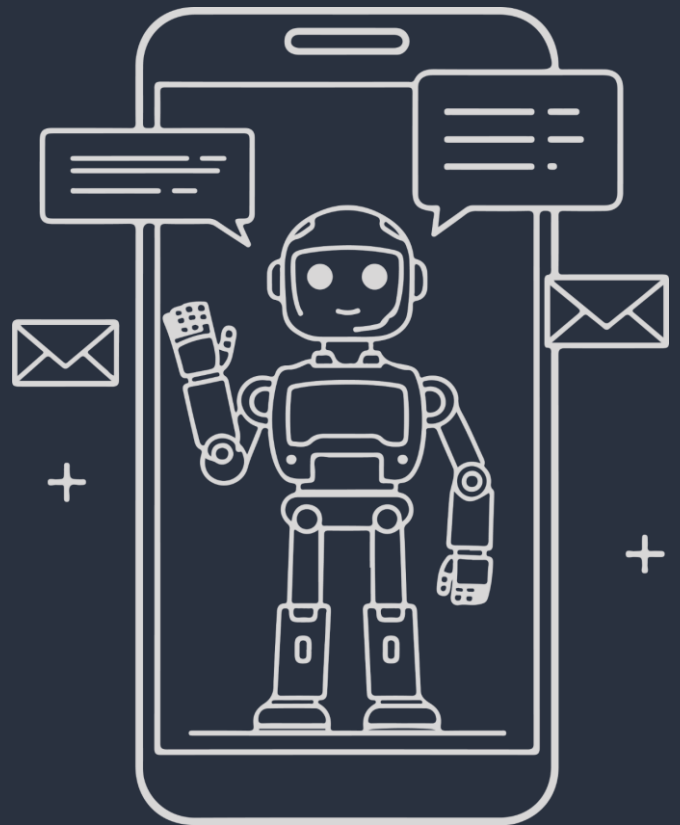


FREE RESOURCE



AI Has Entered the Chat

A Playbook for
Delivering Learning
via AI Chatbots



A Guide for Aotearoa New Zealand's Non-Profit Sector

ABOUT THIS PLAYBOOK

A free resource for AI-delivered learning projects

Artificial intelligence is rapidly becoming part of how learning is designed and delivered. For many organisations – including those in the non-profit sector – this creates both opportunity and uncertainty. There is growing interest in using AI to support capability development, but less clarity about how to do this in ways that are practical, meaningful, and aligned with organisational values.

This playbook is based on a series of real-world projects conducted with three non-profit organisations in Aotearoa New Zealand. It focuses on a specific approach to AI-delivered learning: using conversational AI to create interactive, scenario-based learning experiences that engage learners in dialogue.

The purpose of this playbook is to support organisations to make informed decisions about **whether** and **how** to use AI in their learning design.

This is not a technical manual, and it does not assume prior experience in AI. Instead, it focuses on the design of learning experiences – how conversations are structured, how context is introduced, how feedback is given, and how an organisation's values are expressed through interaction.

While the examples are drawn from the non-profit sector in Aotearoa New Zealand, many of the insights are transferable to other contexts.



What this Playbook Provides

The intent is not to provide a single “correct” approach, but to offer a practical foundation that organisations can adapt to their own needs, constraints, and values.

