

Portfolio Case Study



The work behind the value

Introducing AI-Enabled Roleplay to Strengthen Real-World Capability

The Client or Team

I worked with this client as a Strategic Innovative Learning Consultant. This client was a global beverage organization with a large, complex franchise operating model and partnerships across multiple markets.

The work was completed with an Enablement Division responsible for supporting global franchise contract capability. The audience needed to navigate important business conversations with franchise partners, internal leaders, and regional stakeholders. These conversations required strong judgment, clear communication, business understanding, and the ability to respond effectively in moments that could influence trust, alignment, and commercial outcomes.

The Problem

The organization needed employees to build stronger capabilities in high-stakes franchise contract negotiations.

These conversations were complex. Employees were not only expected to understand contract language, business requirements, and process expectations. They also needed to navigate sensitive discussions with confidence, judgment, and consistency. The quality of these conversations directly impacted partner relationships, alignment, trust, and business outcomes.

Traditional learning could introduce the concepts, tools, and expectations. It could explain the process and provide examples of what good looked like. However, it did not always give employees enough opportunity to practise the conversations before they had to use the skills in real situations.

The gap was in practice, feedback, and confidence-building.

Employees needed a safe way to rehearse the moments that mattered most: clarifying expectations, responding to resistance, asking better questions, explaining decisions, managing tension, and moving the conversation forward. They also needed feedback that was specific enough to help them improve.

Leaders needed better visibility as well. Completion data could show that someone finished a program, but it did not indicate whether they were developing the capability to apply those skills in real conversations. Leaders needed a clearer way to see readiness, identify coaching needs, and understand where additional support or reinforcement was required.

There was also an adoption challenge. AI-enabled roleplay was still a new experience for many learners. If the solution felt artificial, intimidating, or disconnected from the real work, people would not fully engage. The experience needed to feel safe, realistic, and credible enough for learners to practise honestly.

At its core, this was a **performance enablement challenge**: how to help employees build capability in complex franchise-contract conversations through realistic practice, meaningful feedback, and better coaching insights before the stakes were real.

I had the privilege of partnering with Carrie to implement an innovative AI simulation tool for approximately 600 employees, and the experience was outstanding

My Approach

I approached this as a **performance enablement and solution architecture challenge**, not a technology implementation.

The starting point was the business conversation, not the AI tool. I wanted to understand what needed to improve in the franchise contract and negotiation conversations, what decisions employees needed to make in the moment, and what behaviours would show they were ready to perform with confidence.

I used a performance consulting lens to clarify:

- **What good looks like** in real franchise conversations
- **Where employees needed practice** before applying the skills in live negotiations
- **What behaviours and decision points mattered most**
- **How feedback and coaching could support learning transfer**
- **What evidence did leaders need** to understand readiness and capability

From there, I designed the solution as a connected capability pathway:

Learn the expectations → practise safely → receive feedback → reflect → apply to real negotiations → demonstrate capability

A key part of the strategy was building trust in the AI experience. The audience needed to see the roleplay as safe, credible, and useful. To support this, the design started with guided practice, a clear

“happy path,” and feedback that helped learners recognize their strengths before moving into more complex simulations.

The roleplay experience was grounded in expert input. I interviewed strong negotiators to understand the language, decisions, behaviours, and moments that mattered most in real conversations. Those insights shaped the scenarios, coaching rubric, feedback criteria, and reporting approach.

The goal was to create a single, aligned system in which learning, practice, feedback, coaching, and reporting all pointed to the same definition of capability in real franchise contract conversations.

This allowed AI-enabled roleplay to become part of the learning and performance strategy — giving learners a safe way to practise high-stakes conversations, while giving leaders better visibility into readiness, skill development, and coaching needs.

Challenges or Constraints

I designed the strategy and solution architecture for an AI-enabled role-play experience focused on high-stakes franchise contract negotiations.

The goal was to create a practical performance solution that connected knowledge, practice, feedback, coaching, analytics, and real-world application. The roleplay experience needed to help people practise the conversations that mattered before the stakes were real.

