

# WSR

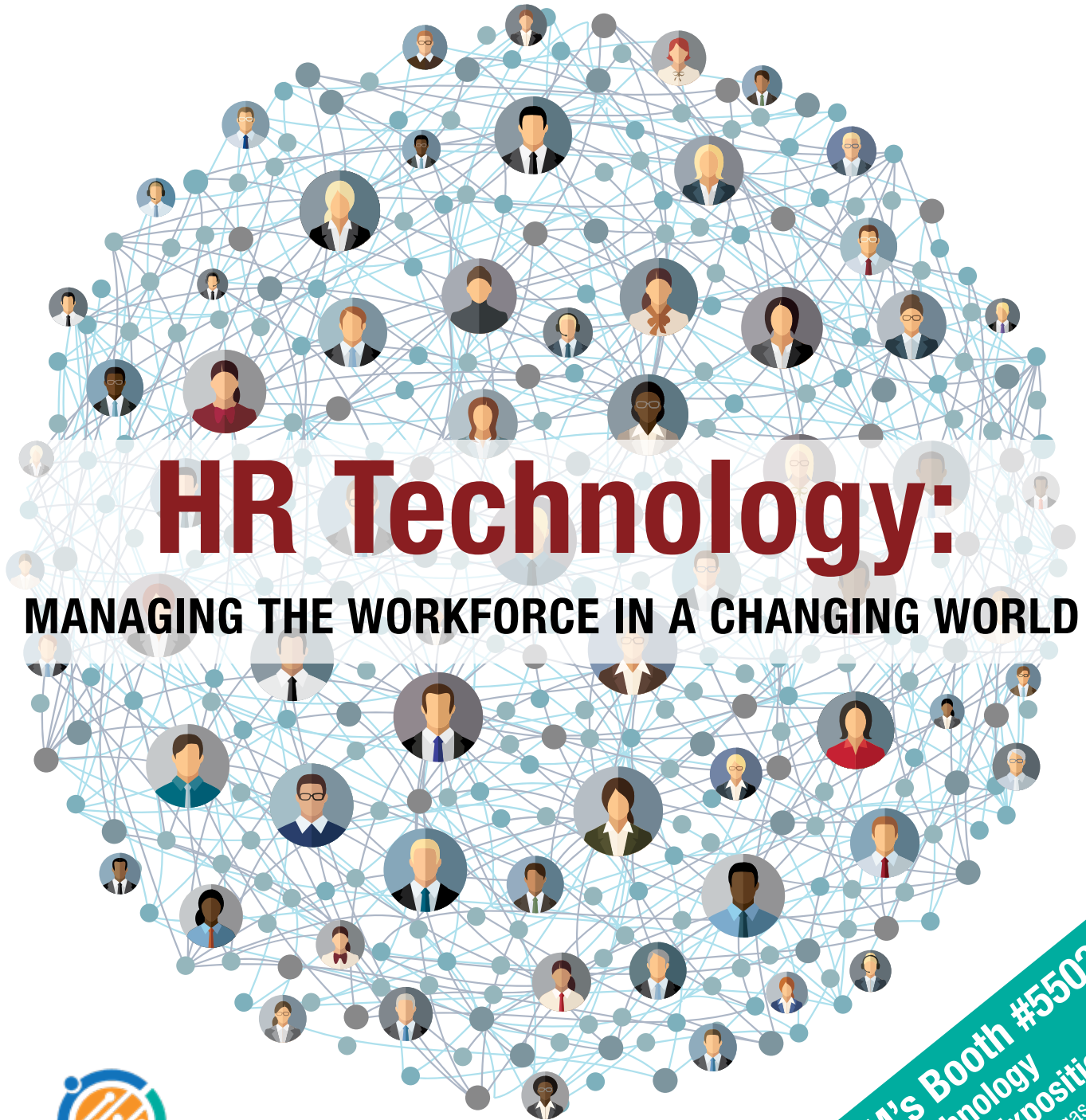
Workforce Solutions Review

3rd Quarter 2024

The Official Journal of the International Association for Human Resource Information Management

IHRIM.org

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## *from the managing editor*

*Dan Vander Hey, HRIP*

This is an exhilarating time of year for HR Technology! As companies dive back into significant projects at the start of the school year, the corporate To-Do lists are long and diverse. ETCV/HR Executive Magazine's HR Technology Conference & Expo arrives at just the right moment each fall when companies are exploring innovative ideas and revisiting what they might have missed. While core systems like HR, Finance, CRM, and supply chain remain essential for most businesses, the game-changer is how these systems align to deliver insightful analytics, setting companies apart from the competition.

Beyond the basics, organizations are increasingly focused on maximizing technology that motivates and incentivizes their workforce and optimizes decision-making. Organizations and companies that embrace HR digital transformation and keep pace with the latest HR technology trends will gain a competitive edge. They'll attract top talent, make timely and informed decisions, and seamlessly transition into new markets. HR technology isn't just about having the latest tools—it's about harnessing transformational forces that redefine how we work with people and uncover opportunities to deliver world-class products and services.

So, what's our outlook for the balance of 2024 and beyond? Embrace it, leverage it, and stay ahead of the game. Every year, our Editorial Review Committee carefully identifies key topics our IHRIM members are eager to learn more about. We keep our finger on the current pulse on the frontlines of HR and related technologies, highlight emerging trends, and engage with peers and thought leaders to shape the focus of *Workforce Solutions Review* (WSR), the official peer-reviewed journal of IHRIM.

Despite Wall Street's tidal commitment to AI, the technology is here to stay. AI's pervasive influence is set to revolutionize every facet of HR beyond automating routine tasks. Generative and collaborative artificial intelligence can empower strategic and tactical decisions in critical areas like recruitment, talent management, compensation, rewards, employee engagement, and performance evaluation. When applied to the fullest practical and ethical extent, emerging HR technologies will create interactive experiences that prepare the agile workforce for future opportunities.

Today, IHRIMedia ([ihrimedia.com](http://ihrimedia.com)) is the curated hub for online content creators, advertisers, and sponsors eager to connect with IHRIM's global community. Our flagship publication, *Workforce Solutions Review*, boasts a broader network of authors than ever, allowing us to expand our topical content and diversify the platforms where we share the latest insights on HR technology. We hope you will enjoy the Fall (Q3) issue, and if you're attending the HR Technology Conference & Expo in Las Vegas, please stop by our booth (#5502) for swag, answered questions, or just to say hi!

Yours truly,  
IHRIM  
Dan Vander Hey, HRIP  
WSR Managing Editor



# from the IHRIM Chair

Dennis Hill, Ph.D., SHRM-SCP, SPHR, HRIP  
IHRIM Chairperson & CEO



Dear IHRIM Community and Future Members,

As Chairman and CEO of IHRIM, I'm thrilled to address HRIT professionals, directors, CHROs, HCM developers, and consultants in our quarterly, peer-reviewed journal, Workforce Solutions Review. IHRIM is more than a professional association; it's a vibrant international community where knowledge, collaboration, and excellence thrive.

Since 1980, two generations of professional members have recognized the critical role of Human Resource Information Management in shaping the future of work. In response to the ever-evolving landscape of technology and HR and expectations of thousands of members, IHRIM established strategic partnerships with leading educational institutions, analysts, and thought leaders to provide our community with cutting-edge insights, innovative solutions, and exclusive networking opportunities.

We're proud to collaborate with top institutions like NYU, Princeton, the London School of Economics, and Loyola University-Chicago, along with industry influencers such as Sapient Insights Group, Raven Intel, Consortium DeHR, AIHR, Hacking HR, and ETC, the HR Tech event promoter and publisher of HR Executive. These partnerships keep IHRIM and our members at the forefront of industry trends, offering access to the most current and

relevant HR technology knowledge and the talented pool of professionals to plan, select, and manage it.

What truly sets IHRIM apart is our culture of mutual support and professional integrity. Our members are dedicated to sharing experiences, discussing challenges, and exploring solutions within a framework that upholds the highest standards of ethics and confidentiality. IHRIM remains a place where trust and respect are paramount.

For HCM solution developers and consultants, IHRIM provides a curated community to showcase your expertise, products, and services. Our marketing channels, including Workforce Solutions Review magazine, streaming services and webinars, newsletters, and websites, offer ideal opportunities to reach decision-makers, practitioners, and influencers across the globe.

With sincere thanks to our partners and community of 14,000 professionals worldwide who value IHRIM's catalytic impact, I invite potential members, organizations, and vendors to join or partner with IHRIM today, so we can continue to shape the future of HR technology and ensure employers are prepared for the challenges of tomorrow.

Warm Regards,  
IHRIM

Dennis Hill, Ph.D., MSL, HRIP, SHRM-SCP, SPHR  
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*feature*

## The Overlooked Potential: How Smart Technology-Augmentation Enables People with Disabilities and Empowers Your Business

By *Eddie Kimminau and Dennis Hill, Ph.D., HRIP*

In today's world, inclusivity is gaining momentum, with increasing attention given to diverse groups such as people of color and those of different sexual orientations. However, one group that often remains overlooked is people with disabilities. Surprisingly, employment of persons with disabilities has stood at a record high of 35% since statistics were first recorded—about half of the employment rate for people without disabilities.<sup>1</sup>

There exists a misconception that hiring individuals with disabilities can be burdensome for employers (NCD.gov).<sup>2</sup> This perception not only hinders employment opportunities for people with disabilities but also deprives businesses of the unique advantages they bring to the table. Here's why integrating skilled employees with disabilities and AI-powered solutions into routine business processes can enhance productivity and profitability for the whole organization.

### Creating an Accessible Work Environment

The first step towards inclusivity is fostering an open attitude towards change. Making an office accessible benefits not only employees with disabilities but everyone within the workspace. For instance, installing ramps not only aids those using wheelchairs but also facilitates more effortless movement for everyone, including clients. An uncluttered space with clear pathways ensures that wheelchair users can maneuver without difficulty, creating a safer

and more efficient environment for all employees.

Consider the example of doors. Automatic doors are a simple yet effective solution for employees who use wheelchairs. Automatic upgrades, costing around \$700, significantly enhance accessibility and save energy. Similar retrofits for curtains and blinds exist, which can be preprogrammed to open and close on multiple schedules, impacting energy management, automating sunlight management, and enhancing security and privacy.

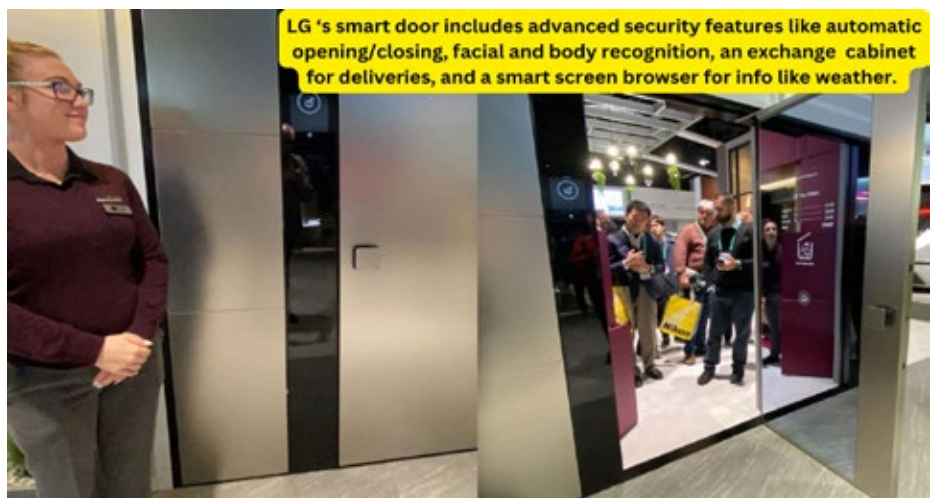


Figure 1.





Figure 2.

## Implementing Ergonomic Interfaces

Human factors engineering led to many contemporary interfaces that recognize, authenticate, and grant access to physical locations and digital applications, including:

- tactical finger and palm prints;
- retinal (eye) and olfactory (smell) biometrics;
- facial patterns;
- spatial torso and peripheral gestures;
- eye-tracking sensors;
- and sound, including voice recognition.

Remember the “Clapper(R)”? In recent years, gaming innovations and artificial intelligence have enhanced and improved these interfaces, enabling everyone, especially people with disabilities, alternatives to conventional mouse and keyboard technologies.

For example, organizations have been replacing doorknobs with handles for decades as a cost-effective measure, allowing easier access for those with limited grip strength. Today, handles, door frames and side panels can be equipped with smart locks that can be activated by a keypad, radio frequency card, or any human interface device (HID).

Electromechanical desks can be adjusted on-demand or on a pre-programmed schedule. At the

same time, ergonomic chairs offer features like autonomous drives and front and rearview cameras. They can be outfitted with complex torso and peripheral supports that have come to market since 2018. From smart keypad locks to adjustable furnishings, HIDs enhanced by artificial intelligence offer additional adaptations that promote inclusivity and comfort.

## Leveraging Assistive Technology Is Good for Business

Implementing assistive technology is another pivotal strategy for enhancing productivity in the workplace. Tools such as screen readers, voice recognition software, ergonomic keyboards, and even smart glasses for the visually impaired enable employees with visual, hearing, or mobility impairments to perform tasks effectively. Training sessions to educate staff on proper etiquette when interacting with colleagues who have disabilities can further create a supportive and understanding work environment.

Leveraging assistive technology is good for business beyond productivity measures and comfort factors. Here are three:

### a. Expanding the Talent Pool

Excluding people with disabilities from the workforce restricts the talent pool. Many individuals

with disabilities possess unique skills and perspectives developed through their life experiences. These experiences often cultivate resilience, adaptability, and innovative problem-solving abilities. Employers who recognize and harness these attributes can gain a competitive edge.<sup>3</sup>

For example, an employee with a visual impairment might develop exceptional listening and memory skills. Such abilities can be valuable in roles requiring keen attention to detail. Moreover, people with disabilities often demonstrate high commitment and loyalty, leading to reduced turnover rates and decreased costs associated with hiring and training new staff.

### b. Enhancing Company Morale and Innovation through Cognitive Diversity

Inclusive hiring practices not only boost the morale of employees with disabilities but also positively impact the entire workforce. When employees see their company making efforts to include and support colleagues with disabilities, it fosters a culture of loyalty and inclusivity. This inclusive environment can stimulate creativity and innovation as diverse perspectives lead to unique solutions and ideas. By comparison, a pair of UK-based scholar-practitioners found no correlation between gender, ethnicity, and age diversity and the problem-solving performance of executive teams, bucking conventional wisdom. This finding led them to consider cognitive diversity.

In their article published in the *Harvard Business Review*, Reynolds and Lewis note, “Cognitive diversity has been defined as differences in perspective or information processing styles. It is not predicted by factors such as gender, ethnicity, or age. Here, we are interested in a specific



Figure 3.

aspect of cognitive diversity: how individuals think about and engage with new, uncertain, and complex situations.”<sup>3</sup>

The authors observe that organizational functional bias arises from low cognitive diversity, an outcome of the all-too-common saying, “We recruit in our image.” They summarize the impact of low cognitive diversity as twofold: (i) it attenuates contributions from people who think differently, and (ii) it reduces the impact of the initiatives by fully representing the cognitive diversity of an organization’s workforce.

