Designing AI-led conversations for HR

A field guide for People teams

A practical method to scope a 30-day pilot, ask for useful evidence, review what comes back and decide what is ready to act on.

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01. Choose one decision and one owner

A conversation campaign earns its place when a named person needs more context to make a decision. Begin with the moment that needs better evidence. In a performance cycle, that could be the manager and employee agreeing on one development priority. In a team campaign, it could be an operations lead deciding which handover change to test. For knowledge transfer, it could be an onboarding lead deciding which task needs a worked example.

> **Write the decision first.** By the end of this pilot, [owner] will decide whether to [specific action] for [team or process]. To decide, they need to understand [what is missing].

Pick a workflow that fits the question

- **Review preparation.** Gather the employee's account of work and the manager's direct observations ahead of a discussion. The useful output is a brief with contributions, context, disagreements and one support question.
- **Team development.** Ask where a recurring process breaks and what makes the better cases different. The useful output is a short list of testable changes, each tied to an owner.
- **Knowledge sharing.** Ask experienced colleagues to walk through a task and the exceptions that require judgment. The useful output is a checklist, worked example or practice guide reviewed by someone who does the work.

Choose a human channel when the situation calls for it

Use a standard survey when you need a comparable rating across a large group. Use facilitated interviews when people need a trusted person to explore a difficult topic. Route urgent, sensitive or formal matters through the appropriate established channel. A narrowly scoped campaign can still complement those approaches. For instance, a survey can identify where onboarding feels unclear, and a follow-up campaign can investigate which handover or instruction causes the problem.

Define what is outside the pilot. For a review-preparation pilot, leave pay, promotion, discipline and individual ranking out of scope. Keep the pilot's output separate from decisions that would require their own governance and assessment.

Use this launch test

The sponsor can explain which decision is ahead, who owns it, who is affected and what the team would do differently if the evidence pointed another way. If the sponsor cannot answer those questions, revise the scope before writing prompts.

02. Design the conversation around real work

Pick a time window participants can remember. Ask them to describe a recent event from their own point of view. The first follow-up should make the answer more specific. A second follow-up can uncover what helped, what was tried or what would make a different outcome plausible.

A five-part prompt pattern

1. **Anchor the event.** What was the last occasion in the past month when this happened?
2. **Find the person's vantage point.** What did you see or do yourself? Which parts did you learn from someone else?
3. **Trace the sequence.** What happened immediately before and after? What information was available at the time?
4. **Look for a counterexample.** Tell me about a similar occasion that went better. What was different?
5. **Invite a practical change.** What is one change that would make the next occasion easier, and who would need to be involved?

Write follow-ups that respond to the content of the answer. If someone says a late change caused confusion, ask what changed, when they found out and what they could do next. If they describe a workaround, ask when it succeeds and where it breaks. Let people say that they do not know or did not observe a particular event.

Worked example. A retail opening handover

Starting question. Think of the most recent opening when an unresolved task carried over from the previous shift. What did you find when you started work?

If the answer is general. Where would the unresolved task usually be recorded, and what could you see in that place on this occasion?

If the participant describes a consequence. What happened next? Was the task picked up, escalated or left until later?

If the participant offers a solution. On a day when the handover worked well, what made that solution easier to use?

Test the guide using practice examples before inviting employees. Check that each question uses words the team recognizes, asks about one thing at a time and can be answered without naming an individual. Test the experience on the devices and with the language or accessibility options your participants need. Agree which topics should lead to a human channel and how the participant will find it.

03. Keep employee and manager evidence separate

For performance and development conversations, employees and managers often see different parts of the same work. The employee may understand how a difficult task was accomplished. The manager may see what the work changed across the team. Give each person prompts suited to their position and preserve the distinction in the review brief. CIPD and Acas describe performance reviews as an opportunity to discuss work, feedback and development. See the references from CIPD and Acas.

Employee prompts

- Which piece of work best shows your contribution this period? What part did you own?
- What made that work harder or easier? What did you try?
- Which skill or situation would you like more support with? What would help you practise it?

Manager prompts

- Which piece of work did you directly observe? What did the employee do, and in what context?
- What evidence is available about the outcome? What remains your interpretation?
- What support or opportunity could you provide, and what progress would you look for?

Worked example. Two perspectives on the same change

An employee reports that they started using a short checklist before sending customer requests to another team and says the handovers felt smoother. Their manager recalls fewer questions during one shift. The time to resolve those requests remains to be checked. Capture the change and the two observations separately. In the review, decide which requests to sample and whether the checklist is worth trying in another shift. Avoid treating either observation as a measure of overall performance.

> **Review brief.** Record the work and time window, the employee account, the manager observation, any evidence of the outcome, open questions and the support to discuss. Give the employee and manager room to correct the account.

Keep discussion close to the work. Distinguish an individual contribution from a shared result. Describe the behavior, the setting and the observed effect before reaching for a trait such as leadership or ownership. If someone describes a capability outside the manager’s direct experience, record it as an opportunity to ask about. Use the review to agree on one action, the support it requires and when the employee and manager will return to it.

