

# AI Readiness for HR Teams

## A Practical Guide to Smarter, Faster Adoption

HR leaders and operators exploring or preparing to adopt AI tools inside their organization, including Winslow.



# Table of Contents / Sections Overview

Section 1

**HR's AI-First Mandate**

Section 2

**Finding Your First AI for HR Use Case**

Section 3

**IT & Legal Alignment and Buy-In**

Section 4

**Prepping the Right Docs, Data, and Processes**

Section 5

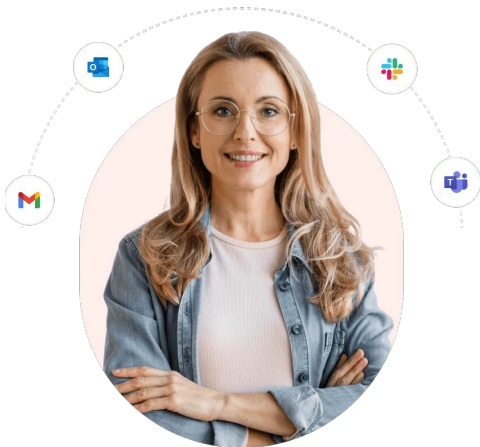
**Preparing Your People**

Section 6

**Rolling Out Your AI Assistant Internally**

Section 7

**AI Readiness Checklist**



## HR's AI-First Mandate

Across industries, HR teams are receiving a clear message from leadership: implement AI now.

Whether it's a CEO-driven directive or part of a broader digital transformation push, the pressure to "do something with AI" is real. However, what is often missing is a clear first step.

### About this Guide

This guide is designed to help HR teams transition from vague mandates to practical action, by implementing an HR chatbot as a smart, low-risk, and educational first step.

Winslow is the market leader in HR specific chatbots. We help HR teams of all sizes achieve their first AI project win with high ROI and low effort.

## Why HR Needs to Lead AI Adoption by Implementing

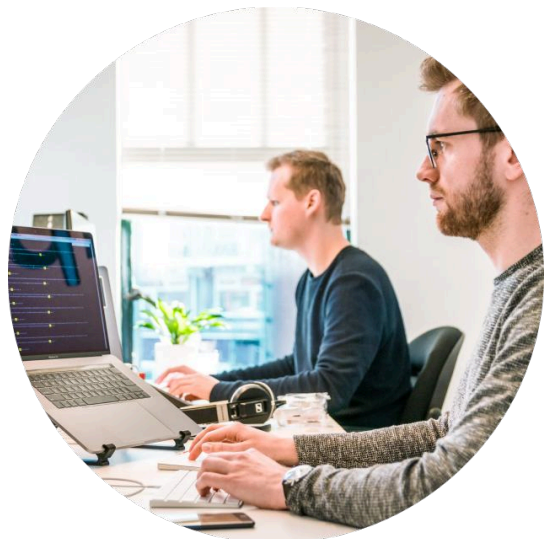
Artificial intelligence isn't coming—it's already here. Your employees are likely using it daily, even if your organization hasn't formally adopted it.

AI tools are now integrated into common platforms such as Slack, Google Docs, Notion, Gmail, and Microsoft Teams.



HR owns the people experience, and AI is quickly becoming a core part of that. Employees are increasingly demanding AI-enabled HR experiences that match what they see in other products. If HR does not have AI implementation experience under their belt and is not recognized as a leading AI thinker within the organization, they risk losing their seat at the table as company-wide decisions are being made.