For instance, consider a team brainstorming session where an employee with a disability contributes a novel approach to a

problem based on their distinct life experiences. Such contributions can drive the development of new products or services, benefiting the company’s growth and profitability and overcoming functional bias.

### c. Improving Public Image and Compliance

Hiring employees with disabilities can enhance a company’s public image. Consumers are increasingly drawn to socially responsible businesses, and demonstrating a commitment to inclusivity can strengthen customer loyalty and attract new clients.

Additionally, employing people with disabilities helps companies comply with legal requirements, reducing the risk of fines and penalties. Many regions also offer

tax benefits to companies that hire individuals with disabilities, such as tax credits for making workplace accommodations or hiring individuals from certain underrepresented groups, providing further financial incentives. For a detailed understanding of your region’s tax benefits and legal requirements, consult your local labor laws or a legal advisor.<sup>4</sup>

For an in-depth comparison of disability-related laws worldwide, see the Hammill Institute on Disabilities report on non-discrimination protections and reasonable accommodation across all 193 UN member states.<sup>5</sup>

## Conclusion

Incorporating employees with disabilities into the workforce is a strategic business decision. By creating an accessible work environment, leveraging assistive technology, expanding the talent pool, enhancing company morale, and improving public image, businesses can unlock a wealth of potential that drives productivity and profitability. Embracing inclusivity and cognitive diversity is a win-win situation, benefiting the workforce and their employers and paving the way for a more equitable and prosperous future.

## Endnotes

<sup>1</sup> Diane M. Winiarski, C. R. C. (2023, February 21). The job market for people with disabilities is booming. Kiplinger.com. <https://bit.ly/3MiteaV>

<sup>2</sup> National Council on Disability: 2023 progress report: Toward economic security: The impact of income and asset limits on people with disabilities. National Council on Disability | 2023 Progress Report: Toward Economic Security: The Impact of Income and Asset Limits on People with Disabilities. (n.d.). <https://bit.ly/3yUcvaW>

<sup>3</sup> Teams solve problems faster when they’re more cognitively diverse. Harvard Business Review. (2021, August 27). <https://bit.ly/3yVCZZB>

<sup>4</sup> U.S. Bureau of Labor Statistics. (n.d.). America’s recovery: Labor market characteristics of people with a disability. U.S. Bureau of Labor Statistics. <https://bit.ly/3T3VfXt>

<sup>5</sup> A Comparative Overview of Disability Related Employment Laws and Policies in 193 Countries, Hamill Institute on Disabilities, Jody Heymann, MD, Ph.D., Elizabeth Wong, MPH, and Willetta Waisath, MPH. <https://bit.ly/4dxBTm3>

## About the Authors



Eddie Kimminau is a Summer Intern entering his third year at the University of Wisconsin-Whitewater in the fall of 2024. He extensively uses assistive technologies for work and personal use. He is majoring in communications with a minor in human resources. When not studying and preparing for his career, Eddie enjoys watching sports, hanging out with friends, and playing video games.



Dennis Hill, Ph.D., is the Chairman and CEO of IHRIM, a serial technopreneur, and the inaugural chair of Consortium DeHR, an international organization focused on emerging Web 3 technologies like trusted operating systems, blockchain design, and embedded AI in HCM and ERP applications. An expert C-Suite Change Catalyst™ and #1 Best-Selling Business Author/Editor, Dr. Hill is also an award-winning software designer and engineering professor. His education includes degrees in Biomedical/Electrical/Computer Engineering from Marquette, Business from Sorbonne, and Law from Champlain, as well as memberships and certifications from SHRM, HRCI, IHRIM, the Association for Change Management, and the Association for Conflict Resolution. He may be reached at <https://www.linkedin.com/in/managechange>.





# Humpty Dumpty and the 9-Box: Five Steps to Putting it Back Together Again Using the Science of Leadership Potential

By Allan H. Church, Ph.D. and Janine Waclawski, Ph.D.

Organizations that are effective at identifying, developing, and placing their best talent in key leadership roles will be the ones that continue to drive sustainable growth over time. A rigorous approach to differentiating people with future leadership potential is the only way to ensure effective succession planning. Successful differentiation is one of the reasons why so many organizations are increasingly turning to the use of formal assessments for development and decision-making (see the recent Workforce Solutions Review article by Church, Scrivani, and Graf and the SHRM Foundation report “Selecting Leadership Talent for the 21st Century Workplace” under suggested readings).

One of the most popular tools in the talent management toolkit is the 9-box model. Although the origins of the 9-box date back to the 1970s with the work McKinsey was doing for GE, it became increasingly prevalent in the 1990s when research on leadership potential emerged from CCL and thought leaders such as Bob Eichinger. Today, benchmarks have reported that over 95% of well-known organizations conduct formal talent reviews. The 9-box approach

is one of the most commonly used tools in this process (see the TM benchmark studies under suggested readings). Despite its popularity, companies struggle to use the 9-box effectively; many have found it doesn’t deliver on the promise. Why is this? Because they are doing it wrong.

## Why the Traditional 9-Box Model is Broken

The intent of the 9-Box model is based on a simple 2x2 matrix construct that has been popular for decades. You put performance on one axis and potential on the other. Theoretically, the resulting grid of 9-Boxes (using a 3x3 scheme as many companies do) enables line leaders and HR professionals to segment talent based on high performance and potential. Unfortunately, we have heard from many colleagues over the years that the discussion quickly devolves into which box the person belongs in versus a discussion of the underlying talent and their development needs.

This phenomenon, known as “the performance-potential paradox” (see the Strategy-Driven Talent Management book chapter by Church

& Waclawski under suggested readings), happens for two reasons: (1) both the performance and potential measures being used in most 9-Box approaches are fundamentally flawed and biased, and (2) the presence of a grid gives leaders a perceived sense of scientific rigor when in fact there is no science behind what they are doing. All of this results in the wrong discussions using the wrong criteria. Worst of all, despite what many think, the 9-box by itself is not an approach to identifying potential since potential itself is one of the categories!

## Five Key Steps to Having a Best-in-Class 9-Box

In our collective experience as HR executives at PepsiCo for over 40 years and another 30 combined as external consultants, we have found a better use of the 9-Box. One that helps clarify the discussion uncovers and challenges inherent biases in how executives think about their talent, significantly improving bench planning and success over time. To do this well, however, requires new thinking about the difference between what we call “designated” vs. “assessed” potential

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and unboxing the 9-box to change the focus of the talent discussion.

### **1. Throw Out Performance Ratings – They Should Be a Gatekeeper, not a Predictor.**

When we say throw out your performance ratings, we don't mean from your performance management process. Just don't use them for your 9-box framework. Performance should be used as a gatekeeper for talent discussions, not as a proxy or indicator of future potential. Why? There are three essential reasons. First, despite what many managers think, decades of research have shown that current performance only predicts future performance in the same role or roles of similar complexity. They might be great for discussing success in lateral moves, but they will not effectively tell you who will be the next EVP or CEO. Performance offers face validity by adding quantitative data in a nicely formatted grid, but this is merely pseudo-science. The whole point of focusing on potential in talent reviews is determining who will do better in more prominent roles, not the same ones.

The second reason not to use performance ratings in your 9-box is that performance ratings aren't objective measures. While management by objectives processes measure outcomes such as revenue, market share, profitability, etc., often the final ratings are influenced by intangible factors outside the influence of the individual. For example, compensation outcomes can play a major role during performance calibration, whether due to forced distributions, stock grants, merit budgets, and bonus targets. Moreover, many managers consider retention, engagement, and potential in determining what rating to give their employees. The latter is double counting, which is what we mean by the performance-potential paradox. How can one expect a

9-box with performance ratings to be objective in this context?

Finally, performance is not normally distributed, making the difference between a 3 or 4 on a commonly used 5-point scale almost meaningless to interpret beyond a certain point. Using performance as a gatekeeper to the entire process is far better. Simply put, you should only include people for talent discussions (in the 9-box) if their performance is average or better.

### **2. Keep Your Current Talent Framework and Embrace it – But Relabel it as Designated Potential.**

The concept of potential has been used in organizations for decades. For years, Managers have classified talent based on different inherent models, frameworks, experiences, values, feelings of similarity, seniority, and other inputs. Consequently, getting a group of managers and HR professionals to agree on a single definition can be difficult. This debate stems from the fact that potential is not one single thing for a given individual. Instead, it can be thought of in several different ways, including general potential (what everybody has), leadership potential, and destination potential (see the article in [Training Industry.com](#) by Church under suggested readings). However, the one element most “common definitions” of potential have is that they are based on perceptions. These perceptions ultimately result in a classification or label during annual talent cycles. In other words, most high-potential talent calls are subjective designations of potential by a manager assigned once a year. Thus, when used in a 9-box context, judgment plays a vital role in discussing how talent is perceived and what actions should be taken to develop people further.

Does this mean the internal talent calls and designations should be eliminated or replaced entirely with data? Perhaps surprisingly,

our answer is no. As the saying goes, “perceptions are reality,” and the judgments made influence the future promotions and success of the leaders being discussed. So instead of constantly reengineering and redefining potential to “get it right,” organizations should embrace their internal model, apply it consistently and with as much definitional clarity as possible, and relabel it for what it is. Unless psychometric behavioral data is involved, it's not an “assessment” of potential. Its designated potential is defined as the “Classification of someone's potential based on key stakeholder judgment about organizational context.” While many traditional 9-box approaches today use designated potential as their basis, they don't always recognize it for what it is. Designated potential is essential in the new 9-box but only when compared with the next component – assessment data based on the science of leadership potential.

### **3. Introduce the Science of Leadership Potential – By Using Formal Assessments & Data.**

While internal perceptions and judgments of potential are important, using designated potential alone only gets you so far. If that's all you have, you don't need a 9-box. It would be more effective and insightful if you introduced the science of potential using formal psychometric assessments of leadership capability. We call this assessed potential, i.e., the “Classification of someone's potential based on an algorithmic outcome from an assessment process, distinct from designated potential.”

We know from decades of research that potential is best predicted by a combination of foundational factors (personality and cognitive skills), growth factors (learning agility and motivation), and career factors (leadership competencies and functional knowledge). By



# Leadership Potential for the New 9-Box

**Designated Potential:**  
*Classification of someone's potential based on key stakeholder judgement in relation to organizational context*



**Assessed Potential:**  
*Classification of someone's potential based on an algorithmic outcome from a data-driven assessment process*

## Performance as a Gatekeeper

using a best-in-class approach to assessing these components, framed in the leadership language of your organization, you will have a robust, relevant, and objective set of insights on your talent (see the recent article in Workforce Solutions Review by Church, Srivani, and Graf under suggested readings for more).

Benchmarks of top companies over the past decade tell us that most companies use some form of assessment (86%) and have formal high-potential programs (79%). Yet far fewer (only 36%) use their data to identify or confirm potential. This represents a genuine opportunity to capitalize on delivering better, more effective talent management and succession processes (see the Workforce Solutions Review article by Ulrich, Church, Eichinger, and Pearman under suggested readings). Other forms of objective data can increase the quality of your 9-box, such as 360 feedback or future-focused simulations, as long as the data measures facets of leadership capabilities that predict potential and not outcomes (i.e., no survey or performance data).

In sum, the new 9-box uses internal judgments in conjunction with objective data and raises the quality of the discussion to an entirely new level.

### 4. Don't Box Yourself In – Determine the Right Size Grid for Your Organization.

Debating boxes is one of the most significant issues with using the

“traditional” 9-box approach for talent planning. In talent review meetings, there is often an inordinate amount of time and effort spent arguing about what box to place people in versus discussing what to do with the talent itself. As a result, time runs out before a substantive discussion about bench implications and talent development actions can be held. This misuse of meeting time is unfortunate and another reason why the 9-box is often seen as ineffective.

When it comes to the new 9-box, avoid getting stuck on the number of boxes. Organizations' tendency to dogmatically attempt to apply all nine boxes instead of using a more simplified model of, say, 4, 6, or 8 is a mistake. Unless you have a very nuanced set of designated potential categories supported by a robust data set, this will not work.

There is nothing magical about the number of boxes in the 9-box model. It can even be as small as a 2x2. What is essential is that the approach you take makes sense for your organization and can be used to make good decisions. The choice of boxes to include depends on how many you need and what your talent data can support. This decision means the number of designated potential categories you use in your talent management system (e.g., high potential, promotable, develop in place, concern) and the validity and completeness of data you'll use for assessed potential. What you select should be based on what gives

you a meaningful way of comparing designated vs. assessed potential for your talent reviews and planning purposes.

Often, companies don't need as many designated potential categories as they have, and these should be streamlined to the smallest usable number. We have seen organizations try to use categories that are far too nuanced to be practical. For an effective 9-box, less is more. Fewer boxes mean less time spent arguing over the placement of people in boxes, more confidence in the categorization of talent because your categories are fewer and more straightforward, and more time spent discussing development and actions. This approach puts the time and effort where it should be and yields better results.

### 5. Use Data to Diagnose the Gaps – Between Designated Potential and Assessed Potential.

Finally, despite what many would like to believe, there is no one “truth” regarding potential. Consequently, the 9-box should be about something other than debating potential or finding the correct answer. It should be about understanding the consistency between what the organization thinks of its talent (designated potential) and what the data indicates against a validated predictive model (assessed potential). In this context, the focus turns to each of the boxes in your grid in a diagnostic discussion, not a labeling exercise.

The figure below presents sample data using a 2x3 matrix (6-box). On the left is a simple approach to designated potential (high-potential and key contributor), and on the right is assessed potential broken up into thirds. Note that no labels are used for any box. Assigning labels is not the point. The point is to focus on why different individuals are in each box and what actions should be taken.

# The New “9-Box” – Designated by Assessed Potential

Assessed Potential: What assessment data from a HiPo predictive approach would suggest

Designated Potential Pre-Assessment	Assessed Potential: <33%	Assessed Potential: 33%-66%	Assessed Potential: 67%+
High-Potential	3	14	8
Key Contributor	5	7	3

Designated Potential: What Managers, Senior Leaders and HRBPs have decided based on judgement, observations etc. pre-assessment

Let’s take an example (see example). The eight leaders in the upper right are those whom the organization feels strongly about their future capability, and they did exceptionally well on the data. These people are the ones to continue developing for succession. Similarly, those 5 in the lower left are key contributors with lower assessed potential. They are doing just fine in their current role. Just be sure they are paid well, recognized for their contributions, and are fully engaged.

The individuals in the upper left and bottom right are significant. The organization “loves” the three on the upper left, but the data shows they may have critical outages. The question is, why? Going deep into

the assessment results for each of these individuals will help diagnose where the outages are occurring. They might be coming from poor 360 feedback results, key personality derailers, a lack of strategic thinking capability, or poor performance on a simulation designed to test decision-making in novel situations. All of these have different implications for developmental support.