04. Read findings before you act

Assign a reviewer who can inspect the evidence and has enough knowledge of the work to recognize when a summary has overreached. Ask a second reviewer to check any theme that could have substantial consequences or where the first reviewer is close to the situation. Record corrections before sharing the findings.

The evidence review

1. **Check coverage.** Compare who was invited with who actually contributed. Note material gaps by site, shift or role. Keep individual-level data and small cohorts out of broader summaries when reporting would expose participants.
2. **Inspect the basis for each theme.** Look at the accounts that support it and those that complicate it. Separate first-hand observations from second-hand reports or suggestions. Verify exact quotes against the original.
3. **Preserve disagreement.** Write down whether accounts differ by shift, task or access to information. Treat missing responses as gaps in coverage.
4. **Right-size the conclusion.** Label a recurring observation as a theme, a single account as a lead, and the explanation you still need to test as a hypothesis.
5. **Tie it to an action.** Name the next check, who will do it and the date. Keep evidence that does not support a useful action in a separate open-questions list.

Worked example. Reporting a process issue

In a practice scenario, closing staff describe leaving notes in a shared document. Opening staff describe looking for updates in a different place. A review of the accounts finds evidence of a channel mismatch. The frequency of missed work across all shifts still needs to be measured. Write the next action narrowly. For two weeks, the operations lead asks both shifts to use one designated place and reviews the handovers against the same criteria.

> **Decision note.** Theme [what was observed]. Basis [evidence and whose vantage point it represents]. Limits [what is missing or disputed]. Next check [owner and date]. Action [what we will test, if appropriate].

Check the decision note after the change. Did the finding survive a fresh observation? Did it point to a change the owner could actually make? A strong pilot is allowed to end with a better question and a clear way to answer it.

05. Put privacy and access into the design

A useful pilot starts with a short written design record. Bring the people responsible for privacy, employee relations, accessibility and security into the conversation early enough that their feedback can change the plan. Use NIST's AI Risk Management Framework as a structure for allocating owners and reviewing risks. It is voluntary guidance. The ICO's AI guidance addresses data protection and minimisation when AI processes personal data. See the references from NIST and the ICO.

Document the boundaries before launch

- **Purpose and scope.** State what you need to learn, the intended use of the output, which participants are in scope and who decides whether the pilot proceeds.
- **Data and retention.** Inventory what the tool and reviewers receive. Include raw responses, summaries, any exports, logs and back-ups. Confirm the approved purpose, access permissions, retention and the method for handling corrections and deletions.
- **Participant notice.** Explain why people are being asked, who can see what, the alternative way to contribute, whether participation is expected and whom to contact with concerns. Confirm every statement against the actual process and tool settings.
- **Accessible alternatives.** Try the experience with relevant devices, input methods and language support. Give participants a way to raise access needs and a route to contribute without the AI interaction where appropriate.
- **Escalation.** Document what reviewers will do if a participant raises an urgent or sensitive issue. Tell participants how to find the established channel without waiting for the campaign to be reviewed.
- **System and vendor review.** Verify hosting and processing locations, access controls, retention and deletion, subprocessors, and whether the provider can use inputs or outputs for model improvement. Request the evidence your organization requires.

Assess consequential use separately

The EU AI Act's Annex III includes specified employment and worker-management AI uses. Classification depends on intended use and the applicable rules. If a proposal moves into evaluating an individual or materially influencing an employment decision, pause and have the relevant specialists assess it before changing the pilot. Check local requirements, including any applicable worker consultation, before launch. See the EU AI Act reference.

For this guide, the pilot boundary is deliberately narrow. People use the material to prepare a conversation or investigate a workflow. A designated owner reviews it, and a change in purpose requires a fresh review.

06. Run a 30-day pilot

Timebox the pilot so the team can commit to reviewing the material while the work is still fresh. One workflow and one accountable owner are enough. Choose a group that can contribute relevant perspectives and that the team can support within its review capacity.

Days 1 to 5. Define the decision

The sponsor and HR lead complete the pilot brief. Agree the question, intended use, participants, reviewer, measures, communication, escalation and data boundaries. Capture a simple baseline from the current workflow, using the same measures you intend to collect during the pilot.

Gate. Approval to test requires a named decision owner, an agreed review process and a clear way to support participants. Resolve open issues that would prevent those conditions from being met.

Days 6 to 10. Rehearse the conversation

Use practice responses to test a clear answer, a vague answer, a contradiction and an out-of-scope disclosure. Ask reviewers to check whether the output preserves important differences and whether they can trace assertions back to the underlying account. Verify participant notices and the alternative channel.

Gate. Confirm that the guide stays on topic, the process preserves context, and the team can handle exceptions and access needs.

Days 11 to 20. Gather input

Send the invitation through the approved route. Keep a record of coverage across the groups you need to hear from. If an important group is missing, ask the appropriate owner about availability and barriers. Give people enough time to participate and honor the scope you communicated.

Gate. The reviewer can explain who contributed, which voices are missing and whether the evidence can support the intended decision.

