TRAINING NEEDS ANALYSIS (TNA) REPORT

TOPIC: ARTIFICIAL INTELLIGENCE (AI)

Prepared for

NovaCorp

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Business Goals

Why is training needed? What organizational or operational changes are driving the need?

The Training Needs Assessment (TNA) was developed at the request of NovaCorp to identify training needs for corporate employees in the use of Artificial Intelligence (AI).

Business Goals and Drivers

Why is training being considered? What organizational needs should be addressed by training?

- ☐ Reorganization process
- ☐ Business strategy/process reengineering
- ☐ Process improvement
- ☐ Reduction in force/layoffs
- ☐ New hires/relocations
- ☐ Communication/conflict resolution
- ☐ Professional/leadership development
- ☒ New equipment/technology
- ☐ Problems in performance/skill gaps
- ☐ Minimize accidents/follow safety protocols
- ☐ New systems/procedures
- ☐ Change in law/regulations
- ☐ Succession planning
- ☐ Other _____

Pre-existing Knowledge

What do learners already know?

Employee experience with generative AI ranges from no experience to frequent use, both personally and professionally. The tools being utilized equally vary, but include ChatGPT, Microsoft Copilot, Google Gemini, Canva AI, DALL-E, Synthesia, and ElevenLabs. Therefore, future training should not require AI experience but should introduce the tools approved for use in the workplace. Common tools that should be avoided in the workplace, as well as procedures for obtaining approval to use new tools in the future, should be addressed.

Performance Gap: Analysis of Findings

Findings revealed a growing reliance on AI tools across various workflows, yet a significant number of employees lack the foundational knowledge, confidence, or understanding necessary to use these tools effectively and securely. [See the *Resources* section for supporting evidence.] For example, 40% of employees rate themselves as having basic or no awareness of AI tools, while only 20% have a strong understanding of their chosen AI tool(s). Our survey found that *ChatGPT* is the most widely used AI tool, with 45% of employees who use AI at work utilizing it. *Microsoft Copilot* has the next highest percentage at 25%. Because these are the two approved tools identified in the new AI SOP policy, our training will focus on these two tools. It is worth noting that non-generative AI tools, including tools that analyze, predict, classify, or automate tasks using data and rules, have not been widely adopted in the workplace. Therefore, training content around these tools is not recommended at this time.

In response, a training plan recommendation was developed to address these needs by promoting awareness of AI, building essential AI-related skills, and reinforcing compliance with newly developed company SOP policies, safety guidelines, and ethical standards. The goal is to empower employees to engage with generative AI responsibly and productively, ultimately supporting innovation while safeguarding organizational technology and proprietary information.

Performance Gaps

What skills, knowledge, or behaviors are lacking? What do learners currently know?

- No current AI policy or procedures in use
- Lack of AI literacy
- Weak prompt writing skills
- Use of unapproved or unsecured tools
- Misuse of AI with unethical and/or sensitive information
- Resistance stemming from fears of automation-related job loss

Audience Analysis

Who is the target audience for training? Who needs to be trained?

The target audience for this AI training initiative includes corporate employees at all levels, with a particular emphasis on individuals who utilize productivity tools or may be affected by the integration of AI technologies into their workflows. This includes team members in operations, communications, HR, IT, marketing, and client services, among others.

Learners represent a diverse range of familiarity with AI, from employees who have never interacted with AI tools to those who use them regularly in their day-to-day tasks. Despite this variance, most employees lack a clear understanding of the differences between general AI and generative AI, as well as the appropriate and secure ways to apply these technologies in a corporate setting.

Key audience characteristics include:

- Wide-ranging experience levels with AI, from novice to frequent users
- Curiosity coupled with concern regarding the ethical use of AI, job security, and data privacy
- Limited awareness of company policy governing AI use and tool approval processes
- Busy schedules, requiring concise, flexible learning formats such as microlearning, quick reference guides, and asynchronous eLearning
- Need for practical relevance, with preference for real-world examples, use case matching, and scenario-based practice

The training must be accessible and engaging for all skill levels while reinforcing the organization's standards for AI usage, data protection, and responsible innovation. Tailoring content to meet these varied needs will support the organization's goal of building AI literacy, reducing misuse risk, and empowering employees to use approved tools effectively and ethically.

