Worksheet: HR Task Suitability for AI

SUMMARY

Every business function is set to be transformed by AI and emerging technologies, and HR is no exception. As a pathway to boost productivity, moving routine or administrative tasks towards AI automation frees up HR teams to do what they do best – the more strategic and human tasks that computers can't replicate. Use this tool to explore how your team might leverage AI-powered tools to automate or augment your HR activities, saving you time, improving work quality, and helping you drive tangible business impact.

EIGHT STEPS TO COMPLETE THE 'HR TASK SUITABILITY FOR AI' WORKSHEET

This exercise will help you reflect on where HR teams spend their time now, and what this could look like in the future, so you can identify which tasks or responsibilities are open for automation, able to be supplemented by AI, or are unsuitable for AI tools. To complete the worksheet on page 4, follow these steps:

+ **Step 1: Select the team or function**. Choose the operational area that will be the focus of your review. This might be your immediate team, functional area, or the whole HR organization.

+ **Step 2: Isolate a strategic area**. Using the Example Strategic Areas table on page 2 as a starting point, identify an area that the team or function is currently responsible for.

+ **Step 3: Define deliverables**. Describe the output that this team or function produces within the strategic area. These are the services, tasks, responsibilities, or assets produced by the team.

+ **Step 4: Estimate current time**. List the amount of time (as a percentage) you think this team currently spends completing these deliverables.

+ **Step 5: Identify task suitability for AI**. Consider the major tasks or responsibilities associated with each deliverable. Using the Categories of Task Suitability for AI on page 3 as a guide, list the activities that could be automated by AI, supplemented by AI, or are not suitable for AI use at this time.

+ **Step 6: Project potential impact**. Now it's time to look to the future – if these tasks were automated or supported by AI tools, what results would you expect? Specifically note how these changes could shift time spent on these tasks, as well as any improvements in quality or efficiency of outcomes.

+ **Step 7: Explore your tech options**. Review this worksheet with internal stakeholders to determine the technology solutions available to support these transitions. Consider meeting with your IT team to discuss how you might apply AI or HR technologies to the tasks that are open to automation or supplementation by these tools.

+ **Step 8: Assess skills and capabilities**. Consider the competencies that this team would need to ensure these transitions are successful. This could be a starting point for existing team members' development plans or for success profiles of talent to be hired.

HOW TO USE

Consider using this tool in the following ways:

+ **Team Planning**. Facilitate a conversation or workshop with your team about the potential uses for AI.

+ **Proposal Development**. Create a business case for investment in technology and/or enablement.

+ **Task Analysis**. Use this worksheet as a planning tool to support role analysis and team needs into the future.

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HR teams play a crucial role in an organization's success as they are responsible for overseeing several strategic areas. While they are often interconnected and it is common for single teams to work across multiple areas, it is helpful to focus in on each unique operational area.

Example Strategic Areas

Recruitment and Hiring Identifying, attracting, and selecting candidates to fill job vacancies.	**Workforce Planning** Forecasting future workforce needs, identifying skill gaps, and developing strategies to address them.	**Performance Management** Assessing and improving employee job performance through feedback and goal setting.
Employee Relations Addressing and resolving workplace issues and maintaining employee satisfaction.	**Diversity, Equity, and Inclusion** Designing, implementing, and monitoring organizational systems and programs to ensure fair treatment and opportunities for all employees.	**Payroll and Benefits** Handling compensation for employees, including salaries, wages, and bonuses. Managing employee benefits, such as health insurance and retirement plans.
Learning and Development Facilitating education and professional growth through training and other initiatives to enhance skills, performance, and career growth.	**Strategic Business Partnership** Collaborating with business leaders to understand priorities and develop people strategies to support success.	**Employee Exit Processes** Managing the offboarding process for employees leaving the company.
People Analytics Gathering, analyzing, and visualizing people data to uncover insights	**HR Technology Management** Implementing, integrating, and managing a portfolio of technology systems.	**Compliance and Integrity** Ensuring compliance with labor laws and accurate regulatory reporting.

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Across the many areas that HR professionals support, there are some tasks that would benefit from AI automation or supplementation, and others that would not. To identify task suitability, start by making a list of critical tasks performed within your team or function and adding them into the "deliverables" column on the worksheet on page 4. Then use the following categories to identify where AI could add value by saving your team time, improving your work quality and impact, and helping you drive meaningful business results.

Categories of Task Suitability for AI

Suitable for AI Automation	Suitable for AI Supplementation	Not Suitable for AI use
Tasks that are highly repetitive, rule-based, and involve minimal decision-making can be fully automated, freeing up human resources for more complex activities.	Tasks or responsibilities that involve the collaboration of both human and AI capabilities. The AI assists the human in completing the task by providing tools, data, insights, or automation of specific sub-tasks. However, the human always retains responsibility for the task and makes final decisions.	Tasks that require complex problem-solving, emotional intelligence, ethical judgment, or high-stakes decision-making should remain solely in the hands of humans.

