

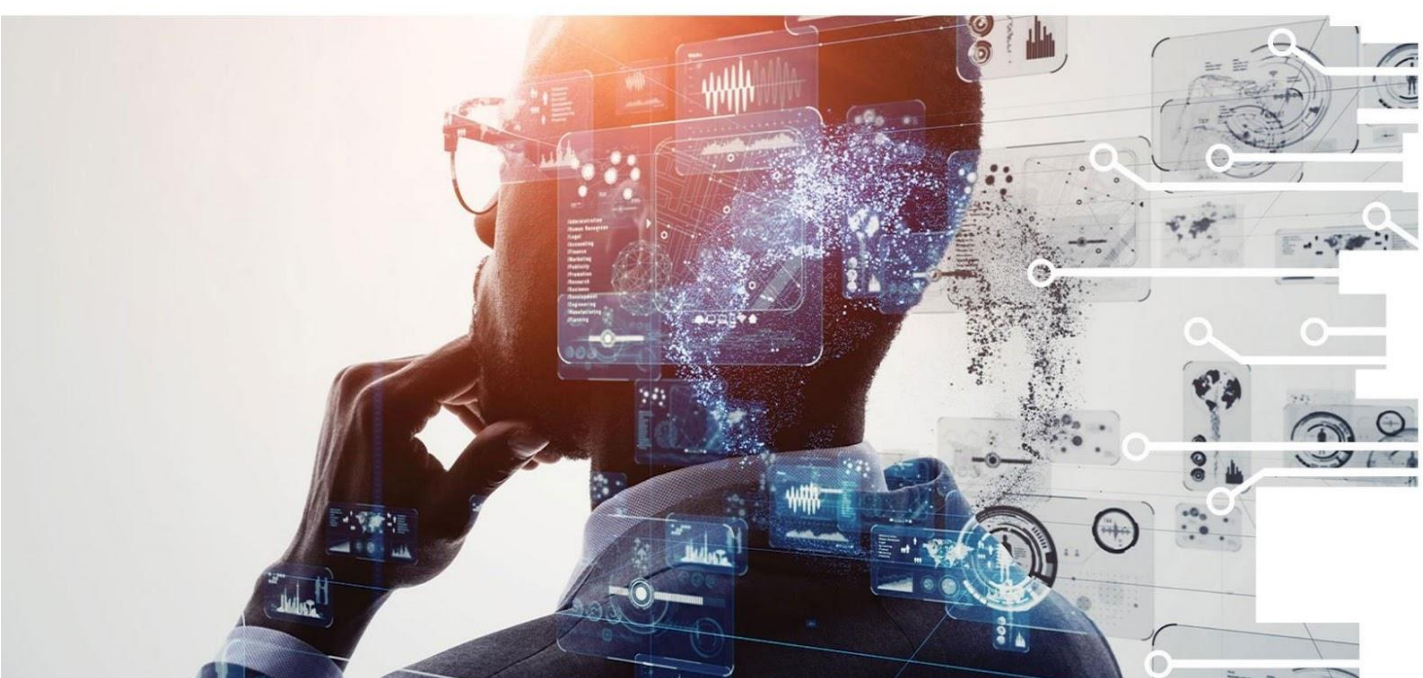


AI4VET4AI

AI-powered Next Generation of VET

AI in Customer Service

CVET Teacher Training Materials



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Purpose of the document

This document supports CVET teachers, trainers, and instructors in delivering the MOOC on AI in Customer Service effectively within adult learning, professional training, and lifelong learning contexts. It covers three of the units that form the advanced module of the MOOC: Unit 8 – AI Performance Metrics in Customer Service; Unit 9 – Future Insights on How AI Will Shape Retail Customer Service; and Unit 10 – Case Studies: AI Applications that Customers Encounter While Shopping.

The document is designed to:

- Help trainers understand AI-related concepts in a practical, non-technical way
- Support the facilitation of MOOC-based learning in both self-paced and blended delivery formats
- Provide ready-to-use teaching materials, examples, and workshop activities
- Enable trainers to connect MOOC content to real workplace applications in retail and customer service

This document is not intended to replace institutional teaching or assessment systems, but rather to complement and support them flexibly. It is self-study friendly, practical, and implementation-oriented, targeting CVET trainers who may have limited technical background in AI.

1. Introduction to the MOOC and Its Relevance for CVET

Trainers

1.1 Overview of the MOOC Topic

This MOOC module introduces trainers and adult learners to the advanced and applied dimensions of Artificial Intelligence in customer service. Across these three focused units, learners explore how AI performance is measured and improved, how AI will continue to reshape retail customer experience in the near future, and how leading global companies are already deploying AI in ways that customers encounter every day while shopping.

The three units build progressively: Unit 8 provides analytical tools (KPIs and metrics) for evaluating AI systems; Unit 9 looks forward to emerging trends and strategic implications; and Unit 10 grounds everything in concrete, real-world case studies from companies such as Sephora and Amazon. Together, they form a cohesive and practically oriented learning journey.

1.2 Why this Topic Matters in Today's Workforce

Artificial Intelligence is no longer an emerging trend in retail and customer service. It is an operational reality. According to a recent IBM survey of 1,500 customer service leaders, every single respondent plans to use generative AI in their operations, and 67 percent have already begun adoption. AI-powered tools such as chatbots and virtual assistants now reduce customer wait times by up to 60 percent, improve first-contact resolution rates by 25 percent, and deliver consistent service across all channels – from mobile apps to in-store experiences.

For CVET learners – many of whom work or will work in retail, hospitality, e-commerce, logistics, or related sectors – understanding how AI tools work, how their performance is evaluated, and how they are experienced by end users is rapidly becoming a foundational professional competence. Employers expect their workforce to engage confidently with AI systems, interpret AI-generated data, and adapt to an AI-enhanced working environment.

1.3 Addressing Uncertainty Around AI

Many adult learners approach topics related to AI with a degree of apprehension – whether due to unfamiliarity with technology, concerns about job displacement, or simply not knowing where to start. This MOOC, and the accompanying trainer materials, are designed specifically for that audience. No prior AI knowledge or technical background is required to deliver or complete these units. All concepts are explained clearly, illustrated with real-world examples, and connected to practical workplace situations.

As a CVET trainer, your role is not to be an AI expert. Your role is to facilitate a confident, critical, and reflective engagement with the material – helping your learners to see AI not as a threat, but as a tool they can understand, evaluate, and use in their professional lives.