Root Cause Analysis

Are performance issues due to a lack of knowledge, motivation, process, or tools? Would a non-training solution be more effective?

The identified performance gaps related to AI usage in the workplace are primarily attributed to a lack of knowledge and uncertainty about approved practices, rather than issues with motivation, process inefficiencies, or access to tools.

While AI tools are increasingly available and integrated into productivity platforms, many employees are unsure how to distinguish between general AI and generative AI, when to use them, and how to apply them in compliance with company policies. This knowledge gap has led to inconsistent use of AI tools, ranging from underutilization to risky or unauthorized use, such as inputting sensitive data or using unvetted applications.

Contributing factors include:

- Limited formal guidance or onboarding around AI expectations and approved tools
- Rapid evolution of AI technologies, leading to confusion about capabilities and limitations
- Inconsistent communication of security protocols and ethical considerations
- Lack of centralized resources or training pathways to develop AI literacy

While some improvement could be supported through clearer policies and access to tool approval guidelines, these alone would not resolve the underlying knowledge deficits. Therefore, a training intervention is the appropriate solution, as it will build foundational awareness, promote safe and effective tool usage, and align employee behavior with organizational standards. Knowledge gaps around AI vs. generative AI, appropriate tool usage, prompt writing, and policy adherence should be the focus of this training program.

To ensure impact, the training should be supported by reinforcement tools (e.g., job aids, collaborative boards, Viva Engage communication board, and FAQs), leadership alignment, and an accessible feedback loop for questions and tool requests, ensuring the training translates into sustained workplace practice.

Training Objectives (High-Level)

What are the broad goals or capabilities learners need to gain?

After completing this training, learners will be able to:

- Understand the differences between AI and generative AI technologies
- Use approved AI tools appropriately within organizational policy
- Apply secure and ethical practices when interacting with AI systems
- Recognize high-risk behaviors and avoid misuse of sensitive data
- Develop clear and effective prompts for AI-assisted tasks
- Identify when and how to request the use of new AI tools or platforms

Technology Requirements

What LMS access, platform delivery methods, and tracking needs are needed?

- All training content will be delivered and tracked via the organization's Learning Management System (LMS)
- SCORM 1.2-compliant content will be used for eLearning modules to enable detailed tracking of completions and assessments
- Delivery formats will include web-based training (WBT), microlearning, ILT/VILT, and job aids
- Learners will use their existing LMS credentials for access; no new accounts are required
- Leaderboard and badge tracking will be integrated into the LMS or linked platforms to promote gamified engagement
- Supplemental collaboration through Viva Engage will support informal learning and community building

Environmental Constraints

What are the time, budget, staffing, schedule, and system access limitations?

Several environmental factors must be taken into account when implementing this AI training program. These constraints include limitations related to time, budget, staffing, scheduling, and system access, all of which impact the design, delivery, and scalability of training.

- **Time Constraints** - Employees have limited availability due to ongoing business operations and high-priority projects. Therefore, training must be designed to be modular and time-efficient, using formats such as microlearning, short videos, and self-paced eLearning to accommodate tight schedules. Live sessions, if used, should be brief, well-timed, and potentially recorded for asynchronous access.
- **Budget Limitations** - While a modest budget has been allocated for training development, it is not expected to cover enterprise-wide platform purchases or extensive third-party vendor support. Training should be primarily developed in-house using existing authoring tools and delivery platforms (e.g., Storyline, Microsoft Stream, Learning Management System) to maximize cost efficiency.
- **Staffing Constraints** - Instructional design, development, and facilitation support are limited to the internal Learning and Development (L&D) team. Subject Matter Expert (SME) availability may vary, especially during peak business periods, requiring flexible scheduling and efficient consultation methods (e.g., templated interview guides, asynchronous reviews).
- **Schedule Constraints** - The training rollout must be coordinated with other organizational initiatives to avoid overlap and learner fatigue. A staggered, weekly rollout strategy has been recommended to maintain momentum and minimize disruption to day-to-day operations.
- **System Access Limitations** - While most employees have access to the organization's Learning Management System (LMS) and productivity tools (e.g., Teams, Viva Engage), some system-level restrictions may affect tool demonstrations or examples involving AI applications that have not yet been approved or installed organization-wide. Careful alignment with IT and compliance will be required to ensure that training content reflects only accessible, approved tools and procedures.