Days 21 to 25. Read and review

Check the findings against the underlying evidence. Record errors, uncertainty and corrections. Create a short decision note, then ask someone familiar with the work to challenge the most important themes and help choose the next check.

Days 26 to 30. Decide and close the loop

Compare the pilot against the baseline and the agreed gates. Choose to continue, adapt or stop. Tell participants what the process produced and how the organization will respond, within the confidentiality you promised. Carry out the agreed retention plan and record the next owner and review date.

07. Agree the measures before launch

Pick measures you can collect consistently and that help the sponsor decide whether to continue. Write down the baseline, denominator and owner. Use the results to learn about your pilot. Use evidence from additional cohorts to assess wider impact across the organization.

Coverage

Record the number invited and the number contributing. Look separately at the relevant roles, shifts or locations with enough participants for appropriate reporting. A high response rate overall can coexist with a key perspective missing.

Quality of evidence

Take a predefined sample of accounts and assess how many contain a specific example with an observable action and relevant context. On a second pass, check the themes for material misquotes, omissions and inferences. Record what a reviewer corrected and why.

Usefulness to the decision owner

Ask the owner which decisions or follow-up questions the evidence helped them clarify. Record what changed, who owns the next check and whether they would use the same approach again. If the findings just restate what was already known, examine whether the original question was precise enough.

Total effort

Count preparation, communication, follow-ups, review, corrections and participant support. Compare equivalent activities to the current workflow. Record any extra effort the pilot displaced to another team.

Participant experience

Use a short feedback prompt to ask whether the purpose was clear, whether people could contribute in the way they needed, and whether anything felt confusing or inappropriate. Review feedback about access separately from general satisfaction.

> **Illustrative pilot rule.** Continue only if the reviewer can substantiate all decision-relevant findings, the decision owner identifies a next check they can act on, and the review team closes any material access or process issues. Adapt the guide if coverage is uneven or evidence too vague. Pause if a material privacy or escalation issue remains open.

Put the measure definitions in the pilot brief. Ask the owner to sign off before launch. A decision made against a rule the team agreed in advance is easier to revisit if circumstances change.

08. Copy the pilot templates

One-page pilot brief

- **Decision and deadline.** [What will the owner decide, and by when?]
- **Campaign question.** [What exactly do we need to understand?]
- **Participants.** [Whose perspective is needed? How will each group have access?]
- **Boundaries.** [Which topics and uses are out of scope? What is the escalation route?]
- **Data and access.** [What is collected, who sees it and how long is it kept?]
- **Evidence review.** [Who checks the material, how will corrections be recorded and what can be shared?]
- **Measures and gates.** [What are the baseline, review dates and continue, adapt or stop criteria?]
- **Close-out.** [Who informs participants, owns the next action and verifies the retention step?]

Participant invitation draft

Use this as a starting point. Replace each bracket with language your privacy and employee relations leads have reviewed and that matches the actual process.

> We are asking about [topic] so that [decision owner] can [purpose]. You will be asked to describe recent work and may be asked a follow-up question. [Who sees which parts of the response and how the material is used.] The conversation takes about [tested time]. You can [alternative route or access support]. Please avoid including [agreed exclusions]. To raise a sensitive or urgent concern, contact [established channel]. Questions about this pilot or your information can go to [contact]. Please contribute by [date].

End-of-pilot review

- Which intended participants contributed? Which important perspective was missing?
- Which finding is supported by evidence? Which finding needs another check?
- What did the review team correct? What was the impact of each correction?
- What changed for the decision owner? What did participants say about the experience?
- Which access, privacy or escalation issues were raised? What is their status?
- Are we continuing, adapting or stopping? Who owns the next action and the close-out?

Keep one decision record. Share the level of detail appropriate to each audience. A sponsor can see the pilot measures and themes while individual contributions remain in the approved review process.

09. References and further reading

The worked examples and templates in this guide were written for illustration. The sources below explain the underlying risk and performance-management practices. Check current guidance in the jurisdictions where you operate before launch.

1. **National Institute of Standards and Technology.** Artificial Intelligence Risk Management Framework 1.0, January 2023. Voluntary guidance on assigning responsibility and identifying, assessing and managing AI risk.
2. **Information Commissioner's Office.** How should we assess security and data minimisation in AI?, consulted November 2026. UK data protection guidance on limiting and protecting personal data in AI systems.
3. **European Union.** Regulation (EU) 2024/1689, the Artificial Intelligence Act, 13 June 2024. See Article 6 and Annex III for the classification framework and listed employment and worker-management uses. Consult the current consolidated text and applicable national guidance when assessing a specific deployment.
4. **Chartered Institute of Personnel and Development.** Performance reviews, 30 January 2026. A professional overview of the role of reviews, feedback and development conversations.
5. **Acas.** Performance management. Reviews and appraisals, consulted November 2026. Practical guidance on discussing work, support and development objectives.

Continue with Lontra HR

- What is conversational AI for HR? explains when a conversation is useful and how to interpret what comes back.
- First HR campaign checklist gives your team a shorter reference for campaign preparation.
- Getting started outlines how to bring a real HR question and plan a first conversation about the workflow.