2. Who this MOOC is Designed For

This MOOC module is designed primarily for:

- Adult learners in employment who are upskilling or reskilling in retail, e-commerce, or customer-facing roles
- Job seekers entering sectors where AI-powered customer service tools are increasingly standard
- Professionals transitioning into digital or data-related roles within their industry
- Small business owners and team leaders seeking to understand AI deployment in customer service contexts

2.1 How this MOOC Supports CVET Trainers

The modular structure of the MOOC significantly reduces preparation time for trainers. Each unit is self-contained and comes with integrated knowledge checks, case studies, and discussion prompts. Trainers can use the MOOC content directly in facilitated workshops, assign individual units for self-paced completion between sessions, or use selected sections as triggers for group discussion and reflection. This guide provides all the pedagogical scaffolding needed to deliver the content confidently and effectively.

3. Target Learners and Professional Relevance

3.1 Learner Profile

The target audience for this MOOC module is adult learners in CVET settings. These are typically working professionals or job seekers aged 18 and above who are engaged in upskilling or reskilling programmes related to retail, customer service, digital commerce, or business operations. Learners may come from a wide range of professional backgrounds and educational levels – from frontline retail staff to team leaders, from recent school-leavers entering the workforce to experienced professionals navigating sector changes driven by digitalisation.

Typical characteristics of learners in this cohort include:

- Limited or no prior exposure to AI concepts, but growing daily familiarity with AI-powered tools as consumers
- Basic to intermediate digital skills, including use of smartphones, e-commerce platforms, and social media
- High motivation when learning is clearly connected to their job or career aspirations
- Preference for concrete examples, practical exercises, and visible real-world relevance
- Varied time availability – many are learning alongside employment, making flexible delivery essential

3.2 Prior Knowledge Requirements

No prior knowledge of artificial intelligence is required. A basic level of digital literacy – such as the ability to use a web browser, access online platforms, and interact with digital content – is sufficient to engage with this MOOC. Trainers may find it helpful to briefly assess the starting point of their group at the beginning of the module, particularly in relation to learners' personal experience of AI-powered tools (for example, chatbots they have used while shopping online, voice assistants, or personalised recommendations on streaming platforms).

3.3 Workplace Relevance

The content of this MOOC module connects directly to a range of professional contexts that are highly relevant for CVET learners:

- Retail and customer service: Understanding how chatbots, virtual assistants, and recommendation engines work helps frontline workers engage more effectively with these tools and with customers who use them
- E-commerce and digital marketing: Knowing how AI performance is measured (Unit 8) supports learners working in digital roles to interpret analytics dashboards and contribute to data-driven decisions
- Management and team leadership: Understanding AI's role in operational efficiency, dynamic pricing, and omnichannel integration (Unit 9) equips learners in leadership roles to make more informed strategic choices
- Business operations and logistics: Case studies from Amazon (Unit 10) illustrate how AI systems transform supply chain, inventory management, and in-store operations in ways that directly affect operational staff

4. Learning Objectives and Competence Development

4.1 Overall Learning Objectives

After completing all three units of this MOOC module, learners will be able to:

1. Explain the key performance metrics used to evaluate AI tools in customer service settings, including Response Time, Resolution Rate, CSAT, NPS, Containment Rate, and Efficiency Gains (Bloom: Understand)
2. Identify the most appropriate KPIs for a given organisational goal and map them to relevant business objectives (Bloom: Apply)
3. Describe how emerging AI technologies – including generative AI, omnichannel integration, dynamic pricing, and personalised recommendations – are transforming retail customer service (Bloom: Understand)
4. Evaluate the benefits and limitations of specific AI tools from both a customer and a business perspective (Bloom: Evaluate)
5. Analyse real-world case studies of AI deployment in retail contexts such as Sephora and Amazon, and extract transferable lessons (Bloom: Analyse)
6. Reflect critically on the ethical, organisational, and social dimensions of AI adoption in customer-facing environments (Bloom: Evaluate)

4.2 Competences Developed

1. *Technical Competences*

- Understanding of AI terminology, tools, and systems used in customer service
- Ability to interpret performance dashboards and AI-related KPIs
- Familiarity with AI tools such as chatbots, virtual assistants, visual search, recommendation engines, and augmented reality applications

2. *Professional Competences*

- Ability to apply AI knowledge to real workplace situations in retail and customer service
- Capacity to engage constructively in discussions about AI adoption within an organisation
- Competence in evaluating AI tools from both a customer experience and a business performance perspective

3. *Transversal Competences*

- Critical thinking: ability to assess the benefits, risks, and limitations of AI systems

- Digital literacy: confidence in engaging with AI-powered tools and data
- Lifelong learning: openness to continued learning in a rapidly evolving technological environment
- Communication: ability to articulate AI concepts clearly to colleagues, managers, and customers

4.3 Employability and Career Development

The competences developed through this MOOC module are directly aligned with growing employer demand for digitally confident, AI-aware professionals across the retail and service sectors. Learners who complete this module will be better positioned to contribute to AI-related initiatives in their workplaces, to engage with digital transformation processes, and to demonstrate a forward-looking professional profile that is increasingly valued in the labour market.

5. Constructive Alignment

The following table maps each learning objective to its corresponding unit, learning activity, and assessment approach. This alignment ensures that every learning outcome is actively practised and appropriately assessed throughout the module.

Table 1 Constructive Alignment Table

Learning Objective	Unit	Activity	Assessment
Explain AI KPIs (Response Time, CSAT, NPS, etc.)	Unit 8	Interactive drag-and-drop matching; video analysis	Knowledge check quiz
Identify appropriate KPIs for organisational goals	Unit 8	KPI mapping exercise; scenario-based discussion	Case scenario task
Describe emerging AI trends in retail customer service	Unit 9	Video review; structured reading	Group discussion
Evaluate AI tools from customer and business perspectives	Units 9 & 10	Benefit categorisation task; group debate	Reflective summary
Analyse AI case studies (Sephora, Amazon)	Unit 10	Case study analysis worksheet	Presentation or written analysis
Reflect on ethical and social dimensions of AI	Units 8–10	Ethics discussion; scenario-based reflection	Portfolio entry or group discussion

6. Overview of the MOOC Structure and Content

6.1 Module Overview

This document covers three of the units that form the advanced module of the AI in Customer Service MOOC. Each unit is self-contained but designed to build progressively on the previous one. The full module sits within a broader MOOC track titled Advanced AI in Customer Service: Personalization and Data-Driven Approaches.

