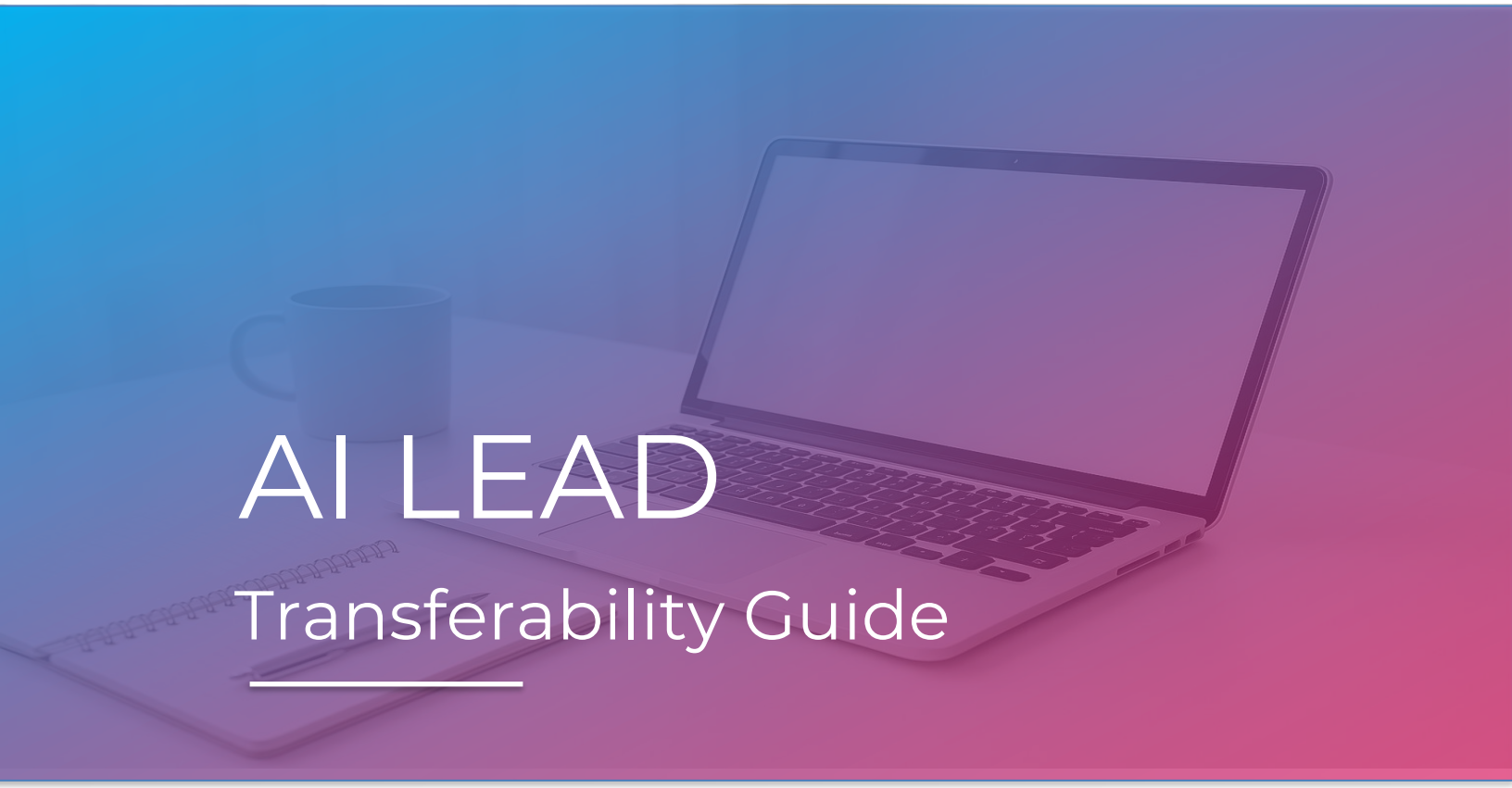
Co-funded by the European Union



AI LEAD

Transferability Guide

2025

Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the Agenzia nazionale Erasmus+ INAPP. Neither the European Union nor the granting authority can be held responsible for them.

Purpose of This Guide

This Transferability Guide supports organisations, trainers, consultants, and professionals working outside the SME context in adapting and reusing the AI Lead Facilitator Kit and the AI Lead MOOC. Although the materials were originally designed for vocational trainers and SMEs, their structure and methodology are modular and applicable across sectors. The guide explains how to translate the underlying logic of the materials so that they remain effective and responsible in different organisational environments.

Core Transferable Principles

The AI Lead approach is based on a problem-driven logic. AI adoption is more successful when it starts from concrete operational needs rather than from technology itself. The materials guide organisations to identify recurring challenges, define measurable objectives, and only then assess whether AI can provide value. This logic applies across sectors, as all organisations face inefficiencies, capacity constraints, or quality issues.

The gradual adoption pathway is another key transferable element. Instead of promoting large-scale transformation, the materials encourage a step-by-step journey that begins with awareness, continues with readiness assessment, and progresses through small pilot projects. This approach is particularly effective in resource-constrained or risk-averse contexts, where trust and early results are essential.

Readiness and maturity assessments are used as learning tools rather than evaluations. Their real value lies in the dialogue they generate between management, operational staff, and technical roles. This reflective process is transferable even when sector-specific assessment tools differ, provided that core dimensions such as strategy, skills, data, processes, technology, and governance are retained.

The materials also emphasise embedding AI literacy into daily work. Learning is integrated into workflows through short sessions, experimentation, and peer exchange. This makes the approach suitable for sectors where time for formal training is limited and immediate applicability is required.

Adapting to Other Sectors

When transferring the materials, language adaptation is crucial. Technical jargon should remain limited, while examples and scenarios should reflect participants' everyday practices. The value proposition of AI may also need reframing. In some sectors, service quality, accountability, or social impact may be more relevant than productivity or cost reduction.

Governance and compliance should be adapted to the regulatory context. The integration of GDPR and EU AI Act principles makes the materials particularly suitable for regulated sectors, where transparency, documentation, and human oversight must be emphasised.

Transferability of the AI Lead MOOC

The online course is highly transferable because it builds foundational understanding rather than technical expertise. Its modular structure allows it to be reused flexibly, reordered according to sector priorities, or integrated into blended learning pathways. It often works best as preparatory material that establishes a shared baseline before facilitated sessions.

Lessons Learned from Testing

Testing showed that demystification is more important than technical depth. Participants responded positively to clear explanations and realistic examples. Readiness discussions proved valuable as organisational learning moments, and small pilot projects were more effective than abstract plans in building trust. Early staff involvement consistently reduced resistance and improved sustainability.

Pilot testing results

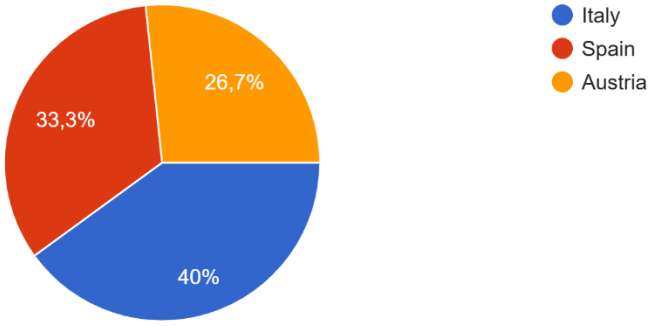
This section reports the pilot testing results collected after testing the AI Lead MOOC and Facilitator kit in each partner country. The main findings can help future adopters understanding the main strengths and critical factors of the AI Lead results and how to mange their adaptation in other sectors or contexts.

