

# HR AI QUICK-WIN PLAYBOOK

*A Step-by-Step Guide to Completing Your HR AI Roadmap*

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Maven Cohort 2: AI for People Leaders · Global People Labs · May 2026

## **What This Guide Does**

There's a shortcut at the start (record a call → hand it to Claude → done). Or follow the 5 steps below tab by tab. Either way, you'll end up with your pain points identified, mapped, and your first 3 Quick Wins committed.

✨ **PRO TIP — BEFORE YOU START**

## Let AI Fill the Workbook For You

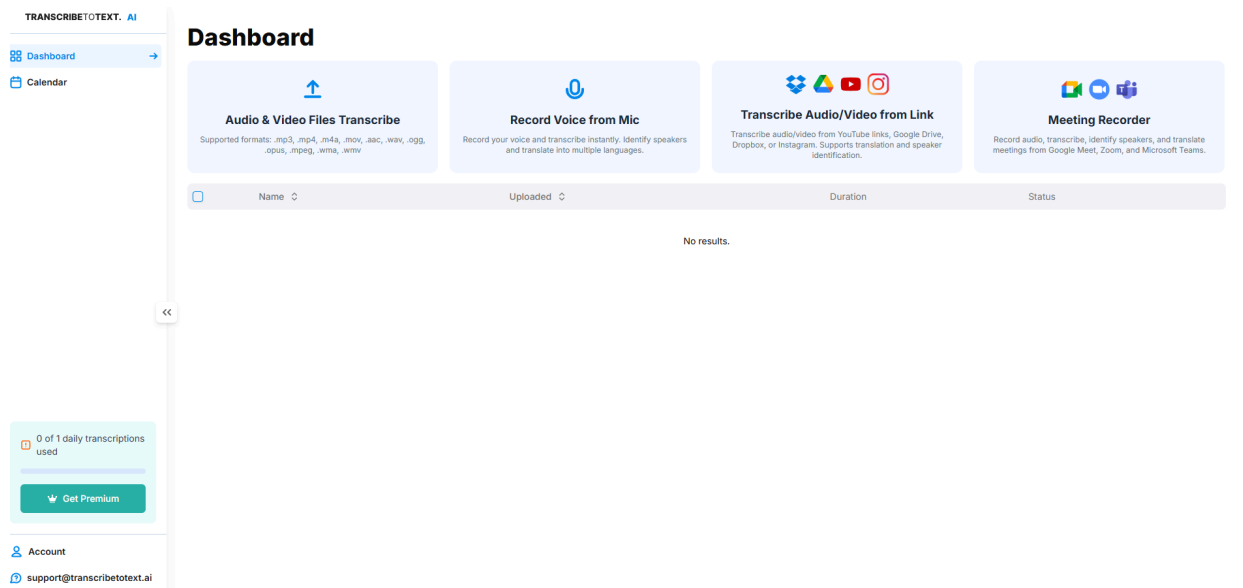
Record a conversation about your HR work → give Claude the transcript + workbook → it fills everything in.

Instead of filling the workbook row by row on your own, you can have a quick conversation about your HR work, record it, and hand the transcript to Claude. It will ask you clarifying questions and populate every tab. Here's the 3-step flow.

**A**

### Record Your Call

Use a transcription tool to record yourself talking through your HR pain points — solo or on a call with a colleague.



*TranscribeToText.AI — upload audio, record from mic, or connect a meeting link to get a transcript.*

**B**

### Give Claude the Transcript + Workbook

Attach both files to Claude — the transcript and the HR AI Roadmap Excel. Ask Claude to question you for any missing detail before it fills anything in.

#### **PROMPT — Give Claude the Files and Ask It to Clarify First**

I've attached two files: my transcript and the HR AI Roadmap workbook.

