

How to Transform Your HR Strategy With AI

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Introduction

AI isn't just a futuristic vision, it's driving the future of work. But the central piece in making AI successful isn't about the tech — it's about people.

Imagine being able to take a load off your managers by helping them generate performance reviews more quickly, or analysing reams of employee engagement data to get the insights you need to pinpoint why an employee group has become a flight risk in seconds.

This is the potential impact AI can — and already is — having on the employee experience. Early studies on generative AI's impact, for example, show it can offer a significant [productivity and efficiency uplift](#). When used effectively, it could [enhance your employer brand](#) and [accelerate your hiring process](#).

In the current business climate, where efficiency and performance are paramount, AI will enable people leaders to be more forward-looking and strategic than ever before. Critically, they can spend more time creating the connections that lead to a great employee experience.

But to realise these potential benefits, you have to get your strategy and implementation right first. In this workbook, we'll help you get started on integrating AI to power up your people processes. We'll guide you through a six-step framework that will help you:

- Evaluate where and how to leverage AI to the greatest effect
- Build policies and best practices to standardise how the employees use AI
- Create an implementation strategy with internal stakeholders
- Measure the success of your initiatives

Before we begin:

We wrote this workbook to help HR leaders get started with harnessing AI. But because AI is still evolving as a technology, it can make people feel uneasy about making missteps.

That's only natural. But trust us when we say that we're all still learning how to unlock the potential of this new technology. What matters most is how you measure and respond to any challenges.

Ultimately, we all get better together. [Join our community of people leaders](#) to share your strategies and best practice tips for working with AI.

"As early adopters of Lattice Engagement Insights we were impressed by how it captures and analyses employee sentiment. The insights help us focus on actions on things that will drive real impact on our engagement. We're excited to see how the tool develops and continue to leverage it to elevate our employee experience."

**Beth Copping, Talent Development
Partner, GoCardless**

GoCardless



Step 1: Evaluate Where You Stand on AI

When it comes to implementing AI into your HR processes, you'll want to start with an evaluation of how your organisation is already using AI. This involves three key points of departure:

- **Survey your workforce:** Ask your employees for their views on AI to gauge existing knowledge and comfort levels.
- **Map existing HR processes:** Identify if you're using AI within different departments or disciplines across the broader HR function, such as DEIB and L&D.
- **Check in on HR process sentiment:** Now's the time to ask your employees how they feel about specific processes within the HR ecosystem, like performance or growth. This may highlight challenges you can solve with AI and shape policy later.

Exercise: Create a survey template to understand how your organisation uses AI

Consider your key objectives when running the survey. What do you need to know from your employees in order to implement AI to improve the employee experience?

Attitudes towards AI

How employees are currently using AI

Ethical, privacy, general concerns surrounding AI implementation in people processes

Understanding of how HR uses AI

HR process efficiency and challenges

Training and upskilling requirements

Support and resource needs

Challenges or roadblocks in using AI successfully

Next, start creating some questions that reflect your key survey objectives. Use and adapt these survey questions below to help you build a survey template:

- How would you rate your current knowledge of AI? (**Choices:** *Very low, low, average, high, very high*)
- Please briefly describe how you are using AI in your job, including specific tools that you are using and the tasks you are using the tools to complete. (**Comment**)
- If you are not using AI, what has prevented you from using AI in your role? (**Comment**)
- What resources or support do you think would be most beneficial for you to enhance your understanding and utilisation of AI in your job? (**Comment**)
- How well do you think our performance management process helps you understand your strengths and areas for improvement? (**Choices:** *Not at all, a little, some, quite a bit, a lot*)
- Is there anything you'd like to improve or change about our current performance management, growth, or progression processes? (**Comment**)

[Find more AI survey questions here](#). Run your survey as a standalone pulse survey, or include a few questions as part of your regular engagement survey. Remember to run this survey at regular intervals to identify any evolving use cases or changing needs.

Tip: Give employees a voice on how your organisation uses AI.

Make sure you're collecting qualitative data via employee comments, so employees can raise any questions, concerns, or use cases that add nuance to their sentiment.

Lattice AI automatically summarises your qualitative and quantitative feedback from surveys as soon as they close, so you speed up time-to-action and deliver measurable changes. [Find out more about Lattice AI here](#).

Step 2: Identify Your Biggest AI Opportunities and Challenges

Once your survey data is in and you've listed out your HR processes and tech stack, you can start to map your key challenges and priorities to use cases.

You can also bring in other data sources to supplement your evaluation, including:

- **Employee engagement surveys:** Data trends in drivers like manager effectiveness, feedback, and growth may help identify where processes are being stressed.
- **HR metrics and goals:** Core KPIs across the broader HR function and employee experience could help identify bottlenecks. For example, measuring training participation may help highlight that L&D delivery isn't working.
- **Qualitative feedback:** Feedback delivered in focus groups, meetings, or as comments in your employee survey can add nuance to sentiment data.