Addressing these environmental factors proactively will support a realistic, scalable, and sustainable training deployment while minimizing disruption to business operations.

Stakeholders

Who are the key stakeholders in the training initiative? Who will provide content and review materials? What roles, departments, experience levels, and learning preferences should be included?

- Project lead (owns the project – final approval**)**: [project lead name, email address, title]
- Subject matter experts (SMEs): [SME names, email addresses, titles]

Stakeholder Input

What SME interviews, leadership priorities, policy changes, etc., are present?

Stakeholder interviews included HR, Compliance, IT Security, and department leaders. Input from these leaders highlights the importance of aligning AI use with security policies and operational goals. Leadership supports training that promotes innovation, safeguards data, and builds employee capability.

- Priorities identified include data protection, tool efficiency, and employee confidence in using AI responsibly
- SMEs provided real-world examples of AI use cases, common errors, and feedback from early adopters
- Recent policy updates introduced formal guidance on acceptable AI use, approved tools, and prohibited practices
- Leadership emphasized the need for training to balance innovation with accountability, ensuring AI enhances work quality without compromising job roles or information security

Instructional Methods and Modalities

Training Delivery

How has training previously been delivered in the organization? What training tools are supported?

☒ Classroom	☐ Microlearning	☒ Job aids (QRG, Checklists)
☒ Virtual	☐ Gamification	☒ eLearning (Web-based Training)
☐ Video/Webinar	☐ Coaching/Mentoring	☒ Learning Management System (LMS)

Training Resources

Is there an existing training program that can serve as the basis for this program? Will the content be a new development? What resources are available for training?

☒ **New development:** No training exists.

☐ **Existing materials:** Click or tap here to enter text.

☒ **Requested/recommended materials:** New Standard Operating Procedures (SOPs), AI use policy provided

Data Collection Methods

What surveys, interviews, job task analysis, observation, performance metrics were used to gain this information?

This report incorporates a comprehensive approach, including a project lead interview, stakeholder survey, employee surveys, and a detailed gap analysis. Examples of these surveys and outcomes can be found in the *Resources* section of this TNA Report.

Recommended Solution

Training Recommendations

Is training the right solution? Is training needed?

Training is the recommended solution for this situation, when a lack of knowledge and understanding of AI and AI tools is the root cause of the challenges presented. The organization is experiencing a rapid increase in the availability and use of AI and generative AI tools across various roles and departments. While many employees are eager to explore these technologies, there is a clear gap in knowledge related to:

- The fundamental differences between general AI and generative AI
- Proper and ethical use of AI tools in the workplace
- The organization's policy regarding approved, restricted, and prohibited tools
- How to write effective prompts and use AI responsibly in their specific job functions

Stakeholder interviews, employee surveys, and a gap analysis confirmed that the lack of understanding and consistency in AI tool usage is leading to potential security risks, inefficiencies, and inconsistent work quality. Additionally, there is a need for clear guidance on reviewing and approving new AI tools to support safe and strategic adoption.

Training will provide employees with the foundational understanding, approved practices, and hands-on guidance necessary to use AI tools effectively, ethically, and in alignment with organizational goals and policies. Non-training solutions (such as updated policies alone) are insufficient to close the skill and behavior gap without guided learning and application opportunities.

Recommended Training Scope

What is the organization trying to accomplish with this training solution? What should the training content include?

The proposed training solution follows a multi-modal, multi-course design to accommodate diverse learning needs and experience levels. It includes a blend of instructor-led training (ILT), webinars, self-paced eLearning/web-based training modules (WBT), job aids, and microlearning videos. To enhance learner engagement and reinforce key concepts, incorporating gamification elements is recommended for both the initial training path and ongoing refreshers.

Given the wide range of employee familiarity with generative AI, the training will be designed to be accessible to all learners without requiring previous AI experience. Training should be

widely available regardless of AI experience level, particularly to ensure a baseline knowledge of best practices and SOP communication. It is strongly recommended that training content highlight the AI tools approved for use in the workplace, outline tools that are restricted or discouraged, and provide clear procedures for evaluating and approving new tools moving forward. This approach supports safe, compliant, and confident adoption of generative AI across the organization.