VET Trainers evaluation

The VET trainers involved in the Pilot testing evaluated the AI Lead facilitator kit and MOOC as follows:

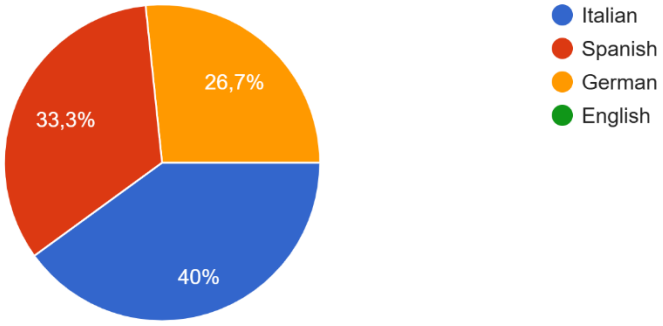
Country

15 risposte



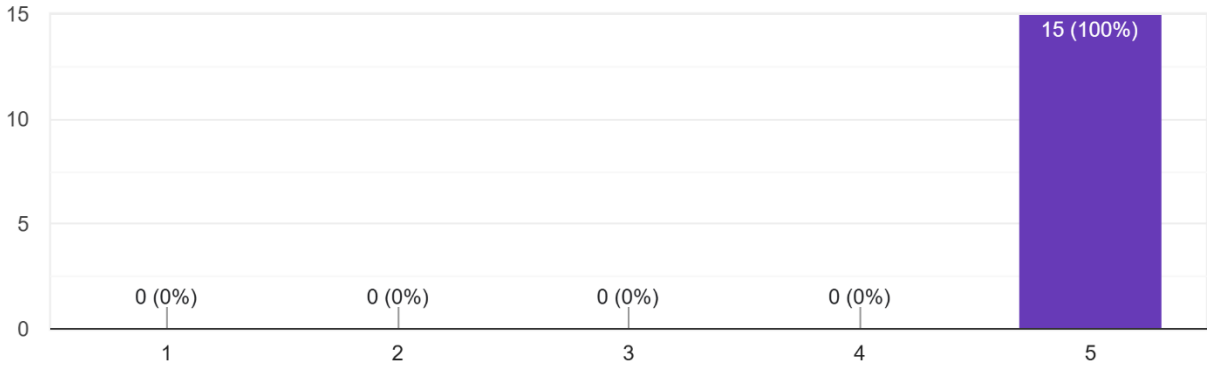
LANGUAGE OF THE PROJECT RESULTS EVALUATED

15 risposte



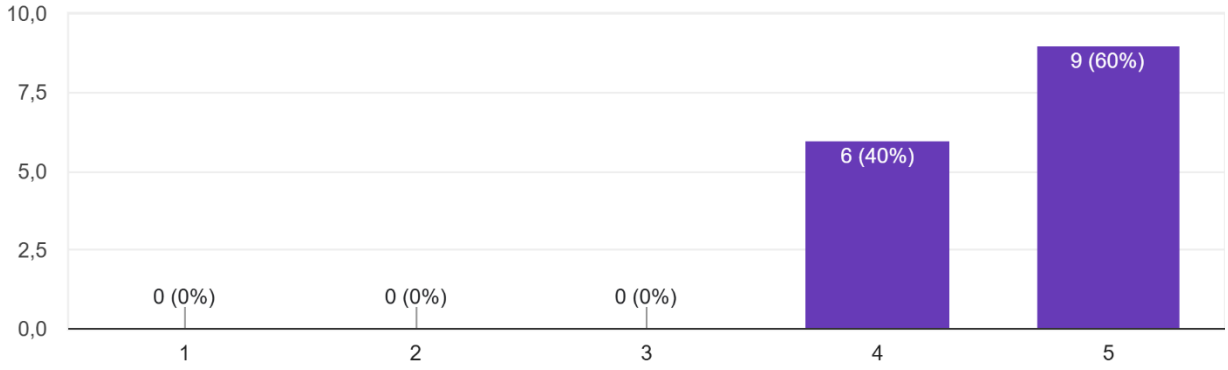
1. The AI Lead Facilitator Kit has a clear layout and is easy to use

15 risposte



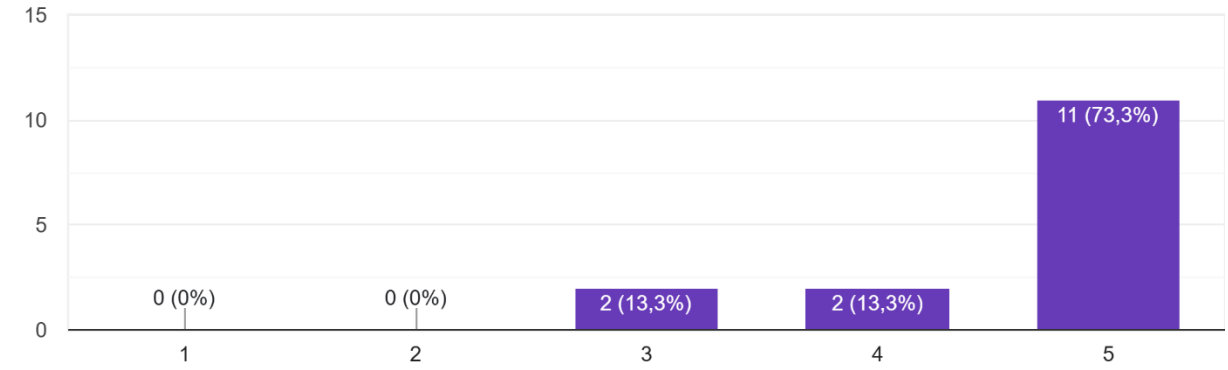
2. The AI Lead Facilitator Kit is easy to understand so that I can quickly perceive the objectives, target groups, innovative aspects and resources.

15 risposte



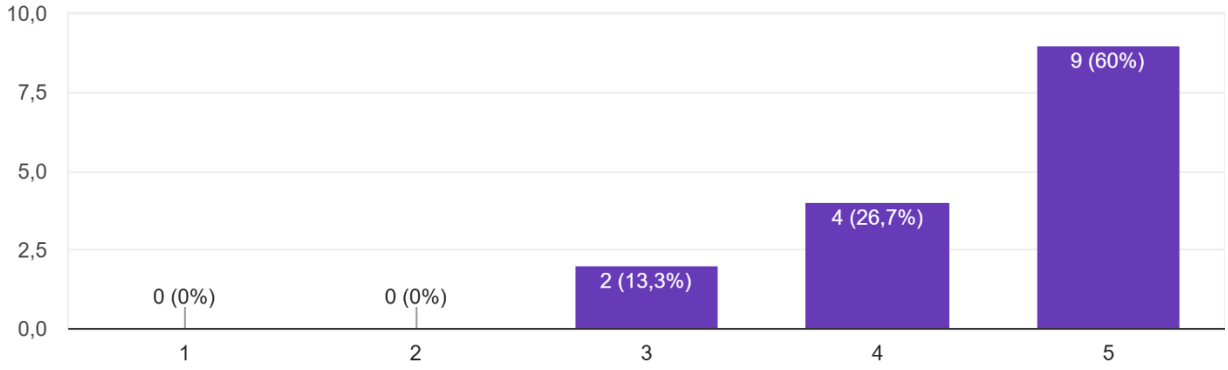
3. The AI Lead Facilitator Kit will be useful in my daily practice