Before you fill anything in, ask me clarifying questions — especially about:

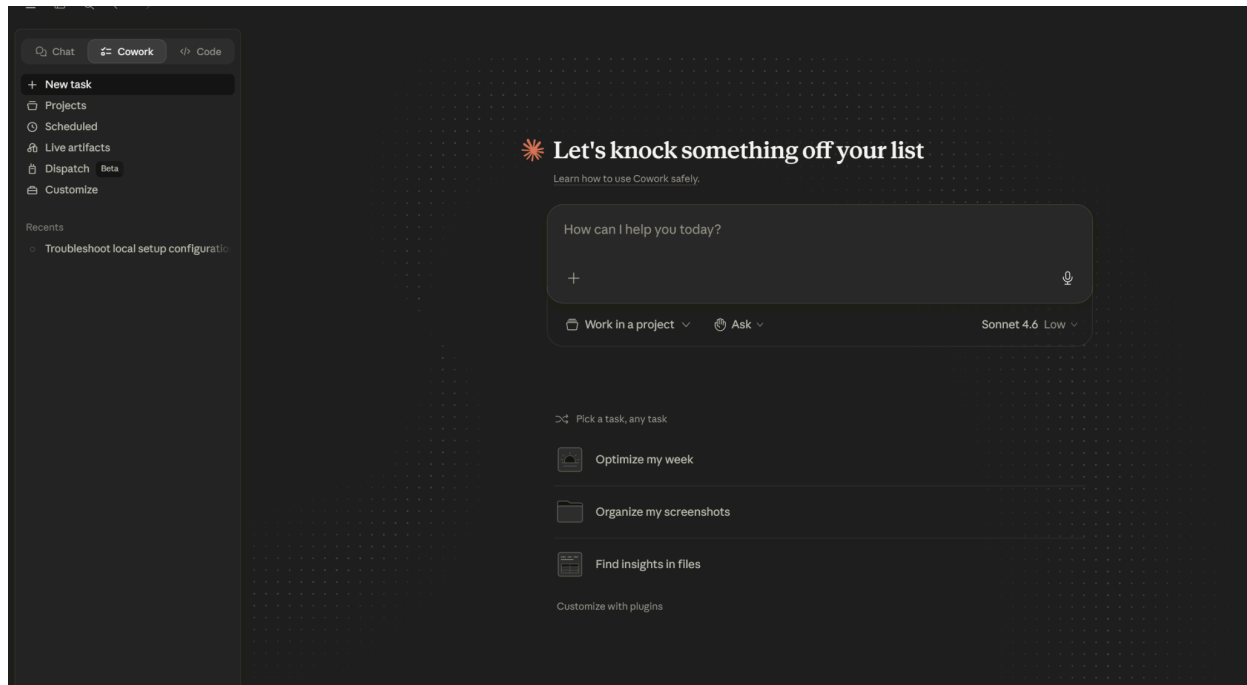
- What HR tools and systems I currently have access to
- Which AI door makes most sense for each use case (Chat, Cowork, or Code)
- Any pain points in the transcript that need more context

Once you have what you need, fill in tabs 1 · Identify, 2 · Map, and 2x2 Matrix based on everything I've told you.

**C** **Choose How Claude Delivers the Filled Workbook**  
Once Claude has asked its questions, choose which door works for you. Both get to the same result — pick what fits your setup.

**Door 1 — Chat**  
claude.ai · ChatGPT  
Paste your transcript + Excel into Claude Chat. Get the filled workbook back as text to copy in manually.  
*Best for: one-off sessions, no setup needed.*

**Door 2 — Cowork**  
Claude Cowork (desktop)  
Give Claude access to your folder. It reads and writes to the Excel directly — no copy-paste.  
*Best for: recurring use, live file edits.*



*Door 2 — Claude Cowork connects to your folder and edits the Excel file directly.*

**Not Sure Which Door?**  
Start with Door 1 (Chat) — works everywhere, no setup. Switch to Door 2 (Cowork) once you're comfortable. It's faster for repeat use and edits the file directly.

