Human Element: Responsible AI Strategies for Wine Industry HR



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endsight

The Human Element

Responsible AI for Wine Industry HR

Real stories. Practical steps. No robots required.

Josh Carroll, Co-founder and CEO
Carissa Tilford, HR Generalist

winejobs.com



Welcome to THE HUMAN ELEMENT



Josh Carroll

Co-founder and CEO, Endsight

Josh Carroll co-founded Endsight in 2004 and has led it as COO, President, and now CEO. He has spent his career helping wine businesses get more from their technology.



Carissa Tilford

HR Generalist, Endsight

Carissa Tilford handles HR for Endsight and uses AI every day for reviews, policies, and the never-ending admin. She holds the PHR certification and brings an HR practitioner's view of what works with AI, what to watch for, and what still needs a human.

Endsight helps wineries connect their systems and data, keep them safe, and put AI to work, so their people can spend their time working on the winery.

And we're a small HR team too.



Whatever HATS You Wear

Raise your hand when you hear yours. Something else? Raise it for that, too.



HR

Department of one or team of many.



Unicorn

Your hat changes day to day.



Owner

Yes, you are doing HR too. We see you.



Payroll

Getting everyone paid, on time and correctly.



Bookkeeper

Keeping the books, and often the people paperwork, too.



Office Manager

Keeping things running, from onboarding to the printer.

Whatever your title, take what fits and leave what doesn't.

Where Are YOU with AI?

Raise your hand if this is you. No wrong answers, no judgment.

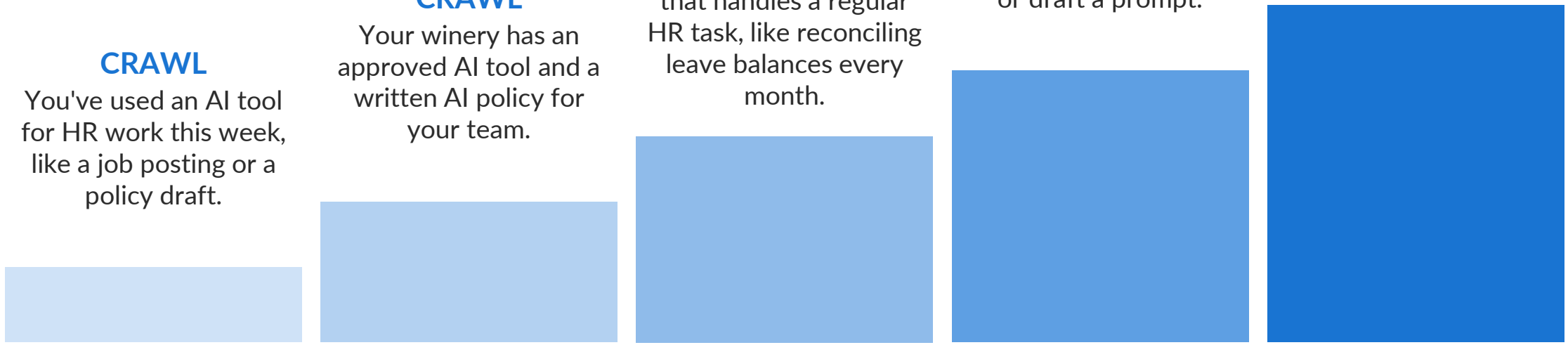
CRAWL
You've used an AI tool for HR work this week, like a job posting or a policy draft.

CRAWL
Your winery has an approved AI tool and a written AI policy for your team.

WALK
You've built an AI skill that handles a regular HR task, like reconciling leave balances every month.

WALK
You've helped a manager or coworker build their own AI skill or draft a prompt.

RUN
You've built an AI agent that keeps working when you're not. You review and approve the result.



Just like this room, your people are at different stages with AI.

Agenda

01 Choosing a Perspective
About 14 min

02 Framing the Perspective
About 13 min

03 Fluency: Putting It to Work
About 15 min

04 What to Remember, and Your Questions
About 18 min

AI should free your people up, *not replace them.*

Choosing a Perspective



We Get to CHOOSE How We See AI

Same technology, many lenses. As with anything new, there is more than one way to take it in.