Similarly, on the far right are 3 individuals who are seen as having no or limited designated potential and yet scored in the top 1/3 of the assessment results, indicating a significant disconnect. The first question is, are there any inherent biases (e.g., diversity, gender) impacting the judgment of their

potential? Going deep into their results and reviewing their strengths can be helpful in challenging misperceptions. Ultimately, organizational culture fit, prior experiences, or other intangibles (e.g., the right set of skills) might be legitimate reasons for their designated potential category. However, if there are biases there, they need to be addressed. We believe that managers own their designated talent calls (not HR or TM) and should be held accountable for the outcomes after making decisions.

In closing, the 9-box is not about identifying potential; it is a tool for making good talent decisions. If it is to be effective, it must meet two criteria: (1) it enables leaders to classify talent based on designated vs. assessed potential, and (2) it generates a meaningful discussion about the right set of developmental and organizational actions for the talent under discussion. If the 9-box does not meet both objectives, what was designed as a relatively simple framework for discussing talent becomes a source of conflict and consternation.

## Suggested Readings

Unleashing The Power of Assessments for Leaders and their Organizations – IHRIMedia (ihrimedia.com)

Selecting Leadership Talent for the 21st-Century Workplace (shrm.org)

How are top companies assessing their high-potentials and senior executives? A talent management benchmark study. (apa.org)

How are top companies designing and managing their high-potential programs? A follow-up talent management benchmark study. (apa.org)

Take the Pepsi challenge: talent development at PepsiCo - EconBiz

How To Identify and Assess Leadership Potential on Your Team (trainingindustry.com)

Why Talent Management and Succession Bench Building Aren’t Working Today: At Least Not as Well as They Could! – International Association for Human Resources Information Management (ihrim.org)

## About the Authors



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## How are You Doing at AI for HR? A Ten-Item Assessment to Evaluate Your Progress.

*By Dave Ulrich, Ph.D. and Participants at The RBL Institute Think Tank on AI for HR*

In nearly every business conference, podcast, or webinar, AI is lauded as the “next” innovation or invention—for all **functions and geographies**. The same applies to HR, which constantly publishes and promotes how AI will change HR. We (and many others) have shared many innovations and **experiments**.

Mastering AI for HR requires a deep dive (not a keynote or high-level call to action) into AI and its implications for HR. To address both these overall AI and AI for HR issues, we held a two-day think tank with 55 senior HR leaders from 28 organizations.

**Professor Nigel Melville**, a nationally recognized expert on AI value and risk, brilliantly taught us to master the deep dive into AI. He talked about the principles of AI in general (not specifically related to HR):

- What is AI, and how does it work? Answer: AI represents a general-purpose technology that can better manage information by understanding, summarizing, analyzing, synthesizing, and

generating texts, videos, sounds, and images. AI “emulates” human capabilities of cognition and communication, resulting in “a new kind of *digital species*” (quote by **Mustafa Suleyman, CEO Microsoft AI**).

- Why adopt it, and who is using it? Answer: Modern AI is getting better faster than any legacy AI by equaling human performance across a widening spectrum of tasks. And “every job is going to be changed by AI, some more than others” (**Dan Shapiro, COO LinkedIn**).

Opportunities include:

- Intern - (ChatGPT, Gemini) to process data and perform basic tasks
- Platform copilot (Salesforce, Einstein) - to boost productivity within a single app
- Domain guru that knows specific information about a corporate function
- Functional expert to perform specific tasks in particular ways (such as a math tutor) and
- Corporate guru for building unique AI applications for your company and for customer facing services.



RBL Institute Think Tank on AI for HR Participants

Risks span poor or inappropriate response bias and reliability, requiring appropriate governance to align AI with the organization.

Drawing on this deep dive into AI and our [RBL insights](#) (ideas, research, solutions) on [sustainable change](#) and the [next agenda for HR value creation](#), 55 senior HR leaders from 28 leading companies worked to identify areas where an organization can apply AI insights to HR. Using a nominal group technique, we engaged these 55 leaders to identify ten key actions to make AI for HR happen. In a world where AI for HR has become de rigueur, these ten dimensions can help any HR leaders assess how they are doing at applying AI for HR to their organization.

### 1. Articulate a Business Case

AI is not about technology per se but about using technology to help a business be more effective. The business case often starts with how investments in AI will help the business be more efficient, productive, and cost-effective by more easily accessing information. When presenting AI for HR, the business rationale for doing so needs to be explicit. What is the return on investment for AI work?

### 2. Add Value to All Stakeholders

We have expanded on the business case from “return on investment” to this logic that AI for HR should help [each stakeholder](#) (who are “human” or “people”) receive the value that matters to them from the information AI for HR provides. A stakeholder value logic ensures that each stakeholder understands and can use AI for HR in ways that help them. For example, when employees recognize how AI will help them do their jobs better, they will be more favorable towards it.



Figure 1. Stakeholder Value from AI for HR

### 3. Assign Accountability (Individual and/or Team)

Like any innovative initiative, AI for HR requires accountability. Senior business and HR executives may sponsor the work when they see the business and stakeholder value, but specific accountability helps move the work forward. This accountability may be to an HR professional with technical and analytics skills, but it is more often team accountability with individuals from HR, IT, operations, finance, and marketing. This individual or team champions AI for HR by defining goals, overseeing investments, managing processes, and reporting progress.

### 4. Develop Talent Who Can Do AI

AI for HR requires that HR professionals have access to skills to get the work done. This may come from collaborating with IT experts, continuous education of the HR staff involved in AI for HR, and/or partnering with external experts. To remove employee fear, employees must realize that AI will not take their job—those who know how to use it will. So, all employees will benefit from being taught how to use AI to improve their work experience.

### 5. Create Responsible/Harmless Policies

We acknowledge the well-stated [risks of AI](#): data from open-source users may be wrong or damaging, proprietary data may be shared,

machines working with other machines may be challenging to regulate, economic inequality, dependence on AI that replaces human creativity, and deep fakes. [Responsible AI](#) policies ensure that information sourced through AI is as accurate as possible and used to improve decision-making. As policymakers, HR professionals should craft AI for HR policies that “do no harm.”

### 6. Use Simple Language

AI democratizes information through broad technologies, including natural language processing, speech recognition, machine learning, and genAI. Creating a simple but common language to decode this ever-changing and evolving technology becomes critical. Glossaries for many terms are available, and each organization may have its own unique definition of key concepts (see Figure 2 for key terms and generic definitions).

Figure 2. Generic Definitions of Key AI Concepts

**Artificial intelligence (AI)** is the simulation of human intelligence processes by machines or computer systems. AI can mimic human capabilities such as communication, learning, and decision-making.

**Big data** refers to large data sets that can be studied to reveal



patterns and trends to support business decisions.

**Generative AI (genAI)** uses AI to find patterns using large amounts of data to create content, including text, video, code, and images.

**Large language model (LLM)** is an AI model that has been trained on large amounts of text so that it can understand language and generate human-like text.

**Machine learning** focuses on developing algorithms and models that help machines learn from data and predict trends and behavior—without human assistance.

**Natural language processing (NLP)** is an AI that enables computers to understand spoken and written human language. NLP enables features like text and speech recognition on devices.

## 7. Upgrade Business Processes Through AI

Every business has multiple processes, such as customer support, product development, sales, account management, budgeting, etc. As these processes become automated with

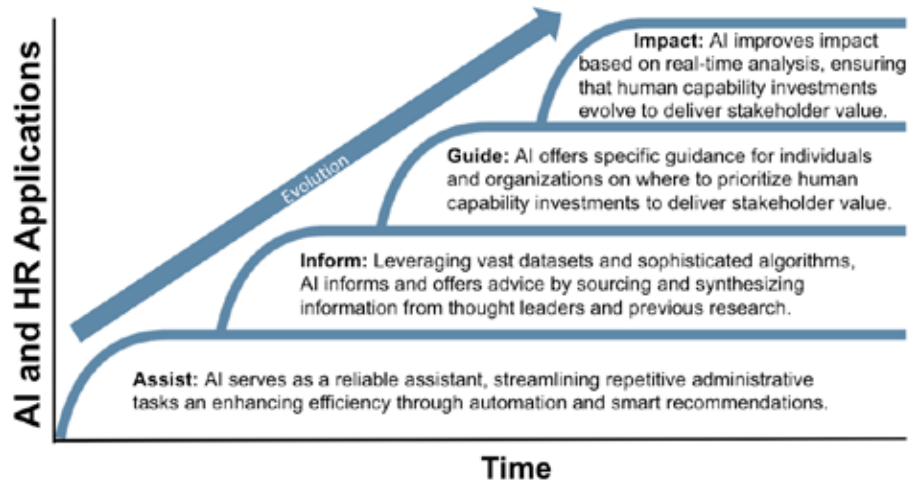


Figure 4. Stages to Make Progress

statistical modeling, AI (using machine learning and genAI) can upgrade them by providing more information that improves each process.

## 8. Create Metrics to Guide and Measure Success

Metrics track progress and ensure improvements. AI for HR requires metrics that track not only what is done (activities) but also the impact of those genAI activities on business results (see criteria 1) and stakeholders (see criteria 2). Since HR has a unique stewardship for employees, metrics should also track how employees use and respond to AI.

## 9. Start with Low-Hanging Fruit

Getting started in AI for HR often begins with initiatives that can be done quickly and easily. We (and others) have discussed an S-curve or evolution of AI for HR. Those in our think tank and others suggest that AI for HR is 20 to 30 percent up the S-curve with a stronger focus on what we call “assist,” which is about streamlining, efficiency, and productivity gains, with an increasing amount of work on “inform” that focuses on sharing information (see figures 3 and 4). As AI for HR advances, we envision more “guidance” for identifying specific priorities. Eventually, we want to move to “stakeholder value,” where the impact of AI for HR creates value for all stakeholders.

## 10. Embrace the Human/Technology Interface

AI for HR complements human capacity. AI accesses, informs, and guides information that improves human decision-making capacity. Human creativity defines the AI algorithms, interprets the generated data, and anticipates how the information will be used. People and technology interface turn artificial intelligence into informed intelligence or wisdom.

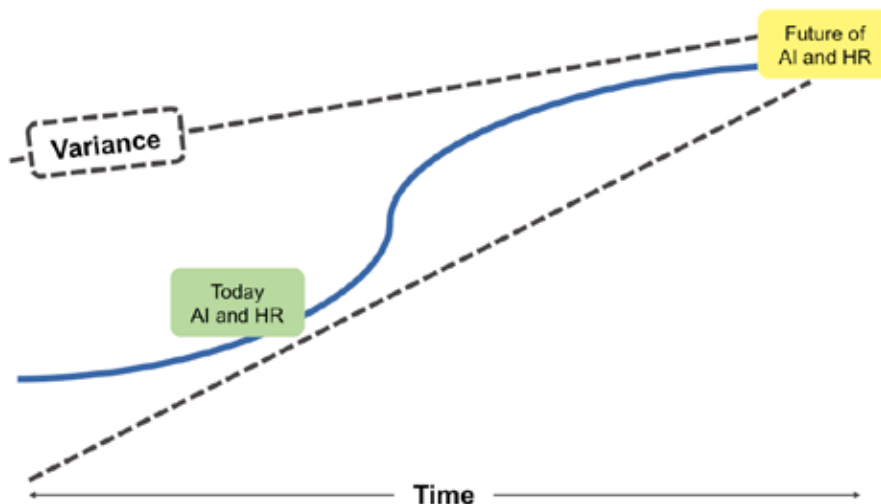


Figure 3. AI and HR S-Curve

## Conclusion and Implication

These ten dimensions (see Figure 5) can become criteria for assessing your organization's progress in using AI for HR. Number 11 in the figure includes what any specific organization might add for its individual setting. There was a meaningful range and distribution when the 28 companies tested themselves using these ten criteria.

We hope this assessment can advance AI for HR and offer specific insights on what can be improved.

How do you score? What are your high and low dimensions?

How well does my organization apply these ten actions to AI for HR?	Assess 1 Low—10 High
1. Articulate a business case	
2. Add value to all stakeholders	
3. Assign accountability (individual and/or team)	
4. Develop talent who can do AI	
5. Create responsible/harmless policies	
6. Use simple language	
7. Upgrade business processes through AI	
8. Create metrics to guide and measure success	
9. Start with low-hanging fruit	
10. Embrace the human/technology interface	
11. Add for your organization	
<b>Total</b>	

Figure 5. Criteria to Evaluate How Well Your Organization is Using AI for HR.

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Dave Ulrich is the Rensis Likert Professor at the Ross School of Business, University of Michigan, and a Partner at the RBL Group. He has written over 30 books and hundreds of articles, consulted with half of the Fortune 200, and spoken in over 90 countries on topics related to human capability (talent + leadership + organization + HR). He has received various recognitions and awards for his insights (theory, research, and practice). He can be reached at [dou@umich.edu](mailto:dou@umich.edu).



IHRIM attracted me because its for HR information management and technology professionals. I'm fortunate to belong to a company that supports the growth and development of its employees.



Yazmin O., HRIP





feature

## The Four Personas Shaping AI Adoption in HR: Current Realities and Future Priorities

By Marna van der Merwe, Ph.D. and Dieter Veldsman, Ph.D.

Generative AI (GenAI) transforms industries and functions by boosting productivity quality and improving efficiency. Despite widespread enthusiasm, HR professionals are still cautious of these technologies' value and application.<sup>1</sup> Our eighteen-month research, surveying over 1,500 HR professionals, reveals four distinct HR personas, each facing unique opportunities and challenges in adopting and leveraging AI. This article explores the present state of AI adoption and the barriers faced within HR. It outlines the four adoption personas and presents critical priorities for HR leaders to effectively leverage AI for future success.

### Introduction

Generative AI (GenAI) is revolutionizing industries by significantly enhancing productivity, quality, and efficiency. Tools like ChatGPT, Microsoft Co-pilot, and DALL-E have surged in popularity, surpassing even mobile phones and earlier digital innovations in their adoption rates.<sup>2</sup>

Despite the enthusiasm, HR professionals are cautious and skeptical about these technologies' value and application. Our research surveyed over 1,500 HR professionals over eighteen months and identified four distinct HR personas, each with unique opportunities and challenges in harnessing AI's potential.

In this article, we delve into the current reality of AI adoption in HR, the four personas shaping AI adoption, and the critical priorities for HR leaders to effectively leverage AI for future success.