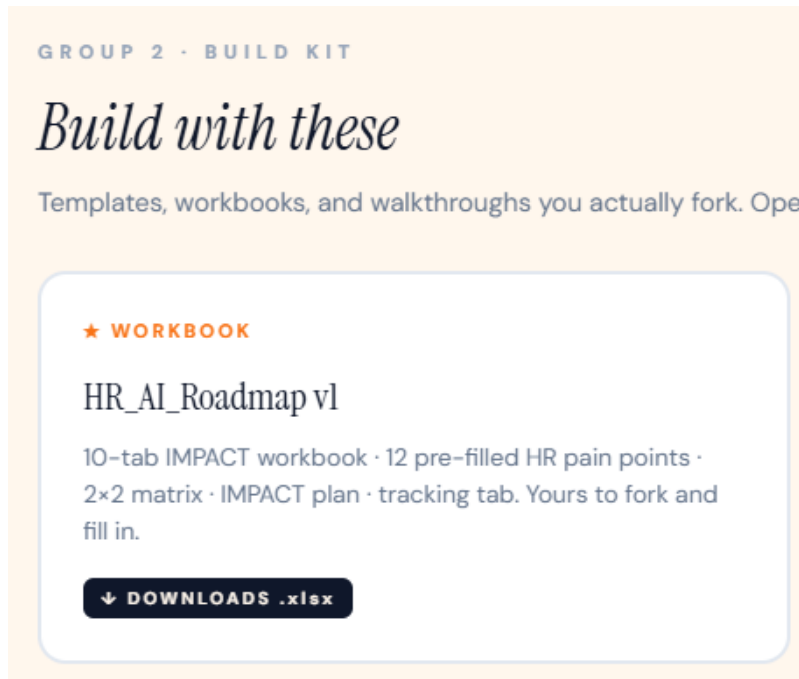
**Then Follow the 5 Steps Below**  
Whether you used the transcript shortcut or are starting fresh, the 5 steps below walk you through the workbook tab by tab. Use them as a checklist.

1

## Navigate to the Resources Page

[globalpeoplelabs.com/resources](https://globalpeoplelabs.com/resources)

Head to the Global People Labs resources page and download the HR AI Roadmap workbook. That file is the foundation for everything in this guide.



The screenshot shows a section titled "GROUP 2 · BUILD KIT" with the heading "Build with these". Below this, it says "Templates, workbooks, and walkthroughs you actually fork. Oper". A card for a workbook is displayed with the title "HR\_AI\_Roadmap v1" and a description: "10-tab IMPACT workbook · 12 pre-filled HR pain points · 2x2 matrix · IMPACT plan · tracking tab. Yours to fork and fill in." At the bottom of the card is a button that says "↓ DOWNLOADS .xlsx".

*The workbook download card on the Global People Labs resources page.*

 **Direct Link**

<https://globalpeoplelabs.com/resources>

## 2

## Download &amp; Read the Read Me

Tab: 0 · Read Me

Once you've downloaded the file, open the Read Me tab first. It explains the whole workbook — what each tab is for and how they connect. Follow it and you can figure out the rest on your own.

**HR\_AI\_Roadmap · v1**

*Companion to Maven Cohort 2: AI for People Leaders. By Global People Labs.*

**What this is**

A working draft.

**How to use**

**Step 1 · Identify**

**Step 2 · Map**

**Step 3 · 2x2**

**Step 4 · Pick 3**

**Step 5 · IMPACT plan**

**Step 6 · Bring to Session 2**

**Treat this as a draft**

**v1 of v=**

**Sources**

A 6-step workbook that maps the IMPACT framework (Slide 9 of Session 1) to your real HR work. You'll move from "AI sounds important" to "these are my first 3 Quick Wins."

On tab "1 · Identify", list 8–15 HR pain points across Recruiting, EX, L&D, Performance, Comp. Pre-filled with starters; replace with yours.

On tab "2 · Map", match each pain point to (a) the AI capability that solves it and (b) the door (Chat / Cowork / Code) you'd use.

On tab "2x2 Matrix", plot every item from Map. Quick Wins quadrant becomes your shortlist.

On tab "Top 3 Picks", commit your first 3 in writing. This is Project 1.1.

On tabs 3–6 (Pilot, Adopt, Capacitate, Track), fill the IMPACT detail for each of your 3 picks.

Come back May 30 ready to share which Quick Win shipped first.