Considerations: Scope Limitations/Parameters

This training will focus on the generative AI tools identified in the new AI SOP policy as approved, ChatGPT and Copilot. It will not focus on non-generative AI, such as tools that analyze, predict, classify, or automate tasks using data and rules.

Recommended Training Audience

The recommended target audience for this training plan includes corporate employees at all levels, including leadership. This group was specifically identified through stakeholder input and training requests, highlighting the broad need for foundational knowledge and guidance on the responsible use of generative AI across the organization.

Recommended Training Goals

What do learners need to learn?

- Increase understanding of AI and generative AI
- Improve prompt quality and tool effectiveness
- Reduce risk of insecure tool use and data exposure

Recommended Training Modalities

The Decision Chart for these recommendations is included in the Resources section of this report.

☒ eLearning/Web-based training (WBT)	☒ Blended Learning (Multiple modalities, as selected)
☒ Instructor-led Training (ILT): ☐ Classroom ☐ Virtual	☐ On-the-Job Training (OJT): ☐ Shadowing ☐ Coaching/mentoring ☐ Guided practice
☒ Microlearning (Short, targeted learning experience for a single task, concept, or skill. Usually 3 minutes or less, mobile-friendly, and available on-demand)	☒ Social and Collaborative Learning: ☐ Discussion Forum ☐ Peer Learning Circles ☐ Wikis/Knowledge Hub
☐ Performance Support/Just-in-Time Training: ☐ Tooltips/Embedded Help ☐ Voice Assistants ☐ QR Code-Linked Content	☐ Immersive/Experiential Learning: ☐ Virtual/Augmented/Mixed Reality ☐ Simulations
☐ Adaptive Learning: ☐ AI-Driven Personalization ☐ Dynamic Pathways	☒ Video-Based Learning: ☐ Interactive Videos ☐ Explainer Videos ☐ Recorded Demonstrations ☐ Webinar
☐ Storytelling/Scenario-Based Learning: ☐ Branching Scenarios ☐ Digital Storytelling	☐ Cohort-Based Learning: ☐ Guided Learning Journeys ☐ Social Assignments
☒ Printed/Static Materials (Job aids) ☐ Manual/Handbook ☐ Workbooks ☐ Quick Reference Guides (QRGs)	☐ Self-Directed Learning Paths/Learning Library (Self-guided learning)

Resources: TNA Data Collection Methods, Decision Charts, and Results

How was data collected for this report? How were decisions/recommendations made?

1. Stakeholder Survey

a. **Audience:** Stakeholders and senior management

b. **Goal:** To determine what performance/organizational issues they are facing and why they think training is a viable solution to those issues

c. **Format:**

i. Digital

☒ Online survey/email ☐ Written/print

ii. Meeting/interview

☐ Face-to-face ☐ Virtual

d. **Survey question bank:**

i. Which performance issues are you currently trying to address?

ii. How do you think training will help to solve the issue?

iii. What steps have you taken previously to correct the problem?

iv. How would you describe performance currently? Please include any relevant metrics and/or data.

v. What is the performance goal? What changes would you like to see once training has been implemented?

vi. What is the critical gap between current performance and desired performance - knowledge, skills, or attitude?

2. Employee Survey

a. **Audience:** Employees because they may have different perspectives on what training is needed to close performance gaps.

b. **Goal:** Gain a more in-depth understanding of what is going on day-to-day and invaluable insight into how best to help improve performance through training.

c. **Format:**

i. Digital

☒ Online survey/email ☐ Written/print

ii. Focus group meeting/interview

☐ Face-to-face ☐ Virtual

d. **Survey question bank:**

i. Do you use any AI tools at work? If so, which ones?

ii. What skills or knowledge are needed to use AI in your role?

iii. How would you rate your understanding of AI tools?

iv. Do you need support to develop any AI skills? If so, which ones?