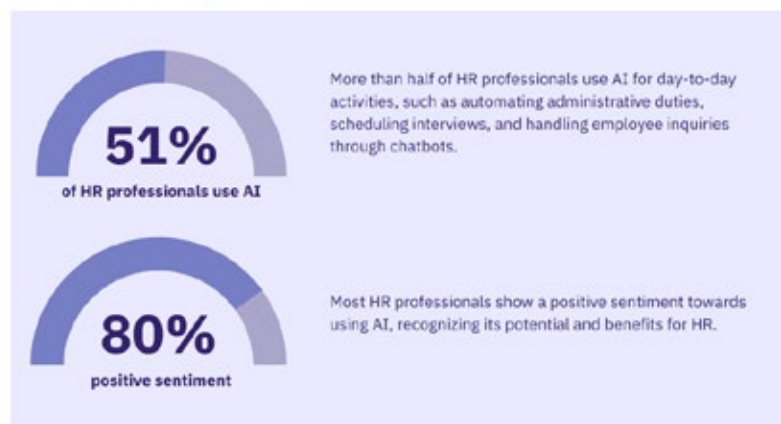
### The Current Reality of AI Adoption in HR

Based on our research, over half (51%) of HR professionals rely on AI tools daily. This growing dependence on AI for tasks like

automating administrative duties, scheduling interviews, and managing employee inquiries through chatbots has streamlined operations, saving time and boosting efficiency.<sup>3</sup> The overall sentiment towards AI in HR is also optimistic, with 80% of HR

### The current reality of AI adoption in HR

Over half of HR professionals use AI in their day-to-day activities and their overall sentiment is positive

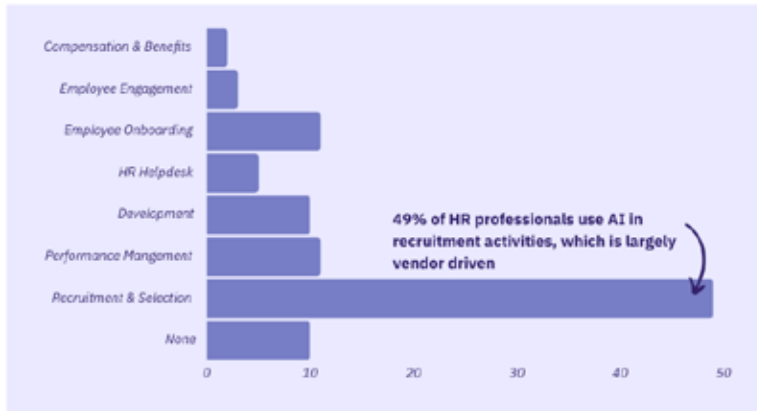


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## Limited integration into broader HR practices

Whilst AI has been extensively adopted in recruitment and selection processes, there are still limited use cases beyond this application



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## Challenges to showcasing the ROI of AI in HR

Showing the return on investment for using AI within HR, beyond operational metrics, remains a challenge



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professionals recognizing its potential benefits in streamlining operations, enhancing decision-making, and improving employee experiences.

Yet, while these practical applications are valuable, there's significant room for improvement in integrating AI into more complex HR processes.<sup>4</sup> Despite the rise of AI in HR, its use cases often need more clarity and substantial impact. Recruitment and talent acquisition has seen the most notable AI adoption, with 49% of HR professionals leveraging AI in these practices. However, this trend is primarily vendor-driven, with most HR departments using AI reactively rather than embedding it into strategic functions like talent management, performance evaluation, and employee development.<sup>5</sup>

HR professionals also indicate that the HR function still struggles to effectively measure AI's impact and return on investment (ROI). Around 60% of HR professionals have yet to active impact measurement approach. While AI tools can enhance efficiency, quantifying their direct benefits is challenging. With robust metrics and analytical frameworks, proving AI initiatives' effectiveness is simple, making it easier for HR to build a compelling business case for broader AI adoption.

## Barriers to AI Adoption in HR

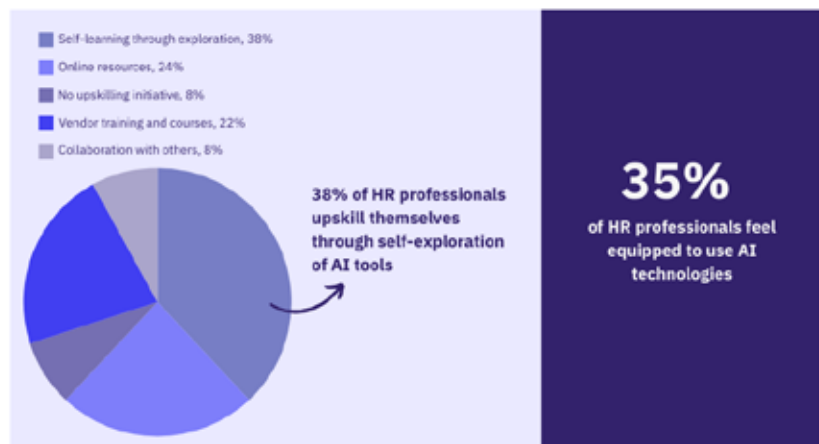
There still needs to be a significant gap in competence and confidence in using AI effectively, with only 36% of HR professionals feeling adequately equipped to use these tools. Many HR professionals need more understanding or expertise in AI technologies, which significantly hinders their ability to make informed decisions.<sup>6</sup> This knowledge gap creates a substantial barrier to adoption, as professionals hesitate to fully implement AI solutions they need to understand.

Without a solid grasp of AI capabilities and limitations, HR departments struggle to envision how these technologies can be seamlessly integrated into their existing processes. This uncertainty is a significant obstacle, leading to a cautious approach that delays the adoption of potentially transformative tools.

Another significant challenge is the adequacy of AI user training. Current training methods, which typically rely on vendor-led sessions or self-directed learning, often fall short of

## Competence and confidence gaps

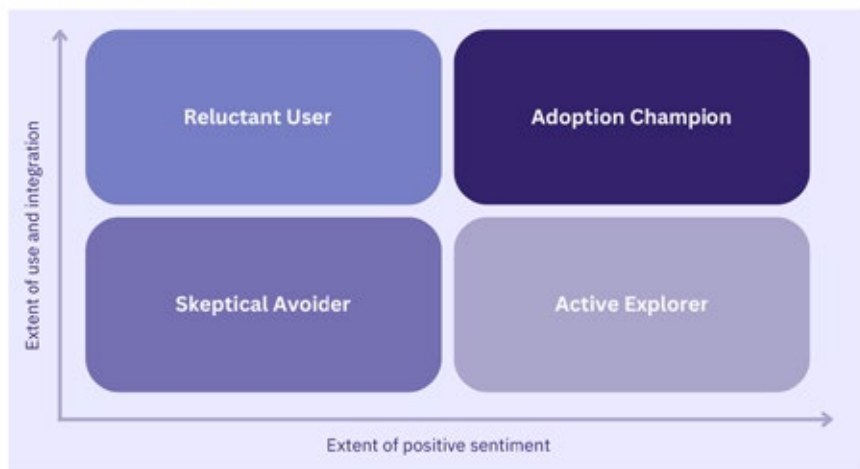
HR professionals don't feel equipped to use AI technologies, which hinders their adoption



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## Four HR adoption personas

There are four distinct personas of AI adopters in HR that have to be managed to accelerate adoption



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addressing HR professionals' diverse needs and contexts. These methods may provide a basic understanding of AI tools. Still, they must equip HR teams with the confidence and competence to use these technologies effectively in their work environments. The lack of comprehensive, context-specific training means many HR professionals feel ill-prepared to leverage AI tools to their full potential.

Data privacy concerns further compound the need for more confidence in using AI. HR professionals are understandably worried about how AI systems handle sensitive employee information. The fear of potential data breaches or misuse of information exacerbates their reluctance to embrace AI technologies. For HR departments, the priority is always to safeguard sensitive data, often overshadowing the potential benefits that AI could bring.<sup>7</sup> This cautious stance is reinforced by high-profile incidents of data breaches in other sectors, making HR professionals wary of introducing new vulnerabilities through AI systems.

### Four Personas Shaping Adoption of AI in HR

Our data reveals that AI adoption in HR is heavily influenced by the use and integration of AI into HR practices and processes and the extent to which AI is viewed positively. These

two factors impact the underlying behaviors of HR professionals, impacting the importance of AI adoption and how AI is integrated into their daily work.

Based on this insight, we classify HR professionals into four distinct adoption personas. These personas highlight the groups' shared behaviors and motivators when adopting AI and enable us to define targeted actions for accelerated adoption in the future.

#### The Skeptical Avider

These users do not actively use AI in their day-to-day activities, AI is not integrated into their HR practices, and they do not perceive

AI as valuable or necessary. This results in little motivation to upskill themselves or prepare for AI adoption and a generally negative or indifferent attitude towards AI in HR.

#### The Reluctant User

Reluctant users are often in environments where AI is actively used or integrated. Their day-to-day HR processes involve AI but need more participation in using it. Their reluctance to use AI stems from various factors, like a need for understanding, budgetary constraints, or integration issues. As a result, their learning approach is mostly self-exploration or relying on tech teams.

#### The Active Explorer

These users use AI in limited capacities, primarily for content creation, research, and task automation. Although they recognize the potential benefits, their opportunities to experiment with these technologies are constrained, typically not extending beyond individual productivity enhancements. They operate in environments with limited investment in AI, resulting in minimal structured adoption. Consequently, these users rely heavily on self-learning through exploration and online resources.

#### The Adoption Champion

These users extensively use AI across various HR practices and for

<h4>Skeptical Avider</h4>  <h5>Challenges to overcome</h5> <ul style="list-style-type: none"> <li>As widespread utilization of AI becomes the norm, these individuals risk being left behind</li> <li>AI investments within HR will not unlock potential benefits or adoption</li> </ul>	 <h5>Opportunities to accelerate</h5> <ul style="list-style-type: none"> <li>Showcase the value of AI in practical use cases and application</li> <li>Ensure intentionally gaining exposure to AI technologies.</li> <li>Adopt AI in day-to-day tasks that are low-risk</li> </ul>
<h4>Reluctant User</h4>  <h5>Challenges to overcome</h5> <ul style="list-style-type: none"> <li>Inconsistent and unstructured methods of GenAI adoption and exposure result in incorrect applications and a lack of necessary skills to adopt sustainably</li> </ul>	 <h5>Opportunities to accelerate</h5> <ul style="list-style-type: none"> <li>Raise awareness of the benefits of using AI and follow a structured change management approach to overcome resistance</li> <li>Start with low-risk, high-impact AI applications to build trust</li> </ul>

## Active Explorer



### Challenges to overcome

- These users are hindered by their lack of structured upskilling and application opportunities, which leads to distrust in the full benefits of AI



### Opportunities to accelerate

- Provide opportunities for hands-on and practical use of AI technologies and showcase efficiency gains from this
- Address any concerns that create hesitance to use AI

## Adoption Champion



### Challenges to overcome

- As AI technology evolves quickly, these users must continuously update their knowledge and skills to stay current and fully leverage new features and capabilities



### Opportunities to accelerate

- Leverage their enthusiasm to drive broader organizational adoption and innovation
- Highlight success stories and benefits achieved
- Use their input into the early adoption of new technologies

individual productivity, reporting tangible benefits such as increased efficiency, time savings, and improved decision-making. Operating in environments with significant investment in AI, these users view the technology as a strategic driver and are keen on experimentation. They actively engage in formal training through courses, vendor programs, and collaboration with tech teams, fostering a positive sentiment towards AI and enabling a focus on strategic tasks.

## Strategies to Accelerate AI Adoption Across the Four Personas

HR must take deliberate and strategic steps to harness AI's advantages, considering the challenges and opportunities across all four personas.

We have outlined four essential actions HR leaders should consider integrating AI into their processes and maximize its potential successfully.

### 1. Clearly define AI use cases.

Identify HR processes where AI adds the most value, such as recruitment, employee engagement, and learning and development. Identify low-risk use cases that allow HR team members to experiment and build their confidence in a safe environment.

### 2. Establish AI guardrails

Implement guidelines to mitigate AI adoption risks, ensuring data privacy and security.<sup>8</sup> Develop ethical standards for AI usage, focusing on transparency and fairness. Regularly review and update these guidelines to address emerging challenges and maintain AI system integrity, building trust in the technology.

### 3. Embrace experimentation and continuous improvement

Foster a culture of experimentation and continuous improvement by initiating pilot projects to test AI tools on a small scale. Gather feedback, analyze performance data, and refine AI strategies based on insights. Encourage agility and adaptability to ensure AI solutions remain effective and aligned with organizational goals.

### 4. Upskill and integrate

Evaluate knowledge and skill gaps within the HR team and provide upskilling opportunities on AI concepts and tools.<sup>9</sup> Promote curiosity and openness to learning, encouraging exploration of new technologies without fear of failure.

## Final Words

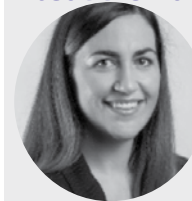
AI and Gen AI hold immense promise for the future of HR, offering innovative solutions and transformative potential to

revolutionize HR. However, to realize this future, it is crucial to address the existing obstacles and ensure that HR professionals can fully embrace and integrate AI into their practices in the future.

## Endnotes

- <sup>1</sup> <https://bit.ly/3WW0BX9>
- <sup>2</sup> <https://bit.ly/3WW7t6W>
- <sup>3</sup> <https://bit.ly/3LWSTpl>
- <sup>4</sup> <https://bit.ly/3LVQ0VM>
- <sup>5</sup> <https://bit.ly/3WAZued>
- <sup>6</sup> <https://bit.ly/3WmbuN>
- <sup>7</sup> <https://bit.ly/3ywEDRa>
- <sup>8</sup> <https://bit.ly/3YE26L4>
- <sup>9</sup> <https://bit.ly/4dae978>

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## Driving Strategic Workforce Planning with Data and Technology: The Role of the HR Information Professional

By Beverly Tarulli, Ph.D. and Marc Sokol, Ph.D.

Strategic workforce planning is the process of looking forward, assessing how to compete and win in your chosen market or business arena, and linking those insights to your existing and potential future workforce. It is core to any organization that aspires to sustain itself over time. SWP is not a solitary endeavor but a team sport involving experts in the strategic workforce planning process, people analytics, HR business partners, and business leaders. It is a highly analytical and consultative process, requiring a focus on current operations as well as long-term organization and talent development. A key player that is often not actively engaged is the Human Resource Information Professional (HRIP). Our proposition is that HRIPs can play a critical strategic role in the SWP process.

Workforce planning has become more than an annual spreadsheet exercise that anticipates how to ensure ongoing staffing meets budget projections. As companies

strive to gain competitive advantage, they look to assess what skills will be most critical for future success, what jobs can be broken into core skills with some skills outsourced and others automated, and what changes in the external world are reshaping the path forward. This comes down to more than opinion or reliance on anecdotes – it requires data leveraged through a planful, structured, capable assessment of the current state against potential business scenarios.

### Data as Fuel: Who Decides?

A foundational element of SWP is data. Analyzing people data gained prominence in 2010 with the Harvard Business Review publication “Competing on Talent Analytics” (Davenport, Harris, and Shapiro, 2010). Since then, the field has grown so that most large organizations have some form of people analytics function. SWP is sometimes practiced by people analytics teams, given their expertise in analysis, but in other cases, these

are two separate teams that work very closely together.

In either case, they can both be considered “downstream” functions – they currently do not drive the decisions on what data the organization collects but instead rely on others to make those decisions. Historically, data were collected as a function of transactional HR activities such as recruiting, hiring, developing, promoting, compensating, and terminating employees without regard to the needs of people analytics and SWP teams. At best, organizations used this information to track HR processes via metrics such as hire rates and training completions. As people analytics and SWP have matured, the need for all sorts of data to answer strategic business and talent questions has increased.