This v1 is a starting point. We'll refine the layout, examples, and metrics together over the 5 weeks. Drop edit suggestions in the cohort chat with #roadmap-edit.

- IMPACT Framework — Cohort 1 of AI for People Leaders.
- Inspired by: BCG / David Green Agentic AI for HR Chart (2025) — see saved-posts library.
- SCALE 5 Pillars, 4-Level Data Sensitivity — frameworks covered in Sessions 2–3.
- Don't trust any number in this workbook without checking it against your own org. v1 is a starting structure. not a prediction.



*The Read Me tab — your orientation to the whole workbook.*



### Need More Help?

If anything in the Read Me isn't clear, this guide walks through every tab in detail. You don't have to figure it out alone.

Key things the Read Me covers:

- The 6 tabs and what to complete in each one
- How the IMPACT framework maps to your real HR work
- A reminder this is a working draft — edit freely, nothing is precious
- Sources: BCG Agentic AI chart, SCALE 5 Pillars, Three Doors model

STEP 3 OF 5

# 3 Identify Your Pain Points

Tab: 1 · Identify

This is the most important step — everything else builds on it. List 8–15 HR pain points across your function. The workbook comes pre-filled with examples; replace them with your own.

1	Recruiting	Inbound resume screening	Volume is high; ATS misses senior-IC nuance; recruiters spend hours on no-go resumes	Recruiting team
2	Recruiting	Interview prep + question generation	Hiring managers reuse stale question banks; behavioral interviews feel generic	Hiring managers
3	Employee Experience	Exit interview synthesis	Themes get lost across 20–40 exits/quarter; CHRO asks for patterns we can't quickly produce	HRBP / People Ops
4	Employee Experience	Onboarding sequence personalization	Same 30-day plan for everyone, regardless of role or level	People Ops
5	L&D	Manager coaching prep	Managers walk into 1:1s without prep; coaching guidance is generic	Managers + L&D
6	L&D	Internal training content drafts	Course outlines take weeks; SMEs can't write fast	L&D team
7	Performance	Calibration prep narratives	Writing fair, comparable evaluation narratives takes forever	Managers
8	Performance	Promotion case writing	Inconsistent quality of promo packets across the org	Managers + HRBP
9	Comp & Total Rewards	Benchmarking writeups	Pulling, summarizing, and explaining market data to leadership is slow	Comp team
10	Policy / Comms	Policy drafting + change comms	Every comp change needs an FAQ; legal review is a bottleneck	HRBP + Comms
11	Engagement / Surveys	Open-ended survey response synthesis	Reading 800 free-text responses by hand to find themes	People Analytics
12	Workforce Planning	Headcount narrative for finance	Building the why behind headcount asks	HRBP / Finance partner
<b>ADD YOUR OWN (rows 20–30)</b>				
13				
14				
15				

Tab 1 · Identify — pre-filled with 12 starter pain points across Recruiting, EX, L&D, Performance, and Comp.

**What to Fill In for Each Row**

HR function · Pain point description · What's painful about it today · Who feels the pain · How often it comes up · Hours spent per month. Aim for 8–15 rows total.

**PROMPT — Use AI to Identify Your Pain Points**

I lead [HR function] at a [company size / industry] company. Ask me 5 questions to help me identify my top HR pain points — where work is slow, repetitive, or produces inconsistent quality. Then give me a list of 8–10 specific pain points with: function, pain point, who feels it, and rough hours per month.

STEP 4 OF 5

4

Map

Tabs: 2 · Map → 2x2 Matrix → Top 3 Picks

With your pain points listed, map each one to the AI capability that solves it. Then use AI to generate your 2x2 matrix and pick your top 3 Quick Wins.