I designed the experience around a clear capability pathway:

Learn the expectations → practise safely → receive feedback → reflect → apply to real negotiations → show evidence of proficiency

Key actions included:

- Interviewing with an AI Agent expert negotiators to define “what good looks like” and capture levers humans may miss
- identifying the decisions, behaviours, and conversation moments that mattered most
- designing a coaching rubric aligned to the knowledge program, performance expectations, and role requirements
- testing the AI avatar experience quickly for realism, credibility, and usefulness prior to implementation
- introducing guided AI roleplay sessions to create a safe baseline experience
- allowing learners to practise upcoming real negotiations using the same rubric
- aligning AI feedback, learner reflection, and leader coaching to the same skill expectations
- connecting rubric data and practice activity to reporting on skill development and readiness

A key challenge was the team’s early maturity with AI-enabled practice. The solution could not feel like a technology experiment or a disconnected tool. It needed to be credible, easy to understand, and clearly connected to the work.

There were several constraints to manage:

- **Psychological trust:** Learners needed to feel safe enough to practise honestly, make mistakes, and receive feedback without feeling judged.
- **Credibility:** The scenarios had to reflect real franchise contract conversations, using the language, decisions, and complexity of the business.
- **AI adoption:** Learners needed a guided introduction to the tool before being asked to use it independently.
- **Rubric alignment:** Feedback needed to connect to clear performance expectations, not generic communication advice, for it to report accurately and provide the correct coaching feedback to improve performance.
- **Leader confidence:** Reporting had to provide useful coaching insight, not just usage or completion data.
- **SME time:** Expert negotiators and business leaders had limited availability, so their input had to be gathered efficiently.
- **Measurement clarity:** Practice data needed to support learning transfer and proficiency, while staying clearly separate from formal performance management.

To build trust in the experience, the first AI-guided sessions were designed with a clear “happy path.” Learners were given an early win, helping them see the tool as supportive rather than intimidating. The first focus was on identifying strengths, understanding the feedback, and building comfort with the AI experience.

Once learners were more comfortable, the simulations became progressively more complex. This allowed them to move from confidence-building practice into more realistic and challenging negotiation conversations.

The roleplay was introduced first as a guided baseline experience. From there, learners could use the tool to prepare for upcoming real negotiations. This moved the learning closer to the flow of work and helped the practice feel relevant, timely, and useful.

The strategic value lay in creating one connected system: what was taught, practised, coached, and measured all aligned with the same definition of proficiency.

In practical terms, this created a scalable way for employees to practise high-stakes conversations, build confidence through feedback and repetition, and give leaders better visibility into readiness, skill development, and coaching needs.

“This wasn’t an off-the-shelf solution—it was a fully tailored experience that blended technology and strategy seamlessly”

Outcomes

Working with the client through implementation, the AI-enabled roleplay solution met the evaluation strategy metrics and demonstrated meaningful impact across learner confidence, skill development, and business performance.

The solution created a safe, structured way for employees to practise high-stakes franchise contract negotiations before applying those skills in real client and partner meetings. This mattered because the practice was not generic. Learners were able to prepare for the actual conversations they would have, using realistic scenarios, expert-informed rubrics, and feedback aligned with the behaviours that mattered.

Key outcomes included:

- **35% skill improvement within five AI roleplay practices**
- **Learner NPS above 80%**
- **Strong learner feedback on the relevance of the experience**, especially the ability to practise before real client meetings
- **Learners who used AI roleplay before real deals increased quota achievement to over 80%**, which exceeded expectations given the economic conditions at the time
- **Practice data and rubric reporting gave leaders better visibility** into readiness, skill development, and coaching needs
- **The client expanded the strategy into all flagship programs** based on the strength of the impact

The experience also strengthened the connection between learning, coaching, and performance. Learners could practise safely, receive feedback, reflect on their strengths, and build confidence before the stakes were real. Leaders had better insight into where capability was developing and where coaching or reinforcement was needed.

At the business level, the outcome was significant. The roleplay strategy helped connect practice activity to measurable skill improvement and quota performance. It gave the client confidence that AI-enabled practice could do more than support learning completion — it could strengthen real conversation capability and contribute to business results.

The real value was creating a human-centred AI practice experience that helped people build confidence, prepare for high-stakes conversations, and improve performance in the moments that mattered most.