SWP professionals need data from sources beyond what exists within traditional HR systems. Examples of these new data types include financials, external labor market data, educational attainment

data, information on non-full-time employees (e.g., contractors, gig, or other contingent labor), and unstructured data such as sentiment from surveys or written feedback from performance reviews. Skills is an area that has been increasingly of interest to SWP practitioners and HR professionals.

Who is “in charge” of ensuring these data are available to the SWP team? When technology decisions are made in different areas of HR, such as talent acquisition or talent development, not much thought is given to the types of data that will be generated that might be useful beyond that specific function. In many organizations, these decisions are made without HRIP involvement, or if HRIPs are involved, they may not consider how data generated by these tools could be utilized downstream by SWP teams. Lack of ready access to these data makes it difficult for SWP practitioners to answer the business questions executives ask.

### Strategic Workforce Planning Technology

While strategic workforce planning is often cited as a top priority among CHROs and other business leaders, SWP teams are frequently hampered by a lack of good technology tools. As Gartner (Kundulli, Poitevin, Stewart, & McRae, 2024) points out, the SWP technology market is immature and evolving, with no one technology solution

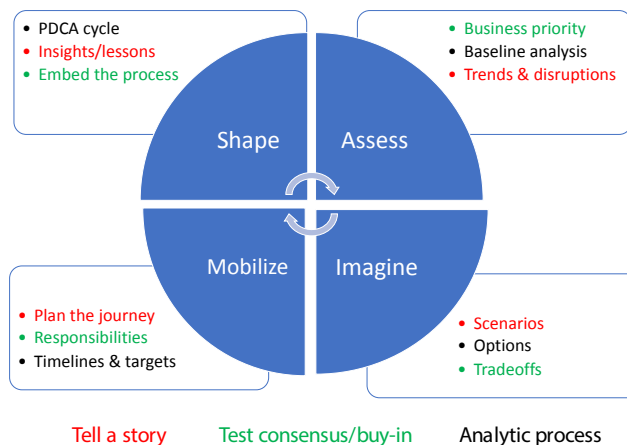


Figure 2. A four-step approach to consulting

that can manage it end-to-end. Gartner recommends that SWP practitioners use a combination of technology solutions that address the most critical business needs while considering the maturity of the SWP function, availability of technical expertise, and technologies already in use by other functions within the organization.

Unfortunately, most SWP practitioners are not technology experts and may only become familiar with solutions via other practitioners in the field, vendors, or consultants. They need experts in HR technology to advise them.

Where can HRIPs provide significant value in data and technology decisions for SWP? We need to start with an understanding of the SWP process. The framework commonly used to describe SWP resembles the model in Figure 1.

Fundamentally, this mechanistic process is a gap analysis between what jobs/skills the organization

currently has compared to what jobs/skills it needs based on the organizational capabilities required by the business strategy. The output is an agile plan of actions the organization needs to take to have the capabilities to achieve its business goals. However, simply applying this framework does not result in a successful plan since, at its heart, SWP is a business consulting activity. Framing the business questions properly and guiding the right discussions, equipped with the right data, can be the difference between success and wasting everyone’s time.

Success depends on approaching SWP from a consulting perspective. We recommend a four-step consulting model, shown in Figure 2, that combines analytic expertise, storytelling, and consensus testing at every stage as the SWP team helps clients assess, imagine, mobilize, and shape the path forward.

Combined, these two models can be used to successfully execute a SWP project, as seen in Figure 3 (Tarulli and Sokol, 2024). The first steps of the SWP framework map to the “assess” and “imagine” steps of the consulting model, while development, execution and follow-up of the strategic workforce plan fall within the “mobilize” and

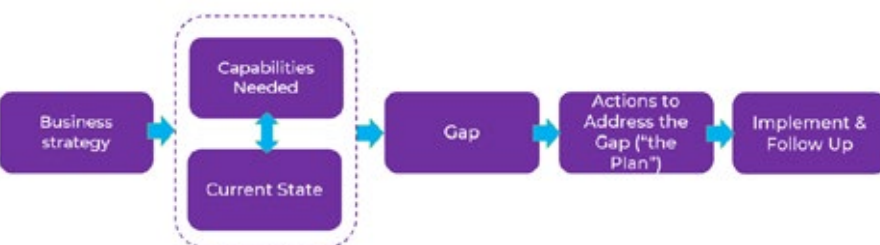


Figure 1. A Common Framework for SWP

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# Coaching Helps City Agency Keep Pace with Change

## How Leadership Investment Facilitated Agency Growth

Ontario's IT agency, which has about 50 employees, plays a vital role in supporting the city, one of the fastest growing in California. Agency employees manage everything from the 911 emergency system to the employee payroll system and even the library reservation system. They also are responsible for maintaining and updating technology and training city employees on various software systems.

Following the pandemic, the agency faced several major challenges. Many city employees were now working remotely, requiring implementing and training on new collaboration tools. The demand for city services increased exponentially. And some of the agency's most experienced employees took early retirement packages.

**“Sapient helped us identify key metrics we should continually monitor, benchmark our organization with those in similar cities, and then use data to support our request for more resources,”**

As a result, the agency had to reevaluate many of its processes and priorities, team members had to find new ways to work together remotely, and managers had to learn new ways to manage.

Colin Fernandes, the agency's executive director, recognized that his managers needed help – not only to tackle the challenges of the moment but also to transition to a new agency structure designed to keep pace with a growing city.

He and Toni McNaughton, the agency's assistant director, decided to work with Sapient Insights Group to level up the agency's leadership skills. The Sapient team had previously worked with the agency to successfully increase overall adoption of ServiceNow.

“The Sapient team showed us how to work more effectively with other agencies to help city employees learn the new system and recognize its benefits. They also demonstrated ways to lead by influence when you don't have authority, which is really important for an organization like ours,” said Colin.

# Coaching Creates a “Safe Place” for Managers

Knowing the agency’s culture and challenges, Susan Richards, a Sapiient managing partner, recommended 1:1 coaching for six of the agency’s managers and principal analysts, several of whom were new to their roles. She also planned a leadership retreat, to be conducted in later months, to solidify team cohesion and reinforce key leadership skills.

“Our program was designed to support the agency’s leaders with coaching and advice to help them more effectively manage their teams while keeping team members engaged and productive,” said Susan. “We also wanted to identify skill gaps that could be addressed through additional education and practice.”

Susan recognized the agency had significant strengths on which to build: A strong commitment to the city and the agency; years of collective IT experience; an excellent reputation throughout the city’s government; and a track record of promoting from within.

In addition to the regular coaching sessions, the Sapiient team met quarterly with the leadership team to review progress, check in on agency priorities, and brainstorm ways to address common issues.

“Each individual set the topics they want to explore during coaching sessions,” said Susan. “We’d talk about ways to address specific work-related issues such as a conflict between two teams, ways to resolve performance issues, or how to hone their own management skills. This was done with complete confidentiality.”

The coaching was welcomed. “We often promote from within, so sometimes a team member becomes a manager overnight,” Colin said. “They know IT, but they might not know how to manage people, give constructive feedback, or conduct performance reviews. Coaching provides a ‘safe space’ for managers and supervisors grappling with these new responsibilities.”

**“I realized we didn’t have clear criteria for promotions, and when promotions did happen, we didn’t have a formal structure in place to help individuals prepare for their new responsibilities.”**

## Fostering Continual Growth

Colin firmly believes leadership development is not “one and done.” Several managers are still receiving coaching, which has been incorporated into the agency’s training budget.

To help the agency’s leadership team stay on track, the Sapiient team checks in quarterly. “We leverage time already on the calendar to see how things are going, celebrate their progress, and surface new challenges they’re experiencing,” said Susan.

In addition to strengthening the agency’s leadership team, Colin credits Sapiient with helping him justify staffing increases. “The city manager values data and metrics. Sapiient helped us identify key metrics for benchmarking our agency with those in similar cities, and then use data to support our request for more resources.” As a result, the agency added ten staff positions. Colin anticipates adding more as the city’s needs expand.

Get a complimentary copy of the detailed case study here!



Sapiient Insights Group works with organizations across all industry sectors in areas such as HR strategy and transformation, change management, and leadership and culture. The company’s annual HR Systems Survey is the HR profession’s most trusted source for objective data on the HR technology market, vendor satisfaction, and purchasing trends. Visit [sapiientinsights.com](https://www.sapiientinsights.com) to learn more.



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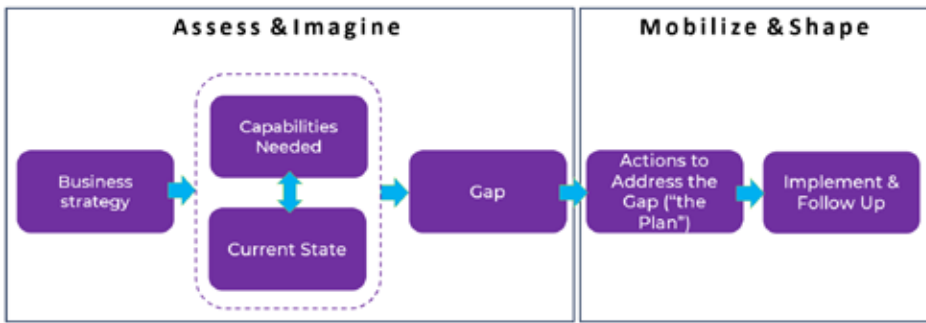


Figure 3. Technical and consulting model for SWP

“shape” steps.

A narrow view of the HRIP’s role in SWP might be as the provider of workforce data to inform the current state assessment – how many employees are in a specific job title, their skills, the average tenure of those employees, performance ratings, employee location, etc. But we argue that HRIPs looking at this model should consider how they contribute well beyond the initial phase, and beyond just data provisioning. Those who take the time to discover what types of information and trends enable business leaders, HR business partners and SWP teams can expect to be invited to fully participate in the entire SWP process and be invited back to the table repeatedly. Those who can integrate internal with external data to help generate future scenarios may be asked how future scenarios hold up against rigorous testing and variation of the trends identified.

### The Opportunity for HRIPs

A 2023 PWC survey indicated that CHROs seek ways to provide greater value to organizations at lower costs. Part of this equation means more surgical hiring focused on the most critical roles, reducing headcount in less strategic roles, developing emerging skills in current employees, determining the appropriate use of AI and other technologies to do tasks better than

humans, and utilizing contingent workers when there are not long-term needs for specific skills or tasks. Determining which of these things makes sense strategically for the organization is the core of strategic workforce planning. CHROs will increasingly look to their cross-functional SWP teams to help them make these decisions.

HRIPs can be invaluable strategic partners in these efforts by stepping into the SWP technology and data void described earlier. However, this means expanding the definition of the HRIP role. IHRIM defines the key competencies and knowledge domains for HRIPs through their Human Resource Information Professional (HRIP) certification blueprint. The competencies defined are foundational to being a strong HRIP, but to provide value to strategic workforce planning, HRIPs will need to take a more strategic view of data and its use within HR. This means:

- Think through what data will be collected with every technology decision and consult with the strategic workforce planning team on how the data can be useful to them.
- Considering (often with one’s IT counterparts) how data can best be stored, transformed, combined, and readily accessed, given that they come from various sources within the organization and, increasingly,

outside sources such as government databases and labor market data vendors. Traditionally, these data management systems were either data warehouses for structured data or data lakes for unstructured data. More recently, data fabric and data mesh frameworks have been introduced to provide an environment that allows access to various data sources.

- Leading the charge for standardizing how human capital metrics, such as turnover rates, are calculated, stored, updated, and accessed across the enterprise. In many large organizations, human capital metrics are defined and calculated differently in various parts of the organization, making data aggregation and interpretation difficult.
- Staying at the forefront of new technologies and systems and proactively making recommendations to the strategic workforce planning team. To do this, HRIPs need to understand strategic workforce planning fully. This can be accomplished in various ways, but one recommended approach is to be an active team member on a strategic workforce planning project.
- Be open to serving as the fourth leg of the SWP stool, partnering with the business leader, the HR business partner, and the SWP experts. This role will elevate the HRIP’s profile to that of a truly strategic partner in the organization.

### Where To Go From Here

To the HRIP reading this, we invite you to consider where you have already been implicitly

applying the model, skills, and mindset described above. Rather than having a provider mindset when it comes to SWP, simply providing the data asked for, get involved with the strategic work of HR. Your knowledge and perspective can provide greater value at the front end of the HR data and technology value chain. Consider how the generated

data can be used strategically downstream when involved in technology decisions across HR. Be the “go to” expert to the SWP team (and other HR specialist teams) about technology trends that impact them. Be proactive in making suggestions to improve data quality (always a pain point for people analytics and SWP teams) or process improvements. Ask to be

involved in the entire SWP process to become seen as an indispensable partner. Finally, look at SWP from an oversight perspective—as you look across the variety of SWP needs in your company, consider how you might structure data capture, storage, analysis, and visualization processes to better contribute to strategic planning in your company.

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## About the Authors



Beverly Tarulli is a Clinical Assistant Professor at New York University. She leads the Human Capital Analytics and Technology master’s degree program within the School of Professional Studies, where she teaches Strategic Workforce Planning, Managing People Analytics Teams, Human Capital Analytics, and Capstone courses. She is also the founder of Novius Consulting, LLC, which helps organizational leaders with talent strategy, people analytics, and strategic workforce planning. Her 35-year career has allowed her to develop and apply a broad, strategic perspective on how human resources contributes to organizational outcomes. Her professional interests include talent strategy, talent development, pay equity, employee reskilling, and workforce development. She has published in both academic and professional publications. She and Marc Sokol recently co-edited a book, *Strategic Workforce Planning: Best Practices and Emerging Directions*. Beverly earned a Ph.D. in industrial/organizational psychology from The University of Akron. She can be reached at [bt2155@nyu.edu](mailto:bt2155@nyu.edu).



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## Avoiding the Pitfalls of Hallucinating GPT Models

By Frank P. Ginac

*GPT models have significantly impacted HR technology but can produce ‘hallucinations’—misleading or incorrect information—highlighting the need for HR professionals to understand and mitigate these errors. A scenario involving a model misclassifying an employee’s potential illustrates this challenge. To address such issues, grounding techniques like prompt engineering, integrating external databases, fine-tuning with domain-specific data, Retrieval Augmented Generation (RAG), and Reinforcement Learning from Human Feedback (RLHF) are essential. These methods enhance the model’s accuracy and relevance, improving its application in HR for talent development. As AI technology evolves, its role in HR will become more critical, making it vital for HR professionals to grasp and apply these techniques to navigate the future of talent management effectively.*

Welcome to the next addition to my series, AI Buyers Guide for Human Resources (HR) Professionals. This is article number 3 in the series. My objective for this series is to arm HR professionals responsible for selecting, deploying, and managing AI-based HR Tech solutions in the enterprise with the knowledge they need to perform these tasks confidently. The information shared here is not just of value to HR professionals but also generally applies to any buyer of AI-based software. I hope you find the information helpful, and welcome your feedback and comments.