4a Fill the Map Tab

M · Map					
<i>For each pain point, name the AI capability that solves it and the door you'd open. (Chat = quick ask · Cowork = persistent helper with files · Code = ...)</i>					
MAP PAIN → CAPABILITY → DOOR					
#	Pain point (from tab 1)	AI capability needed	Era	Door	Tool example
1	Inbound resume screening	Classification + summarization	Trad ML + GenAI	Cowork	Claude Projects
2	Interview prep + question generation	Generation + role-specific tailoring	GenAI	Chat	Claude Chat
3	Exit interview synthesis	Theme extraction across long-form text	GenAI	Cowork	Claude Projects + file uploads
4	Onboarding sequence personalization	Conditional content generation	GenAI	Cowork	Claude Projects
5	Manager coaching prep	Summarization + tailoring to person	GenAI	Cowork	Claude Projects
6	Internal training content drafts	Long-form generation + structuring	GenAI	Cowork	Claude Projects
7	Calibration prep narratives	Comparison + standardized writing	GenAI	Cowork	Claude Projects
8	Promotion case writing	Evidence synthesis + standardized format	GenAI	Cowork	Claude Projects
9	Benchmarking writeups	Number-summarization + narrative	GenAI	Cowork	Claude Projects
10	Policy drafting + change comms	Generation + tone-matching	GenAI	Chat → Cowork	Claude Chat or Projects
11	Open-ended survey response synthesis	Theme extraction + sentiment	GenAI	Cowork	Claude Projects
12	Headcount narrative for finance	Number-to-narrative translation	GenAI	Cowork	Claude Projects

 **The Three Doors**

Chat = quick one-shot asks (Claude.ai, ChatGPT). Cowork = persistent assistant with your files (Claude Projects). Code = autonomous builder — unlocked in Session 3 (Claude Code).

**4b Ask Claude to Build Your 2x2 Matrix**

Don't fill in the matrix by hand. Paste the prompt below into Claude and it will generate your personalised 2x2 with 10 AI applications sorted into the right quadrants.

 **PROMPT — Ask Claude to Generate Your 2x2 Matrix**

I'm a [your HR role] at a [company size / industry] company.

Generate 10 specific AI use cases for my HR function and plot them in a 2x2 Strategic AI Opportunity Matrix with these four quadrants:

- Quick Wins = Low complexity + High impact
- Strategic = High complexity + High impact
- Experiments = Low complexity + Low impact
- Avoid Zone = High complexity + Low impact

Format as a filled 2x2 table. Then list the Quick Wins separately so I can copy them straight into my Top 3 Picks tab.

<b>↑ HIGH BUSINESS IMPACT</b>	
<p> <b>QUICK WINS</b>  <i>Low complexity · High impact</i>                  ← Claude fills these in</p>	<p> <b>STRATEGIC</b>  <i>High complexity · High impact</i>                  ← Claude fills these in</p>
<b>← LOW COMPLEXITY</b>	<b>HIGH COMPLEXITY →</b>
<p> <b>EXPERIMENTS</b>  <i>Low complexity · Low impact</i>                  ← Claude fills these in</p>	<p> <b>AVOID ZONE</b>  <i>High complexity · Low impact</i>                  ← Claude fills these in</p>
<b>↓ LOW BUSINESS IMPACT</b>	

*Claude generates 10 use cases and sorts them into the correct quadrant automatically.*

 **Then: Commit to Your Top 3**

Open the 'Top 3 Picks' tab. Take the Quick Wins Claude identified and pick your best 3. Fill in: name, owner, stakeholder, time to demo, tool, data sensitivity, risk, hours saved, success metric, and first action this week.

5

## Hurray!! You're Done 🎉

Submit before Session 2 · May 30

That's it. You've identified your pain points, mapped them to AI capabilities, let Claude build your matrix, and committed to 3 Quick Wins. Come to Session 2 ready to share which one you shipped first.

### ✓ Before You Submit — Check These Tabs

- 1 · Identify** — 8–15 pain points, all columns filled in
- 2 · Map** — Every pain point mapped to capability, era, door, and tool
- 2x2 Matrix** — 10 AI applications plotted — generated with Claude
- Top 3 Picks** — 3 Quick Wins committed with all fields filled in

### See You May 30

Session 2 is May 30. Come ready to share which Quick Win you shipped first. Numbers > opinions when leadership asks if it worked.

## Need more detailed help on any step?

The full expanded guide with worked examples, prompt templates, and the IMPACT plan is available on request.