Table 2 Advanced Module

Unit	Title	Focus	Est. Duration
Unit 8	AI Performance Metrics in Customer Service	Measuring and improving AI tool performance through KPIs, dashboards, and case analysis	5 hours
Unit 9	Future Insights on How AI Will Shape Retail Customer Service	Emerging AI technologies, omnichannel strategies, dynamic pricing, personalisation	5 hours
Unit 10	Case Studies: AI Applications that Customers Encounter While Shopping	Real-world applications of AI in retail through Sephora and Amazon case studies	5 hours

6.2 Unit 8 – AI Performance Metrics in Customer Service

Unit 8 introduces learners to the concept of performance measurement in AI-powered customer service environments. The unit opens with a compelling question - have you ever used a chatbot that felt slow or unhelpful? - and uses this as a gateway to explore why and how organisations measure the effectiveness of their AI tools.

The unit covers six core KPIs: Response Time, Resolution Rate, Customer Satisfaction Score (CSAT), Net Promoter Score (NPS), Containment Rate, and Efficiency Gains. Each metric is explained with a clear definition, a measurement methodology, and a real-world example drawn primarily from the Klarna case study, which demonstrates how a major fintech company achieved an 82 percent improvement in resolution time and saved approximately 40 million dollars annually through AI deployment.

The unit also covers the tools and methods used to collect and analyse these metrics: system logs, CSAT surveys, analytics dashboards, and A/B testing. A detailed insurance provider case study illustrates how these methods work in an integrated cycle of continuous improvement. Multiple knowledge checks throughout the unit ensure active engagement with the material.

6.3 Unit 9 – Future Insights on How AI Will Shape Retail Customer Service

Unit 9 provides a forward-looking exploration of AI's transformative role in retail. Beginning with a survey-backed overview of generative AI adoption rates, the unit introduces learners to the key technologies currently reshaping customer service: AI-powered chatbots and virtual assistants, visual search and image recognition, omnichannel integration, efficient customer support tools, personalised product recommendations, community engagement platforms, and dynamic pricing systems.

Each technology is explained clearly and illustrated with prominent real-world examples: Pinterest Lens for visual search, Nike's app ecosystem for omnichannel integration, Lululemon's Sweat Collective for community engagement, and dynamic pricing models drawn from multiple industries. The unit consistently connects technical descriptions to their business rationale, helping learners understand not just what these tools do but why organisations invest in them.

6.4 Unit 10 – Case Studies: AI Applications that Customers Encounter While Shopping

Unit 10 brings the learning to life through two detailed, in-depth case studies. The first is Sephora's Virtual Artist, an augmented reality tool that allows customers to virtually try on makeup products in real time using facial recognition and 3D modelling. The second is Amazon's Just Walk Out technology, which uses machine learning, computer vision, and sensors to eliminate the traditional checkout process entirely.

For each case study, the unit explores the technology's mechanisms, its impact on the customer experience, and its benefits for the business. The unit concludes with a synthesis of winning strategies in AI-enhanced retail, covering personalisation, operational efficiency, and the conditions under which AI creates sustainable competitive advantage.

6.5 Level of Difficulty

This module is rated at an intermediate level. It assumes no prior AI knowledge but expects learners to engage critically with concepts and apply them to real-world scenarios. The dominant Bloom's taxonomy levels are Understand and Apply, with significant components at the Analyse and Evaluate levels – particularly in the case study and assessment sections.

7. Key AI Concepts Explained for Trainers

This section provides trainers with accessible, non-technical explanations of the key AI concepts covered in this module. You do not need to be an AI expert to use this material. The explanations below are designed to build your confidence and give you the vocabulary to facilitate discussions effectively.

7.1 Chatbots and Virtual Assistants

What they are: Software applications that interact with users via text or voice, simulating human conversation. Chatbots are typically task-specific (handling FAQs, order tracking), while virtual assistants are more sophisticated and capable of a broader range of tasks.

Simple explanation: Think of the chat window that pops up when you visit a retail website, or the voice that answers when you call a customer helpline and asks you to 'say or press 1 for...' These are AI agents responding to your inputs.

Real-world example: Siri and Alexa are examples of AI virtual assistants. The chat support on a fashion retailer's website is likely a rule-based or AI-powered chatbot.

Relevance: Understanding the difference between rule-based chatbots (which follow fixed scripts) and AI-powered chatbots (which learn from interactions) helps learners evaluate the capabilities and limitations of tools they encounter in the workplace.

7.2 Key Performance Indicators (KPIs) for AI

What they are: Measurable values that tell organisations how well their AI tools are performing. In customer service, the most commonly used KPIs are Response Time, Resolution Rate, Customer Satisfaction Score (CSAT), Net Promoter Score (NPS), Containment Rate, and Efficiency Gains.

Simple explanation: Just as a sports team tracks goals scored and possession statistics, companies track how fast their chatbot responds, how often it solves problems without human help, and whether customers leave the interaction feeling satisfied.

Real-world example: Klarna, the Swedish fintech company, reduced average resolution time from 11 minutes to under 2 minutes after deploying its AI chatbot – an 82 percent improvement measured through system logs and CSAT surveys.

- Response Time: Average seconds/minutes between customer query and AI reply
- Resolution Rate: Percentage of queries fully resolved by AI without human escalation
- CSAT: Post-interaction customer satisfaction rating, typically on a 1–5 scale
- NPS: Customer likelihood to recommend the service (0–10 scale)
- Containment Rate: Percentage of interactions handled entirely by AI
- Efficiency Gains: Time and cost savings attributable to AI adoption

7.3 Machine Learning and Natural Language Processing (NLP)

What they are: Machine learning (ML) is the ability of a computer system to learn and improve from experience without being explicitly programmed. Natural Language Processing (NLP) is a branch of AI that enables computers to understand, interpret, and generate human language.

Simple explanation: When you type a question to a chatbot in natural conversational language – not a pre-defined command – and it understands you correctly, that is NLP at work. The more interactions the system processes, the better it becomes: that is machine learning.

7.4 Augmented Reality (AR) in Retail

What it is: AR overlays digital elements onto the real world through a device screen. In retail, it allows customers to virtually try on products before buying them.

