

AI Fluency at Work

Training Needs Analysis

Prepared for Meridian Hale & Associates | by Liliana Cotoară, Learning Core Consulting

CLIENT	TRIGGER	AUDIENCE	FRAMEWORK
Meridian Hale & Associates	Employee survey — low AI confidence	All staff (450, multi-office)	4D AI Fluency

Business Context

Meridian Hale gave all staff access to enterprise AI tools three months ago, expecting a natural productivity lift. Instead, adoption has been uneven and anxiety-driven. Leadership commissioned a firm-wide employee survey to understand why.

Survey Findings

- 68% of respondents said they've used AI tools “rarely” or “never” at work, despite having access
- Top two reasons cited: “*I don't know what's appropriate to use it for*” and “*I'm worried about making a mistake with client data*”
- Only 22% felt confident explaining what these tools can and can't do
- Managers reported inconsistent quality/tone in AI-assisted work product, with no shared standard

Root Cause — Mapped to the 4D Framework

This isn't a tool-access problem — it's a judgment gap across all four AI Fluency competencies:

Gap Observed	Missing Competency
Staff don't know which tasks are appropriate to hand to AI	Delegation
Staff who do use AI get inconsistent, low-quality output	Description
No one is trained to catch AI errors before they reach a client	Discernment
No shared understanding of client-data boundaries	Diligence

Framing the gap this way — rather than as generic “AI training” — makes the fix specific and teachable: staff don't need to become AI experts, they need working competence in four defined skills.

Recommended Solution

A short, mandatory **e-learning module** (not a lengthy policy document or live workshop), structured around the 4D framework, that:

- Builds baseline competence in each D through realistic professional-services scenarios
- Gives staff a shared, memorable vocabulary (“Is this a Delegation call or a Diligence call?”) that managers can reinforce afterward
- Focuses on judgment, not AI mechanics — staff don’t need to understand how the tools work to use them responsibly

Why e-learning over ILT: 450 staff across multiple offices/time zones makes live training logistically costly; the 4D content is foundational (same for everyone) rather than role-specific, making it a strong fit for self-paced async delivery. A live session is flagged as a *possible* follow-up for managers only, to handle team-specific Discernment/Diligence edge cases.

Success Criteria — One Per D

Delegation	Staff can correctly sort at least 4 of 5 sample tasks into “appropriate to delegate to AI” vs. “requires human judgment”
Description	Staff can identify what’s missing from a vague prompt and improve it
Discernment	Staff can catch a planted factual error in an AI-generated sample before it’s used
Diligence	Staff can identify at least 2 client-confidentiality red flags in AI tool usage scenarios
Overall	Post-training confidence self-rating increases measurably (baseline: 22% confident → target: 70%+)