The gap is real

Technology has always outrun how we use it. AI made that gap far larger, far faster.

Reactions to the gap vary

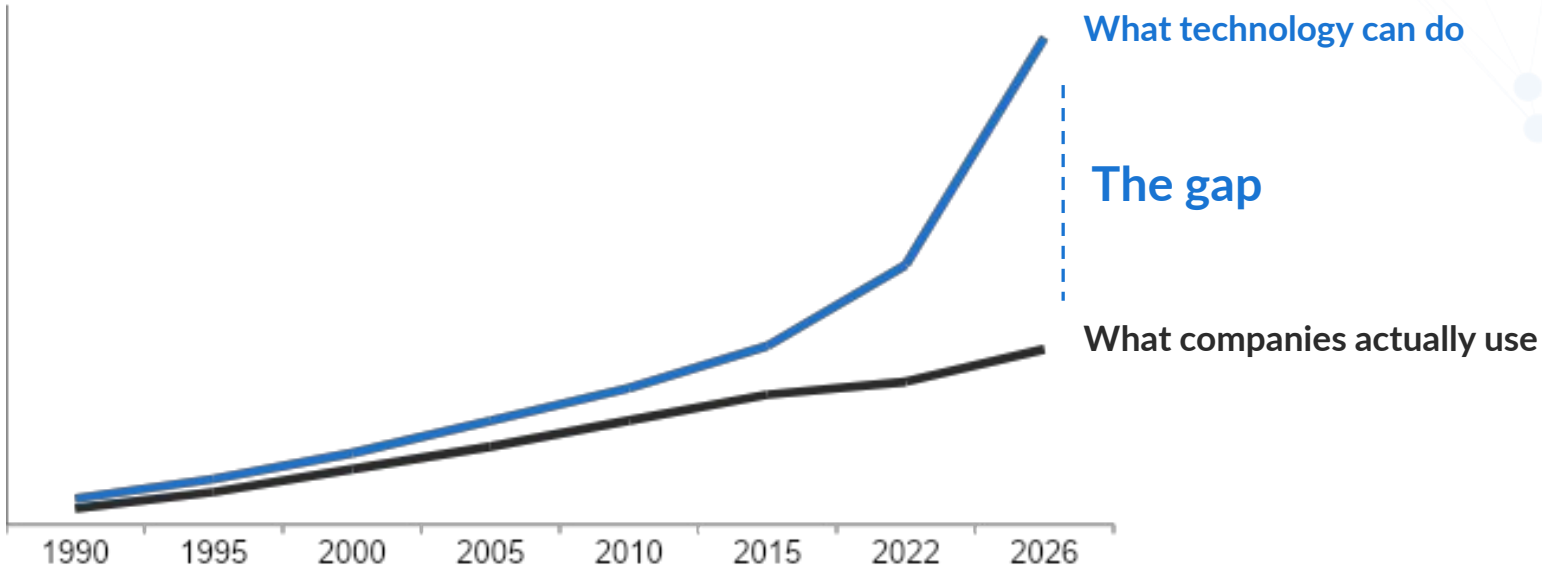
Some see utopia, some see the end of days. Most of us land in between.

Choose your lens

We choose optimism, with flexibility.

Once you choose a lens, you can **build the strategy** around it.

The Gap Is WIDENING



Illustrative curves, not measured data. Adapted from Endsight client materials, June 2026.

1

Technology has always moved faster than we use it.

2

AI made that gap far larger, far faster.

3

The gap closes through people: training, confidence, and permission to use it. **That's HR's work.**

One Disruptive Technology, TWO FUTURES

Which one we get depends on the choices we make.



UTOPIA

Jobs become optional

Elon Musk, CEO of Tesla and SpaceX, VivaTech 2024

END OF DAYS

Half of entry-level jobs gone

Dario Amodei, CEO of Anthropic, Axios, May 2025

END OF DAYS

Four powerful voices. Who's right?

END OF DAYS



You CHOOSE

Same technology. Very different results.

Which side you land on depends on how you lean in.