15 risposte



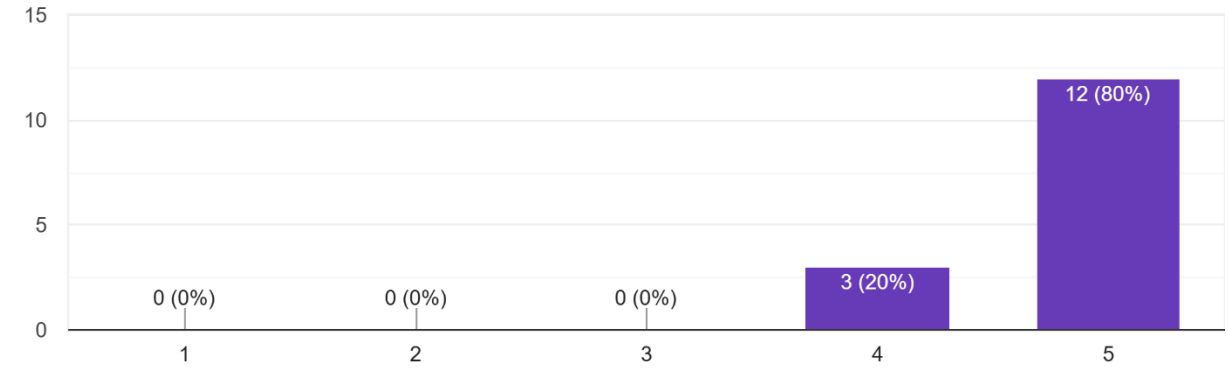
4. I gained adequate level of knowledge, skills and competences to implement training courses on AI for SMEs

15 risposte



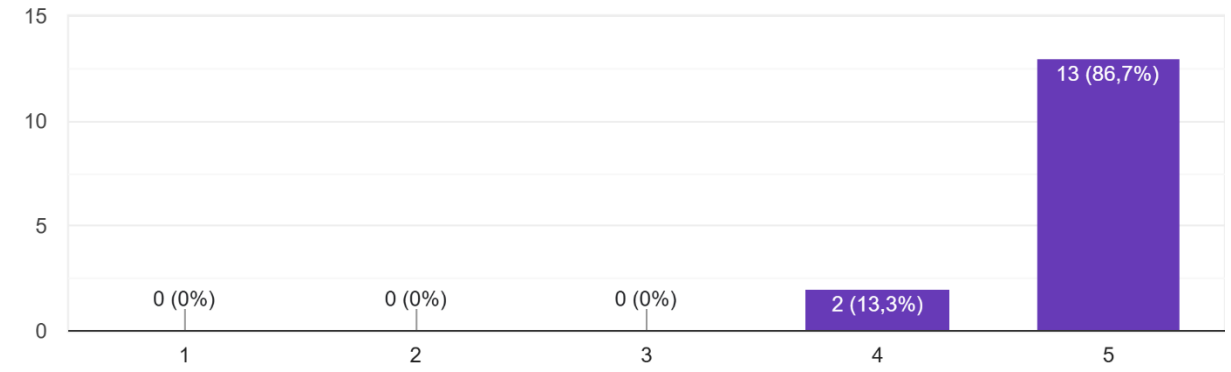
5. The contents included in the AI Lead Facilitator Kit overall meet my expectations

15 risposte



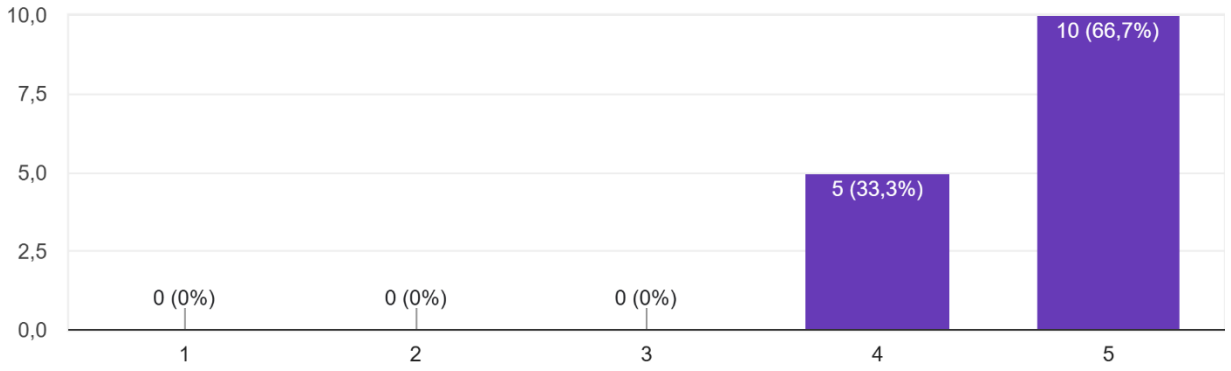
1. The AI Lead MOOC has a clear design and layout

15 risposte



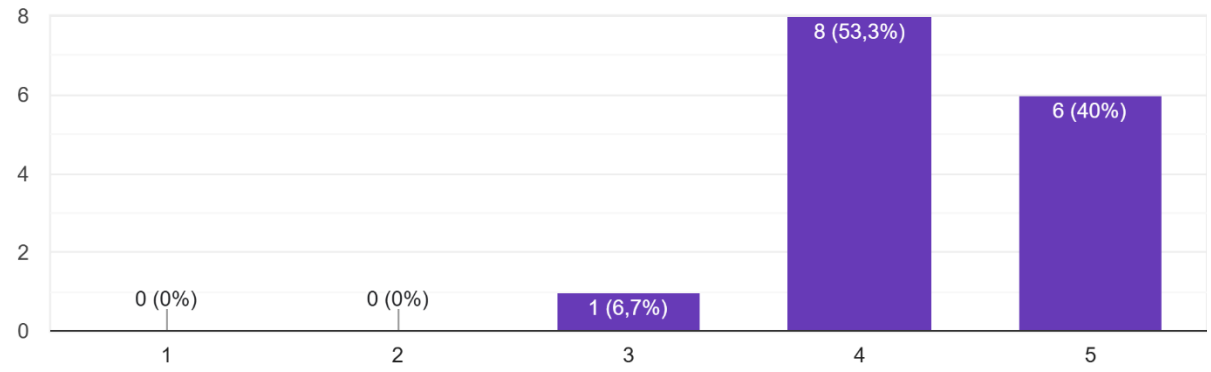
2. The AI Lead MOOC is easy to use

15 risposte



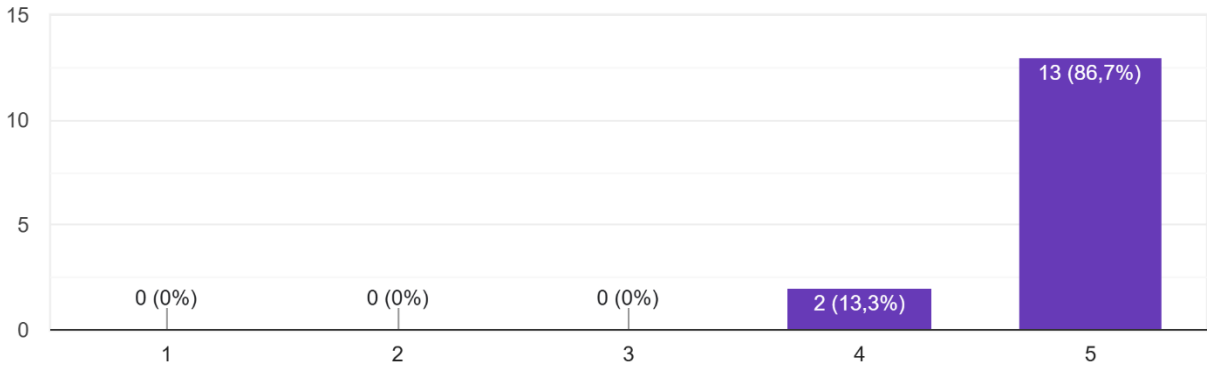
3. The AI Lead MOOC is easily accessible