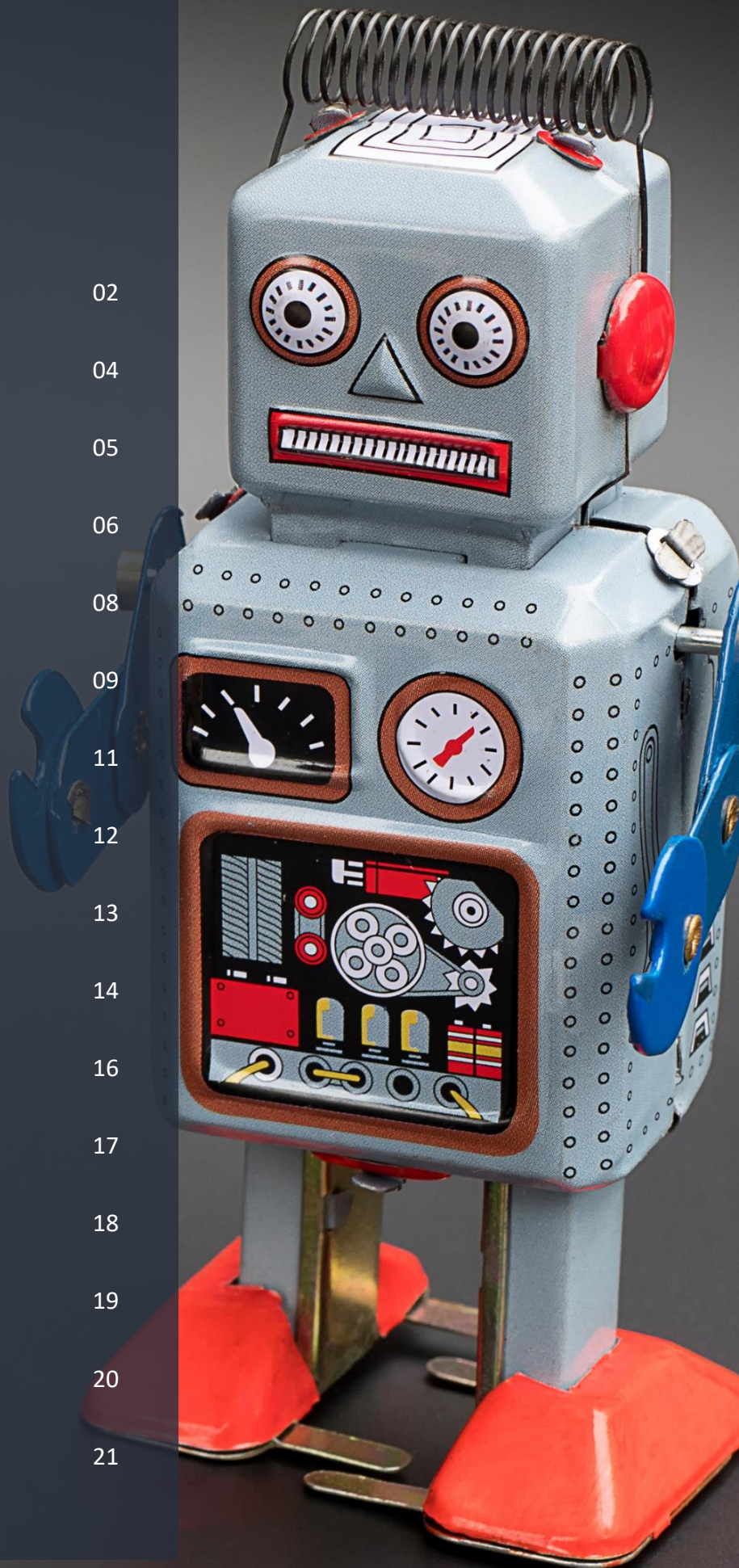
It provides:

- A structured pathway from early exploration through to design, development, testing, and evaluation
- Practical advice on designing learning experiences with AI tools, including prompts, context, and feedback
- Insights from real-world implementation, including what worked, what didn't, and where judgement is required
- Tools and examples that can be adapted to different organisational contexts.

The focus throughout is on learning design rather than technology. AI is treated as a medium through which learning is delivered, not as the centre of the solution.

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THE OPPORTUNITY AND THE QUESTION

Artificial intelligence is becoming part of how learning is designed and delivered. For many organisations, the question is no longer whether to use AI, but **how** to use it in ways that are practical, meaningful, and aligned with their values.

Much of the current focus is on efficiency – generating content faster or scaling delivery. This playbook focuses on a different opportunity: using AI to support dialogue-based learning, where learners engage in conversation, respond to scenarios, and receive feedback in real time.

1

Why AI is entering learning now

AI tools are now easier to use and require less technical expertise. At the same time, organisations need learning that is more flexible, more personalised, and better aligned with real-world situations.

This creates an opportunity to move beyond static content toward more interactive learning experiences.

2

What AI-delivered learning can (and cannot) do

AI can support interactive, responsive learning – particularly where judgement and decision-making are important.

However, it does not replace all learning design. Without careful management, learning interactions can become confusing or superficial. AI also does not inherently reflect organisational context or values – these must be designed into the experience.

+

3

The case for conversational, scenario-based learning

Conversational AI is well suited to scenario-based learning, where learners respond to realistic situations and consider trade-offs.

This shifts the focus from what learners know to how they think and respond. In practice, learning becomes something that is shaped through interaction, rather than simply delivered.

“Instead of shying away from AI in education, we’re leaning into it as a tool to automate and support learning. I find that super interesting.”

- Learner survey

A PRACTICAL PATHWAY

This playbook follows a practical, iterative approach to designing AI-delivered learning.

It is not a linear process. In practice, organisations move back and forth between stages, refining their approach as they learn what works.

Progress is not always
linear,
but it always counts.

Explore

Clarify the learning problem, context, and goals.

Design

Shape the learning experience – scenarios, interactions, and feedback.

Build

Develop the AI experience using tools, prompts, and supporting content.

Test

Trial the experience with learners and observe how it performs.

Evaluate

Assess what is working, what is not, and why.