LEAN IN	WAIT AND SEE
Your people get more done, and do better work, in the same time	People use AI anyway, on their own accounts
You attract people who want to work with modern tools	Competitors move first and set the pace
AI becomes an advantage your competitors have to catch	The gap gets harder to close every year

“We'd be irresponsible not to go down the AI path, but we can't be irresponsible spending too much time and money.”

A winery CFO we work with

Flexibility WINS

Three ideas worth knowing, and what each means for your people.

Lean

Redeploy, don't remove

When you find efficiency, redeploy people to higher-value work. Lay people off for it, and you teach your teams to stop looking for efficiencies.

Maslow

People need purpose

People need purpose, and work provides it. The responsible path is retooling people for more meaningful work, not removing it.

Jevons Paradox

Cheaper means more

When something gets cheaper, we use more of it. The pie isn't fixed in size. It gets larger.

AI will likely put the inflexible out of work.

Those who are flexible and willing to learn will become more necessary than ever.

Protect the company, the data, and your people.

Framing the Perspective



Your AI Strategy: THREE STREAMS

Once you've chosen your lens, run all three at once, over the next three to five years.

AREA	HR'S ROLE	START THIS YEAR
Fluency Everyone can use AI well, safely, on their real work.	Training, champions, and making it safe to ask.	About five hours of basics for everyone, then hands-on work by team.
Data AI can reach the information your people already use.	Decide what HR data it can reach, through which trusted tools.	Pick one company-controlled AI tool and connect what you already use.
Security Protection that keeps pace with how fast AI moves.	The policy, onboarding and offboarding, and scams aimed at your people.	A written policy, and AI accounts on the offboarding checklist.

Run them together.

Fluency without data stalls, and data without security is a risk you didn't mean to take.

STREAM: SECURITY

AI Is Already Part of Your Team's WORKDAY

People have found it, with or without a plan. Leaders decide whether they have support.

63%

of organizations have no AI policy at all

IBM, Cost of a Data Breach

65%

of employees admit to using AI their employer doesn't know about

Auvik

75%

of executives believe they know all the generative AI in use

Auvik

47%

of enterprise AI conversations run on personal accounts

LayerX, State of AI Usage 2026

65% and 75% don't add up.

Someone is using tools leadership doesn't know about.

STREAM: SECURITY

Guardrails Let People MOVE FREELY

A good policy takes away the hesitation about what's allowed, so people use the tool with confidence.

~6x

more likely to have tried AI when the company has defined AI guidelines

Slack Workforce Lab, 10,281 workers, 2024

25%

of US employees say their employer has communicated a clear AI plan

Gallup, May 2026

1.7x

as likely to use AI regularly when their manager actively supports it

Gallup, May 2026

Even a restrictive policy beats **no policy**.

People use AI more when they know what's allowed.

STREAM: SECURITY

What a Good Policy CONTAINS

Seven parts. Two pages. Plain language. Scan to download our template.

1. **Purpose and scope**
   Everyone, and every kind of AI tool.
2. **What counts as company data**
   Public on your website? If not, it's confidential.
3. **Company vs. personal tools**
   Company data only in approved, company-managed tools.
4. **The approved list**
   Named tools, kept current.
5. **Your responsibility**
   You own what you produce. Review every output.
6. **Review and questions**
   Reviewed yearly. Questions go to your manager.
7. **Signed acknowledgment**
   Everyone reads it and signs it.

A starting point.
It gets specific once you pick your AI tool.

Scan for the template

The more of us using good guardrails, the better we all are.

Source: Endsight AI Usage Policy Template v3.2, June 2026.

STREAMS: DATA AND SECURITY

When Do You Give AI WHAT Data?

It depends on what type of account it is, not how careful the person is.

Public Information	***Like the stranger at the airport bar*** Already on your website or social media: job postings, published policies, press.	Any tool, including free ones. Turn off training on your inputs where you can.
Company Data	***Like your friend in another department*** Anything not public: employee records, finances, internal documents, and client and customer information.	Approved, company-managed tools only, such as Copilot, ChatGPT Business, or Claude Team. Never a personal or free account.
Most Sensitive HR Data	***Like your assistant, who sits next to you*** Medical and leave details, investigations, and Social Security and bank account numbers, pay.	Decide on purpose. Our view: a trusted tool that doesn't learn from your data. Many keep it out entirely.