15 risposte



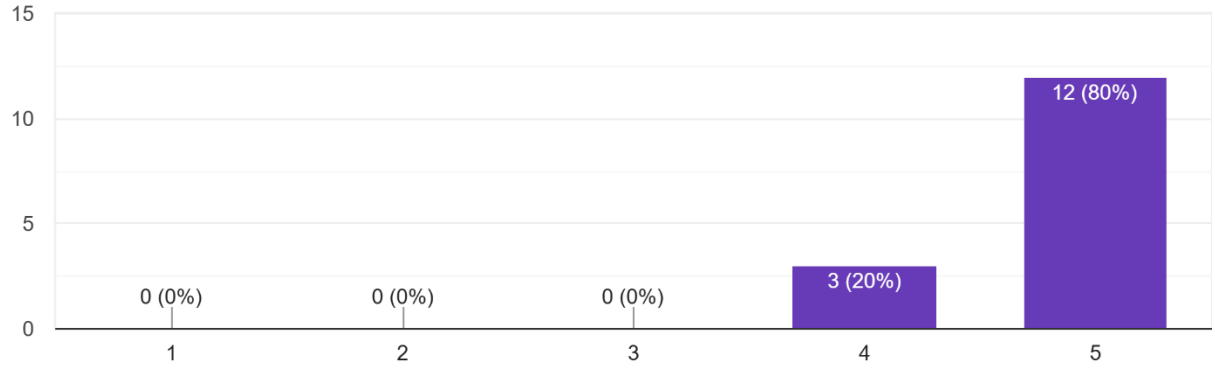
4. The AI Lead MOOC is easy to understand and the level of difficulty is adequate

15 risposte



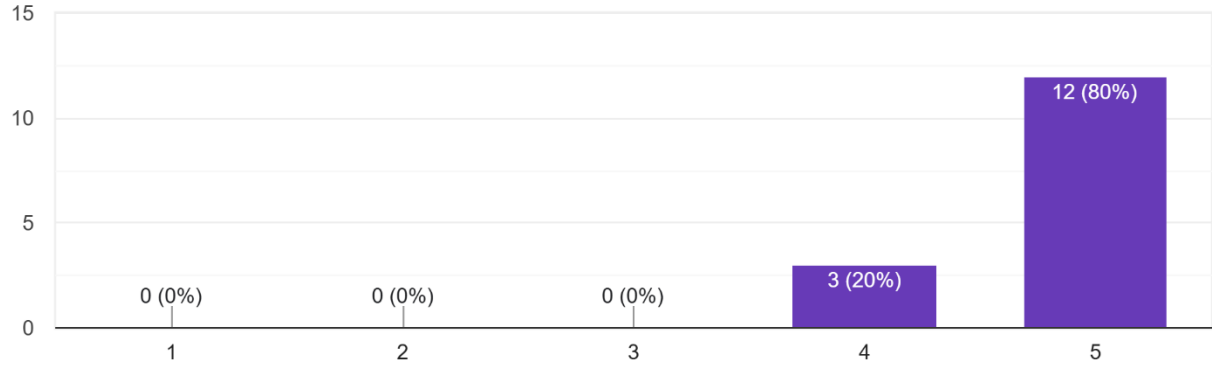
5. The contents included in the AI Lead MOOC can be usefull to support SMEs in implementing AI tools

15 risposte



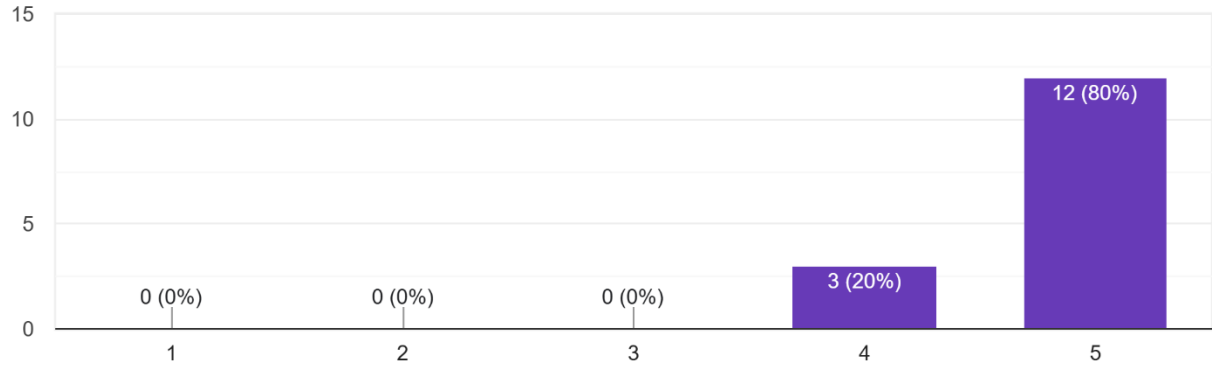
5. The AI Lead MOOC overall meets my expectations

15 risposte



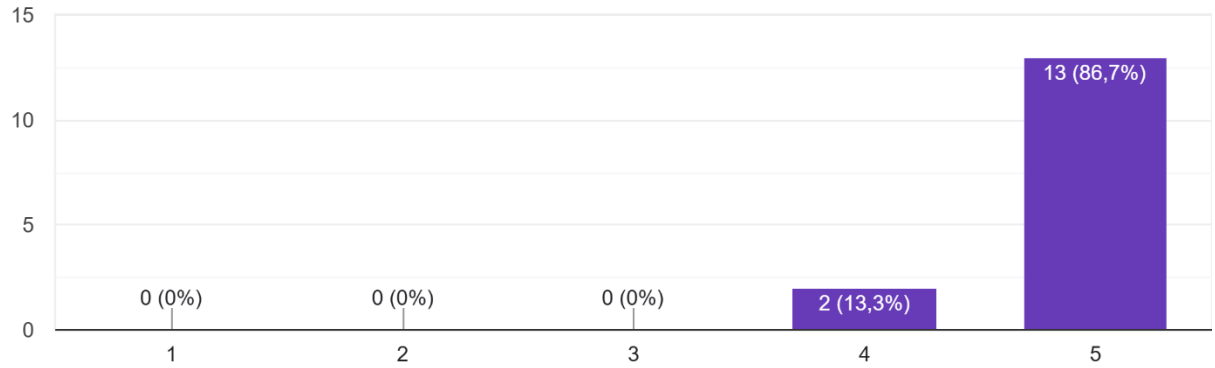
6. I am able to implement AI Lead MOOC in future initiatives

15 risposte



7. I have a clear understanding of the potential of AI tools for SMEs

15 risposte



Main Findings

The evaluation data collected from VET trainers during the AI Lead pilot testing highlight a very strong overall assessment of both the AI Lead Facilitator Kit and the AI Lead MOOC. Across all evaluated dimensions, responses are consistently high, with mean scores ranging from 4.33 to 5.00 on a five-point Likert scale and with positive evaluations (scores ≥4) exceeding 86% in all items.