Remember that this is just a starting point to help you clarify your key goals in implementing AI, and should be adjusted in line with evolving priorities and goals.

Exercise: Identify your goals and objectives for implementing AI

Use the data you've gathered to answer the questions below. These questions will help you pinpoint your key objectives and opportunities for implementing AI.

Looking at your survey data, can you identify your top three opportunities or challenges for successful AI adoption?

Example: Managers have indicated that they're struggling to find time to write up performance reviews for their direct reports.

- 1.
- 2.
- 3.

Next, think about your core HR processes. What are your biggest pain points? Which regular tasks or processes are taking up a lot of time or resources — either for the HR team, or for process owners across the organisation?

Example: HR is struggling to synthesise and summarise key employee performance trends for strategic reporting.

- 1.
- 2.
- 3.

How could applying AI help you tackle these challenges or priorities?

Example: HR could implement AI into performance management processes to drive better manager efficiency.

What are your broader HR and strategic objectives, and how can implementing AI support those?

Example: We are focused on empowering every employee to perform at their best. Enabling managers with more efficient performance review processes will ensure every employee has the personalised feedback and goals needed to thrive.

Are there any potential future HR challenges that might impede successful AI adoption?

Example: Managers may need additional training on how to use AI-enabled tooling.

Tip: Use Lattice AI to scale performance management processes.

Performance review processes are often inefficient, time-consuming, and plagued by bias. But they're essential to driving a high-performance culture. Lattice AI equips managers with a collated view of feedback, employee goal performance, and one-to-one discussions so they can write more objective, relevant reviews that minimise the risk of recency bias and coach direct reports towards high performance.

[Find out more about Lattice AI here.](#)

Step 3: Map Your Opportunities to Use Cases

Once you have a sense of your key priorities and opportunities, it's time for practical application. When used in the right way, AI can drive huge process efficiencies across HR and across the broader employee experience:

- Analyse qualitative and quantitative insights from employee engagement surveys to synthesise trends, risk factors, and action points.
- Implement Natural Language Processing (NLP) to analyse qualitative feedback from engagement surveys and summarise key trends or patterns.
- Create customised growth and development plans based on employee performance data, goals and KPI achievement, and learning preferences.
- Suggest targeted learning and development resources according to employee career goals and skills gaps.
- Generate feedback meeting summaries to improve time-to-action for employees.

Remember that when implementing AI, your primary goal should be to enhance the employee experience and spotlight the 'human' part of human resources, rather than replace human input entirely with technology.

Exercise: Map challenges and priorities to potential solutions

From your analysis in step 2, which opportunities and priorities stand out as the most impactful ways to apply AI? Write them down here.

Example: Managers don't have time to analyse performance data for employee evaluations.

- 1.
- 2.
- 3.
- 4.

Using these as a jumping-off point, step through the practicalities of solving this challenge with AI. How might AI help drive greater efficiency in the process, or drive behavioural changes that enhance performance? What might be some potential setbacks to prepare for?

Priority/ Challenge	Solution	Tool	Feasibility Analysis	Potential Setbacks
Example: Managers are finding it hard to write up performance reviews.	Leverage AI to analyse performance and generate a draft performance review for managers to refine.	Lattice AI	• Integrates with existing tech stack • Requires manager and employee training	• Low initial user adoption • Change management of performance processes

Case in point: Intercom



Intercom’s Global VP of People Lauren Cullen had her big a-ha moment on AI when observing how ChatGPT was being used in the company’s customer service department to improve response times and rates to customer queries.

“We’re starting to look at across the employee experience, where are those parts where we think there is a lot of low complexity, high frequency work that we could automate. An example there is that we’re looking through our recruitment process—little things we can implement [like an] AI note-taker. It’s understanding what are the use cases where we could have an impact now.”

Step 4: Understand Your Internal AI Risk Factors

AI can be an immensely powerful addition to your HR toolkit. But because it's so powerful, it's essential to have a balanced understanding of the potential risks, ethical concerns, and legal ramifications involved.

To understand internal risk factors, you'll need to review any ethical concerns highlighted by employees — and specifically how the use cases you identified in step 3 might lead to new risks.

Some potential risk factors and considerations include:

- Data privacy and security.
- Employee trust and perception of AI.
- Legal, regulatory, and compliance requirements for your industry/country.
- Cultural and ethical issues at an organisational level.
- Introduction of bias into key HR processes.

Exercise: Conduct an AI risk analysis

Using the use cases you’ve identified in step 3, fill in this risk matrix to help you reflect on the specific challenges, concerns, or risks associated with implementing AI.