Refine

Adjust and improve the experience based on what you learn.

How To Use This Approach

- Start where you are - not every project begins at “Explore”
- Expect to revisit earlier stages as you learn more
- Keep the focus on the learning experience, not the technology
- Prioritise small tests over large, one-off builds.

CASE STUDY 1: TIME-STRAPPED

Case study 1 follows a national non-profit in Aotearoa New Zealand. This organisation is a network of other organisations, with a national office that provides centralised learning and development support, among many other supports and resources.

We will refer to this as the Time-Strapped Organisation (or the TSO for short).



“A key challenge is finding dedicated time when we’re all so busy.”

- L&D Lead

The TSO was interested to see if AI-delivered learning would help address challenges such as:

- Limited facilitator availability
- Variable learner competency
- Inconsistent engagement
- Funding constraints
- Difficulty in keeping up with demand.

They have strong organisational values such as integrity, innovation, and respect – which the TSO expected to see demonstrated in any learning opportunities provided to their people.

The learning problem to be solved was inconsistent understanding of a topic that was technical in nature and required some judgement from the TSO people to apply accurately.

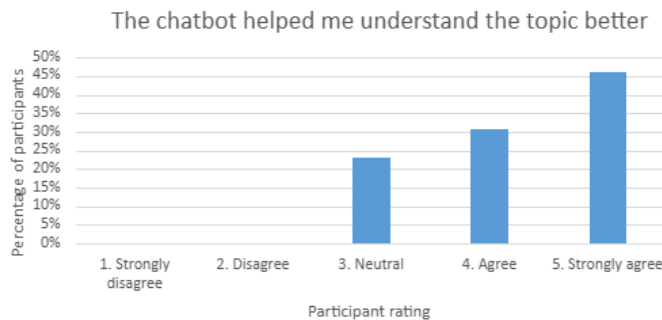
They developed 6 scenarios that allowed the learner to replicate a variety of client interactions through engaging with the AI chatbot. Each focused on a different element of the information and client interaction style.

The TSO created a draft, tested it, iterated the draft and tested it again. Each iteration was tested by analysing the actual AI:learner conversation plus survey feedback. The final version, version 3, is now ready for deployment.

CASE STUDY 1: CONTINUED

The Time-Strapped Organisation (TSO) used analysis of the AI:learner conversations and post-interaction surveys to test, evaluate, and refine their AI-powered chatbot.

Below are some of their results.

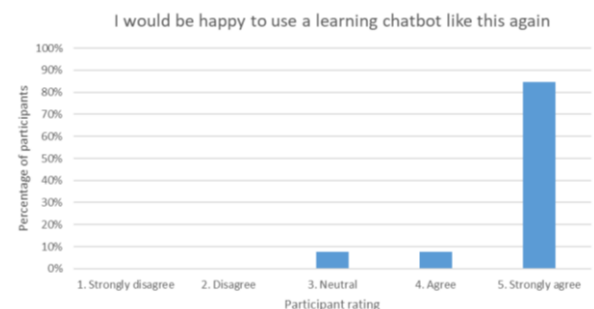
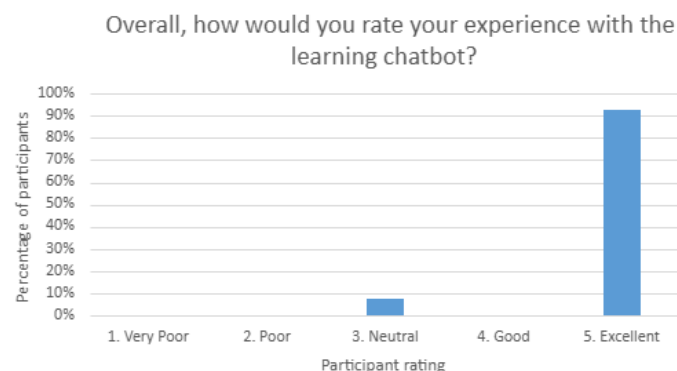
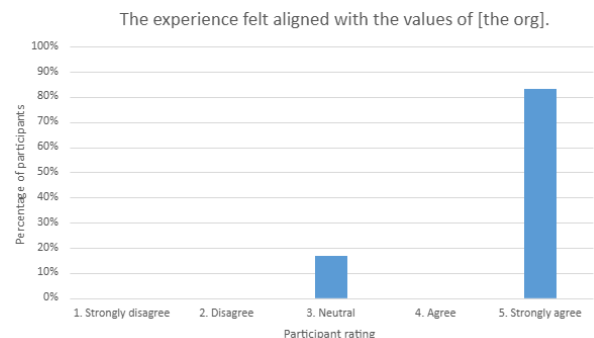
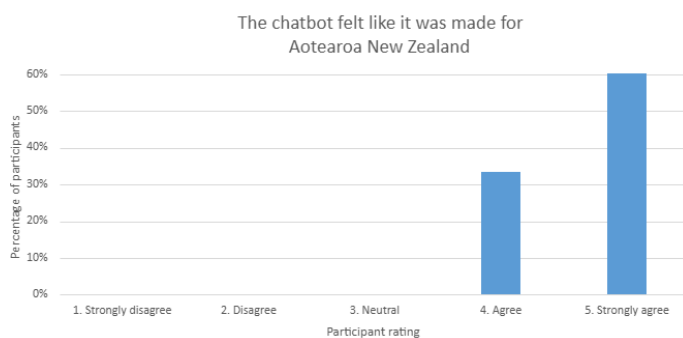


