

FROM KNOWING TO DOING

The AI Skills Practice Planner

Practical guide to turn a learning topic into AI-supported practice

PLAN | PRACTICE | APPLY

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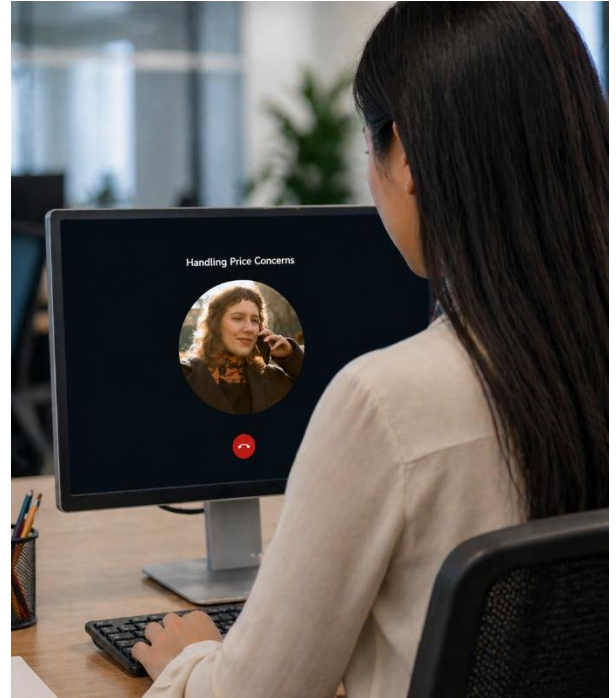
Move from learning content to practice that supports real performance

Start with Performance, Not Content

AI can help create content faster. But more information or quizzes do not automatically improve performance.

This is the shift from using AI to push knowledge or make weak learning faster, to using AI to design effective learning solutions that drive business outcomes.

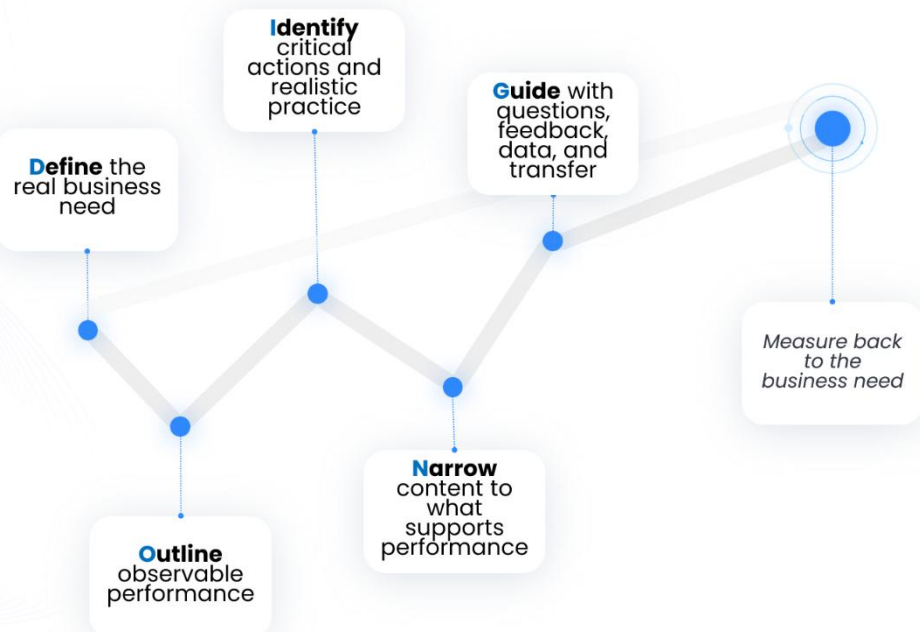
Use this planner to start with the real business need, define what learners need to do differently, and design AI-supported practice that helps them apply the skill in realistic situations.



Use AI to move learners from understanding to application

The DOING framework

Design learning by starting where performance happens.



1

Define the real business need

Start here before deciding what content to create, what AI tool to use, or what activity to build.

A learning solution is only useful if it connects to a real performance need. That need may show up as missed sales, poor customer experiences, inconsistent manager coaching, slow onboarding, safety issues, compliance risk, rework, low confidence, or too much reliance on supervisors to fix problems after the fact.

What business problem are you trying to improve?

What is happening now that needs to change?

Examples:

- Customers are not getting consistent service.
- Sales targets are missed.
- Managers avoid difficult feedback conversations.
- ☐ Sales reps know the process but struggle when customers object.
- ☐ Employees can pass the quiz but still make errors on the job.
- ☐ New hires take too long to perform independently.

Your answer:

Why does this matter to the organization?

What is the cost or impact if nothing changes?

Consider:

- ☐ Revenue
- ☐ Customer experience
- ☐ Safety
- ☐ Quality
- ☐ Compliance
- ☐ Productivity
- ☐ Retention
- ☐ Manager time
- ☐ Confidence
- ☐ Consistency
- ☐ Regulatory fines

Your answer:

Who needs to perform differently?