Risk	Likelihood (low, medium, high)	Potential impact (low, medium, high)	Resolution	Stakeholders
Example: <i>Using AI tools in our talent acquisition process could introduce bias.</i>	<i>Medium</i>	<i>High</i>	<i>Define best practices for how AI can and can't be used. For example, AI can personalise candidate email nurturing but not screening or decision-making.</i>	<i>HR, talent acquisition, hiring managers</i>

Step 5: Create HR Policies to Ensure Best Practices

Creating an AI policy can help outline best practices that provide a guardrail for usage by the HR team and other internal stakeholders.

According to [2022 research into organisational governance on AI](#), your policy needs to encompass how AI will integrate with your existing processes, infrastructure, and the needs of your workforce.

In simple terms, your policy should include:

- **Purpose and scope:** Your north star for why you're implementing AI and how you'll use it.
- **Tooling and technology:** Criteria for selecting AI technology providers.
- **Ethical and legal standards:** How you will ensure fairness, transparency, and unbiased usage — especially in the case of any decision-making processes.
- **Internal stakeholders:** Who is accountable for managing AI implementation, monitoring its usage, and safeguarding against risk in the HR function.
- **Knowledge and training:** How employees will be enabled to use any AI-enabled processes.
- **Data privacy and security:** How you'll safeguard, store, and use sensitive data, especially when integrating AI with employee lifecycle.

Exercise: Define your internal stakeholders

As part of your policy, you'll need to understand how your implementation of AI requires cross-functional input or facilitation from leaders or employees in other teams.

Do you need input or buy-in from other teams to help drive implementation, adoption, management, or data security? Fill in the table below.

Team	Role
IT	Implement and maintain AI tooling
Legal	Advise on legal, regulatory, and ethical standards

Are there any specific groups of employees that will be working with AI-enabled tooling that may require training? Detail them here.

Example: Managers will require training on how to use some of the features of our AI performance management platform.

Exercise: Begin building your AI policy

At a fundamental level, your AI policy needs to answer who, what, where, and why. Answer the questions below to start building some of the key points of your policy.

In a sentence or two, why and how are you going to implement AI?

Are there any ways that would not constitute an acceptable application of AI within your current processes?

As a team, how will you manage changing priorities, ethical issues, or use cases that present a risk?

Who will be responsible for managing and updating your HR AI policy?

Tip: Leave room for experimentation.

Your AI policies and guidelines will help standardise how you implement new processes and tools across HR processes and the broader HR function. But they shouldn't be a rigid set of rules.

Building in room and budget for experimentation gives teams flexibility to test AI tools at a smaller scale according to their specific needs.

See our [AI usage policy template](#) for more ideas on how to structure the right policy for your organisation.

Step 6: Create Your Implementation Strategy

Once you're ready to start implementing any new tooling or processes, you'll need a strategy to introduce them to the company. Successful adoption of any AI tooling—particularly when it involves changing behaviours and existing processes—relies on good change management.

Effective communication and proactive enablement are critical to getting this right. Use our roll-out checklist as a guide, adding tasks to make it your own.

HR's AI roll-out checklist

Develop a communication plan that outlines key process changes.

Create training and user enablement.

Ensure technical integration and data security are in place.

Design feedback processes to gather employee views.

Define metrics to measure and track success.

Run small-scale pilot projects to test new approaches.

Set up an audit cadence to regularly review the success of processes and policies.

Exercise: Define metrics of success

Measurement and tracking is one of the most important parts of implementing a new process or tool.

Defining KPIs and benchmarks—either quantitative (time-to-hire or eNPS) or qualitative (positive comments on AI) can help you measure the success of your initiatives and track patterns and trends effectively.

In the table below, list out any AI use cases and define KPIs according to the intended outcomes.

Process/Use Case	Objective	Outcome	KPI(s)
Example: Introduced interview note-taker tool for hiring managers.	Improve candidate experience and improve time-to-action from interview to hire.	Streamline the hiring process and improve the speed of hiring decisions.	Time-to-hire Candidate experience survey

Next, answer the questions below to help flesh out reporting and measurement processes.

How often do you plan to track these metrics? Who will be responsible for tracking and reporting on success?

How will you respond in the scenario that a tool or process change fails to deliver on intended outcomes?

That's it—you're ready to get started with building AI-enabled people processes that help your whole organisation thrive. Keep this workbook on hand to help you re-evaluate your processes on a regular basis.

Tip: Upgrade your AI roll-out with expert insight from Exabeam.



To make sure AI embeds successfully into your HR operations, you need a strong roll-out plan. In this [on-demand webinar](#), Gianna Driver, CHRO at Exabeam, outlines her expert advice for creating an effective roll-out plan that scales impact and delivers results faster.