Real-world example: Sephora's Virtual Artist allows customers to try on lipstick shades, eyeshadow, and blush using their phone camera, without physically touching the product. The system uses facial recognition to apply the product realistically to the user's face in real time.

7.5 Visual Search and Image Recognition

What it is: AI-powered technology that enables users to search for products by uploading or taking a photo, rather than typing a text query. The system analyses the visual content of the image to identify matching or similar products.

Real-world example: Pinterest Lens allows users to point their phone camera at any object – a piece of clothing, a piece of furniture – and instantly receive visually similar product recommendations. It has been described as 'Shazam for products'.

7.6 Dynamic Pricing

What it is: A pricing strategy in which prices are adjusted automatically in real time based on demand, competitor pricing, customer behaviour, and other data signals. AI enables this to happen at a scale and speed that would be impossible manually.

Real-world example: Airlines and ride-sharing services are well-known users of dynamic pricing. In retail, AI systems adjust product prices during high-demand periods (such as Black Friday) or in response to competitor price changes detected in real time.

7.7 Recommendation Systems

What they are: AI systems that analyse user behaviour, preferences, and history to suggest products or content that a specific user is likely to find relevant. There are three main types: collaborative filtering (based on what similar users liked), content-based filtering (based on product attributes), and hybrid systems.

Real-world example: McKinsey estimates that 35 percent of Amazon's total sales are generated by its AI-powered recommendation engine. Netflix attributes 75 percent of viewer activity to its recommendation system.

7.8 Omnichannel Integration

What it is: A strategy that connects all customer touchpoints – physical store, website, mobile app, social media – into a seamless and consistent experience. AI enables this by maintaining a unified understanding of the customer across all channels.

Real-world example: Nike's app ecosystem – including the Nike App, Nike Run Club, SNKRS, and Nike Training Club – is fully integrated with its retail stores and online platform. Customers can browse online, reserve in-store, use barcode scanning in physical stores, and receive personalised recommendations across all channels.

8. AI Tools and Practical Implementation

8.1 Tools Referenced in the MOOC

The following AI tools and platforms are discussed or referenced across the three units. Trainers are encouraged to familiarise themselves with these tools before facilitating the module, and where possible to explore free versions or demos to enrich the training experience.

Table 3 Tools Referenced in the MOOC

Tool / Platform	Type	Relevance in MOOC	Access
Klarna AI Chatbot	AI-powered chatbot	Unit 8 – KPI benchmarking case study	Available via Klarna app (customer)
Pinterest Lens	Visual search	Unit 9 – Visual search demonstration	Free – Pinterest mobile app
Sephora Virtual Artist	AR makeup try-on	Unit 10 – Case study	Free – Sephora mobile app
Amazon Just Walk Out	Autonomous checkout (ML + computer vision)	Unit 10 – Case study	Amazon Go stores
Google Cloud Vision	Advanced image recognition	Unit 9 – AI image search explanation	Free trial via Google Cloud
Microsoft Power BI	Analytics dashboard	Unit 8 – Dashboard creation guidance	Free version available
Google Looker Studio	Data visualisation	Unit 8 – Dashboard tools	Free – Google account required

8.2 Practical Use Examples for Training

- Live chatbot demonstration: Ask learners to interact with a publicly accessible chatbot (e.g., a retail website's live chat) and evaluate it using the six KPIs from Unit 8
- Pinterest Lens exploration: Ask learners to download Pinterest and use the Lens feature on an object in the room, then discuss how this relates to product discovery and the customer journey

- Dashboard analysis: Present learners with a sample analytics dashboard (Unit 8 includes a visual example) and ask them to identify which metrics are most useful for different business objectives
- Recommendation engine audit: Ask learners to reflect on their own recent online shopping experience and identify where personalised recommendations appeared, then discuss what data may have informed those suggestions

8.3 Risks and Limitations to Discuss with Learners

Trainers should facilitate an honest discussion about the limitations and risks of AI tools. Key points to cover include:

- Bias: AI systems learn from historical data, which may contain biases. A recommendation engine trained on data from a predominantly female customer base may perform poorly for other demographics
- Incorrect or misleading outputs: AI chatbots can misunderstand complex or ambiguous queries, generating unhelpful or incorrect responses. This is why human escalation pathways remain essential
- Data privacy: All AI personalisation relies on collecting and processing user data. Learners should understand the implications of GDPR and data consent in this context
- Over-reliance on containment metrics: A high containment rate does not necessarily mean customers are satisfied. It may simply mean they gave up. KPIs must always be interpreted in combination
- Cost and infrastructure barriers: While large companies like Klarna and Amazon can invest heavily in AI infrastructure, smaller businesses may face significant barriers to adoption.

9. Guidance for Facilitating Learning in CVET Contexts

9.1 Delivery Approaches

Self-paced Learning

All three units are designed to be completed independently by learners at their own pace. The MOOC includes integrated knowledge checks, matching exercises, and true/false questions that provide immediate feedback. Trainers facilitating self-paced delivery should establish a clear completion timeline, check in with learners midway through each unit, and provide a structured reflection session after each unit is completed.

Trainer-guided Learning

In a guided delivery format, the trainer introduces each unit with a brief contextual framing exercise, learners complete the unit content (online or via printed excerpts), and the trainer then facilitates a debrief discussion using the discussion questions provided in Section 10 of this document. This format typically requires 3–4 contact hours per unit.

Blended Learning

Blended delivery combines independent online completion of MOOC content with face-to-face or synchronous online workshops. A recommended structure for each unit would be: 90 minutes of independent MOOC completion (asynchronous), followed by a 60-minute workshop session focusing on application activities and discussion. This format works well for learners who are employed and cannot commit to full days of training.

Workshop-only Delivery

Trainers can use selected sections of the MOOC content as the basis for standalone workshop sessions. For a half-day workshop covering all three units, the recommended sequence is: Unit 10 (case studies) as an engaging opener, Unit 9 (future trends) for conceptual grounding, and Unit 8 (metrics and measurement) as the analytical deep-dive. This reverse sequence starts with the most concrete and relatable content before moving into more technical territory.