One of the most significant findings concerns the usability and clarity of the AI Lead Facilitator Kit. All trainers (100%) rated the layout and ease of use with the maximum score, resulting in a mean value of 5.00/5. Similarly, 100% of respondents agreed that the Facilitator Kit is easy to understand and clearly explains objectives, target groups, innovative aspects and available

resources (mean score 4.6/5). These results indicate that the materials are well structured and intuitive, reducing cognitive load for trainers and facilitating immediate adoption. For future users, this confirms that the kit can be effectively used even without extensive prior preparation or advanced AI expertise.

In terms of practical applicability, the Facilitator Kit was rated as useful for daily professional practice by 86.7% of trainers, with a mean score of 4.6/5. A comparable percentage (86.7%, mean 4.47/5) stated that the materials enabled them to gain an adequate level of knowledge, skills and competences to implement training courses on AI for SMEs. While still very positive, these slightly lower percentages compared to other items suggest that some trainers may benefit from additional time, practice or contextualisation to fully integrate the materials into their routine activities. This represents an important lesson for future users: the materials are effective, but their impact is maximised when combined with experiential use and adaptation to specific training contexts.

Expectations regarding the Facilitator Kit were fully met for 100% of respondents, with a mean score of 4.8/5, confirming a strong alignment between trainers' needs and the content provided.

The evaluation of the AI Lead MOOC shows equally strong results. All trainers (100%) positively evaluated the design and layout of the MOOC (mean 4.87/5) as well as its ease of use (mean 4.67/5). Accessibility was also rated very positively, with 93.3% of respondents expressing agreement (mean 4.33/5), indicating that only a very small minority experienced minor access-related issues.

Comprehension and appropriateness of difficulty level emerged as one of the strongest points of the MOOC, with 100% positive responses and a mean score of 4.87/5. Furthermore, all trainers agreed that the MOOC contents are useful for supporting SMEs in the implementation of AI tools (mean 4.8/5) and that the MOOC overall meets their expectations (mean 4.8/5).

From a forward-looking perspective, one of the most relevant findings is that 100% of trainers stated they feel able to implement the AI Lead MOOC in future initiatives (mean 4.8/5). In addition, 100% of respondents reported having gained a clear understanding of the potential of AI tools for SMEs as a result of the training (mean 4.87/5). These results confirm the sustainability and transferability of the project outcomes and underline their value not only as learning resources, but also as capacity-building tools for trainers.

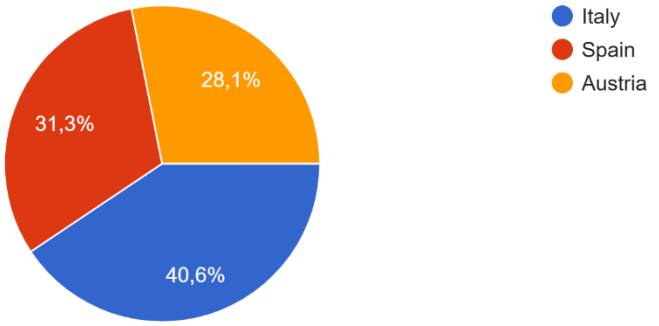
Overall, the evaluation data demonstrate that the AI Lead materials are perceived as clear, relevant and highly usable. The key lesson for future users is that the materials are ready for immediate deployment, while their effectiveness can be further enhanced through contextual adaptation, peer exchange and continued practical application in real training environments.

SME workers and managers evaluation

The SME workers and managers involved in the Pilot testing evaluated the AI Lead MOOC as follows:

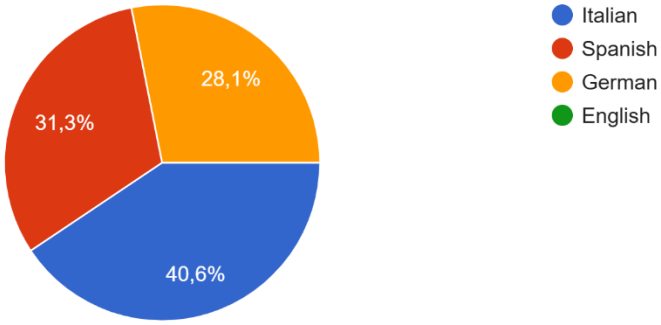
Country

32 risposte



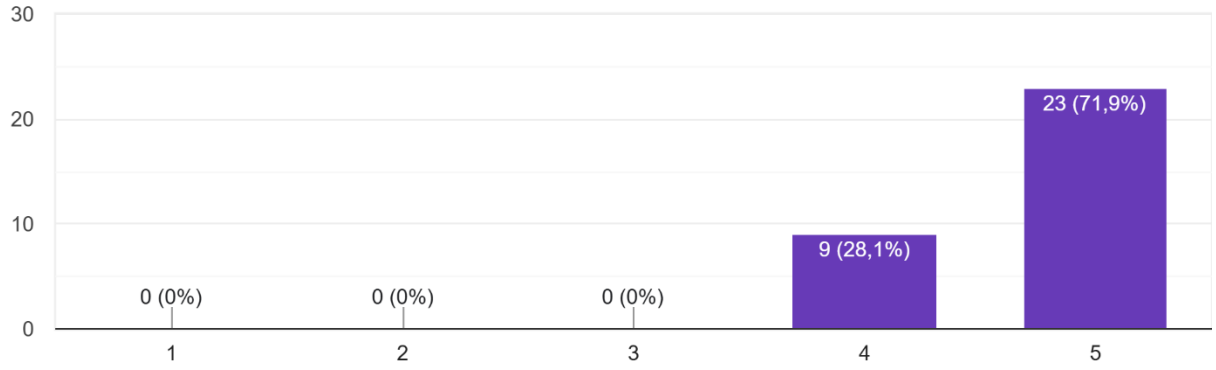
LANGUAGE OF THE MOOC EVALUATED

32 risposte



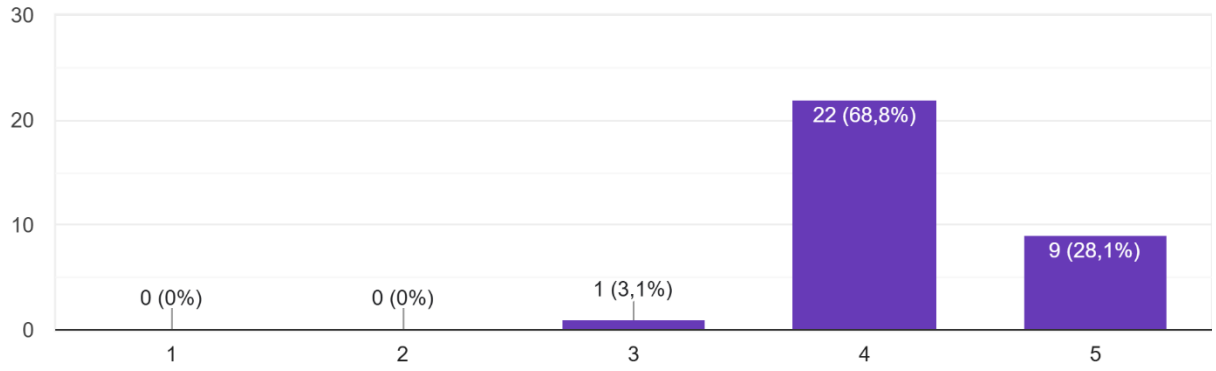
1. The AI Lead MOOC has a clear design and layout