**The window to establish your leadership in AI is a matter of months, not years.**



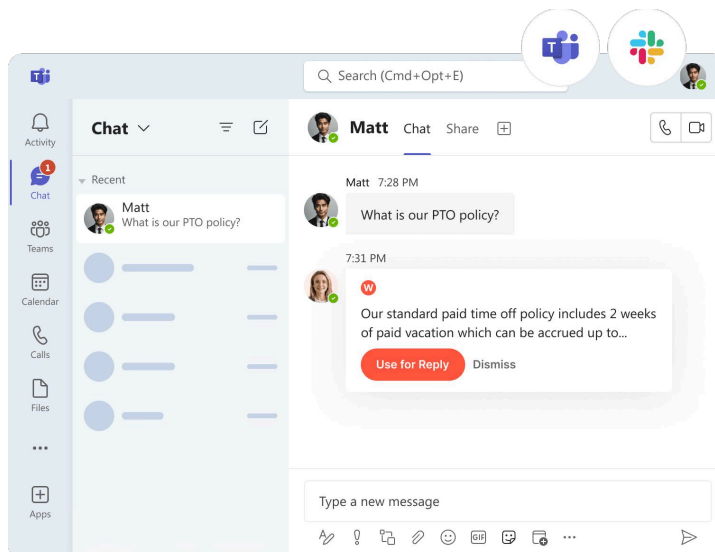
## Finding Your First AI for HR Use Case

One of the crucial early decisions in adopting AI is determining where to begin. While AI can support a range of HR functions, not every process is an ideal fit from the outset. The best place to begin is with tasks that are already well-defined, follow existing policies or workflows, and happen frequently across the organization.

 **Tip:**

*Look for problems that are repetitive, time-consuming and policy-based.*

Two of the most common starting points are the recruitment process and implementing a chatbot to help answer repetitive employee questions. While both are viable candidates, we would argue that HR chatbots are the right place to start. They meet the above criteria and take less time to implement, have immediate benefit to your whole HR team, and can be rolled out to all employees if desired as part of a showcase of your HR team's leadership in AI



### **Not All Chatbots Are Created Equal**

Winslow is designed to speed the process of answering repetitive employee questions. Built first and foremost for the HR team, we integrate seamlessly into existing workflows where your team answers questions, including Gmail, Outlook, Slack, Teams, Front, and the Web. You can optionally enable employees to ask questions directly to Winslow via Slack or Teams.

Answering employee questions correctly also requires connecting to and monitoring the locations where your policies and procedures are stored, as well as integrating with your HRIS system. Every time your HR team receives a question they need to know who the employee is and what their context is such as:

- State
- Country
- Worker status
- Health plan docs

Winslow collects this information and ensures we're answering the question with the right context and relevant docs every time.

Generic chatbots often lack the ability to understand this information, which can result in inaccurate responses being frequently surfaced. If an employee in Germany is asking about their healthcare options, it's important not to answer that question using SPDs for your American employees.

Winslow always provides answers to your HR team for review, so you can keep HR informed. We take the process of finding the right answer for the exact employee from 10-15 minutes down to 10-15 seconds. It's a high-value, low-risk first step into AI.

## IT & Legal Alignment

Rolling out AI in your organization isn't just an HR initiative—it requires support from IT, security, and legal teams. These stakeholders will have important questions about risk, data handling, and compliance. The good news? With a little prep, you can answer them confidently—and speed up the path to yes.

---

### Common IT & Legal Questions to Prepare For

#### 1. Access to Systems

Can the tool be installed in Slack, Teams, Outlook, or your internal environment? Is access read-only? Can it be scoped to specific folders or data fields?

#### 2. Employee Data Handling

What data is accessed (e.g., names, emails, salary, roles)? Is any data copied or stored by the vendor? How is PII secured or anonymized?

#### 3. Query & Response Storage

What happens to sensitive queries (e.g., medical concerns)? Where are responses stored and for how long? Can HR or IT view, delete, or redact logs?

#### 4. Regional and Legal Compliance

Where is data processed (U.S., EEA)? Does the vendor comply with GDPR SCCs? How are third-party AI services (like OpenAI) involved and managed?

## Legal & Common IT & Legal Questions Compliance Checklist

- ✓ Involve them early in the evaluation process.
- ✓ Share a list of integrations (Slack, HRIS, Google Drive).
- ✓ Provide a data flow diagram and a security one-pager.
- ✓ Ask your vendor for a complete INFOSEC overview (we're happy to give you one)
- ✓ Ask your IT department to provide your vendor with their INFOSEC or DPA (Data Protection Agreement) questionnaire as soon as possible in the process.
- ✓ Get a walkthrough on how third-party AI services are utilized and how data is managed.