9.2 Practical Facilitation Tips

Encouraging Discussion

- Begin each session with a personal experience question: 'When did you last use a chatbot? How did it go?' This immediately grounds abstract concepts in lived experience
- Use the case studies in Unit 10 as debate starters: 'Would you use Amazon Just Walk Out? Why or why not? What concerns might you have as a customer or as an employee?'
- Introduce the concept of KPIs by asking learners how they measure their own performance at work – this creates a natural bridge to AI performance measurement

Supporting Learners with Low Confidence

- Reassure learners from the outset that no technical background is required. Emphasise that the MOOC is about understanding AI as a user and a professional, not as a programmer
- Use relatable analogies throughout. The comparison of KPI dashboards to a car's instrument panel (showing speed, fuel, temperature) can help demystify data visualisation
- Celebrate moments of recognition: when learners identify that they have already used AR, visual search, or dynamic pricing without realising it, use this as a confidence-building moment

Connecting Learning to Real Work Situations

- Ask learners to bring examples from their own workplace or sector: 'Does your company use a chatbot? How would you evaluate its performance based on what you've learned?'
- Assign a between-session observation task: ask learners to notice and document one AI-powered tool they encounter as a consumer during the week, then bring their observations to the next session
- Encourage learners in management roles to consider how the metrics covered in Unit 8 could be applied or adapted to performance discussions in their own organisations

Encouraging Peer Learning

- Organise learners into small mixed-background groups for case study analysis. Diversity in professional experience enriches the discussion significantly
- Use the knowledge checks as group activities rather than individual assessments – discuss disagreements collaboratively
- Assign peer feedback roles during presentations and reflection exercises

10. AI Use Cases for Professional and Workplace

Contexts

10.1 Use Case 1: Klarna – Transforming Customer Service with AI

Background

Klarna, the Swedish buy-now-pay-later fintech company, deployed an AI-powered chatbot that rapidly became one of the most cited examples of AI performance in financial customer service. Within its first month of operation, the bot handled approximately 2.3 million customer chats.

Key Results

- Average resolution time dropped from 11 minutes to under 2 minutes – an 82 percent improvement
- Approximately 66–70 percent of all customer queries were resolved entirely by AI without human escalation
- CSAT scores remained at parity with human agents, despite the dramatic increase in speed
- Repeat inquiries were reduced by 25 percent
- Annual cost savings of approximately 40 million US dollars, equivalent to the work of 700 full-time agents

Trainer Guidance

This case study is ideal for introducing Unit 8 concepts. Ask learners to identify which KPIs are relevant to the Klarna example, and to calculate or estimate what a Containment Rate of 66–70 percent means in practice. Discuss the relationship between containment and satisfaction – the CSAT parity finding is particularly rich for debate.

Discussion Questions

- What makes Klarna's result impressive? Which metric do you find most significant, and why?
- CSAT remained stable even as human agent involvement dropped. What does this tell us about what customers actually care about?
- What risks might a company like Klarna face if it pushes containment rates above 80 percent? How would you monitor for those risks?
- How transferable is the Klarna model to a smaller retail business with fewer resources?

10.2 Use Case 2: Sephora – Augmented Reality as a Customer Service Tool

Background

Sephora, the global beauty retailer, introduced the Virtual Artist feature in its mobile app, allowing customers to virtually try on thousands of makeup products using facial recognition and 3D modelling. The tool can simulate lipstick, eyeshadow, blush, and other products in real time, adapting to the user's skin tone and lighting conditions.

Key Results

- Reduced uncertainty and product returns by enabling customers to make more informed purchase decisions
- Increased average time spent in the app and greater engagement with product pages
- Enabled social sharing of virtual looks, generating organic brand promotion on social media
- Improved hygiene standards by reducing the need to physically test products in store – a benefit that became especially significant following the COVID-19 pandemic

Trainer Guidance

This case study pairs well with Unit 10 content and can be introduced using Sephora's actual app (downloadable for free) as a live demonstration. Ask learners to categorise the benefits they observe as either customer benefits or business benefits, and to consider what data Sephora might be collecting through the app and how it could be used.

Discussion Questions

- Have you or someone you know used a virtual try-on tool? How did it affect your purchasing decision?
- What are the customer benefits of AR try-on technology? What are the potential concerns (privacy, accuracy, accessibility)?
- How might a smaller beauty retailer without Sephora's resources offer a similar experience? Are there lower-cost alternatives?
- Sephora collects data on which products users virtually try on. What could they do with this data? Is it ethical?

10.3 Use Case 3: Amazon – Just Walk Out Technology

Background

Amazon's Just Walk Out system, deployed in Amazon Go stores, uses a combination of machine learning, computer vision, and sensor arrays to track customer movements and purchases in real time. Customers enter the store using the Amazon Go app or a registered payment card, pick up products freely, and leave without visiting a checkout. The system automatically charges the correct amount to their account.

Key Results

- Complete elimination of checkout queues and traditional payment friction
- Significant reduction in staffing costs associated with checkout management
- Real-time inventory tracking capability, enabling intelligent restocking and demand forecasting
- Detailed behavioural data on customer movement patterns and purchasing decisions within the store

Trainer Guidance

This case study raises important questions about the future of retail employment as well as the customer experience. It is particularly effective when discussed in groups that include learners with retail backgrounds. Encourage learners to engage with both the operational efficiency argument and the workforce implications argument simultaneously.

Discussion Questions

- What are the advantages of the Just Walk Out system for the customer? Are there any disadvantages?
- What does this technology mean for retail employees? Is it a threat, an opportunity, or both?
- Just Walk Out requires customers to download an app and agree to data tracking. Not everyone has a smartphone or wants to be tracked. How should Amazon address this?
- If your organisation introduced this kind of technology, what KPIs from Unit 8 would you use to evaluate its success?

11. Practical Training Activities and Workshop Exercises

11.1 Activity 1: KPI Mapping Challenge

Objective: Apply knowledge of AI performance metrics by matching them to business goals and scenarios.

Duration: 30–40 minutes

Description: Learners are presented with three fictional company scenarios, each with a different strategic priority (cost reduction, customer satisfaction improvement, sales growth). In small groups, they must identify which KPIs from Unit 8 are most relevant for each company and explain their choices.

Instructions for Trainers

1. Divide learners into groups of 3–4 and distribute the scenario cards (create your own)
2. Allow 15 minutes for groups to discuss and select their KPIs
3. Each group presents their top 3 KPIs for their scenario and justifies their choices
4. Facilitate a plenary discussion comparing choices across groups

Sample Scenarios

- Scenario A: A large online fashion retailer wants to reduce the number of customer service agents needed during peak season while maintaining service quality
- Scenario B: A mid-size telecommunications company has received poor customer feedback about its chatbot. Management wants to understand why satisfaction is low despite a high containment rate
- Scenario C: A new e-commerce startup wants to measure whether its AI recommendation engine is actually driving additional purchases

Expected Learning Outcome: Learners connect abstract KPI definitions to concrete business contexts and develop the ability to select metrics strategically.