Learner comment:

“Nice and to the point. It asked questions and if I provided the answer it confirmed the accuracy. If the answer was slightly off, it would clarify and be specific, and it answered any questions I had.”

Learner comment:

“Enhanced my learning in a constructive manner. Uplifting and positive all the way!”



Learner comment:

“It gave instant replies which were thought provoking and made me think more laterally.”

DESIGNING AI-DELIVERED LEARNING

Designing AI-delivered learning is not primarily a technical task. It is a learning design challenge, focused on how learners think, respond, and engage through interaction.

Start with the learning, not the tool

AI should support the learning - not define it. Begin with a clear learning need.

Focus on:

- What learners need to do
- The situations they need to navigate
- The decisions or judgements they need to make.

Useful reference: Map It, The Hands-On Guide to Strategic Training Design by Cathy Moore.

Design for interaction

The quality of the learning comes from the interaction, not the information. Learning is strongest when the learners are actively involved.

For example:

- Realistic scenarios or questions that require a response from the learner
- Feedback that builds on what the learner has said.

Scenarios should reflect real-world situations, language, and constraints - not generic examples.

Design feedback carefully

Feedback is one of the most powerful aspects of AI-delivered learning.

Effective feedback:

- Responds to the learner's input
- Reinforces good thinking
- Gently challenges assumptions
- Encourages reflection.

Learners respond very positively to accurate and useful feedback... and they respond negatively to feedback that is overly positive or generic.

» Embed Values in the Interaction

Values are expressed through how the AI responds. This includes:

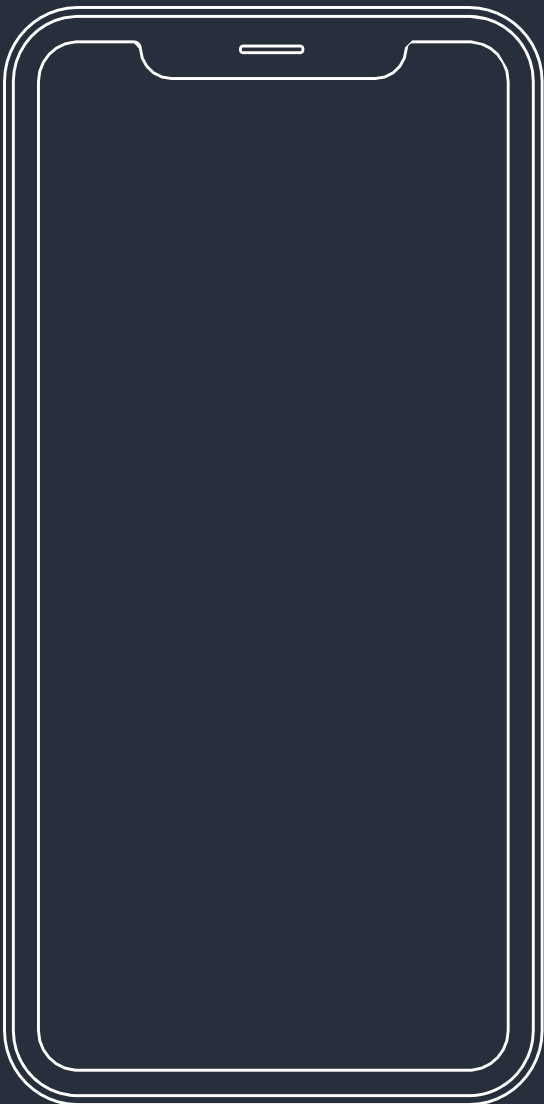
- How it frames questions
- What it reinforces
- How it handles different perspectives.

In value-driven organisations, this is critical. Off-the-shelf tools may not do a good job of this without deliberate design and clear instructions.

More discussion on instructions is included on page 18.