GPT (Generative Pre-trained Transformer) models have been game changers in the rapidly evolving landscape of HR technology. However, applications that use these models can sometimes suffer from ‘hallucinations’ —

instances where the model generates misleading or incorrect information. Understanding and overcoming this challenge is crucial for HR professionals, especially generalists who are not deeply entrenched in AI technology.

Imagine a scenario in which a GPT-based model is tasked with plotting an employee on the company’s 9-box grid. The HR team carefully crafted a prompt supplying the model, in this case, ChatGPT using the GPT4-Instruct model, with details about the employee, such as their recent performance scores and feedback from managers and peers. Looking at the two possible extremes of the 9-box, employees who fall on the bottom left of the grid (low performance-low potential) are transitioned out of the organization, and those who fall on the upper right (high performance-

high potential) are ready for promotion.

One of the company’s employees, Sarah, a recent college graduate, received an outstanding performance appraisal after her first year on the job. Feedback from Sarah’s manager and several of her peers was overwhelmingly positive. The model classified Sarah as an employee “ready for promotion.”

The HR team at this company is aware of LLMs’ shortcomings and sent the employee’s data and the model’s recommendation to a team tasked with validating the model’s recommendation. In this case, the team concluded that the model had incorrectly classified Sarah’s potential. The model didn’t account for the many factors identified by HR experts required to evaluate employee potential. This type of mistake is referred to as a model



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# Ultimately, our goal is to teach the model something new and to use that new information to generate a result that we both have confidence in and trust.

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“hallucination.”

Conversely, it could also have classified Sarah as an employee with low potential. In both cases, the model doesn't actually “know” in the human sense of the word which one is correct. It doesn't understand employee potential as an HR expert understands it. It doesn't know anything about the factors used to evaluate employee potential, yet the model identified Sarah as having high potential. How is that possible? It has learned that given a particular sequence of words, i.e., the “prompt,” it will generate the most probable sequence of words that follow the prompt, i.e., the response we see as a statement of Sarah's potential. This is, in essence, what a language model does; it completes a sequence of tokens, words in this case, given a starting sequence, i.e., the prompt.

While the model may have been trained on vast amounts of data from various sources, its knowledge of the world and its ability to perform such tasks depends on the data it was trained on and what the model learned during

the training process, among other factors. Model hallucinations are a significant challenge in AI, as they can lead to misinformation and reduce the reliability of the model's responses or predictions, leading to a lack of trust or, worse, making recommendations that ultimately adversely affect someone's job or career. Addressing these hallucinations is crucial for improving the accuracy and trustworthiness of AI systems.

To reiterate, LLMs don't understand the task they are being asked to perform or the implications of making a mistake. These mistakes, or hallucinations, can be mitigated (not eliminated) by applying grounding techniques. Grounding techniques are like updates or additional training sessions that enhance the model's performance. Ultimately, our goal is to teach the model something new and to use that new information to generate a result that we both have confidence in and trust. There are many grounding techniques. I've presented a handful of the more popular ones below.

- **Prompt Engineering:**

Crafting effective prompts involves creating specific, clear, relevant questions or statements that guide the model to generate useful responses. The quality of these prompts directly impacts the relevance and accuracy of the model's output. In the context of employee development, crafting clear prompts that focus on specific aspects of employee performance or development needs can help the model generate more actionable and relevant insights.

- **External Databases:**

Integrating with external databases allows the model to access additional data sources outside its initial training set.

Access to rich and relevant data enhances the model's ability to provide accurate and context-aware responses, ensuring that the model's output is more aligned with real-world data and current information. For HR applications, linking the model to comprehensive employee databases can provide deeper insights into workforce dynamics, leading to more informed decisions regarding employee development and management.

- **Fine-tuning:** Fine-tuning involves training a pre-existing model with specific, domain-relevant data to tailor its responses to particular needs. This process adapts the model to focus on and prioritize the new, specific data it has been exposed to, improving its performance in specialized tasks. By fine-tuning a GPT model with HR-specific data, such as company protocols and employee performance records, the model can provide more precise and contextually relevant responses for HR-related tasks.
- **Retrieval Augmented Generation (RAG):** RAG is a technique that combines the model's generative capabilities with the retrieval of relevant documents or data from a large corpus. This approach allows the model to generate responses that are not only based on its training data but also enriched with up-to-date and context-specific information from external sources. In employee development, RAG can enable the model to pull in relevant documents, policies, or records while generating recommendations or insights, ensuring that the outputs are well-informed and contextually

accurate.

• **Reinforcement Learning from Human Feedback (RLHF):** RLHF is a technique

where the model is iteratively improved based on feedback provided by human users. This process helps the model understand the nuances and complexities of real-world applications by learning from human evaluations of its performance. It enhances the model's ability to generate more accurate and useful responses. In HR contexts, using RLHF allows the model to refine its

evaluation techniques and recommendations based on continuous feedback from HR professionals, ensuring that its outputs align more with human expectations and needs.

Integrating GPT models into HR technology holds immense potential for transforming talent management and employee development. However, the inherent risk of 'hallucinations'—where models produce inaccurate or misleading information—must be carefully managed. By employing grounding techniques such as prompt engineering,

integrating external databases, fine-tuning with domain-specific data, Retrieval Augmented Generation (RAG), and Reinforcement Learning from Human Feedback (RLHF), HR professionals can significantly enhance the accuracy and reliability of AI applications. As AI technology continues to evolve, HR professionals need to stay informed and adept at utilizing these tools, ensuring they effectively navigate the future landscape of HR and harness the full potential of AI to make informed, strategic decisions.

### About the Author



Frank Ginac is a leading figure in the intersection of artificial intelligence (AI) with talent management. As Co-founder and Chief Technology Officer of TalentGuard, he has been pivotal in advancing AI applications and addressing complex challenges within large enterprises. Frank also serves as the head of TalentGuard Labs, where he drives innovation in AI to enhance employee growth, organizational growth, and operational efficiency. Frank has also made significant contributions to the academic field by providing instructional support for graduate-level courses in AI and related subjects at the Georgia Institute of Technology. His work in education reflects his dedication to nurturing the next generation of tech innovators, ensuring ongoing engagement with the forefront of technological research and development. He holds a Master of Science in Computer Science from Georgia Institute of Technology and a Bachelor of Science in Computer Science with Honors from Fitchburg State University. His

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# HCM Transformation

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## Runway to HCM Transformation: Steps Prior to an HR Systems Implementation, Part 1

By Janna Hartsock, HRIP, and Rob Ginzel, SHRM-SCP

A certain amount of transformation will occur naturally when implementing a newer Human Capital Management (HCM) system. Newer functionality can replace manual and customized system workarounds. Having different employees or leaders review processes, often implemented decades ago, can help update, streamline, and standardize them. The exercise of scrubbing and transforming data for conversion, sometimes from multiple sources, including spreadsheets, can put your organization in a better place for reporting and metrics.

For an HCM systems implementation to truly transform your HCM practices, it's crucial to continuously review and update multiple practice areas a year or two before the implementation. This ongoing process ensures that the system remains effective and relevant to your organization's needs.

The project clock starts ticking the minute a kickoff meeting begins. There are milestones and deadlines to meet with systems, training, design, testing cycles, end-user training, and ultimately, cutover and go live. For example, suppose

you want to revise your performance management process. In that case, you need at least six months to get through exposure to leading practices, design, and socialization of the new process and approval by executives. Implementing a performance management module or system is typically a three-to-four-month process, so there isn't time to think twice about your current practice when that begins.

There is a more strategic, broader perspective to enabling HCM transformation in your organization through implementing a system. HCM systems have robust



### HR Team

Example roles:

- HRBPs & Generalists
- Recruiters
- HR COEs



### IT Team

Example roles:

- IT Managers
- System Admins
- Business Analysts



### Executives

Example roles:

- CHRO
- CIO
- CEO



### All Employees

Example roles:

- Individual Contributors
- Associates



### Managers

Example roles:

- Team Leads
- Dept. Heads
- People Managers



### External

Example roles:

- Job Applicants
- Alumni
- Interns / Contractors



functionality these days, so the question is no longer, “Can the system support this process?” but “What process do you want the system to support?” Do you want to “lift and shift” old processes and practices into a new system? Imagine if your new system’s go-live was the point people looked back to and said, “That enabled us to move into the future of multiple processes and practices for our organization!”.

## Consider Your Stakeholders

Take a step backward to take a view of the groundwork that is often forgotten in the rush to get an HCM implementation started. Taking the time to identify and prioritize your stakeholders can make or break an HCM systems implementation. Think about your HR team, the IT team, executives, employees, managers, and external users such as job applicants. Each group has different expectations of and needs for an HCM system. Understanding and engaging with each stakeholder group early and often will ensure that all parties have ownership over the project and set you on a path to successful adoption of the new system and a maximum ROI.

This article will cover six “success drivers” of an HCM implementation. Some of these are groupings of HR functions; others are callouts of specific areas that may be new to your consideration. All six drivers are critical to the success of your project.

### Success Driver #1: Leadership Alignment and Vision

Is your leadership unified, and does it have a clear vision for a successful change implementation? Is your leadership committed to an HCM transformation vision? Is that vision aligned with the overall organizational strategy? Do you have advocacy for change and

## Data underscores the imperative for organizations to prioritize & cultivate leadership alignment to achieve their HCM objectives:



Organizations with high levels of leadership alignment are 72% more likely to outperform their competitors in terms of profitability and revenue growth

(Gartner, 2020)



Companies with strong organizational alignment are 2.9 times more likely to succeed in their transformation efforts

(Harvard Business Review, 2017)



70% of large-scale transformations fail to achieve their goals, largely due to a lack of employee engagement and inadequate management support

(McKinsey, 2016)

innovation among your leaders? Are your leaders willing to lead by example and by their sponsorship of the implementation? And will they back up their talk of support by ensuring resources are available for the implementation to be successful?

Leadership alignment plays a pivotal role in HCM implementations, fostering coherence, shared vision, and concerted efforts across all levels of the organization. Data underscores organizations’ need to prioritize and cultivate leadership alignment to achieve their HCM objectives. According to a report in LSA Global, organizations with high levels of leadership alignment are 72% more likely to outperform their competitors in terms of profitability and revenue growth (2020). The Harvard Business Review identified in 2017 that companies with strong organizational alignment are 2.9 times more likely to succeed in their transformation efforts. According to McKinsey, 70% of large-scale transformations fail to achieve their goals due to a lack of employee engagement and inadequate management support (2016).

Some signs that your leadership focus and project vision require

better alignment include the following:

- Leaders who do not understand the business case for change or vision for HCM transformation
- A lack of investment in the implementation, often evidenced by a lack of resource allocation
- Leaders who appear disengaged or indifferent to the journey ahead

An example of an implementation where leadership alignment did not happen and negatively impacted the ROI of the new system can be illustrative. During a nine-month implementation of core HR and another nine-month implementation of additional talent management modules, the HR executive would mention the implementation of the system periodically in regular C-suite level meetings. However, the executive did not conduct in-depth discussions of the implementation to engage the other leaders.

The first phase of this project was primarily a back-office optimization effort with minimal impact on stakeholders outside of HR. However, when the second phase implemented several talent management modules—goals, performance, compensation,

# What is an Operating Model?



**Grant Thornton's Operating Model Framework**

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learning and development, and talent acquisition—the head of one division refused to use several of the modules. Just mentioning an ongoing systems implementation in executive-level meetings, it turns out, does not lead to alignment among executives around actual implementation.

A more positive case study is a global food and beverage manufacturer and retailer we worked with to help prepare for AI integration. They were anticipating temporary disruptions to their people, culture, and processes. They realized they needed change management support and leader alignment for senior executives and stakeholders while transitioning to a new technology vendor.

We conducted readiness assessments to identify transformation gaps. Then, we helped the organization build a

coalition of executive champions. We developed a stakeholder engagement and communications plan and created consistent language and branding. Finally, we mapped out the impacts on the organization's global stakeholders.

Ultimately, the organization was able to establish a structured and engaged leadership. They

enhanced their leadership alignment with a people-first approach. This realignment enabled agile adaptation to changing work and technology landscapes, minimized disruption to daily operations, and positioned the organization for continued success in its multi-year transformation efforts.

## Success Driver #2: Operating Model and Design

An optimized organizational structure can maximize the success of your HCM system implementation. Most HCM systems need a hierarchy of organizational structure. When defining that structure is a challenge, it usually indicates that the organization's operating model is not clearly defined or understood.

But what is an operating model? It is a blueprint for aligning business objectives with company strategy. An operating model structures roles and workflows for efficiency, with flexibility to adapt to changing needs and integration across business functions and technology, defining governance, processes, and procedures.

An organization, department, or team's shift in its operating model creates an opportunity to examine and enhance how teams accomplish work, define roles, report

## With an efficient organizational design, companies are...



More likely to exceed targets<sup>1</sup>



More likely to engage and retain talent<sup>1</sup>



More likely to innovate effectively<sup>1</sup>



**Grant Thornton's Talent Strategy Framework**

relationships, and collaborate. With an efficient organization design, companies are 2.3 times more likely to exceed targets, 27 times more likely to engage and retain talent, and 13 times more likely to innovate effectively (The Definitive Guide to Organization Design: The Journey to Agile. Josh Bersin Company, May 2022).

Some signs that your operating model/design requires focus include:

- Inconsistent organizational strategy and goals where different parts of the organization pursue independent goals, resulting in a lack of cohesive direction.
- Unclear roles and responsibilities, where there is confusion or overlap in roles, leading to duplicated efforts and gaps in accountability.
- Technology, data, and processes that lack coordination, with employees using different processes and tools across departments, creating inconsistency and inefficiency.

In the example where one division refused to use parts of the new system, the underlying issue was that that division had a completely different operating model — where most of the organization was non-profit, this division operated more like a for-profit entity. Additionally, most of the organization had managers who had input into their direct reports' pay increases, but this division had supervisors who were often peers and budget groups owned by higher-level staff who made all the pay decisions. As all the differences in rules, structure, and approval paths were understood, the organization realized they probably should have set this division up as a separate company. The division was eventually sold off because it was not part of the core business, so all the workarounds done in the system to accommodate their differences had to be back-engineered.

In contrast, consider a project where we helped a multinational financial services company

implement a job architecture framework for pay equity and career transparency. Significant change impacts across HR, Finance, and other business departments required governance and standardization of processes to uphold the job architecture framework globally, and stakeholders were engaged to understand the job architecture impacts. Workshops were conducted to develop a future-state operating model, validate process flows, and identify change needs. Roadmaps were also designed to support the transition to implementation.

We delivered a comprehensive gap analysis for informed decision-making, established a robust governance structure for ongoing maintenance, and created clear process-flow maps for enhanced clarity and efficiency. This enabled the organization to identify essential technology requirements for seamless integration.

### Success Driver #3: Talent Strategy

You want to elevate talent management practices to impact your organization significantly. Several HCM practice areas cover the entire lifecycle of an employee. Suppose you need a comprehensive talent strategy for your organization built on understanding your operating model. In that case, your efforts in any of these areas may use something other than the differentiated return on investment that was meant.