32 risposte



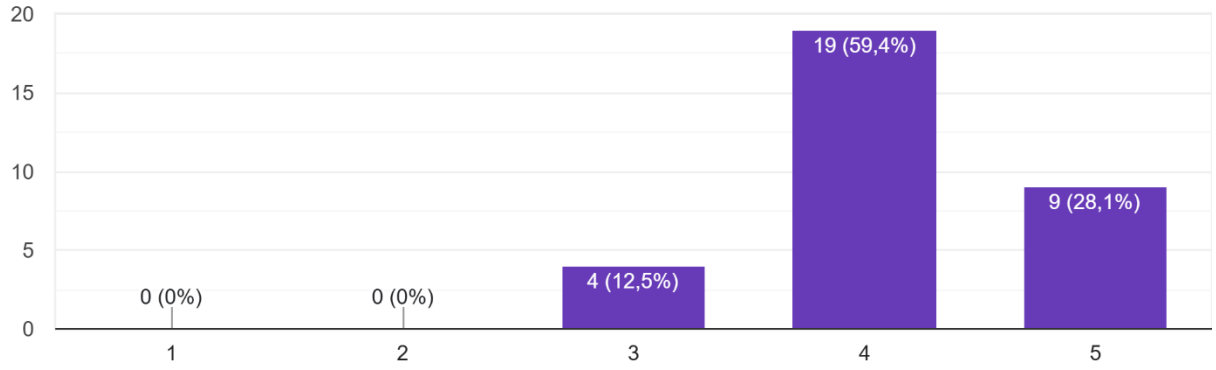
2. The AI Lead MOOC is easy to use

32 risposte



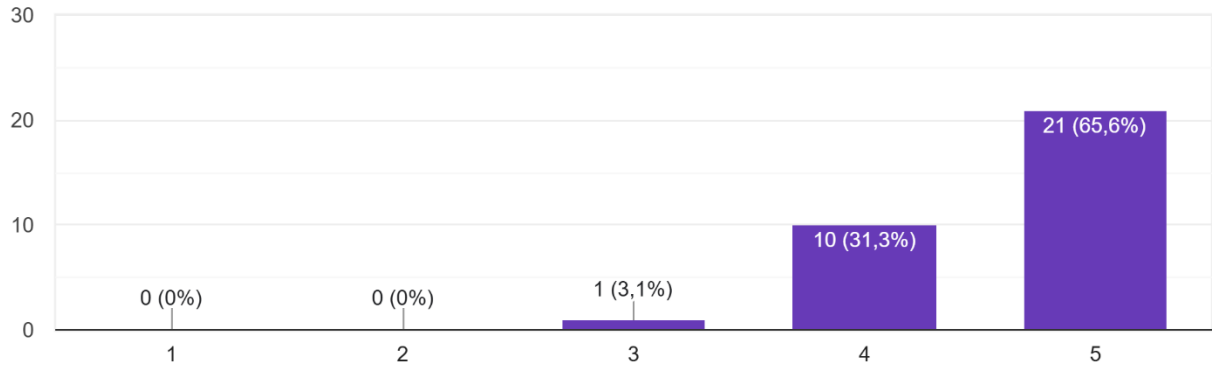
3. The AI Lead MOOC is easily accessible

32 risposte



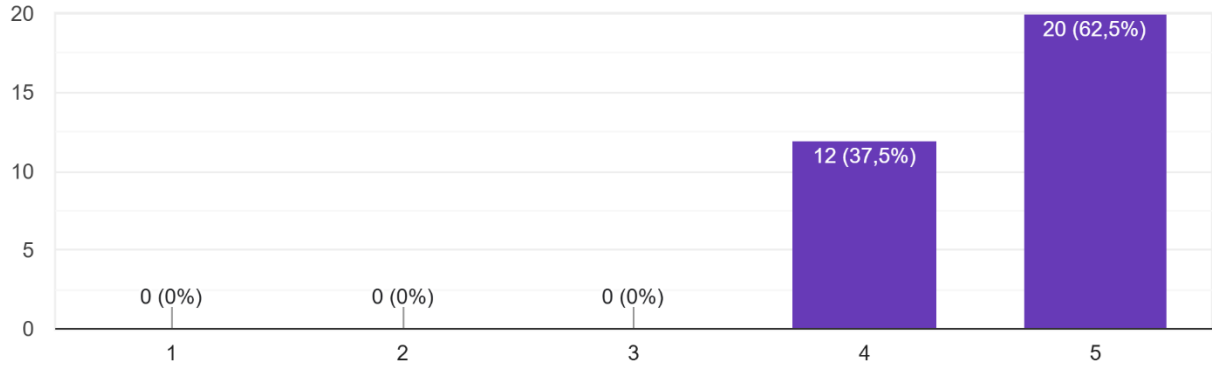
4. The AI Lead MOOC is easy to understand and the level of difficulty is adequate

32 risposte



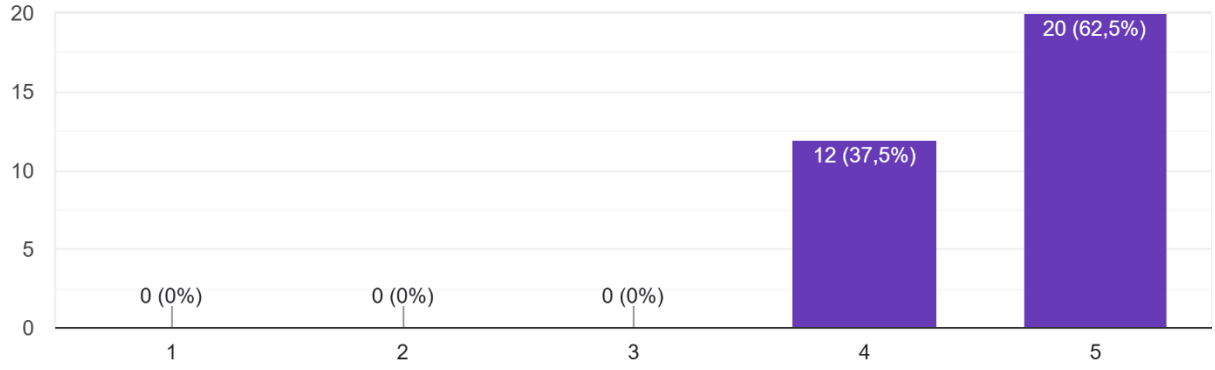
5. The contents included in the AI Lead MOOC can be usefull to support SMEs in implementing AI tools

32 risposte



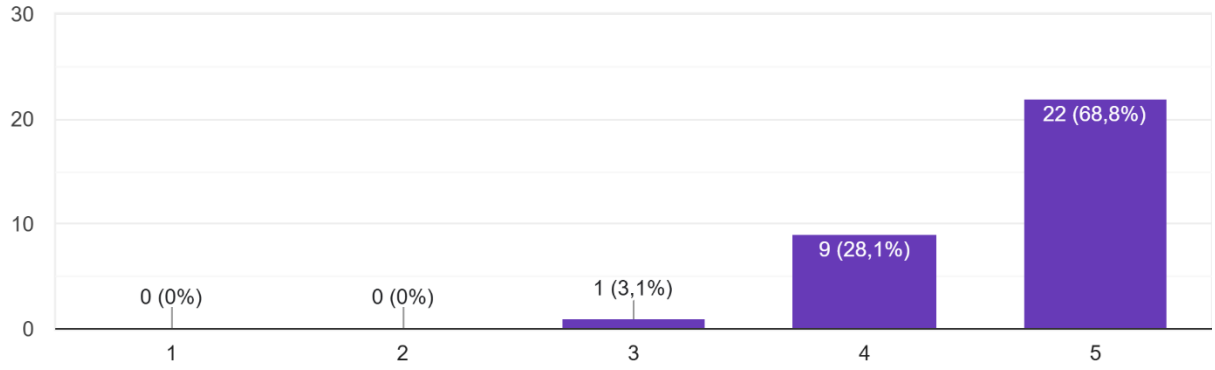
I will implement, at least one AI tool in my company.