BUILDING THE EXPERIENCE

Choose tools that fit your context



**The tool you choose
should support your
learning design – not
drive it.**

Focus on:

- Ease of use and setup
- Ability to guide AI behaviour through instructions
- Flexibility to test and refine.

Simple tools are often sufficient at the start.



**“I am encouraged
that we are
looking at this -
we need to keep
up with learning
(and researching)
tools.”**

- Learner survey

Provide Relevant Context

AI needs access to relevant information to respond appropriately, such as: organisational policies or guidance, key concepts or frameworks, examples or reference material. This context becomes the local knowledgebase that your AI uses to formulate responses.

Without this, responses may be generic or inconsistent.

Design Instructions for the AI

You are not scripting a fixed interaction. You are guiding how the AI should support the learner to achieve the learning objectives. Instructions should define: how the AI communicates (tone, language, level of formality), how it responds to learner input, how it gives feedback and encourages reflection, how it reflects organisational values.

Well-designed instructions lead to more consistent and meaningful interactions.

Set Boundaries and Constraints

AI should operate within clear limits. This includes:

- staying within scope
- avoiding unsupported claims
- signalling uncertainty where appropriate

Boundaries help maintain quality and trust.

CASE STUDY 2: RESOURCE-STRAPPED

Case study 2 follows a national non-profit in Aotearoa New Zealand. This organisation is a professional membership body, with a small office that provides a range of sector and member benefits, including professional development opportunities.

We will refer to this as the Resource-Strapped Organisation (or the RSO for short).

“Our resource capacity is tapped out.”

- L&D Lead



The RSO thought that AI offered an opportunity to scale up some of its professional development resources without substantially increasing the resource investment – of which they had almost none available.

They were worried about quality control, noting that learners would be unforgiving of an AI system that makes a mistake. However, they thought their learners would be receptive if the AI could hold a natural conversation that was helpful to the learner.

The RSO wanted the tool to be transparent about its information, and therefore must be able to provide sources for its statements.

The learning problem to be solved was a general lack of awareness of a topic that was under-discussed and sometimes left to happen organically without much thought. Yet, when it went wrong, it went spectacularly wrong.

The RSO developed a traditional online learning course into which the chatbot was added at three points, allowing learners to understand the topic via traditional means, then discuss and expand their understanding through conversation with the chatbot.

They created a draft, tested it, iterated the draft and tested it again. Each iteration was tested by analysing the actual AI:learner conversation plus survey feedback. The final version, version 3, is deployed.

TESTING WITH LEARNERS

AI-delivered learning does not always behave exactly as intended. Testing with real learners is essential to understand how the experience works in practice.

1. Start small and observe closely

Begin with a small group of learners and focus on how they interact with the AI.

Look for:

- How learners interpret questions or scenarios
- Where they hesitate, disengage, or go off track
- How the AI responds to different types of input

Small-scale testing makes it easier to identify issues early.



2. Expect variation in responses

Learners will respond in different ways - sometimes in ways you did not anticipate.

This can reveal:

- Gaps in instructions
- Unclear scenarios or expectations
- Unintended AI behaviour

Variation is not a problem; it is a source of insight.



3. Identify breakdown points

Pay attention to moments where the interaction does not work as intended.

This may include:

- Responses that are vague, repetitive, or overly generic
- Feedback that does not align with the learner's input
- Situations where the AI loses context or direction

These are often signals that instructions or context need to be adjusted.



4. Refine based on what you learn

Testing should lead to changes.

This may involve:

- Adjusting instructions to guide behaviour more clearly
- Refining scenarios or examples
- Tightening boundaries or constraints

Sometimes small changes can significantly improve the experience.

Note: Testing is not a one-off step. It is an ongoing part of improving the learning experience.

In the three case studies in this document, learners completed a learning conversation with an AI chatbot, then answered a survey with both structured and unstructured responses. Analysis included reviewing the actual AI:learner conversations as well as the survey responses.

EVALUATING IMPACT

AI-delivered learning should be evaluated based on how well it supports meaningful learning in practice. The focus is not just on whether the AI works, but whether the learning experience is effective, relevant, and sustainable.

Use the insights below to refine the experience over time, rather than seeking a single measure of success.

1

Look at learning effectiveness

Consider whether the experience is helping learners to think, respond, and improve. Look for:

- Evidence of deeper thinking or reflection
- Improvements in how learners approach situations
- Whether feedback is understood and applied.

2

Assess alignment with context and values

Learning should reflect the organisation's context, language, and values. Consider whether:

- Scenarios feel realistic and relevant
- Responses reflect organisational expectations
- The tone and interaction feel appropriate.

3

Understand the learner experience

The experience should feel engaging, clear, and useful. Look for whether:

- Learners stay engaged in the interaction
- Instructions and expectations are clear to the learner
- The experience feels helpful rather than confusing.