The real question isn't whether AI is safe.

It's what type of account it is, and what happens to what you put in.

STREAMS: DATA AND SECURITY

Partner With IT on Your DATA

HR decides what's allowed. IT or operations makes it real. Some calls you make together.

HR decides

- Where your most sensitive HR data can go, if anywhere
- Which decisions always have a named, accountable person
- When AI use is disclosed, to employees and candidates

Decide together

- Who gets the company AI tool, and who approves anything new
- What happens to AI accounts and AI-built work when someone leaves

IT or Ops runs

- Business-grade tools with contracts that rule out training on your data
- Permissions cleaned up, so AI shows people only what they can already see
- Vendor, breach, and access logs

TRUE STORY

One standard, for everyone

Give the company tool to only some people, and the rest bring their own. One college let each department pick its own; student records ended up in tools nobody approved.

TRUE STORY

It leaves with them

A winery finance leader built his best AI work on a personal account. When the company moved to business accounts, his saved work didn't come with him.

AI does the first pass.
You make *the final call.*

Fluency: Putting It to Work



STREAM: FLUENCY

Bring Everyone ALONG

How to explain it, train for it, and win people over instead of ordering them.

1

Say Why

Leadership explains why you're adopting AI, and that it's about freeing people up, not cutting them.

2

Walk through it

Plain language: what's in, what's out, and why. Then everyone signs.

3

Pilot first

A small group goes first and becomes your coaches, so nobody starts in the dark.

4

Train in two steps

About five hours of basics for everyone, then hands-on work on each team's real tasks.

5

Champions

Identify one champion for each subject area, such as finance, HR, and marketing.

6

Keep learning

A small group meets monthly to review what's working and which tools to add. Questions and mistakes get answered, not punished.

STREAM: FLUENCY

Start With the QUICK WINS

Begin with work your team already understands.

If you can't write the steps down, AI can't do them well either.

Repeated work you do the same way

Leave balances, onboarding steps, policy questions. If the steps are written down, AI can follow them.

Watching the standard for misses

It checks the work against how it should be done and flags what's off before it reaches an employee.

Pointing you where to look

It finds the pattern in your data, so you know where to go and see for yourself.

Prove it before you trust it:

Run it beside the way you do it today.

Retire the manual step only after three clean months in a row.

One named person checks the results every month.

IN PRACTICE: ALL THREE STREAMS

HELPS

Handoff, Help me, Hands on: the repetitive admin goes away, so people get time back for the human work.

AI DOES MORE



AI runs it. You check it.



AI drafts. You finish.

YOU DO MORE



You decide. AI prepares.

Set up your AI like a new hire: give it a role, a voice, and clear instructions.

Handoff – MEETING NOTES

Carissa Tilford
To: Carissa Tilford

Reply | Reply all | Forward

Thu 11/5/2026 5:34 PM

5 meetings today, 3 summarized, 2 without a transcript.

AI & Automation in T&P | Weekly Check In

9:00–9:45 AM · Attendees: Carissa Tilford, Brian Tirado, Marrah Goad, Aaron Brezenski (Josh Carroll was invited but doesn't appear to have joined/spoken)

Discussion: Marrah has been testing the new Pinpoint recruiting MCP — geo-location filtering of applicants, resume/skill screening, and an interview-scorecard "cheat sheet" that cross-references values and past question formats. The group talked through usage/license limits (Marrah is well under her cap; premium licenses may be needed for heavier users). Aaron and the group agreed on access controls for the Pinpoint MCP: offers, private/confidential job ads, and compensation-adjacent data should be locked out for everyone, including Marrah and Carissa themselves, to keep a clean tiering model; hiring-manager access will likely be scoped to a "T&P + managers" group rather than company-wide. For moving signed offers into Workday, the preference is to have the Pinpoint and Workday connectors talk to each other directly rather than routing sensitive applicant data through Claude — Claude would just confirm the transfer happened. Carissa gave an update on the Workday MCP build: the "company service/review date" fields she needs are only exposed via Workday's older SOAP API, not REST; Brian and Aaron will ask the Kognitiv vendor contact (Philip) whether there's another way to get it before committing to building SOAP support. Carissa is also drafting a proposal to decouple performance review timing from hire-anniversary dates, moving instead to a schedule based on role type (e.g., all Pod A RCEs review in January); she'll share it with Marrah first and won't resume that work until after her in-person presentation next week. Carissa and Josh Carroll are presenting together at a wine-industry HR event running alongside the Wine Industry Financial Symposium.