32 risposte



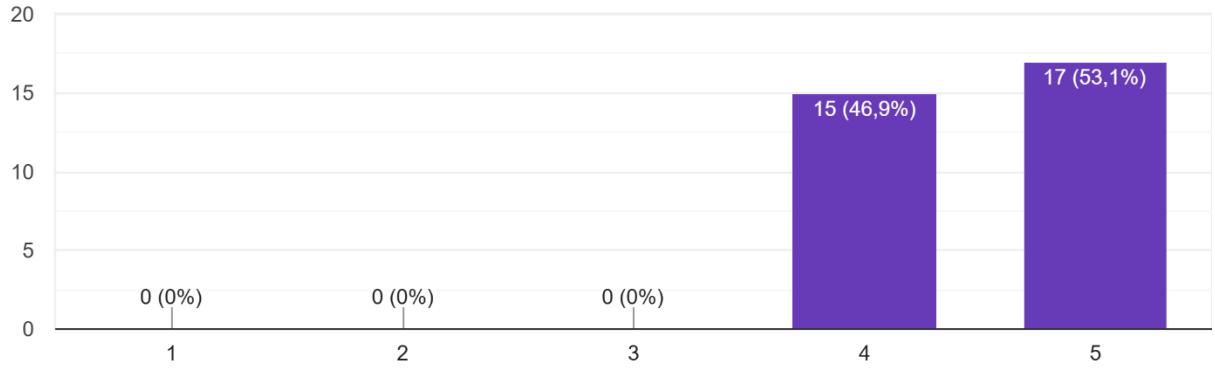
7. The overall quality and effectiveness of the AI Lead MOOC meets my expectations

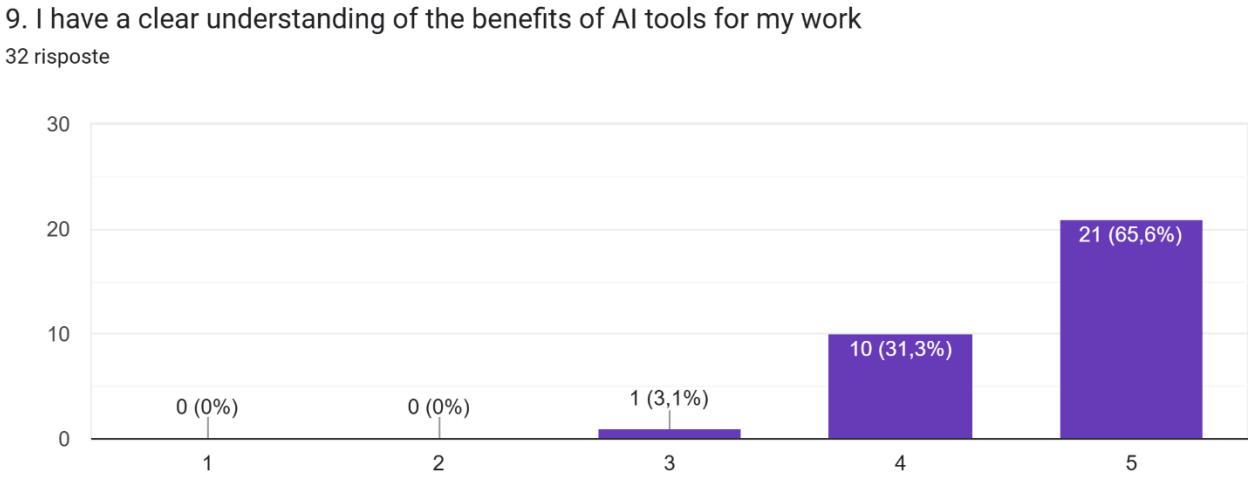
32 risposte



8. By attending the MOOC I have achieved an adequate level of knowledge, skills and competences for the proper use and access to AI tools and services

32 risposte





Main Findings

The evaluation data collected from SME workers and managers during the AI Lead pilot testing indicate a very positive overall perception of the AI Lead MOOC, confirming its relevance, usability and practical value for non-technical business profiles. Across all evaluation items, the results show consistently high scores, with average values largely above 4.3 on a 5-point Likert scale and positive responses (scores ≥4) ranging between 88% and 100%.

One of the most relevant findings concerns the clarity and comprehensibility of the MOOC contents. All respondents (100%) stated that the contents were understandable and clearly presented, with a mean score of 4.8/5. Similarly, 96% of participants positively evaluated the level of difficulty of the modules (mean 4.7/5), confirming that the MOOC is well calibrated for SME staff with limited or no prior experience in Artificial Intelligence. This represents a key point of interest for future users, as it demonstrates that the learning pathway effectively lowers entry barriers to AI-related topics.

The usability and accessibility of the MOOC platform were also rated very positively. Ease of use received positive evaluations from 92% of respondents (mean 4.5/5), while accessibility was positively rated by 90% (mean 4.4/5). These results suggest that the digital environment does not represent a significant obstacle for SME workers and managers, even for those with average digital skills. For future implementations, this confirms that the MOOC can be deployed without requiring advanced technical support.

A particularly significant result relates to the perceived usefulness of the MOOC for professional practice. 96% of participants agreed that the contents are useful for their work in SMEs (mean 4.7/5), and 94% stated that the MOOC helped them better understand how AI tools can support business processes (mean 4.6/5). This indicates that the training is not perceived as purely theoretical, but as closely connected to real organisational needs and decision-making processes.

In terms of learning outcomes, the evaluation data show that 94% of SME participants reported an increased awareness of the potential of AI tools for SMEs (mean 4.6/5). Furthermore, 92% declared that the MOOC contributed to improving their knowledge and competences related to AI applications in business contexts (mean 4.5/5). These findings are particularly relevant from a project impact perspective, as they demonstrate the MOOC's effectiveness in fostering not only knowledge acquisition, but also strategic awareness and readiness for AI adoption.

Expectations were largely met, with 96% of respondents stating that the AI Lead MOOC met or exceeded their expectations (mean 4.7/5). This confirms a strong alignment between the needs of SMEs and the structure and content of the learning materials.

From a lessons-learned perspective, the data suggest that future users will benefit most from the MOOC when it is framed as a practical awareness-raising and decision-support tool, rather than as a technical training programme. The results also indicate that the MOOC is particularly effective when learners are encouraged to reflect on their own organisational context and to explore concrete opportunities for AI adoption. Overall, the evaluation confirms that the AI Lead MOOC is a mature, accessible and highly relevant resource for supporting SMEs in their first steps towards the strategic use of Artificial Intelligence.

h. Lessons Learned from the Pilot Testing

The pilot testing of the AI Lead MOOC and the AI Lead Facilitator Kit across Italy, Spain and Austria generated a set of valuable lessons that can guide future users wishing to adopt and transfer the materials to different sectors, organisational settings or target groups.

A first key lesson concerns the importance of accessibility and progressive learning design. The consistently high evaluation scores from both VET trainers and SME workers confirm that AI-related training is most effective when complex concepts are introduced gradually and explained using clear, non-technical language. The pilot demonstrated that lowering the entry barrier to Artificial Intelligence does not require oversimplification, but rather a careful balance between conceptual clarity and practical relevance. Future users are therefore encouraged to preserve the progressive structure of the MOOC and to maintain a strong focus on real-world examples when adapting the materials to new contexts.