Scaling the Future of People Processes with Lattice AI

AI isn't just a possibility — it's a reality for how businesses will operate in the future. Getting it right in the people function will depend on building the right processes, policies, and implementation strategy that help you identify where you can maximise AI's impact and create an employee experience where everyone can thrive and perform at their best.

You'll also need the right tech. Lattice AI offers people leaders, teams, and managers a complete toolkit to scale AI-enabled processes that improve the employee experience.

Lattice AI helps you:

- Synthesise qualitative and quantitative survey results and identify priorities.
- Analyse performance insights and create draft reviews using generative AI.
- Generate personalised onboarding videos to welcome new team members.
- Create personalised Individual Growth Plans based on career tracks, performance, and feedback.
- See your team's engagement health and trends at a glance.

Lattice AI helps teams plug capacity gaps, unload repetitive tasks, and free people up to focus on the most meaningful parts of their work. [Find out more about how Lattice AI can transform your People processes by booking a demo.](#)

Additional Resources:

Webinars:

[Leading with AI](#)

[From hype to HR policy: How to approach generative AI at work](#)

Articles:

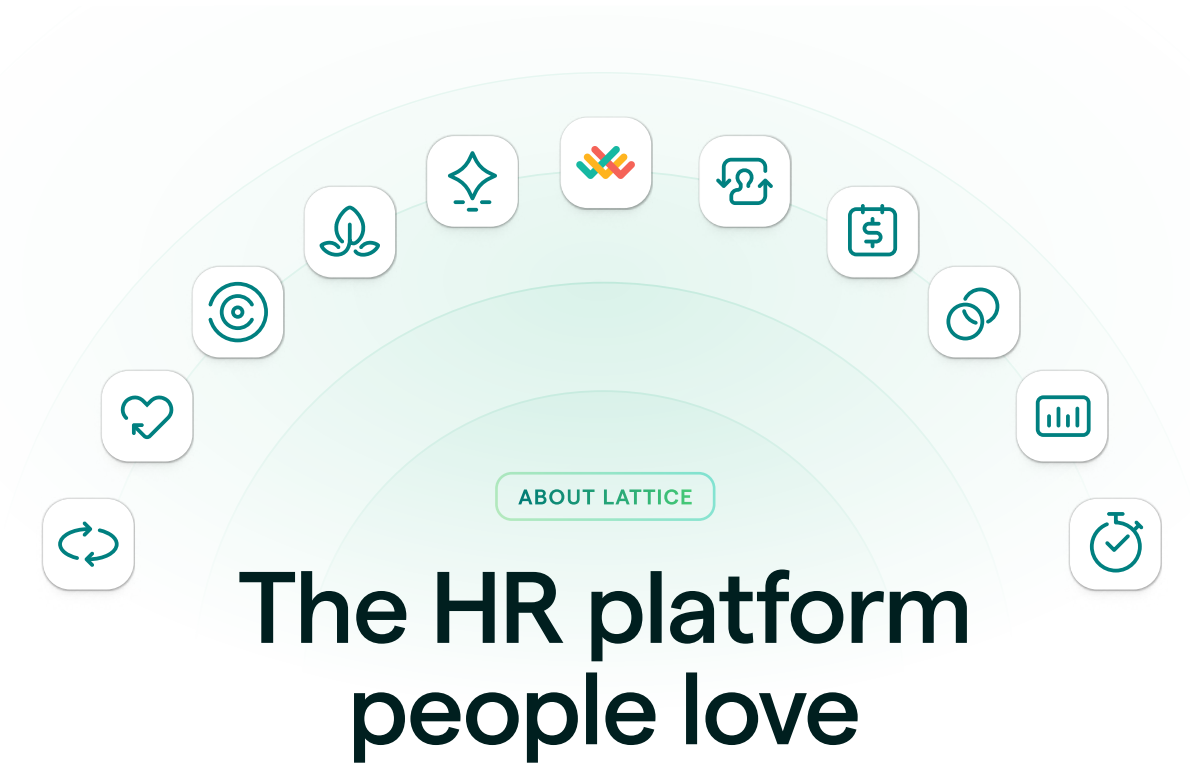
[40+ Cutting Edge AI Tools for HR Teams](#)

[How HR Is Putting Artificial Intelligence to Work](#)

Templates:

[AI at Work Survey Template](#)

[AI Usage Template](#)



Lattice's HR platform gives companies the tools they need to drive performance and build people-first cultures. Combining an HRIS with continuous performance, engagement surveys, compensation management, and career development, Lattice enables teams to invest in their people, empower managers, and accelerate business results.

With offices across North America, the UK, and Europe, Lattice serves more than 5,000 customers worldwide, including Slack, Gusto, Intercom, Ramp, Calm, NPR, Tide, and more. The company has ranked on the Inc. 5000 list of the fastest-growing private companies five years in a row.

Learn more by visiting [Lattice's site](#).

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