4

Consider sustainability of effort

AI-delivered learning should be practical to maintain over time. Consider:

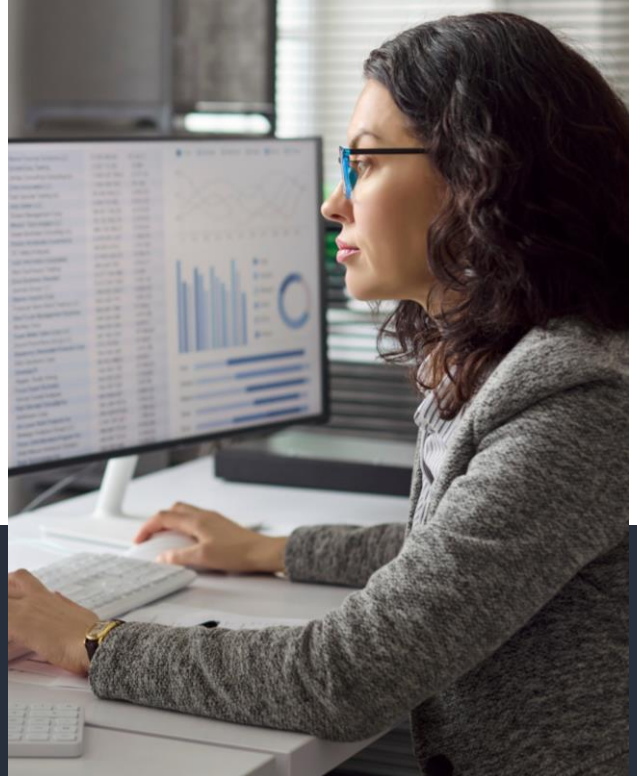
- How much effort is required to update or refine instructions
- Whether the approach can be reused or adapted
- Whether it provides value relative to the time invested.

CASE STUDY 3:

ACCURACY-FOCUSED

Case study 3 follows a national non-profit in Aotearoa New Zealand. This organisation is a unified network made up of independent outposts around the country and a national office that provides centralised services such as advocacy, a database / client management system and ongoing professional development.

We will refer to this organisation as the Accuracy-Focused Organisation (or AFO for short).



“Accuracy is the most important feature.”

- L&D Lead

The AFO felt that an AI chatbot might be another delivery method to support its existing professional development programme. It would be one tool among several options for learners, so must have a clear benefit – such as tailoring responses and feedback to the learner.

However, its primary focus was accuracy of information. While every case study in this playbook wanted the AI to be accurate, the context of the AFO meant this was a primary focus.

Ultimately, the people at the AFO were conveying information to the public that *had* to be accurate, so they had the same requirements of the AI chatbot.

The learning problem to be solved was an inconsistent application of information in a particular context. The topic itself was broadly understood already, but applied inconsistently across the country.

The AFO developed several scenarios to allow the learner to roleplay and get feedback on their application of knowledge.

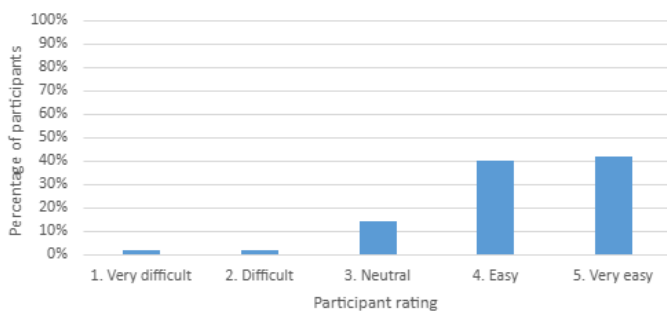
The AFO tested the draft, iterated and tested again. Each iteration was tested by analysing the actual AI:learner conversation plus survey feedback.

From the first version, the AFO learned that it over-formalised the process to select a scenario and the second version allowed this to happen more organically in conversation.

CASE STUDY 3: CONTINUED

The Accuracy-Focused Organisation (AFO) used analysis of the AI:learner conversations and post-interaction surveys to test, evaluate, and refine their AI-powered chatbot. Below are some of their results.

How easy was it to use the chatbot?



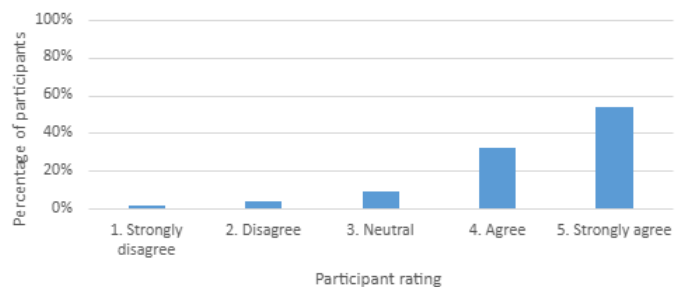
Learner comment:

“Not enthusiastic about using AI due to some commentaries that they are not 100% accurate.”