A second lesson relates to the central role of contextualisation. While the core contents of the AI Lead materials proved to be transferable and relevant across countries, the pilot testing highlighted the added value of adapting examples, use cases and discussion points to the specific characteristics of the target sector or organisational environment. Trainers reported that even minor contextual adjustments significantly improved participants' engagement and comprehension. For future implementations, this suggests that the materials should be seen as

a flexible framework rather than a rigid curriculum, capable of being tailored to different industries, levels of digital maturity or strategic priorities.

Another important lesson emerging from the pilot testing is the complementarity between the MOOC and the Facilitator Kit. The results show that the MOOC is particularly effective as a self-paced learning and awareness-raising tool, while the Facilitator Kit strengthens its impact by enabling structured, interactive and reflective learning experiences. Future users aiming to apply the materials in other sectors are therefore encouraged to combine autonomous online learning with facilitated sessions, peer discussion and practical exercises, especially when working with adult learners or professionals.

The pilot testing also highlighted the need to consider time constraints and learning flexibility, particularly for managers and professionals. While the modular structure of the MOOC was appreciated, some participants faced difficulties in completing all activities within a limited timeframe. This suggests that future implementations may benefit from offering alternative learning pathways, prioritising selected modules, or integrating the materials into blended learning formats that allow greater scheduling flexibility.

Finally, a key lesson concerns the strategic positioning of AI training. Both trainers and SME participants consistently perceived the AI Lead materials not as purely technical training resources, but as tools to support strategic understanding, informed decision-making and organisational readiness for AI adoption. For future users, this implies that the materials are particularly suitable for awareness-raising, leadership development and change management processes, and can be effectively applied beyond the SME context, for example in public organisations, education, creative industries or non-profit sectors.

In conclusion, the pilot testing confirms that the AI Lead MOOC and Facilitator Kit are mature, adaptable and transferable resources. Their successful application in other sectors and contexts will depend on maintaining clarity and accessibility, investing in contextualisation, combining self-learning with facilitation, and framing AI not merely as a technology, but as a strategic lever for organisational development.

Methodological Guide – Adapting AI Lead Materials Across Sectors

Step-by-Step Adaptation of AI Lead Project Materials

Step 0 – Preparation and Framing

Objective: Create the conditions for a structured and realistic adaptation process.

Before starting the adaptation, it is essential to define a clear governance and scope. Appoint an *adaptation lead* responsible for coherence and quality, and involve at least one *sector expert* who understands the target context's operational reality, language, and constraints.

At this stage, clarify:

- the target sector and type of organisations,
- the participant profiles (managers, frontline staff, trainers, policymakers),
- the intended format (workshops, blended learning, coaching, self-paced),
- key constraints (time, budget, regulation, data sensitivity).

This framing prevents generic adaptations and ensures early alignment with real-world conditions.

Step 1 – Context and Needs Analysis

Objective: Anchor the adaptation in real operational challenges rather than abstract AI possibilities.

Begin with a short but focused needs analysis. Use interviews, small group discussions, or workshops to identify recurring operational problems in the target sector. These should be issues that consume time, create bottlenecks, reduce quality, or limit decision-making.

Translate these problems into short, concrete descriptions that include:

- who is affected,
- how often the problem occurs,
- what the current workaround is,
- why it matters for performance, quality, or mission delivery.

The outcome of this step should be a short list (ideally 2–3) of **priority challenges** that will guide all subsequent adaptations.

Step 2 – Mapping Transferable Components

Objective: Identify what can be reused "as is" and what requires adaptation.

The AI Lead materials are modular. At this stage, review each component (chapters, exercises, tools, online modules) and classify them into three categories:

- elements that are fully transferable (e.g. adoption logic, pilot methodology),
- elements that require contextual adaptation (examples, terminology, use cases),
- elements that may be optional or reduced depending on the sector.

Focus on preserving the **methodological structure**—problem-first logic, readiness assessment, piloting, skills development—while accepting that surface-level content will change.

Step 3 – Language and Narrative Adaptation

Objective: Ensure relevance, clarity, and trust in the target context.

Adapt the language so that it reflects the vocabulary, culture, and priorities of the sector. Replace SME-specific terminology with sector-appropriate expressions, and avoid importing business jargon where it does not fit.

Equally important is reframing the **value narrative**. While SMEs respond strongly to productivity and cost arguments, other sectors may be more motivated by service quality, accountability, social impact, or professional well-being. The AI Lead logic remains valid, but the *reason why AI matters* must resonate with the sector's mission.

Step 4 – Use Case and Scenario Redesign

Objective: Make AI tangible through familiar situations.

Redesign examples, exercises, and scenarios so they reflect real workflows in the target sector. This includes adapting:

- use cases discussed in plenary sessions,
- hands-on exercises and trainer handouts,
- role-play or scenario-based activities.

The aim is not to showcase advanced AI, but to demonstrate **credible, low-risk applications** that participants can realistically imagine using in their own work.

Step 5 – Readiness and Maturity Reframing

Objective: Use readiness assessment as a facilitation and learning tool.

Retain the AI Lead approach to readiness assessment, but adapt it to the sector's reality. Even if different tools are used, preserve the core dimensions:

- strategy and leadership,
- skills and competences,
- data availability and quality,

- processes and workflows,
- technology and integration,
- ethics, compliance, and governance.

Facilitate assessments as collective reflection moments rather than evaluations. The discussion around differing perceptions is often more valuable than the final score.

Step 6 – Pilot Design and Validation

Objective: Translate learning into safe, concrete experimentation.

Guide participants to design **small pilot initiatives** that address one priority problem identified earlier. Pilots should be limited in scope, time-bound, and supported by simple KPIs that measure tangible outcomes such as time saved, errors reduced, or response times improved.

This step is crucial across all sectors, as it transforms AI from a conceptual topic into a practical learning experience and builds trust through evidence rather than promises.

Step 7 – Skills and Literacy Methodology Adaptation

Objective: Build practical AI literacy that fits daily work.

Adapt the AI literacy methodologies to match the learning culture of the sector. Preserve the AI Lead emphasis on:

- learning embedded in workflows,
- short, focused learning units,
- experimentation and peer learning,
- scenario-based critical thinking.

Avoid long theoretical sessions. Instead, ensure that learning activities connect directly to tasks participants already perform, reinforcing confidence and responsible use.

Step 8 – Governance, Ethics, and Compliance Alignment

Objective: Ensure responsible and sustainable AI use.

Adjust the depth and emphasis of governance topics according to the sector's regulatory environment. In highly regulated contexts, expand discussions on transparency, documentation, human oversight, and accountability.

Use the EU AI Act's risk-based logic as a common reference framework, even when systems are low risk, to encourage anticipatory thinking and responsible decision-making.

Step 9 – Testing, Feedback, and Iteration

Objective: Refine the adapted materials through real use.

Pilot the adapted materials with a small group before wider rollout. Collect qualitative feedback on clarity, relevance, and applicability, as well as quantitative signals such as engagement levels and pilot outcomes.

Use this feedback to refine language, examples, pacing, and emphasis. Treat adaptation as an iterative process rather than a one-off translation exercise.

Step 10 – Documentation and Transfer Readiness

Objective: Make the adaptation reusable by others.

Document the adapted version clearly, explaining:

- what was changed and why,
- which elements remain generic,
- which parts are sector-specific.

This final step ensures that the adapted materials can themselves be transferred further, supporting scalability and long-term sustainability.

Conclusion

Although developed for SMEs, the AI Lead materials are grounded in principles that apply across sectors. By preserving their structure while adapting language, examples, and value framing, organisations can reuse them to support informed, ethical, and sustainable AI adoption.