11.2 Activity 2: Chatbot Evaluation Exercise

Objective: Evaluate a real AI chatbot using the KPI framework from Unit 8.

Duration: 45–60 minutes

Description: Learners interact with a publicly available chatbot on a retail or service website, then complete an evaluation worksheet assessing the chatbot's performance against the six core KPIs.

Instructions for Trainers

1. Ask learners to choose a brand they are familiar with that uses a live chat or chatbot feature (retail websites, utility companies, banks)
2. Learners initiate a real interaction with the chatbot, documenting their experience

3. Using the evaluation worksheet, learners rate the chatbot on each KPI (where quantifiable data is not available, they provide a qualitative assessment)
4. Learners share their evaluations in a group debrief, identifying patterns and differences across the chatbots tested

Expected Learning Outcome: Learners develop practical analytical skills in applying KPI frameworks to real-world AI systems.

11.3 Activity 3: Benefit Classification Workshop

Objective: Distinguish between customer benefits and business benefits of AI tools in retail.

Duration: 25–35 minutes

Description: Learners are given a list of 12 benefits associated with the AI tools covered in Units 9 and 10. They must classify each benefit as primarily a benefit for the customer (BC) or a benefit for the business (BB), and justify their classification. This activity mirrors the knowledge check format used in the MOOC units.

Sample items include: personalised product recommendations, reduced operational costs, elimination of checkout queues, improved inventory management, social sharing of virtual looks, real-time sentiment analysis, increased customer retention, fraud detection, reduction in product returns, hyper-personalised marketing, dynamic pricing optimisation, and expanded omnichannel reach.

Expected Learning Outcome: Learners develop nuanced understanding of the dual value proposition of AI in retail – for both the customer and the business – and recognise that many benefits operate at both levels simultaneously.

11.4 Activity 4: Future AI Scenario Planning

Objective: Apply knowledge of AI trends to anticipate future developments in a specific sector context.

Duration: 45–60 minutes

Description: Drawing on the AI technologies introduced in Unit 9, learners work in small groups to develop a 'Future AI Strategy' for a fictional retailer or service provider. Each group selects two or three AI technologies from the unit and describes how their chosen company could implement them within the next two years, what KPIs they would use to measure success, and what risks they would need to manage.

Instructions for Trainers

1. Assign each group a different type of retailer (fashion, grocery, electronics, sports, beauty, financial services)
2. Groups have 25 minutes to develop their strategy on a poster or digital slide
3. Each group presents their strategy in 3–4 minutes
4. The group discusses which strategies seem most feasible, most impactful, and most risky

Expected Learning Outcome: Learners synthesise knowledge from all three units and develop the ability to think strategically about AI adoption in a professional context.

11.5 Activity 5: Ethics and Society Discussion Circle

Objective: Critically reflect on the social, ethical, and workforce implications of AI adoption in customer-facing environments.

Duration: 30–45 minutes

Description: A structured discussion using a set of provocative statements related to AI in customer service. Learners take positions (agree, disagree, or nuanced), justify their thinking, and respond to counterarguments.

Sample Discussion Statements

- 'A chatbot that resolves your problem in 2 minutes is always better than a human agent who takes 11 minutes.'
- 'Just Walk Out technology is bad for retail workers and should be regulated.'
- 'Personalised product recommendations are a service for customers, not a manipulation technique.'
- 'If an AI system saves a company 40 million dollars per year, it should share some of those savings with customers.'
- 'Companies collecting data through AR try-on tools like Sephora's Virtual Artist should be required to provide full transparency about how that data is used.'

Expected Learning Outcome: Learners develop critical thinking and communication skills while engaging with complex ethical questions that are directly relevant to their professional contexts.

11.6 Activity 6: A/B Testing Simulation

Objective: Understand and apply the concept of A/B testing in an AI customer service context.

Duration: 30 minutes

Description: Learners are given two versions of a customer service chatbot opening message (Variant A: generic greeting; Variant B: personalised, context-aware greeting) and a simulated dataset showing performance metrics for each. They must analyse the data, draw conclusions, and make a recommendation.

Expected Learning Outcome: Learners understand how A/B testing works in practice and how data from tests feeds into continuous improvement cycles.

12. Assessment and Competence Validation

12.1 Philosophy of Assessment

Assessment in this module is designed to be practical, competence-focused, and context-relevant. The emphasis is not on memorisation of technical definitions but on the ability to apply knowledge to real-world scenarios, evaluate AI tools critically, and communicate insights clearly. This approach is appropriate for CVET learners who are primarily motivated by professional application rather than academic achievement.

Assessment approaches should be adapted to the institutional context and are not mandatory when using the MOOC as a complementary learning resource. The options described below offer a range of possibilities from informal classroom activities to more formal portfolio-based assessment.

12.2 Assessment Options

1. *Option A: Case Study Analysis (Individual or Pair)*

Learners select one of the three case studies from the MOOC (Klarna, Sephora, or Amazon) and produce a structured written analysis of approximately 500–700 words covering: the AI technology used, the KPIs most relevant to measuring its success, the benefits for the customer and the business, potential risks or limitations, and what lessons could be transferred to a different sector or organisation.

2. *Option B: KPI Dashboard Presentation*

Learners create a mock KPI dashboard for a fictional AI-powered customer service tool in their own industry sector. The dashboard should include at least four KPIs from Unit 8, with clear explanations of how each metric would be measured, what a 'good' result looks like for each, and what actions should be taken if performance falls below target. This can be presented as a poster, a slide deck, or a digital spreadsheet.

3. *Option C: Reflective Portfolio Entry*

Learners produce a reflective journal entry of 300–500 words addressing: what they learned about AI in customer service that surprised them, how the MOOC content connects to their own professional experience or workplace, one AI tool or application they would recommend their employer considers adopting, and one concern or risk they believe deserves more attention in their organisation.

4. *Option D: Group Discussion and Peer Evaluation*

Learners participate in a structured group discussion (using Activity 5 above or a trainer-designed scenario), and peers evaluate each other's contributions using a simple rubric covering clarity of argument, use of MOOC concepts, and quality of critical thinking.