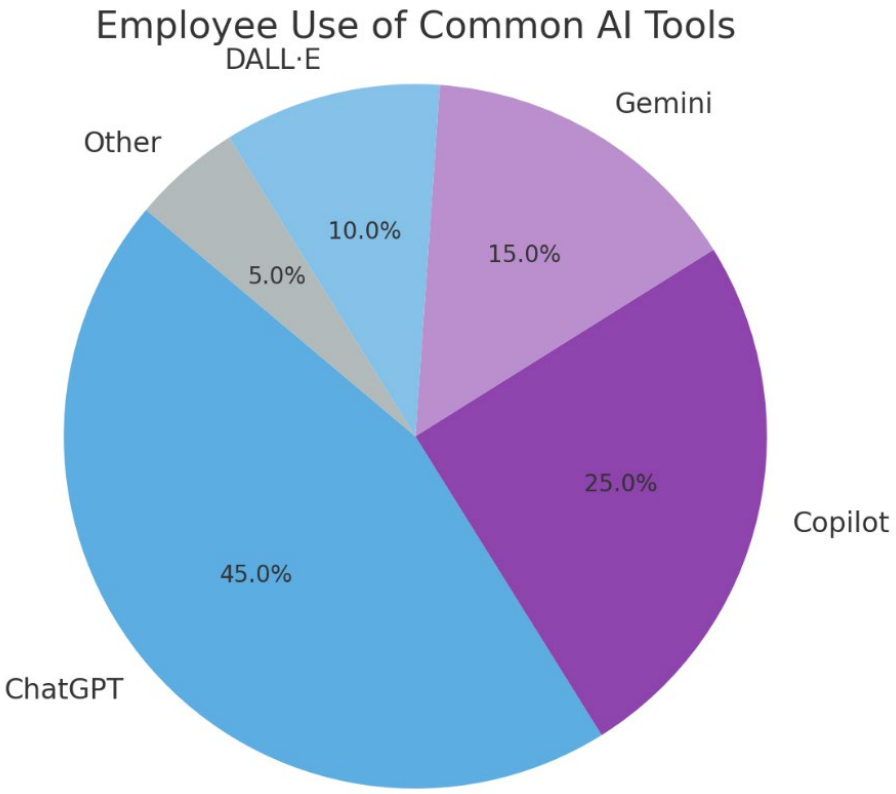
v. What are the most challenging aspects of using AI in your role? What concerns do you have with using AI?

vi. What AI training have you received in the past? Please list specific courses you have completed (including eLearning and external workshops).

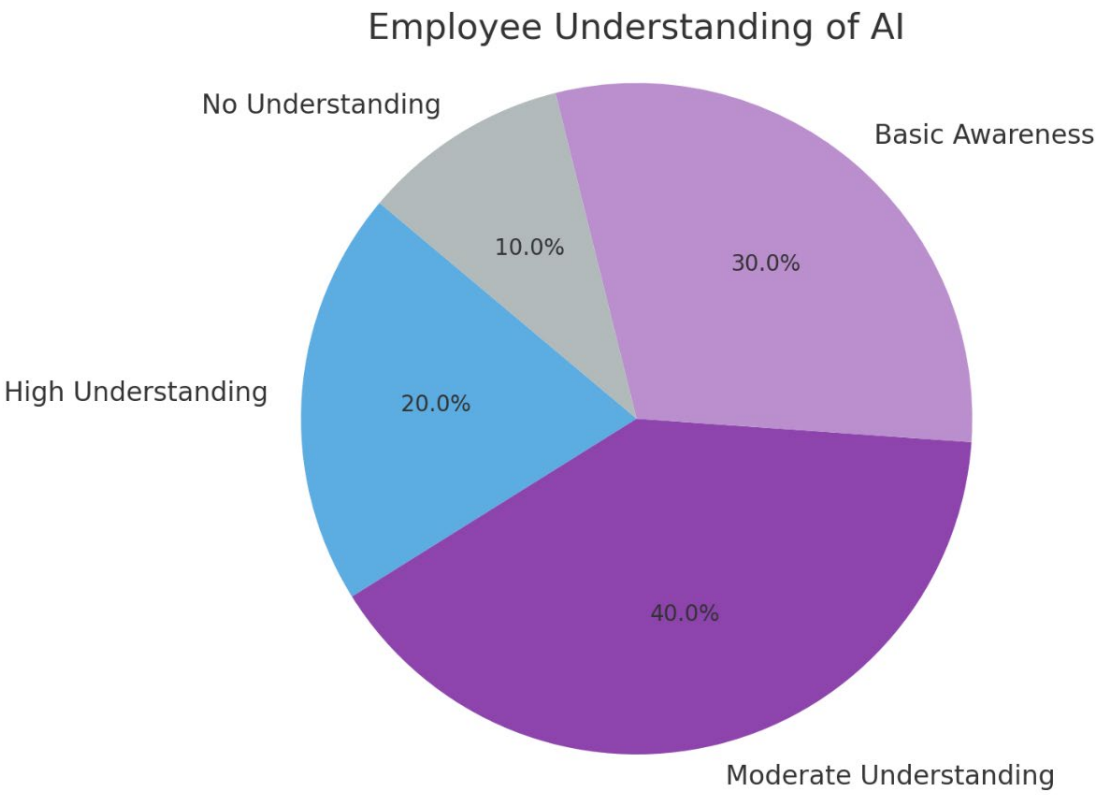
vii. Other than training, what other type of support would help?