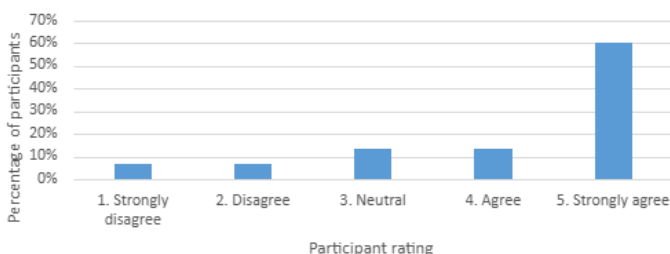
Learner comment:

“I felt the alignment was good, and I liked the accurate information and solutions.”

I could see this kind of chatbot being useful for others in my organisation



I felt comfortable asking the chatbot questions or seeking clarification



Learner comment:

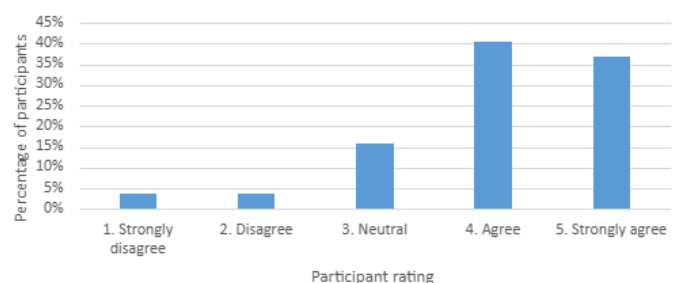
“With the nature of the enquiries we deal with, there is so much grey area. This style of conversation is much more similar to what we'd actually deal with, than the multichoice black and white questions that training is normally based on.

I'd love the opportunity to work on some complex enquiries created by a chatbot, and see if I would deal with them correctly.”

Learner comment:

“Gave great feedback and excellent summary of my responses. It fully understood my answers and what was correct and what wasn't.”

The chatbot helped me understand the topic better



As the project wrapped-up, the AFO felt that concerns about accuracy and trust remained, but now with more nuance. Rather than expecting AI to always be right, the focus is on supporting human judgement when ambiguity arises.

CASE STUDY SYNTHESIS

Across all three case studies, the same pattern emerged: AI was useful when it was bounded, contextualised, tested, and refined. **It was not the technology alone that created value. It was the learning design wrapped around it.**

The Chatbot is a Learning Facilitator

The chatbot was most useful when it helped learners practise judgement. Learners were not just reading content; they were testing their understanding through conversation, responding to realistic scenarios, receiving feedback, and refining their thinking.

This is where AI-delivered learning can add value, especially when real-world situations are ambiguous or require judgement.

“I think this is a wonderful way of exploring new content.”

- Learner survey

Context and Source Material Shape Trust

All three organisations needed the chatbot to work within a specific context. It needed access to relevant guidance, policies, examples, language, scenarios, and organisational expectations.

Source material is not just background information. It is part of the learning design. It helps determine what the AI can say, how confidently it can say it, and whether learners are likely to trust the interaction.

Testing Exposes What Design Alone Cannot Predict

Each organisation created a draft, tested it with learners, reviewed the AI:learner conversations, gathered survey feedback, and refined the experience.

Testing revealed where the AI was too formal, too enthusiastic, too generic, or too constrained. It also showed what learners valued: instant feedback, thought-provoking questions, accurate correction, and the opportunity to practise complex situations safely.

Sustainability Depends on Keeping the Design Manageable

AI-delivered learning creates new maintenance responsibilities. Instructions may need refining. Source material may need updating. Learner feedback needs to be reviewed.

For non-profit organisations, this matters. The most sustainable approach is to start small, use existing materials where possible, test with a small group, and refine only what needs refining.

The Opportunity is Practical, Not Magical

AI-delivered learning can be valuable when learners need to practise applying knowledge, receive feedback, work through scenarios, or build confidence before facing real situations.

But AI does not remove the need for learning design. If anything, it makes learning design more important. The chatbot's behaviour, tone, feedback, boundaries, and use of source material all need to be deliberately shaped.

LESSONS FROM THE FIELD

Working with AI-delivered learning in practice revealed a number of consistent patterns. These are not theoretical insights - they are drawn from real implementation projects.

AI-delivered learning is a form of delegated judgement.