Action Items:

- Pull the transcript and log the Pinpoint MCP feature/access requests discussed (geo/skill filtering confirmation; locking offers, private/confidential ads, and comp data for all users) — Aaron Brezenski
- Ask Kognitiv (Philip) whether Workday service/review date data is available outside the SOAP API; build SOAP support if not — Brian Tirado / Aaron Brezenski
- Finalize and share the role-based review-date proposal with Marrah before presenting more broadly (on hold until after next week's presentation) — Carissa Tilford
- Share the Kognitiv community presentation access with Aaron so he can review it — Carissa Tilford

Help Me – COMPLIANCE REPORTING

Civil Rights Department
STATE OF CALIFORNIA

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y
1	Establishment Name*	Address Line 1*	Address Line 2	City*	State*	ZIP Code*	NAICS Code*	Major Activity*	Total Number of California Payroll Employees at Establishment*	Was a California Pay Data Report Filed for This Establishment Last Year?*	Is This Establishment the Employer's Headquarters?*	Job Category*	Race/Ethnicity/ Sex*	Pay Band*	Exemption Status	Employment Type	Total Number of California Employees in This Employee Group*	Total Annual Hours Worked*	Total Annual Weeks Worked	Mean Hourly Rate*	Median Hourly Rate*	Number of California Employees That Do Not Work Remotely*	Number of Remote California Employees Located Within California*	Number of Remote California Employees Located Outside of California*	Row-Level Clarifying Remarks
6	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	2	B10	11	Exempt	Full-time	1	2080	52	114.25	114.25	0	1	0	
7	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	2	B20	8	Exempt	Full-time	1	2080	52	46.52	46.52	1	0	0	
8	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	2	C10	8	Exempt	Full-time	1	2080	52	47.71	47.71	1	0	0	
9	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	B10	8	Exempt	Full-time	2	4160	104	49.44	49.44	2	0	0	
10	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	B10	9	Exempt	Full-time	5	10000	250	60.55	60.79	4	1	0	
11	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	B10	10	Exempt	Full-time	1	2080	52	71.63	71.63	1	0	0	
12	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	B20	8	Exempt	Full-time	1	2080	52	49.23	49.23	0	1	0	
13	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	B40	8	Exempt	Full-time	2	4160	104	47.39	47.39	2	0	0	
14	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	B40	9	Exempt	Full-time	3	6240	156	60.00	56.95	2	1	0	
15	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	C10	8	Exempt	Full-time	1	2080	52	46.80	46.80	0	1	0	
16	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	C10	10	Exempt	Full-time	1	2080	52	72.12	72.12	1	0	0	
17	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	C40	8	Exempt	Full-time	1	2080	52	42.75	42.75	0	1	0	
18	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	5	B10	7	Exempt	Full-time	1	2080	52	33.65	33.65	0	1	0	
19	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	5	C10	6	Exempt	Full-time	1	2080	52	30.05	30.05	0	1	0	
20	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	6	C10	4	Exempt	Full-time	1	2080	52	16.83	16.83	1	0	0	
21	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	6	C10	7	Exempt	Full-time	1	2080	52	37.81	37.81	0	1	0	
22	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	6	C10	8	Exempt	Full-time	1	2080	52	45.67	45.67	0	1	0	
23	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	B10	8	Non-exempt	Full-time	1	2080	52	49.56	49.56	1	0	0	
24	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	3	B40	8	Non-exempt	Full-time	1	2080	52	42.90	42.90	0	1	0	
25	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	4	A10	7	Non-exempt	Full-time	1	2080	52	38.20	38.20	0	1	0	
26	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	4	A10	9	Non-exempt	Full-time	1	2080	52	58.55	58.55	1	0	0	
27	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	4	B10	6	Non-exempt	Full-time	2	4160	104	30.96	30.96	2	0	0	
28	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	4	B10	7	Non-exempt	Full-time	2	4160	104	37.95	37.95	0	2	0	
29	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	4	B10	8	Non-exempt	Full-time	4	8000	200	45.14	44.16	3	1	0	
30	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	4	B40	7	Non-exempt	Full-time	1	160	4	40.86	40.86	1	0	0	
31	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	4	B40	8	Non-exempt	Full-time	2	4160	104	45.20	45.20	2	0	0	
32	Napa	1144 Jordan Lane		Napa	CA	94559	518210	IT Support	49	Yes	Yes	6	B10	7	Non-exempt	Full-time	1	2080	52	33.63	33.63	1	0	0	
33	San Diego	6359 Nancy Ridge Dr		San D	CA	92121	518210	IT Support	23	Yes	No	1	C10	9	Exempt	Full-time	1	2080	52	62.50	62.50	1	0	0	
34	San Diego	6359 Nancy Ridge Dr		San D	CA	92121	518210	IT Support	23	Yes	No	2	B10	8	Exempt	Full-time	1	2080	52	48.31	48.31	1	0	0	
35	San Diego	6359 Nancy Ridge Dr		San D	CA	92121	518210	IT Support	23	Yes	No	2	B10	10	Exempt	Full-time	2	4160	104	76.73	76.73	2	0	0	

