenComm can offer insights into best practices and strategies that align with your specific needs, helping you navigate the complexities of AI integration. More importantly, they can share what is still developing, not well tested, or what may be likely to change in the near future.

SCAFFOLDING SUCCESS

A strategic vendor partnership for your AI initiative can accelerate timelines, minimize risk, and **reduce cost**.



- What upskilling or **advisement** might you require as a learning leader who is relatively new to this technology?
- What **internal stakeholders** would accelerate this initiative and help ensure success? Team members, cross-functional leaders, stakeholders, early adopters, IT, governance, etc.?
- What vendor partners, particularly **learning services providers (LSPs)**, can help you to fill in the gaps? What criteria can be used to vet such partners?
- What sort of leadership will enable **an agile, practical pilot** that can overcome the inevitable setbacks and seeming roadblocks?
- How can you approach **prioritization** of this initiative with executive leadership to engage them as sponsors and champions?

READY TO TAKE THE NEXT STEP? **drum roll**

Evaluating AI readiness can seem complex, but a thorough, flexible approach clarifies the path forward. **AllenComm can partner with you** to assess your specific needs, navigate the technical landscape, and design impactful AI-powered learning solutions.

Contact AllenComm today to discuss the potential for an AI agent or to explore the adoption of other AI strategies for learning and talent development. allencomm.com/contact