Identify the learner group as specifically as possible.

Examples:

- Frontline sales associates
- New managers
- Customer service representatives
- Advisors
- Supervisors
- Field employees
- New hires

Your answer:

What does the organization need them to do differently?

Focus on observable behaviour, not knowledge.

Instead of: *“Understand how to handle objections.”*

Write: *“Ask a follow-up question, acknowledge the concern, and respond with a relevant benefit before asking for the next step.”*

Your answer:

What evidence would show improvement?

Choose the evidence that would tell you the learning solution is working.

Examples:

- Higher conversion rates
- Better customer feedback NPS scores
- Fewer escalations
- Faster time to proficiency
- Stronger manager observations
- Better quality checks
- Fewer repeated errors
- Less customer churn
- New sales deals closed

Your answer:

Business need statement

Use this sentence starter:

Because _____ **is currently**

_____,

the organization is experiencing

_____.

This learning solution needs to help learners _____,

so the organization can

_____.

_____.

2

Outline observable performance

Once the business need is clear, define the performance you want to see.

The goal is not to list everything learners need to know. The goal is to identify what they need to do when the moment happens.

What is the skill learners need to apply?

Examples:

- Handle a customer objection
- Coach a direct report
- Ask better discovery questions
- De-escalate a frustrated customer
- Apply a policy in a realistic situation
- Make a judgment call
- Explain a recommendation clearly

Your answer:

What would good performance look like?

Describe what the learner would say, do, ask, decide, or produce.

Your answer:

What would weak performance look like?

Describe the common mistake or missed behaviour.

Your answer:

3

Identify critical actions and realistic practice

A strong AI-supported practice experience focuses on the moment where the learner needs to apply the skill.

This is where you move from “What do learners need to know?” to “What do learners need to practise?”

What is the realistic practice moment?

Examples:

- A customer says the price is too high.
- An employee becomes defensive during feedback.
- A client asks a question the learner is not fully prepared to answer.
- A learner needs to choose between two reasonable options.
- A customer is frustrated and wants an immediate solution.

Your answer:

What makes this moment difficult?

Select all that apply:

- | | |
|---|--|
| ☐ The other person may resist | ☐ The learner needs to make a judgment call |
| ☐ The learner needs to respond in the moment | ☐ There is no single perfect answer |
| ☐ The learner needs to ask better questions | ☐ The learner needs to balance policy and empathy |
| ☐ The learner needs to manage emotion | ☐ The learner may know the concept but struggle to apply it |

Other: _____

What are the critical actions learners need to practise?

List the 3–5 behaviours that matter most.

1.

2.

3.

4.

5.

4

Narrow content to what supports performance

AI makes it easy to create more content. The harder and more valuable work is deciding what content actually supports performance.

Use this section to separate what learners need to know from what they need to apply.

What content is essential before practice?

Include only what learners need to understand before they can try the skill.

Examples:

- ☐ The process or model
- ☐ Key policy points
- ☐ Product or service facts
- ☐ Decision criteria
- ☐ Common mistakes
- ☐ A simple framework
- ☐ What good looks like

Your answer:

What content can be removed, shortened, or turned into support?

Not everything belongs in the core learning experience.

Content that is useful but not essential may work better as:

- ☐ A job aid
- ☐ A quick reference guide
- ☐ A manager coaching guide
- ☐ A checklist
- ☐ A follow-up resource
- ☐ A performance support solution
- ☐ Human intervention
- ☐ Revised incentive structure

Your answer:

What does the learner need before, during, and after practice?

Before practice:

During practice:

After practice:

5

Choose the right AI-supported format

Different performance needs require different forms of practice.

If learners need to...	Consider...
Practise a conversation	AI role play
Make decisions in context	Scenario or case study
Apply a process while working	Job aid or performance support
Reflect on a real situation	Guided reflection or AI coaching prompt
Check understanding	Knowledge check or quiz

Which format best fits this learning topic?

- ☐ AI role play
- ☐ Scenario or case study
- ☐ Job aid or performance support
- ☐ Guided reflection
- ☐ Knowledge check
- ☐ Combination of formats
- ☐ **Other:** _____

Why is this the right format?

Your answer:

6

Guide with questions, feedback, data, and transfer

Practice becomes more useful when learners are guided before, during, and after the experience.

Questions to guide thinking

What questions can help learners prepare before practice?

Examples:

- What are you trying to achieve in this situation?
- What might make this difficult?
- What does the other person likely care about?
- What will you listen for?
- What will you do if the first response does not work?

Your answer:

Feedback criteria

What will learners receive feedback on?

Choose 3–5 criteria that connect directly to the skill.

Examples:

- Asked relevant questions
- Acknowledged the other person's concern
- Applied the process correctly
- Responded clearly and confidently
- Chose an appropriate next step
- Balanced empathy with business needs
- Used judgment in a realistic situation

Your criteria:

- 1.
- 2.
- 3.

4.

5.

Data to collect

What information would help you see whether learners are improving?