Pay Data by Establishment | Resources | Code Lists for Select Fields | Raw Data | +

IN PRACTICE

Hands On – Recruiting CASE STUDY

Hiring a senior platform developer: the screener said no and couldn't tell us why.

1,200 applicants between Friday and Monday



cut by AI screening before a person looked

What went wrong

- Strong resumes were tagged rejected, and nothing recorded why. The hiring manager had to rebuild the analysis herself to check it.
- One flawed rule: it called a candidate's Microsoft Fabric experience impossible because the job started before Fabric existed, even though the job ran past its launch.

What we're doing about it

- Use AI questions that flag a candidate for a person to review, not ones that reject.
- Stay away from knockout automation that hides candidates and sends rejections on its own.
- Keep questions concrete. 'Lives within 35 miles of Napa?' works. Judgment calls don't.

If the tool can't tell you why it rejected someone, you can't defend the decision. And the decision is still yours.

Endsight internal hiring, October 2026.

IN PRACTICE

You're Still RESPONSIBLE

If the tool decides, the decision is still yours.



The tool is treated as part of you

Mobley v. Workday: discrimination claims over AI screening were allowed to proceed on the theory that the vendor acted as the employer's agent. The case is still open.

Maynard Nexsen, April 2026

California already regulates it

Rules on automated-decision systems in employment took effect October 1, 2025. The employer owns the outcome, even when a vendor built the tool.

Holland & Hart, February 2026. Not legal advice.

It can't reliably show its work

Ask AI why it decided something and it will often make up a confident answer after the fact. Have it log its reasons as it decides, and treat that as a lead, not a full record.

Bias comes from past decisions and from proxies nobody intended: names, zip codes, graduation years, gaps.

What you can do

Hide names and other identifiers from the screener

Flag candidates for review; don't auto-reject.

A person makes, and can explain, every rejection

Ask vendors about bias testing and the records they keep

IN PRACTICE

Hands On – Performance Reviews CASE STUDY

One annual review, drafted with AI. About the same time, and a much better review.

What We Gave It

- The employee's self-review
- Months of 1:1 and meeting notes
- Project records
- Engagement survey results and hiring numbers, added along the way

What It Gave Back

- A draft answer to every review question, in the manager's voice
- Specific examples from months of notes, not just last month
- Where the record was more mixed than the manager's overall read
- What it couldn't see, and the questions to settle

What the Manager Did

- Rewrote the hard paragraphs in his own words
- Cut numbers from a source he didn't trust
- Asked for real data and an outside benchmark
- Made every rating and every call on what goes in

Bottom Line: It didn't save much time. It made the review better: stronger examples, a longer view, and gaps named instead of glossed over.

IN PRACTICE

Where It HELPS

The same tool, doing two very different jobs.