Tasks best suited to being **automated** by AI:

+ Have a clear set of rules or steps that can be explained simply
+ Use data that is structured and easily accessible
+ Carry low risk for potential errors
+ Are repetitive and time-consuming
+ Could benefit significantly from efficient scaling
+ Could be piloted or tested before scaling
+ Would require minimal to no emotional intelligence or empathy to complete
+ Tap into existing AI solutions that effectively perform similar tasks
+ Include a pathway for human intervention at all stages of the process
+ Have outputs and processes that can be monitored and managed by experts

Tasks best suited to being **supplemented** by AI:

+ Could be improved by AI tools that provide insights or recommendations to inform human decision-making
+ Involve large amounts of data that would be difficult for a human to fully process through other means
+ Have sub-tasks or steps within a larger process that AI can automate
+ Are currently performed with limited knowledge or insight
+ Include check-points where a person can validate or override the AI output
+ Are currently unable to be performed due to a lack of resources to source data and compute complex analysis
+ Have privacy, governance, and integrity safeguards in place to ethically involve AI
+ Could become more accurate or consistent through the use of AI
+ Can be supported by staff who have the adequate training and skills to use AI tools

Tasks that are likely to be considered **not suitable** for the use of AI:

+ Cross (or come close to) legal and regulatory boundaries
+ Require decisions that are highly complex and/or have critical impact on people's lives
+ Involve sensitive or confidential information, without adequate privacy, security, governance, or ethical frameworks to protect it
+ Take place in an environment of low trust or transparency
+ Build any potential for over-reliance or trust in AI generated output
+ Use existing datasets that are incomplete or contain algorithmic bias
+ Would significantly reduce explainability or transparency of decision-making by the introduction of AI
+ Are not supported by individuals who have the necessary skills or competencies to use the tools or outputs
+ Would cause significant employee or customer discomfort if AI were introduced

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Follow the directions on Page 1 to fill out this worksheet. Use the example on page 5 to see what a completed version might look like.

TEAM OR FUNCTION			STRATEGIC AREA			
Deliverables	Current time (%)	Tasks Suitable for AI **Automation**	Tasks Suitable for AI **Supplementation**	Tasks **Not Suitable** for AI	Potential Impact	
					Projected Time (%)	Results

Technology Required for Transition	Skills or capabilities required for transition

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EXAMPLE: Completed HR Task Suitability for AI Worksheet

TEAM OR FUNCTION	Talent Acquisition Team			STRATEGIC AREA	Recruitment and Hiring	
Deliverables	Current time (%)	Tasks Suitable for AI **Automation**	Tasks Suitable for AI **Supplementation**	Tasks **Not Suitable** for AI	Potential Impact — Projected Time (%)	Potential Impact — Results
Job analysis and candidate profile development	10%	+ Posting job ads + Inbox sorting	+ Analyzing job vacancy requirements + Writing job descriptions (Length, format, inclusive language, translation)	+ Headcount approval + Ideal candidate profile development	Job descriptions and ads written faster, customized for different audiences and platforms. <u>Potential time saving</u>: -5%	Reduced time from headcount approval to requirements posted, Increased ROI on job ads (customized based on performance)
Talent sourcing and candidate attraction	25%	+ Resume screening + Candidate queries (chatbot)	+ Candidate application process + Sourcing candidate profiles	+ Setting standards for application eligibility + External branding events	Talent acquisition time saved in technical skill screening, answering queries, and sourcing. <u>Potential time shift</u>: -10%.	Faster candidate progression through early stages, Increased bandwidth for external events
Applicant screening	20%	+ Application tracking and reporting	+ Screening interviews	+ Soft skill or culture-fit filtering	Reduced talent acquisition time in manual reporting. <u>Potential time shift</u>: -5%	Faster and more accurate insights for stakeholders
Candidate evaluation and interview processes	30%	+ Interview scheduling + Interview notes summaries + Candidate progress comms	+ Interview coordination + Skills assessment + Bias detection + Candidate and hiring manager experience management	+ Hiring committees + Accommodations Offer extend decisions	Time saved for both the talent acquisition team (chasing summaries) and internal interviewers (manually taking notes and writing summaries). <u>Potential time shift</u>: TA -10%, plus 50 hours per week (1hr per interview)	Faster candidate progress, Improved internal client and candidate experience (AI notetaker in the interview), Reduced bias through natural language processing, Improved interviewer quality through natural language generated feedback (currently not conducted)
Offer negotiation and acceptance	10%	+ Offer writing + Compensation package generation	+ Onboarding workflows	+ Offer negotiation	Reduced manual compensation generation steps and onboarding admin <u>Potential time shift</u>: -2%	Fairer and more accurate compensation packages, More effective transition to onboarding (currently a very manual process that's inconsistent across business units and locations)
Operational	5%	+ Processing paperwork + Manual workflows	+ Workforce planning + Internal talent mobility + Talent coaching and mentoring	+ Strategic advisory + Personal development	Savings in other tasks opens bandwidth for these areas <u>Potential time shift</u>: +20%	Time saved in other areas can increase capacity for strategic planning and advisory tasks.

Technology Required for Transition

+ Thematic analysis and automated summarization of text-based content, including bias and keyword alerts
+ Automated internal talent recommendations – skills management/taxonomy development
+ Virtual assistant/workflows for internal and external queries
+ Generative AI models for interview questions and summaries
+ Candidate and new hire process workflows and tickets (e.g., assessments, IT orders, onboarding notifications)
+ Continuous candidate and onboarding experience management – AI models trained on HR topics/terms, methodologies, and benchmarks, with ability to ingest experience/operational/behavioral data for added context

Skills or capabilities required for transition

+ Proficiency in HRIS and talent management software
+ Data analysis and visualization
+ Understanding of data security and regulations
+ Project and change management
+ Basics of IT, networks, and systems integration
+ People analytics

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