Examples:

- ☐ Sales data
- ☐ Skill scores
- ☐ Common missed behaviours
- ☐ Confidence ratings
- ☐ Manager observations
- ☐ Performance data after learning
- ☐ Learner reflections

Your answer:

Transfer plan

How will learners apply the skill after the practice?

Examples:

- ☐ Try the skill in a real customer conversation
- ☐ Discuss results with a manager
- ☐ Use a job aid during the next task
- ☐ Reflect on what happened after applying the skill
- ☐ Repeat the practice before a high-stakes moment

Your answer:

7

Measure back to the business need

Return to the business need you identified at the start.

What would tell you this learning solution worked?

Use both learning evidence and business evidence where possible.

Learning evidence	
Business evidence	
Manager or team evidence	

What might need to happen outside the learning solution?

Performance is not improved by learning alone. Consider what else may support the change.

- ☐ Manager coaching
- ☐ Clear expectations
- ☐ Job aids
- ☐ Practice opportunities
- ☐ Feedback loops
- ☐ Metrics
- ☐ Team routines
- ☐ Culture of trying and improving
- ☐ Follow-up communication

Your answer:

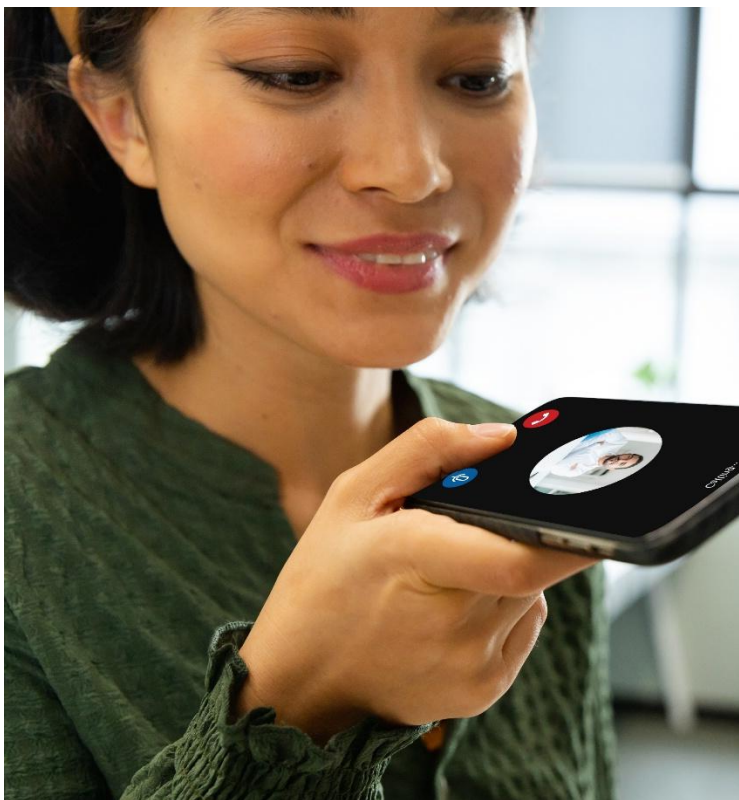
Ready to Turn Practice into Performance?

Practice Only Builds Skill When People Use It

An AI role-play platform only creates value when learners use it, and when **every minute of practice is designed to build skill.**

Beyond Role Plays helps organizations turn critical workplace conversations into focused, realistic practice. Each role play is built around the challenges, feedback criteria, and outcomes that matter most to your organization, so learners are not just repeating conversations. They are building skills with purpose.

A platform alone will not change behaviour. That is why Beyond Role Plays includes custom adoption support, learning strategy, effective eLearning, and custom learning paths so practice becomes part of a complete learning solution learners can use and leaders can trust.



How Skills Build Fast

- ✓ Expert-built AI role plays
- ✓ Realistic workplace scenarios
- ✓ Feedback tied to your criteria
- ✓ Effective eLearning
- ✓ Custom learning paths
- ✓ Adoption and rollout support
- ✓ Learning strategy consulting

Request Free Trial Access

Experience a realistic AI role play and see how expert-built practice can make every minute count.



One-page AI Skills Practice Plan

Learning topic	
Real business need	
Observable performance	
Realistic practice moment	
Critical actions learners need to practise	1. 2. 3.
AI-supported format	
Feedback criteria	1. 2. 3.
Transfer plan	
Evidence of improvement	

Final Check

Before building the learning solution, ask:

- | | |
|--------------------------|---|
| ☐ | Is this connected to a real business need? |
| ☐ | Is the desired performance observable? |
| ☐ | Have we identified the moment learners need to practise? |
| ☐ | Have we narrowed the content to what supports performance? |
| ☐ | Have we chosen the right AI-supported format? |
| ☐ | Have we defined useful feedback criteria? |
| ☐ | Have we planned how learners will apply the skill after practice? |
| ☐ | Do we know how we will measure back to the business need? |

**This is the shift from using AI to create more learning content
to using AI to support real application.**