Recency bias
Summarizes the full year, not just last month

Blank-page time
A first draft from the manager's own notes

Language
Flags vague phrases and feedback with no example behind it

Consistency
Checks a team's reviews against the same role expectations

Where It Goes Wrong

Repeating past bias
Who gets called 'abrasive' and who gets called 'confident'

Reviews that sound the same
People can tell, and it costs trust

Sensitive data
Approved, company-controlled tools only, never a personal account

The decision
A named manager owns it, explains it, and delivers it in person

AI can help prepare and improve the review.

The manager writes it, owns it, and delivers it.

IN PRACTICE

Hands On – Development Plans CASE STUDY

The Development Plan Builder: how our T&P team turned official readiness plans into a self-service AI skill.

What It Is

- A Claude skill that starts with one question, "I'm here, how do I get there?" and reaches a result in a few guided prompts
- Grounded in our standards: a growing library of official readiness plans, plus live job descriptions
- Four outputs: readiness gap check, 1:1 prep, a completed development plan, and draft SMART goals
- Guardrails built in: drafts only, no promises, nothing invented beyond the official plan

The Value It Brings

- **Consistency:** every plan is measured against the same official expectations, not a manager's memory
- **Better conversations:** employees and managers walk into 1:1s with evidence, strengths, and clear asks
- **Scale:** a 3-person T&P team supports development for ~130 employees
- **Transparency:** employees can see exactly what the next level looks like, on their own time

ROADMAP

DONE

Build

v1.0 built with 12 role paths and the live job description hub connected

NOW

Pilot

Testing with pilot manager and employee groups to refine before launch

NEXT

Roll Out

Manager-first launch, then all staff, with a feedback loop

LATER

Full Coverage

Plans for roles with only a job description; job descriptions and plans for T&P, Dev, and Office Admin

FUTURE

Skill Assessment

A built-in baseline of current skills and metrics to shape each plan. Today, this happens in the 1:1 before plans are finalized.

HOW WE BUILT IT

How We Built It RESPONSIBLY

Four building blocks, clear limits, and what we learned along the way.

01

START WITH STANDARDS

Embedded our 12 official readiness plans so every answer is measured against our expectations, not generic advice.

02

CONNECT LIVE SOURCES

Linked our SharePoint Job Descriptions hub, so a job description update flows into the skill automatically.

03

WRITE THE GUARDRAILS

Defined what it must never do before deciding what it should do.

04

VERSION AND ITERATE

Built as v1.0 under our AI & Automation versioning rule; every change ships as a new version.

What it WON'T do

- Promise promotions, pay, or timelines
- Invent requirements beyond the official plan or job description
- Finalize anything: every output is a draft for manager alignment
- Replace the manager and employee conversation

Lessons learned

- **Live sources beat copies:** linking the hub keeps the skill current
- **Name what's not supported:** clear coverage comms keep people from feeling left out
- **Pilot before you launch:** real managers and employees find what testing alone misses

Biggest lesson: AI is only as good as your documentation. Building this exposed which roles still need job descriptions and plans.

IN PRACTICE

CAN'T

The parts of HR that require being human.



The Hard Conversation



An Employee Relations Investigation



Reading the Culture



Employment Decisions



AI can help you prepare.

Only a person can show up.

What to REMEMBER

If you remember nothing else.

CHOOSE YOUR LENS

Choose optimism and stay flexible

Put the time AI frees up into higher-value work, and keep learning alongside your people.

ACTION: Ask five people what AI they used last week, and for what.

GUARDRAILS

Put a policy in place

Two pages: what counts as company data, which tools are approved, who's responsible.