viii. Are there any factors (such as processes or technology) that are preventing you from achieving maximum performance in your role?

3. Survey Results: Employee Generative AI Tool Use



4. Survey Results: Employee Self-Assessment of AI Understanding



5. Modality Selection Criteria

Selection Criteria	Key Considerations	Recommended Modalities (Examples)
Learning Objectives	Knowledge: • Cognitive/mental abilities to retain/process information, learning facts/concepts. • Requires recall, recognition, understanding, application, evaluation of facts, patterns, concepts. • Measured with written quizzes that document/explain knowledge. • Pair with spaced repetition (for retention). Skills: • Physical abilities, how to perform tasks/activities, application of knowledge.	☐ Knowledge ☐ eLearning ☐ Microlearning ☐ Video tutorials ☐ Job aids ☐ Webinars (recorded) ☐ Knowledge Checks/Quiz ☐ FAQ/ Glossary ☐ Podcasts/ Audio ☐ Skills

<table>
<tr><th>Selection Criteria</th><th>Key Considerations</th><th>Recommended Modalities (Examples)</th></tr>
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Requires training and practice.
Measured in terms of speed, precision, technique through observation or monitoring.
Pair with performance support tools, immediate feedback, follow-up practice opportunities (to build mastery over time).

Attitude/behaviors:

Feelings/emotions/viewpoint/belief about people or things
Requires considerable amount of time and effort to adjust.
Difficult to measure feeling/perception or change in attitude.
Pair with manager reinforcement, ongoing nudges/reminders, follow-up practice.

</td><td>
<table>
<tr><td>ILT
VILT
Simulations
Scenario-Based Learning
Interactive eLearning
Job shadowing/mentorship
Practice lab/sandbox</td><td>Job aid with practice activities
Peer coaching/guided walkthrough/demonstration</td></tr>
</table>
<table>
<tr><td colspan="2">☐ Attitudes</td></tr>
<tr><td>Scenario-based learning with consequences
Role-playing/behavioral simulations
Facilitated group discussions
Peer learning and social collaboration
Coaching and mentoring</td><td>Microlearning with reflective prompts
Testimonies/ case studies/ storytelling (builds emotional connection)
Gamification with ethical choices/badges
Surveys/self-assessments</td></tr>
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Selection Criteria	Key Considerations	Recommended Modalities (Examples)
Concept Mastery:	Level of understanding required: ☒ Knowledge – recall, definitions, concepts ☐ Comprehension – understand, explain, restate, interpret ☐ Application – use information/ideas/skills in new situations, solve problems ☐ Analysis – categorize, break things down, critical thinking ☐ Synthesis – put things/ideas together to create something new, creative thinking ☐ Evaluation - judge	eLearning, videos, infographics, knowledge checks, formative assessments, spaced repetition
Behavior Change	Requires mindset shifts, reinforcement, and feedback	Case studies, ILT/VILT, role-plays, guided discussions, coaching, scenario-based learning
Skill Application	Needs practice, feedback, and real-world simulation	Simulations, sandbox tools, job aids, interactive tutorials, hands-on labs, live demonstrations
Policy Adherence	Must ensure understanding and compliance with rules	SCORM modules, quick reference guides, checklists, scenario-based branching, ILT, compliance modules, policy-focused microlearning
Engagement and Retention	Training must be memorable, motivating, and relevant	Gamification, peer forums, cohort learning, rewards systems, storytelling, interactive eLearning
Audience Characteristics	Location, experience, accessibility, preferences ☐ Location ☐ Number of learners ☐ Experience level ☐ Preference/accessibility ☐ Language/literacy	Onsite/classroom ILT, virtual/remote VILT, self-paced, mobile learning, small group, enterprise-wide