An effective talent strategy should:

- Align with the organization's goals.
- Identify critical skills and competencies to facilitate robust recruitment, retention, and development and foster



## Grant Thornton's CFO Survey respondents revealed the following...



Face continued challenges to attract and retain the right talent<sup>1</sup>



Said future of the workforce is their top challenge<sup>1</sup>



Are confident in their ability to meet its goals around labor needs<sup>1</sup>

diversity, inclusion, and a culture of belonging.

- Continuously monitor and adjust as the organization's needs and goals change.

In a rapidly expanding and competitive market, prioritizing talent management is crucial for organizations to attract and retain critical talent and unlock their workforce's full potential.

In Grant Thornton's most recent CFO Survey, 67% of respondents said they face continued challenges to attract and retain the right talent, 40% said the future of their workforce is their top challenge, and only 45% said they are confident in their ability to meet their organization's goals around labor needs.

Some signs that your talent strategy requires better focus include:

- Your organization is unable to define what "good" looks like for any role or identify the critical skills needed for many roles.
- There is a cumbersome performance management practice that hinders rather than promotes development.
- Recruiting is a constant churn, and your candidate experience is poor.
- Succession planning is based on subjective opinion without data to drive decisions.

One organization spent months developing competencies covering 40% of its population but needed help to roll them out consistently. They could not use the parts of the system built around competency functionality, including a more strategic approach to succession planning. Six years after the new system's go-live, they lost all momentum in using competencies throughout the employee lifecycle. They reduced it to an optional activity employees could take on for their self-development.

Another organization asked us to facilitate a review of the organization's talent strategy and employee lifecycle. They started with "hot jobs" and critical jobs, reimagining the recruiting processes to create a technology-forward, streamlined candidate journey from identification to onboarding, and realigned core competencies to foster more significant equity.

The enhanced recruiting experience was aligned on fit to a role rather than prior experience or certification. An objective basis for succession planning was established, with the evaluation of next-level competencies, rather than subjective opinion, used to determine successors. A more consistent application of competencies across the

organization fostered growth and development.

Be sure to grab the next issue of *Workforce Solutions Review* to get the second part of this article! In it we'll look at three additional success drivers: a deeper dive into compensation practices as a more specific example, a look at the material in the upcoming HR operations section (in part 2) is focused on time records and payroll, where Change Management is the sixth and final success driver. You'll want to read it to get the full perspective and strategy!

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### About the Authors



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# Navigating AI-Driven Business Transformation in the Workspace: Balancing Automation and Ethics

By Tirtha Chavan

## Introduction

Artificial Intelligence (AI) is revolutionizing the business landscape, offering unprecedented opportunities for higher employee productivity, innovation, and growth. However, as businesses increasingly integrate AI into their operations, they face the critical challenge of balancing the benefits of automation with ethical considerations. This article delves into the complexities of AI-driven business transformation, exploring how companies can effectively leverage AI for automation to boost employee productivity while maintaining ethical standards and ensuring employee engagement.

## Understanding AI-Driven Business Transformation

### The Impact of AI on Business Operations

AI's impact on business operations is profound and far-reaching. AI transforms industries by optimizing processes, enhancing decision-making, and driving innovation. In manufacturing, AI-powered robots and automation systems

handle complex assembly lines with precision and speed, resulting in increased employee productivity and significant cost savings. For instance, AI systems can monitor production lines in real-time, predicting maintenance needs and reducing downtime, ultimately enhancing operational efficiency.

In the finance industry, AI algorithms analyze vast amounts of data to detect fraud, optimize investment strategies, and provide personalized financial advice. AI-driven systems can process transactions faster and more accurately than humans, improving customer experiences and reducing operational risks. Moreover, AI's predictive analytics capabilities enable businesses to anticipate market trends and make data-driven decisions, giving them a competitive edge.

### AI Tools and Technologies in the Workplace

AI is being applied across various business functions, revolutionizing tasks. AI-driven tools assist recruitment by screening resumes

and identifying the best candidates based on predefined criteria. AI speeds up the hiring process and reduces biases associated with human decision-making. Additionally, AI can help HR departments manage employee performance and engagement by analyzing feedback and identifying areas for improvement.

Customer service is another area where AI is making significant strides. AI-powered chatbots, equipped with natural language processing (NLP) capabilities, can handle a wide range of customer inquiries, providing instant support and resolving issues efficiently. These capabilities improve customer satisfaction and allow human agents to handle more complex and high-value interactions.

### Balancing Automation with Human Expertise

AI's strength lies in its ability to handle tasks involving large-scale data analysis, pattern recognition, and routine processes. However, human workers bring unique qualities, such as creativity,

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emotional intelligence, and critical thinking. For example, in healthcare, AI can analyze medical images with high accuracy, identifying potential health issues that human eyes might miss. Yet, the interpretation of these results, making nuanced decisions, and providing compassionate care are tasks that require human expertise.

In the creative industries, AI can assist in generating content, such as writing articles, creating music, or designing graphics. However, human creativity and intuition are essential for producing work that resonates emotionally and meets specific client needs. Thus, integrating AI and human skills leads to a symbiotic relationship where both entities enhance each other's capabilities.

### **Optimizing Integration for Best Outcomes**

Businesses must strategically integrate AI into their workflows to achieve the best outcomes. AI supports identifying tasks best suited for automation and those requiring human intervention. For instance, in customer service, AI can handle routine inquiries, such as checking account balances or resetting passwords. At the same time, human agents focus on resolving complex issues and building relationships with customers.

Training and reskilling employees are crucial for optimizing AI integration. As AI takes over repetitive and mundane tasks, employees can be redeployed to roles that require higher-level skills and creativity. Companies should invest in continuous learning programs to equip employees with the skills to work alongside AI that not only enhances the overall productivity of the workforce but also boost employee morale and engagement.

### **Challenges and Solutions in Integration**

Apart from the persisting challenges of how to achieve transformation excellence and increase the maturity of enterprise project management functions to maximize success, there are AI-specific questions companies are all engaged in addressing: embedded bias, hallucinations, use of synthetic data, explainability, data privacy, and cybersecurity — all of which have significant implications for customers and employees. Not to mention the classic transformation challenge of culture change, which will likely be even more of an issue with the most experienced teams. 1

Integrating AI into existing workflows can present technical and cultural challenges. Employees may resist change due to fears of job displacement and uncertainty about the future. To address these concerns, companies should prioritize open and transparent communication about AI's benefits and limitations. Involving employees in the AI implementation process can foster a sense of ownership and collaboration.

Technical challenges like data integration and system compatibility can also hinder AI adoption. Businesses should invest in robust IT infrastructure and collaborate with technology partners to ensure seamless integration. Additionally, adopting an iterative approach to AI implementation, starting with pilot projects and gradually scaling up, can help identify and address issues early on.

### **Ethical Considerations in AI Adoption**

#### **Transparency and Fairness in AI Systems**

Ensuring transparency in AI systems is essential for building trust and avoiding biases. AI algorithms should be explainable

and understandable, allowing stakeholders to comprehend how decisions are made. For example, if an AI system is used for hiring, how candidates are evaluated and selected should be clear to avoid biases that could lead to discrimination.

Regular audits and evaluations of AI systems are necessary to detect and mitigate biases. Businesses should establish clear criteria for evaluating the fairness of AI algorithms and involve diverse teams in the development and testing process. Companies can ensure that AI systems operate fairly and equitably by promoting transparency and accountability.

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## **Involving employees in the AI implementation process can foster a sense of ownership and collaboration.**

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#### **Privacy and Data Protection**

AI relies heavily on data, raising concerns about privacy and data security. Businesses must implement robust data protection measures to safeguard sensitive information. Prevention includes encrypting data, using anonymization techniques, and ensuring compliance with data protection regulations such as the



General Data Protection Regulation (GDPR).

Employees and customers should be informed about how their data is used and have control over their personal information. Companies should adopt transparent data practices, providing clear and concise information about data collection, usage, and storage. Building a culture of data privacy and security is essential for maintaining trust and ensuring the ethical use of AI.

### **Establishing Ethical AI Guidelines**

Developing and enforcing ethical AI guidelines is crucial for responsible AI adoption. These guidelines should cover data usage, bias mitigation, and accountability. Companies should establish an ethical framework that aligns with their values and business goals.

Leadership plays a vital role in promoting ethical AI practices. Executives and managers should lead by example, prioritizing ethical considerations in AI initiatives and decision-making processes. Establishing an ethics committee or advisory board can provide oversight and guidance on AI-related ethical issues.

Here are seven steps toward building a customized, operationalized, scalable, and sustainable data and AI ethics program.

1. Identify existing infrastructure that a data and AI ethics program can leverage.
2. Create a data and AI ethical risk framework tailored to your industry.
3. Change how you think about ethics by taking cues from the successes in other sectors.
4. Optimize guidance and tools for product teams.
5. Build organizational awareness through training and upskilling employees
6. Formally and informally

incentivize employees to play a role in identifying AI ethical risks.

7. Monitor impacts and engage stakeholders.<sup>2</sup>

## **Maintaining Employee Engagement and Morale**

### **Addressing Employee Concerns**

Employees may have concerns about AI's impact on their job security and roles. It is important to address these concerns through transparent and empathetic communication. Companies should explain how AI will be used, its benefits, and the opportunities it presents for career growth.

Involving employees in the AI implementation process can foster a sense of ownership and collaboration. By soliciting feedback and involving employees in decision-making, companies can build trust and ensure that AI is seen as a tool for empowerment rather than a threat.

### **Fostering a Positive Work Environment**

A positive work environment that encourages continuous learning and development is essential for maintaining employee engagement. Companies should provide training programs to help employees acquire new skills and adapt to changing roles. Offering opportunities for career advancement and professional growth can boost morale and motivation.

Recognizing and rewarding employee contributions is essential for maintaining a positive work environment. Celebrating successes, acknowledging hard work, and providing constructive feedback can enhance employee satisfaction and foster a culture of appreciation and respect.

## **Leveraging AI for Employee Well-Being**

AI can also enhance employee well-being. AI-driven tools can help monitor and manage workloads, preventing burnout and promoting work-life balance. For example, AI can analyze work patterns and suggest optimal schedules to ensure employees have adequate rest and recovery time.

Personalizing employee experiences through AI insights can increase job satisfaction and retention. AI can provide tailored recommendations for career development, training opportunities, and wellness programs based on individual preferences and needs. By leveraging AI to support employee well-being, companies can create a healthier and more productive work environment.

### **Enhancing Employee Productivity with AI**

AI can significantly enhance employee productivity by automating routine and time-consuming tasks. For example, AI-powered virtual assistants can handle administrative tasks such as scheduling meetings, managing emails, and organizing files. AI then allows employees to focus on high-value activities that require critical thinking and creativity, which leads to more productive workers, happier customers, and higher employee retention.<sup>3</sup>

AI-driven analytics tools can provide employees with real-time insights and data, enabling them to make informed decisions quickly. For instance, sales teams can use AI to analyze customer data and identify potential leads, streamlining the sales process and increasing conversion rates. Marketing teams can leverage AI to analyze campaign performance and optimize strategies for better results.

## Upskilling and Reskilling the Workforce

As AI continues to evolve, the demand for new skills is increasing. Companies must invest in upskilling and reskilling programs to ensure their workforce is equipped to work alongside AI. This investment involves identifying skill gaps and providing targeted training to help employees acquire the necessary competencies.

Online learning platforms and AI-driven training programs can offer personalized learning experiences, allowing employees to learn at their own pace and focus on areas for improvement. Mentorship and coaching programs can also support employees' career development, providing guidance and encouragement as they navigate new roles and responsibilities.

Build and implement an AI transformation program fueled by passionate volunteers. Identify, recruit, motivate, and empower these champions. They'll become

the evangelists and influencers driving the transformation forward, inspiring others to embrace the change.<sup>4</sup>

## Boosting Employee Morale Through AI Integration

The successful integration of AI can boost employee morale by creating a more engaging and fulfilling work environment. When employees see AI as a tool that empowers them to achieve more and grow professionally, they are more likely to embrace the technology.

Companies can foster a positive attitude towards AI by celebrating milestones and achievements related to AI projects. Recognizing the contributions of employees who have successfully integrated AI into their workflows can motivate others to follow suit. Additionally, involving employees in developing and implementing AI solutions can give them a sense of ownership and pride in the technology.

## Conclusion

Balancing automation with ethical considerations is crucial for navigating AI-driven business transformation in the workplace. By integrating AI with human expertise, maintaining transparency and fairness, and fostering a positive work environment, businesses can harness the full potential of AI while upholding ethical standards. As AI evolves, a holistic approach that prioritizes technological advancements and ethical considerations will be essential for sustainable and inclusive growth. Empowering employees through continuous learning, addressing their concerns with empathy, and leveraging AI to enhance well-being and productivity are critical strategies for ensuring a harmonious and productive AI-driven workplace. In doing so, companies can create a future where technology and humanity coexist synergistically, driving innovation and success while maintaining a commitment to ethical principles and employee welfare.

## ENDNOTES

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## About the Author



Tirtha Chavan is an accomplished Business Transformation leader in the Software-as-a-Service (SaaS) industry, boasting over a decade of expertise in unlocking value for millions of global customers, driving long-term strategic growth, and maximizing profitability for Fortune 500 organizations. She is the Director of the Enterprise Transformation Office, focusing on the profitability of Salesforce, the #1 customer relationship management software and the fastest-growing software company in history. One of her recent notable achievements includes spearheading Salesforce's International expansion, enabling teams to deliver consistent value to global customers while unlocking new strategic global markets that fuel revenue growth. Before this, she built a new revenue stream for Autodesk by creating Tiered Subscription Plans and launching the Premium Plan for millions of global customers. Her expertise and contributions to the industry have garnered recognition and entrusted her with significant responsibilities. Tirtha has been invited as an international award judge, contributing her expertise to recognize outstanding achievements in the industry. She can be reached at <https://www.linkedin.com/in/tirthachavan/> or <https://tirthachavan.com/>.



## *the back story*

# GenAI in Resume Development: A Recruiter's Dream—or Nightmare?

*By Katherine Jones, Ph.D.*

If your HR team is among the many purchasing new software applications this year, you may be introducing artificial intelligence (AI) into your organization. Today's tools, such as Generative AI, provide time savers across many aspects of HR, from initial candidate experiences through the entire employee life cycle.

Resume development is a critical area that affects both the recruiter and the candidate. Clearly, a candidate seeks to create a resume that best addresses the company to which he or she is applying. Recruiters appreciate resumes that are as specific as possible in relation to the position they are seeking to fill.

### **Do Recruiters Care How a Resume is Developed? Should They?**

Given that a crisp, precise resume addressing the position to be filled is a clear advantage for any applicant

and likely a source of delight for both a recruiter and hiring manager, does it matter if the resume was created by a Generative AI tool? One possible ramification is that all resumes could look very much alike, differing mainly by educational background and previous positions. Will this make the recruiter's task easier—or more complicated?

Let's look at some examples. I am going to ask Microsoft's Copilot some questions that a candidate might go to an AI tool to ask when polishing up a resume for a specific company. And because I am using Copilot, I will use Microsoft as my sample company.