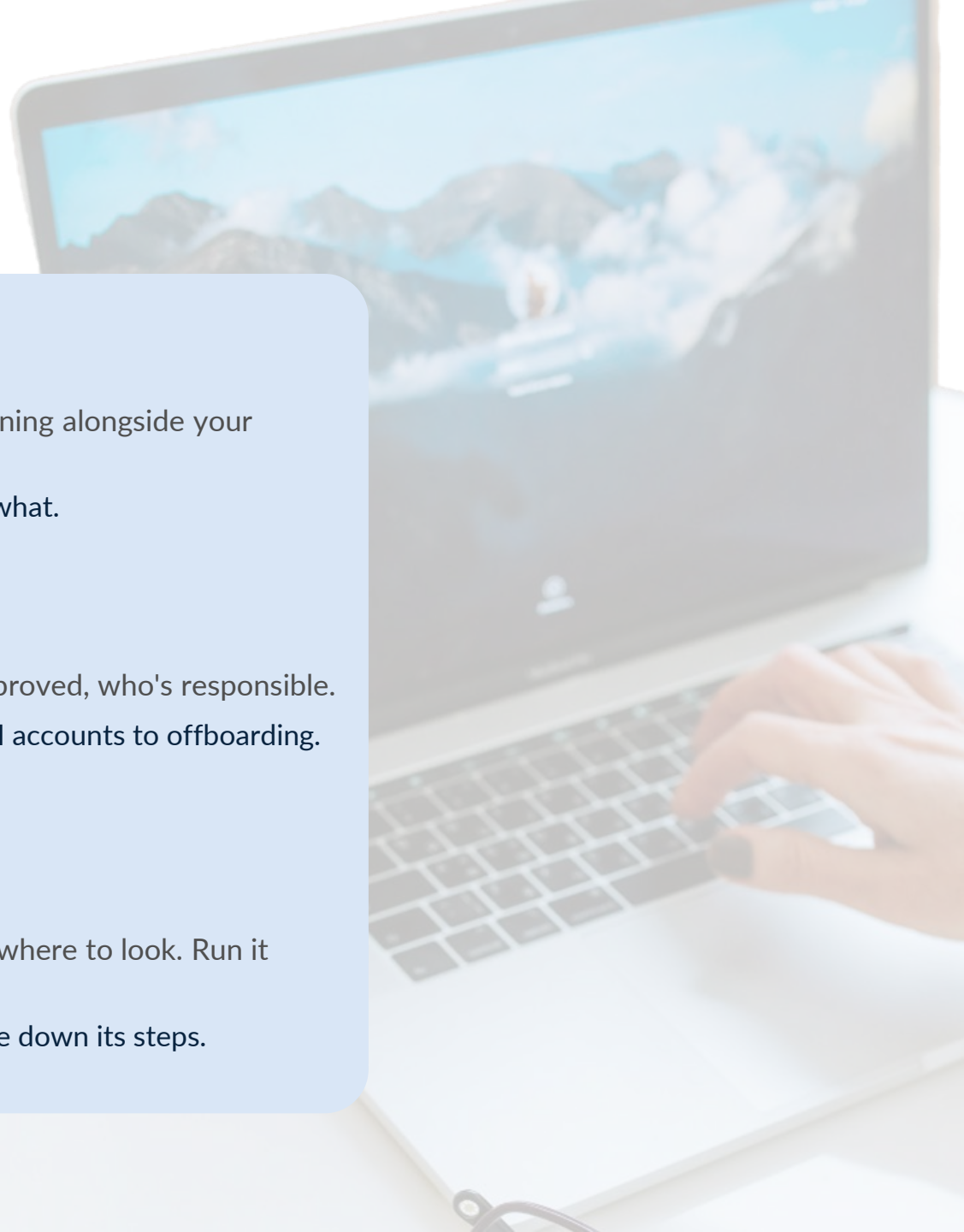
ACTION: Scan the QR code, start from our template, and add AI accounts to offboarding.

FLUENCY

Start with the quick wins

Repeated work first. Let AI check the standard and point you where to look. Run it beside the old way until it proves itself.

ACTION: Pick one process your team runs every week and write down its steps.



A few TAKEAWAYS

Scan for the templates. Same QR code as the policy slide.

Download page
for the templates.

AI acceptable use policy template

HR use cases: safe to start, needs a guardrail, keep human

AI checklist for onboarding and offboarding

Prompts to get started

AI Office Hours

Cybersecurity Training (Free!)

Didn't get to your question?

Erin will send us every question we don't get to today. We'll answer each one in writing for the event recap.

Questions

Send your questions through the event app.
No topic is off limits, and if we don't know, we'll say so.

Automate the admin. **Handoff.**

Assist the judgment. **Help me.**

Enable the human. **Hands on.**





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The more of us using good guardrails, the better we all are.