Selection Criteria	Key Considerations	Recommended Modalities (Examples)
Complexity of Content	Simple, moderate, or complex tasks ☐ Simple/foundational ☐ Moderate ☐ Complex/high-risk	Foundational: Self-paced, checklists Moderate: Microlearning, blended learning, eLearning Complex: Live sessions, instructor-led training (ILT), hands-on practice, coaching
Interactivity and Practice Needs	Required level of interaction or feedback ☐ Low ☐ Moderate ☐ High interactivity	Videos, infographics, reading materials, quizzes, branching scenarios, discussions, simulations, role-plays, virtual labs
Scalability and Reach	Size and distribution of learner population ☒ Widespread access ☐ Small teams/specialized audience	Asynchronous (eLearning/recorded webinar) Synchronous ILT/cohort-based VILT
Time Constraints	Limited learner availability Extended onboarding/development program	Microlearning Job aids Recorded sessions
Technology Infrastructure	Available platforms/tools Devices and Connectivity Tracking/reporting capabilities Learner access	LMS Teams Zoom Internal portals
Budget and Development Resources	Budget requires off-the-shelf/generic content Budget supports custom development	Use existing platforms and tools (e.g. PowerPoint, internal LMS) Custom eLearning, vendor-supported ILT, immersive technologies
Urgency of Training	Urgent deployment/short-term need Long-term initiative	Curated content Recorded sessions/video QRGs

Selection Criteria	Key Considerations	Recommended Modalities (Examples)
		Comprehensive courseware Certifications Blended programs Formal curriculum
Evaluation and Measurement Requirements	Assessment Needs: ☒ Formative ☒ Summative Tracking: Completion tracking Success Metrics: Behavior change	Modalities: ☒ LMS/Quiz ☐ Observation checklist ☒ Learner Survey ☒ Reports

6. Modality Decision Matrix

Training Topic	Learning Goal	Best-Suited Modalities	Rationale	Priority Ranking
AI Fundamentals	Build conceptual understanding	Self-paced eLearning, Infographics, Explainer videos, Interactive videos	Foundational knowledge benefits from structured and repeatable formats that allow self-pacing.	High
AI vs. Generative AI	Clarify distinctions and use cases	Animated video, Scenario-based microlearning, Job aid (comparison table)	Visual contrast and examples help reinforce conceptual differences.	Medium
Prompt Writing Basics	Build practical skill and confidence	Simulations, Practice-based microlearning, AI sandbox (guided), Job aid	Hands-on activities and immediate feedback build effective habits and reinforce skill.	High
Accessing AI Tools at Work	Demonstrate where and how to access tools	Screen recording videos, Step-by-step guides, Embedded tooltips (in platform)	Learners benefit from direct, visual walkthroughs and just-in-time help.	High
Safe and Ethical Use of AI	Promote responsible behavior and awareness	VILT/ILT (discussion-driven), Case study scenarios, Knowledge checks, Badge system	Complex and value-based content benefits from discussion and reflection, plus accountability.	High

Training Topic	Learning Goal	Best-Suited Modalities	Rationale	Priority Ranking
Policy and Security Compliance	Ensure alignment with company rules	WBT module with quiz, Quick reference guide, Interactive checklist, Poster	Must-have knowledge should be trackable, easily referenced, and reinforced through multiple channels.	High
Tool Approval Process	Guide decision-making for tool vetting	Decision trees (interactive), LMS knowledge base, Microlearning series	Interactive formats allow learners to explore rules based on real-world conditions.	Medium
Tracking & Motivation (Gamification)	Encourage engagement and retention	Badges, Leaderboards, Learning journeys	Helps incentivize completion and promotes ongoing participation across teams.	Medium