Here is my hypothetical applicant's first question:

"What are the keywords on a successful Microsoft new hire's resume?"

Copilot's response is shown in Figure 1.

This information would no doubt be useful for our Microsoft applicant. Now let's go a bit deeper with question two:

"What are the keywords on a successful Microsoft new hire's resume in the marketing department?"

Figure 2: Copilot's Key Words for a Marketing Position at Microsoft

Microsoft is currently seeking a Senior Product Marketing Manager in Redmond. We will use this as an example to see how Copilot can accomplish the tailoring mentioned above.

Our Question 3:

"What are the keywords on a successful Microsoft new hire's resume for a senior product marketing manager in Redmond?"

Copilot offers some more specific details at this point (see Figure 3):

To be on the safe side, our hypothetical applicant wants to know what NOT to say as well as



what to say in applying for this position:

Question 4:

“What keywords should be avoided when creating a resume for a senior product marketing position?”

Our applicant is well on their way to the job-specific AI-generated resume. (See Figure 4.)

What happens if our job candidate takes the job position description and asks to have a resume created? Let's find out. I copied the position description and requested a sample resume from Copilot. Figure 5 shows the result.

To ensure that Copilot can address companies other than Microsoft (which is responsible for the CoPilot tool), let's ask the same initial keyword question for an applicant at Workday (Figure 6). Indeed, company-specific knowledge is readily available.

Recruiters can safely assume that AI tools can help candidates apply to almost any company and for any position.

### AI's Impact on the Job Applicant

AI tools can make the job applicant's job significantly faster and easier. A Generative AI tool can create a resume from a job description in seconds. The ramifications are several:

- A newcomer to the job market can get instant online help to create a reasonably competitive

resume. (Noting that assistance in resume help has been available online for years – just not as thorough and specific).

- An applicant can easily and better tailor a resume for the specific position.
- Applicants can quickly apply to many more jobs, potentially flooding ATS systems with multiple applications for open jobs, and equally quickly apply to various organizations with carefully tailored resumes.

### What GenAI Can Mean for Recruiters

Recruiters will appreciate the use of GenAI in creating job descriptions for posting more expeditiously and vibrant and developing personalized correspondence with applicants and candidates much more easily. Planning for the impact of GenAI on the recruiter is another issue. Consider:

- Recruiters may see better, clearer resumes that are more tailored to the positions to which the applicant is applying.
- Because applicants can create resumes more easily, recruiters can be flooded with resumes as never before, likely in part from job seekers who are not interested in the position at hand.
- Recruiters may see such similarity in AI-created resumes based on job descriptions that

actual distinctions between candidates lie buried.

- In theory, an applicant can easily apply to every job opening in an organization, potentially having multiple recruiters present the same candidate to various hiring managers across the company.

It is fortuitous that GenAI can also aid the recruiter in responding to an onslaught of resumes.

### Heaven or Hell?

As we see, as we will, smarter applicants using GenAI tools to ensure position relevancy, how might this affect the recruiting process in general? Timeliness will be one clear outcome: applicants can respond to an opening immediately after it is posted without having to mull over what resume revisions might be necessary for response. Thus, positions may be able to be filled more quickly as a pool of applicants may be available within hours rather than days. On the other hand, an overabundance of resumes that look very similar may make rating or weeding out much more difficult.

Will GenAI thus make the recruiter's job in application review easier or more difficult? It remains to be determined, but at the very least, recruiters need to be aware of the tools applicants now have access to.

***This article and Figures 1-6 can be viewed at <https://bit.ly/3Xl2JrM>.***

### About the Author



Unique as a thought leader for her ability to make theory actionable and technology comprehensible to non-technologists, Dr. Jones is a sought-after writer and speaker in the U.S. and internationally. Moving easily from the academic world to the worldwide technology stage, she has repeatedly created value propositions bridging technology and theory with the practical world of today's business. Now an independent high-tech marketing analyst, she was previously responsible for the creation and provision of thought leadership content for a web-based membership program as a partner at Mercer and spent several years at Bersin & Associates both before and after its acquisition by Deloitte, where she was the VP heading the HCM technology research practice in Bersin by Deloitte. An industry veteran and independent high-tech analyst, she is widely published on talent management and personnel-related technologies, cybersecurity, ERP and HCM systems implementations, change management, and the mid-market, totaling over 500 works in print. Her master's and doctorate degrees are from Cornell University. She can be reached at [katherine\\_ics@msn.com](mailto:katherine_ics@msn.com).

## Sources

To craft a resume that stands out for a position at Microsoft, it's essential to include specific keywords that align with the job description and highlight your skills and experiences. Here are some key elements to consider:

- 1. Technical Skills:** Mention specific technologies and tools relevant to the role, such as Azure, .NET, Python, SQL, or Microsoft 365.
- 2. Soft Skills:** Emphasize skills like collaboration, communication, problem-solving, and adaptability.
- 3. Action Verbs:** Use strong action verbs like "developed," "implemented," "led," "designed," and "optimized" to describe your achievements<sup>3</sup>.
- 4. Quantifiable Results:** Highlight your accomplishments with measurable outcomes, such as "increased sales by 20%" or "reduced costs by 15%"<sup>1</sup>.
- 5. Certifications and Education:** Include relevant certifications (e.g., Microsoft Certified: Azure Solutions Architect) and educational qualifications<sup>1</sup>.
- 6. Project Experience:** Detail specific projects you've worked on, especially those that demonstrate your ability to innovate and drive results<sup>2</sup>.

Tailoring your resume to each job application by incorporating these keywords strategically in your summary, skills section, work experience, and any relevant certifications or education can significantly improve your chances of getting noticed<sup>1</sup>.

Is there a specific role at Microsoft you're targeting? I can help you tailor your resume even further!

### Figure 1. Copilot's Initial Resume Advice for an Applicant to Microsoft

Source: [Copilot \(microsoft.com\)](https://copilot.microsoft.com)

To stand out as a candidate for a marketing position at Microsoft, it's essential to include specific keywords and skills on your resume. Here are some of the most relevant ones:

#### Technical Skills

- **SEO/SEM:** Search Engine Optimization and Search Engine Marketing
- **Data Analysis:** Proficiency in tools like Google Analytics, Tableau, and Power BI
- **CRM Systems:** Experience with Salesforce, HubSpot, or Microsoft Dynamics
- **Email Marketing:** Familiarity with platforms like Mailchimp or Constant Contact
- **Social Media Management:** Skills in using tools like Hootsuite, Buffer, or Sprout Social

#### Marketing Skills

- **Content Creation:** Ability to create engaging content for various platforms
- **Digital Marketing:** Experience with online marketing strategies and tools
- **Marketing Strategy:** Developing and implementing marketing plans
- **Project Management:** Managing marketing projects using tools like Asana, Trello, or MS Project
- **Promotional Techniques:** Knowledge of different promotional strategies and techniques

#### Soft Skills

- **Communication:** Strong written and verbal communication skills
- **Creativity:** Innovative thinking and problem-solving abilities
- **Collaboration:** Ability to work effectively in a team
- **Adaptability:** Flexibility to adapt to changing market trends and technologies
- **Analytical Thinking:** Ability to analyze data and make data-driven decisions

Including these keywords and skills can help your resume get noticed by Microsoft's recruiters and applicant tracking systems (ATS)<sup>12</sup>. Tailoring your resume to highlight these areas will improve your chances of landing an interview.

Is there a specific role or project you're targeting at Microsoft?

### Figure 2: Copilot's Key Words for a Marketing Position at Microsoft

Source: [Copilot \(microsoft.com\)](https://copilot.microsoft.com) 2024

For a Senior Product Marketing Manager position at Microsoft in Redmond, it's crucial to highlight specific keywords and skills that align with the role's requirements. Here are some key areas to focus on:

#### Technical Skills

- **Product Marketing:** Experience in product marketing, particularly within the technology sector.
- **Sales Enablement:** Skills in developing and executing sales enablement strategies.
- **Data Analysis:** Proficiency in analyzing market data and customer insights.
- **CRM Systems:** Familiarity with tools like Microsoft Dynamics, Salesforce, or similar.
- **Digital Marketing:** Expertise in digital marketing strategies and tools.

#### Marketing Skills

- **Go-to-Market (GTM) Strategy:** Experience in developing and implementing GTM strategies.
- **Content Creation:** Ability to create compelling marketing content and technical storytelling.
- **Customer Engagement:** Skills in driving customer engagement initiatives.
- **Field Readiness:** Experience in preparing sales teams with the necessary tools and knowledge.
- **Campaign Management:** Managing and executing marketing campaigns.

#### Soft Skills

- **Communication:** Excellent written and verbal communication skills.
- **Collaboration:** Ability to work effectively with cross-functional teams.
- **Leadership:** Proven leadership and team management skills.
- **Strategic Thinking:** Strong strategic and analytical thinking abilities.
- **Adaptability:** Flexibility to adapt to changing market trends and technologies.

#### Specific Keywords

- **Microsoft Viva:** Understanding of the Viva product suite and its applications.
- **AI Workforce Transformation:** Knowledge of AI and its impact on the workforce.
- **Employee Experience:** Focus on enhancing employee experience through marketing initiatives.

Including these keywords and skills on your resume can help you stand out to Microsoft's recruiters and applicant tracking systems (ATS)<sup>12</sup>. Tailoring your resume to highlight these areas will improve your chances of landing an interview.

Is there a particular aspect of the role you're most interested in?

### Figure 3: Key Words for a Senior Product Marketing Manager

Source: [Copilot \(microsoft.com\)](https://copilot.microsoft.com) 2024

When crafting a resume for a senior product marketing position, it's important to avoid certain keywords and practices that can detract from your application. Here are some key points to consider:

- 1. Buzzwords and Jargon:** Avoid overused terms like "synergy," "think outside the box," and "results-driven." These can come across as clichéd and insincere.
- 2. Keyword Stuffing:** While it's important to include relevant keywords, don't overdo it. Keyword stuffing can make your resume look unnatural and hard to read.
- 3. Vague Descriptions:** Phrases like "responsible for" or "worked on" are too vague. Instead, use specific action verbs and quantify your achievements (e.g., "led a team of 10 to increase sales by 20%").
- 4. Irrelevant Skills:** Tailor your resume to the job description. Including skills or experiences that aren't relevant to the position can dilute the impact of your resume.
- 5. Personal Pronouns:** Avoid using "I," "me," or "my." Resumes should be written in a professional tone without personal pronouns.
- 6. Negative Language:** Steer clear of any negative language or experiences. Focus on positive achievements and contributions.

By avoiding these pitfalls, you can create a more compelling and professional resume that stands out to hiring managers. If you need more specific advice or examples, feel free to ask!

### Figure 4: Copilot's Words to Avoid for a Marketing Manager Resume

Source: [Copilot \(microsoft.com\)](https://copilot.microsoft.com) 2024.

Here's a sample resume tailored for a Senior Product Marketing Manager position focused on Windows Cloud:

[Your Name]  
[Your Address]  
[City, State, ZIP]  
[Your Email] | [Your Phone Number] | [LinkedIn Profile]

### Professional Summary

Dynamic Senior Product Marketing Manager with over 10 years of experience in cloud computing and enterprise software. Proven expertise in driving product adoption, increasing market share, and enhancing brand visibility for Windows Cloud solutions. Skilled in leading cross-functional teams, conducting market research, and leveraging data-driven insights to inform strategic decisions.

### Professional Experience

**Senior Product Marketing Manager, Windows Cloud**  
Microsoft, Redmond, WA  
June 2018 – Present

- Spearheaded the go-to-market strategy for Windows Cloud solutions, resulting in a 30% increase in market share.
- Conducted in-depth market research and competitive analysis to identify emerging trends and opportunities.
- Collaborated with product management, engineering, and sales teams to align product features with customer needs.
- Developed and executed integrated marketing campaigns, including digital marketing, content marketing, and social media, leading to a 35% increase in lead generation.
- Analyzed campaign performance metrics and provided actionable insights to optimize marketing strategies.

### Product Marketing Manager, Cloud Solutions

XYZ Inc., Austin, TX  
March 2014 – May 2018

- Managed the product lifecycle for cloud solutions from concept to launch, ensuring alignment with market demands and business objectives.
- Created and executed marketing plans, including product positioning, messaging, and pricing strategies.
- Coordinated with sales teams to develop sales enablement tools and training materials.
- Conducted customer segmentation and targeted marketing efforts, resulting in a 25% increase in customer acquisition.
- Monitored and reported on key performance indicators (KPIs) to measure the effectiveness of marketing initiatives.

### Education

**Master of Business Administration (MBA)**  
University of Texas at Austin, McCombs School of Business  
Graduated: May 2013

### Bachelor of Science in Marketing

Texas A&M University  
Graduated: May 2009

### Skills

- Cloud Computing
- Strategic Planning
- Market Research & Analysis
- Go-to-Market Strategy
- Digital Marketing
- Cross-Functional Team Leadership
- Data-Driven Decision Making
- Product Lifecycle Management
- Customer Segmentation
- Sales Enablement
- Performance Metrics Analysis

### Certifications

- Certified Product Marketing Manager (CPMM)
- Google Analytics Certification
- Microsoft Certified: Azure Fundamentals

### Professional Affiliations

- Member, Product Marketing Alliance
- Member, American Marketing Association

Feel free to customize this template to better fit your specific experiences and achievements. If you need more examples or specific advice, let me know!

## Figure 5. Copilot-Generated Resume for a Sr. Product Marketing Manager Posting

Source: [Copilot \(microsoft.com\)](https://copilot.microsoft.com). 2024

To create a successful resume for a position at Workday, it's important to include keywords that align with the skills and qualifications they typically look for. Here are some key terms that can help your resume stand out:

- 1. Technical Skills:** Highlight any technical expertise, especially related to Workday's software and systems. Keywords like HCM (Human Capital Management), XML, SQL, and Web Services are valuable.
- 2. Business Process:** Demonstrate your understanding of business processes. Use terms like Business Process Analysis, Vendor Management, and User Acceptance Testing.
- 3. Communication and Collaboration:** Emphasize your ability to work well with others and communicate effectively. Keywords such as Collaboration, Communication Skills, and Consulting Experience are important.
- 4. Recruiting and Documentation:** If you have experience in recruiting or documentation, make sure to include these terms. Keywords like Recruiting, Troubleshooting, and Documentation can be beneficial.

Additionally, keeping your resume simple and using standard formatting can help ensure it is easily parsed by Workday's applicant tracking system (ATS).

Do you need help with any specific part of your resume?

## Figure 6: What are the Key Words on a Successful New Hire's Resume at Workday?

Source: [Copilot \(microsoft.com\)](https://copilot.microsoft.com) 2024

Microsoft Copilot is a generative artificial intelligence chatbot developed by Microsoft. Based on a large language model, it was launched in February 2023 as Microsoft's primary replacement for the discontinued Cortana.

Microsoft operates Copilot on a freemium model. Users on its free tier can access most features, while priority access to newer features, including custom chatbot creation, is provided to paid subscribers under the "Microsoft Copilot Pro" paid subscription service.



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