



Coffee Chat Recap

AI Didn't Kill L&D, But It Changed How We Work

Friday, August 14, 2026 | Learning Rebels Coffee Chat | Hosted by Shannon Tipton

The Big Question We Started With

Shannon opened by asking whether L&D is using AI to prop up processes (ADDIE, SAM, etc.) that may no longer fit how fast business moves — rather than letting AI help redesign the process itself. The point: the frameworks aren't broken, but it's worth asking whether we're still analyzing, designing, and evaluating the right way in 2026.

Key Takeaways

1. “Train it like a new hire, then let it run.”

The group kept circling back to one metaphor: treat AI like an intern. Spend time upfront teaching it your business, your voice, and your brand — mission/vision statements, style guides, hex codes, past work samples — then stop “riding along” and let it do more independently. Once trained, you don't have to re-teach it every session; you just remind it occasionally.

2. Licensed / enterprise versions are a different tool entirely.

Multiple people (Sandra, Barbara) described a “night and day” jump between free/basic Copilot and the licensed enterprise version. Output quality, tone-matching, and usefulness jumped dramatically once security and data controls allowed deeper connections (OneDrive, email, Teams, calendar).

3. Tools are converging — and some let you pick your model.

Andrew's org runs Copilot but lets users choose the underlying model (GPT, Claude Sonnet, Claude Opus) depending on the task — for example, a more “math-focused” model for calculation-heavy work. Several people are paying out of pocket for multiple tools (ChatGPT + Claude) because each has different strengths and those strengths keep shifting.

4. Projects/folders + custom instructions are the underused feature.

Shannon walked through how she uses Claude “projects” (Copilot has a similar notebook feature) to store standing instructions and files per client or per content type — branding guidelines, blog-pillar checklists, tone rules — so she never has to re-explain context. Custom trigger phrases (e.g., typing “devil's advocate”) can be defined once in project instructions to make AI push back critically instead of just being agreeable.

5. Real use cases shared by the group

- **Christopher (medical/pharma L&D):** Marks up narration scripts with SSML so text-to-speech tools pronounce medical terminology correctly.
- **Sandra:** Used licensed Copilot to co-create a manager/learner reinforcement conversation guide, plus a quick Excel-based discovery workbook to help clarify whether a request is really a training problem — built in a fraction of the usual time.
- **Melissa:** Uploads publicly available bylaws, mission/vision, and strategic plan docs to ChatGPT to keep professional-learning planning aligned with organizational strategy.
- **Andrew:** Uses enterprise Copilot connected to OneDrive/SharePoint to pull past meeting notes and references when building SOP-based training, and treats it like a cube-mate for facilitator guide feedback.
- **Shelly:** Records meetings in Google Meet/Gemini, then asks it to summarize action items and draft post-meeting reminders.
- **Michelle:** Keeps a project folder of annual goals/performance targets and periodically asks ChatGPT to compare recent work against those goals — useful documentation for performance conversations.
- **Maureen:** Uploads company priorities and objectives, then has Copilot pull from Outlook, calendar, and OneDrive to draft a mid-year (and later year-end) self-review, flagging gaps and key stakeholders.
- **Maureen (bonus tip, not AI-related):** Update your resume at the same time you write your year-end review — the achievement language is already there.

6. Caveats and honest pushback

Not everyone is sold yet. Barbara noted that for her specialized/technical domain, output still isn't reliable enough to skip fixing it herself, and switching between tools as their strengths shift feels like a moving target. Maureen flagged that strict brand guidelines limit how freely her team can use image-generation tools. The group agreed: human review and critical thinking are still required — AI won't be making the strategic calls.

Practical Tips Worth Stealing

- Upload your brand guidelines (including hex codes spelled out in words, not just codes) once per project so the AI stops guessing at “the blue.”
- Build a standing library of custom trigger phrases in your project instructions (e.g., a “devil's advocate” mode that tells the AI to be critical, not agreeable).
- Before publishing a blog post, run it through a project-specific checklist prompt: Which content pillar does it support? Does it stay coherent and avoid turning into a manifesto? Does it match your close and actually speak to the reader?
- Use Notebook-style tools (Claude/Gemini) to load articles, reports, and white papers on an unfamiliar topic, then generate an audio walkthrough to learn faster.
- When you hit a tool-specific wall (Articulate, Captivate, Lectora, WordPress, Substack), describe the exact problem to your AI instead of searching a help site — it's often faster and more accurate.
- Don't upload proprietary/competitive information (your “secret sauce”) even if a tool claims it won't retain your data.

Action Items

- Pick one recurring task (blog QA, meeting recap, performance tracking, client research) and set up a dedicated AI project/folder with standing instructions and reference files, so you stop re-explaining context every time.

- Draft one custom trigger phrase for your own AI instructions (a “critique mode” or similar) and test it on a current piece of work.
- If you have access to a licensed/enterprise AI tool, compare its output on a real task against the free version you may have written off earlier — several people found it was a genuinely different experience.
- Ask your AI directly: “Here's how I currently do [X process]. If you could redesign it, what would you change?” and see what it surfaces.
- If you haven't already, add a short AI-use disclaimer to client-facing documents or workbooks that notes AI assisted with process/formatting while the ideas and words remain yours.

Announcements

- **Next Coffee Chat:** “Confessions of an L&D Professional” — an open, lighthearted session on the workarounds, shortcuts, and things we don't always admit to doing.
 - **New podcast episode:** The latest Learning Rebels podcast episode, on managing difficult subject matter experts, is now live.
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AI tools were used to assist with formatting, structure, and refining the prose in this guide. However, the original concepts, frameworks, instructions, and intellectual property are created by Shannon Tipton, Learning Rebels.