Small Changes Can Have a Big Impact

AI behaviour is highly sensitive to instructions. Small adjustments to wording, tone, or emphasis can significantly change how the AI responds. This makes iteration essential.

Learner Responses are Unpredictable

Learners do not respond in fixed or expected ways. This can expose gaps in instructions, unclear scenarios, or unintended AI behaviour. Designing for flexibility is more effective than trying to control every pathway.

Generic Experiences Reduce Value

When context, language, or examples are too generic, the learning experience feels less relevant and less engaging. Specific, real-world context significantly improves the quality of interaction.

Feedback Quality Matters More than Quantity

More feedback is not necessarily better. Learners respond best to feedback that is specific, relevant, and connected to their input. Repetitive, generic, or overly-positive feedback quickly reduces engagement.

Values Do Not Carry Through Automatically

AI does not inherently reflect organisational values. Without deliberate instructions, responses can feel neutral or misaligned. Values need to be actively embedded in the AI instructions and in the scenarios you supply.

STRUCTURED STARTING POINTS

The following structures are intended as starting points that can be adapted to different contexts. Examples are provided on pages 19 and 20.

Starter: **Tool Selection**

When selecting the AI tool you will use, consider:

- How easily instructions can be created and updated
- How interactions can be tested and refined
- How context or reference material can be incorporated.

See the example on page 19.

Starter: **Instruction Structure**

Clear instructions help guide how the AI behaves. A simple structure might include:

- The role of the AI (e.g. facilitator, coach, assessor)
- How it should communicate (tone, style, level of formality)
- How it should respond to learner input
- How it should provide feedback and encourage reflection
- Any organisational values or principles to reflect.

Example instructions are included on page 20.

Starter: **Scenario Setup**

Scenarios help create context for interaction.

A scenario might include:

- A realistic situation or challenge
- The learner's role
- Any relevant constraints or considerations.

Starter: **Feedback Approach**

Feedback should build on what the learner has said.

This might involve:

- Acknowledging the learner's response
- Highlighting strengths in their thinking
- Identifying gaps or assumptions
- Prompting further reflection.

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Exactly. If you were [name], **what would you look for in the documentation to confirm that?**

> Sources

[Fine-tune this answer](#) AI (Claude Sonnet 4) 4/11

INSTRUCTIONS: EXAMPLES

Below are some examples of the instructions the Time-Strapped Organisation (TSO) (see page 6) used to configure their AI-powered chatbot.

In total, TS used 21 instructions. 16 were fairly generic, while five were to address specific AI behaviours.

Instruction 1

Setting the context

You are a scenario-based educational chatbot guiding learners through a structured, conversational learning experience on [topic]. The learner is a [role] (also known as a [role]) working in Aotearoa New Zealand.

Explanation: This instruction sets the context for the conversation, positioning both the chatbot and the learner.

Instruction 2

Setting the conversation style

Use Socratic questioning throughout: ask thoughtful questions first, and only provide definitions or advice if the learner is unsure or asks directly. Encourage reflection and draw out the learner's own reasoning.

Explanation: This instruction sets the conversation style and the expectation of the chatbot.

Instruction 3

Setting the conversation style

Do not start every message with praise. Keep the tone natural and balanced — mix reflection, follow-up questions, and occasional encouragement.

Explanation: AI is often over-positive. Despite a few instructions like this, TSO only managed to tone the AI down from “enthusiastic praise” to “mild praise”. However, when the learner had some factual information wrong, the AI would still (gently) correct them.

Instruction 4

Setting the boundaries

Model your tone and pacing on the conversation found in the Knowledge Base document titled “Lesson Plan vN.docx” and the Example Conversations in the Knowledge Base.

Explanation: This gives the AI some structure to work with, as well as expectations on the type of conversation. TSO found the AI echoed the example conversations quite well, but was variable in how closely it stuck to the lesson plan.



LOOKING AHEAD

AI-delivered learning is still evolving. Tools will continue to improve, and new capabilities will emerge. However, the core challenge is unlikely to change: designing learning experiences that are meaningful, relevant, and aligned with organisational values.

In Aotearoa New Zealand, this includes reflecting local context, language, and values, and recognising the diversity of communities and organisations across the sector.

The approach outlined in this playbook is intended to provide a practical foundation. It emphasises learning design, deliberate instruction, and ongoing refinement – rather than relying on technology alone.

As organisations continue to explore AI, the most effective implementations are likely to be those that:

- Focus on real learning needs
- Test and refine their approach over time
- Remain attentive to context, values, and learner experience.

There is no single “correct” way to use AI in learning. The opportunity lies in adapting these ideas to your own context, and building capability through practice.

**“It’s like I have
a professional
coach on the
other end.”**

- Learner survey



Contact Details:

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