Table 4 Evaluation Criteria

Criterion	Excellent	Satisfactory	Needs Development
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Use of AI concepts	Accurately applies multiple concepts from the MOOC with nuance	Correctly uses key concepts with minor gaps	Concepts are missing or incorrectly applied
Real-world connection	Strong, specific, and well-reasoned connections to professional context	Reasonable connections made with some specificity	Connections are vague or absent
Critical thinking	Evaluates both benefits and risks thoughtfully; considers multiple perspectives	Identifies benefits and at least one risk	Only describes features without evaluation
Communication	Clear, well-structured, and professional in presentation	Mostly clear with minor structural issues	Difficult to follow or poorly organised

12.3 Providing Feedback

- Focus feedback on what the learner demonstrated, not just what they missed
- Connect feedback to specific MOOC content: reference the relevant unit or section when pointing to knowledge gaps
- Encourage learners to revisit the MOOC knowledge checks if they struggled with particular concepts
- For group assessments, provide both group-level and individual feedback where possible

13. Adapting the MOOC for Different CVET Settings

13.1 Training Centres

In a training centre context, the MOOC units can be integrated into an existing digital skills or AI literacy curriculum. Each unit can function as a standalone session within a broader programme. Trainers should contextualise the material with sector-specific examples relevant to their learner cohort – for example, focusing on retail-specific chatbot examples for a fashion and retail cohort, or on financial services chatbots for a banking and finance group.

Recommended format: 90-minute workshop per unit, structured as 30 minutes self-directed MOOC content, 30 minutes trainer-facilitated discussion, 30 minutes group activity from Section 10.

13.2 Workplace Training

When delivering this module in a workplace training context, trainers have the significant advantage of being able to reference the organisation's own AI tools and systems directly. If the company uses a chatbot, ask permission to use its performance data as a live case study. If the company uses dynamic pricing or personalised email marketing, invite learners to reflect on the AI principles behind those tools using the knowledge from Unit 9.

Workplace delivery may require more flexible scheduling. Consider breaking units into 45-minute lunchtime or end-of-day micro-sessions, with self-directed MOOC completion as homework in between.

13.3 Online and Remote Training

All three units are natively suited to online delivery, as the MOOC itself is a digital product. For trainer-facilitated online sessions, tools such as Mentimeter, Padlet, or Jamboard can replicate the physical activity formats described in Section 10. A dedicated discussion thread or messaging channel (Slack, Teams) can sustain peer learning between sessions.

In online settings, the video resources embedded in the MOOC (YouTube links) can be screenshared during live sessions and paused for discussion – a particularly effective technique for the Sephora and Amazon demonstration videos.

13.4 Blended Learning

Blended delivery is the recommended approach for most CVET settings, as it combines the flexibility of self-paced online learning with the engagement and accountability of facilitated contact time. A recommended three-week blended schedule for this module might look as follows:

- Week 1: Learners complete Unit 10 (case studies) independently online; 60-minute group discussion session facilitated by trainer
- Week 2: Learners complete Unit 9 (future insights) independently online; 60-minute workshop on AI trends and scenario planning (Activity 4)

- Week 3: Learners complete Unit 8 (metrics) independently online; 90-minute workshop combining KPI mapping (Activity 1) and chatbot evaluation (Activity 2); assessment task assigned

14. Supporting Learners with Different Backgrounds and Needs

14.1 Learners with Low Digital Skills

- Before beginning the MOOC, conduct a brief digital readiness check. Identify learners who may need support navigating online platforms or accessing video content
- Pair less digitally confident learners with peers who can provide informal technical support during sessions
- Provide printed summaries of key concepts for learners who struggle to read on screen or prefer hard copy materials
- Use the printed knowledge check formats in a classroom setting before transitioning to the digital MOOC interface

14.2 Learners with No Prior AI Knowledge

- Begin every session with a personal connection activity: 'Where have you already encountered AI today?' This almost always reveals that learners know more than they think – through smartphone voice assistants, streaming recommendations, or online shopping
- Use everyday analogies consistently. Comparing a KPI dashboard to the metrics a footballer reviews after a match, or comparing NLP to Google Translate, helps demystify technical concepts
- Reassure learners regularly that the goal is understanding and application, not technical expertise

14.3 Learners with Fear or Uncertainty About AI

- Acknowledge uncertainty openly at the start of the module. Invite learners to share their concerns, and treat these as legitimate professional questions rather than barriers to be overcome
- The ethics discussion activity (Activity 5) is particularly valuable for learners who are anxious about AI's impact on their jobs. Use it early to create space for honest discussion
- Emphasise throughout the module that AI tools require human oversight, critical judgment, and professional expertise to function well – and that these are skills learners are developing

14.4 Learners with Different Learning Speeds

- Use the MOOC's integrated knowledge checks as natural pacing points. Learners who finish early can revisit the external resource links; learners who need more time can do so without disrupting the group

- Offer extension activities for fast-finishing learners: for example, ask them to research a fourth AI case study from their own industry and prepare a 2-minute presentation for the group
- Provide condensed summaries for learners who struggle with the volume of content in a unit

14.5 Learners with Disabilities

- Ensure MOOC content is accessed via a device with accessibility features enabled (screen readers, text enlargement, closed captions on videos)
- Provide alternative assessment formats where needed: oral presentations instead of written submissions, or verbal discussion instead of a written reflection
- Where printed materials are used, ensure they meet accessibility standards (minimum 12-point font, adequate contrast, clear layout)

15. Teaching Materials and Resources

15.1 Key Visual Aids from the MOOC

The following visual materials are embedded in the MOOC units and can be reproduced or adapted for use in training sessions:

- Table 1 (Unit 8): The six central AI KPIs – a clean summary table suitable for use as a handout or display
- Picture 1 (Unit 8): Illustrated overview of all six KPIs with icons – ideal as a poster or slide background
- Picture 2 (Unit 8): Most Important KPIs in B2B Market – a bar chart showing survey data on which KPIs organisations prioritise
- Picture 3 (Unit 8): Example analytics dashboard (ClearPeaks) – useful for the dashboard discussion activity
- Image 3 (Unit 9): Pinterest Lens interface screenshots – for the visual search discussion
- Image 5 (Unit 9): Nike App screenshots – for the omnichannel integration discussion
- Picture 3 (Unit 10): Sephora Virtual Artist screenshots – for the AR case study
- Picture 6 (Unit 10): Amazon Just Walk Out three-step process diagram – for the autonomous checkout case study

Table 5 Sample Lesson Plan: Half-Day Workshop (4 Hours)

Time	Activity	Format	Resources Needed
0:00–0:15	Welcome and AI warm-up: 'Where have you met AI today?'	Whole group discussion	Whiteboard or flipchart
0:15–0:45	Unit 10 highlights: Sephora and Amazon case studies	Trainer presentation + video	Laptop, projector, MOOC access
0:45–1:15	Benefit classification workshop (Activity 3)	Small groups	Printed cards or digital worksheet
1:15–1:30	Break		
1:30–2:00	Unit 9: AI technologies in retail (trainer-led overview)	Presentation + discussion	Slide deck based on Unit 9 content
2:00–2:30	Future scenario planning (Activity 4)	Small groups	Poster paper or digital slides

2:30– 3:30	Unit 8: KPI deep dive + KPI mapping challenge (Activity 1)	Trainer input + group activity	KPI table handout, scenario cards
3:30– 3:50	Ethics discussion circle (Activity 5, abbreviated)	Whole group	Discussion statements printed or displayed
3:50– 4:00	Reflection and close: one thing I will take back to work	Individual, then shared	Sticky notes

15.2 Handout Suggestions

- KPI reference card: A one-page summary of the six core KPIs with definitions and the Klarna benchmark figures
- AI glossary: A one-page glossary of key terms from all three units (chatbot, NLP, AR, visual search, NPS, containment rate, dynamic pricing, omnichannel, collaborative filtering, etc.)
- Case study fact sheets: One-page summaries for Klarna, Sephora, and Amazon case studies, suitable for reference during activities
- Evaluation worksheet: A structured template for Activity 2 (chatbot evaluation), with rows for each KPI and space for qualitative comments

16. Additional Resources for Trainers

16.1 Recommended Videos

- 'How Do You Measure the Success of AI in Customer Service?' – An engaging overview of core AI KPIs. Referenced in Unit 8 (linked in the MOOC)
- 'The Top 10 KPIs for Customer Service in 2025' – Forward-looking perspective on metrics in AI-driven service environments (linked in Unit 8)
- 'Conversation AI Bot Dashboard' – Introduction to chatbot analytics visualisation (linked in Unit 8)
- 'How to Create Your Own Chatbots' – Practical introduction to chatbot building (linked in Unit 9)
- 'Pinterest Lens' – Demonstration of visual search technology (linked in Unit 9)
- 'Dynamic Pricing Explained' – Overview of AI-driven dynamic pricing strategies (linked in Unit 9)
- Sephora Virtual Artist – Product demonstration video (linked in Unit 10)
- Amazon Just Walk Out – Official demonstration video (linked in Unit 10)

16.2 Useful Articles and Reports

- IBM Global AI Adoption Index 2023 – Data on generative AI adoption in customer service globally
- McKinsey 'Next in Personalization 2021' – Consumer survey on personalisation and repeat purchases
- Nineten.ai (2025): 'Measuring Chatbot Effectiveness Beyond CSAT and Basic Metrics' – In-depth analysis of advanced chatbot KPIs
- Aisera: 'Key Customer Service Metrics and How to Measure Them' – Comprehensive guide to AI performance metrics
- Ada.cx (2024): 'Why Customer Service Leaders Are Sounding the Alarm on Containment Rate' – Critical perspective on containment metrics
- Calabrio (2023): 'Demystifying Chatbot Containment Rates with Analytics' – Practical guidance on measuring containment

16.3 AI Analytics and Dashboard Tools

- Microsoft Power BI (powerbi.microsoft.com) – Free version available; templates for chatbot analytics
- Google Looker Studio (lookerstudio.google.com) – Free data visualisation tool linked to Google data sources
- Metabase (metabase.com) – Open-source business intelligence tool suitable for smaller organisations
- Wotnot.io (wotnot.io/platform/chatbot-analytics) – Chatbot analytics platform with business impact visualisations

16.4 AI Literacy Resources for Trainers

- AI for Everyone (Coursera, Andrew Ng) – A non-technical introduction to AI for professionals and managers
- Elements of AI (elementsofai.com) – Free online course covering AI fundamentals in an accessible format
- European AI Alliance (digital-strategy.ec.europa.eu) – EU-level resources on AI strategy, regulation, and ethics
- AI4VET4AI project website – Materials, case studies, and community resources developed through the project

17. Self-Study Guidance for CVET Trainers

17.1 Recommended Preparation Order

If you are using this document to prepare for delivering the MOOC module independently, we recommend the following sequence:

1. Begin by reading Section 1 (Introduction) and Section 2 (Target Learners) to contextualise the module
2. Review Section 6 (Key AI Concepts) carefully – this is the foundation for understanding everything else
3. Read through the three unit overviews in Section 5 to understand the structure and flow of the MOOC content
4. Explore the case studies in Section 9 with the discussion questions in mind
5. Select 2–3 activities from Section 10 that best match your learner group and delivery context
6. Review the assessment options in Section 11 and choose the approach most appropriate for your setting
7. Spend 10–15 minutes with each of the recommended videos listed in Section 15

17.2 Estimated Preparation Time

- Reading this guide in full: approximately 1.5–2 hours
- Completing the MOOC units independently (as a learner): approximately 6–8 hours
- Preparing session materials and activities: approximately 2–3 hours per session
- Total recommended preparation time before first delivery: 10–14 hours

17.3 Reflection Questions for Trainers

Before delivering this module, take some time to reflect on the following questions. There are no right or wrong answers – they are designed to help you connect the material to your own professional experience and identify where you may want to deepen your knowledge.

- How familiar are you with the AI tools described in this module? Have you used any of them as a consumer? As a professional?
- What aspects of this MOOC content do you feel most confident delivering? Which parts might you need to research further?
- Who are your learners, and what connections can you draw between the MOOC content and their specific professional contexts?
- What is your own position on the workforce implications of AI in customer service? How will you ensure you facilitate a balanced discussion even if your learners hold strong views?

- Which of the case studies (Klarna, Sephora, Amazon) do you think will resonate most with your learners, and why?
- How will you handle a learner who is resistant to or fearful about AI? What approach will you take?
- Are there AI tools already in use in your learners' workplaces that you could reference to make the content more immediately relevant?