When HR comes prepared with this level of detail, it builds credibility and makes you a partner in responsible adoption, not just another tool requester.

## Want to get buy-in for Winslow? Here's how we address the above issues:

**Minimal Permissions:** In most cases we require minimal permissions for our plug ins so anyone can install us.

**Certification:** We are Microsoft certified and all our Microsoft plug ins are available in the Microsoft App Store.

**Read-only + encrypted:** Winslow never writes back to your systems. All data access is encrypted using bank-grade standards.

**Limited Sensitive Information:** Winslow never asks for sensitive information (like SSN) from your HRIS. We limit the data we ask for to basic information required to have enough context to answer employee questions.

**We never store HRIS data:** We look up HRIS data in real time for every query and don't save it on our system ever.

**Context-aware, not open-ended:** Winslow only responds using your connected documents and systems.

**OAuth access:** We allow simple OAuth access for things like Sharepoint which can be easily revoked by you at any time.

## Section 3

---

**Delete and Forget Infrastructure:** Built with delete and forget features readily available to you in the UI. You always control when we have access to data.

**No data training:** Winslow does not learn from your queries or share anything across customers.

**Audit logs + admin control:** Full visibility into usage, with permission-based access controls.

**3rd Vendor Compliance:** Our 3rd party vendors all forget all data and prompts within 30 days, segment data between regions, and use SCC (or equivalent standards in Europe where required).

**SOC 2 in progress:** Compliance documentation is available and transparent.



# Prepping the Right Docs, Data, and Processes

If you're deploying an HR assistant like Winslow, preparation is key. These steps ensure the AI has the right context to be accurate, trusted, and truly helpful.

AI can't deliver accurate, helpful responses without clean inputs. Just like a new hire, it needs to be trained on the correct policies, formats, and workflows to perform its job effectively.

## Step 1: Start with Your HR Content Houtse

- Map where your information lives: policies in SharePoint, GDrive, Notion, PDFs; employee data in HRIS or payroll; comms in Slack or email.
- Centralize and clean up your source content: consolidate duplicates, confirm most recent versions, and archive outdated files.
- Organize documents by employee segments (we refer to these as personas): California, union, remote, part-time, etc.
- Highlight frequently used materials, such as offer letter templates, onboarding schedules, and common FAQ replies.
- Tag SOPs, such as onboarding flows, time-off approvals, and performance review cycles.

## Step 2: Prepare Your Employee Context (Persona)

- Outline different employee types: full-time vs. part-time, union vs. non-union, hybrid vs. remote.
- Ensure tools have read-only access to your HRIS to personalize answers based on role, status, or location.
- Group policies by audience where needed: e.g., "PTO Policy – Hourly Employees."

### Implementation Tips

- Consider assigning an “AI librarian” to collect, manage, tag, and organize documentation that all your AI tools will use
- Start by adding something simple, such as an Employee Handbook, and then install all the plugins you need for your workflow. Run a simple test with a few questions to ensure the end-to-end system is functioning properly.

When your documents are centralized, current, and contextualized, your AI assistant can provide faster, more accurate support, and your rollout goes more smoothly.

## Preparing Your People

If you're implementing an HR assistant like Winslow, preparing your team to engage with AI effectively is just as important as prepping your documents. Your AI is only as useful as the people using it.

That's where AIQ comes in: the ability to understand, interact with, and evaluate AI responsibly.

### What Is AI IQ?

Think of it like digital literacy for a new era. It's not about becoming a machine learning expert—it's about knowing:

- When and when not to use AI
- How to write clear, effective prompts
- How to assess the quality of AI-generated content
- How to align AI use with company values



### How to Build Team AI IQ

- Host a monthly “Prompt Jam” to share best practices
- Create an internal prompt library with templates for common HR tasks
- Run short trainings or share an “AI tip of the week” in Slack or Teams
- Highlight examples of good (and bad) AI output for discussion

Download our ChatGPT Cheat Sheets to help with learning how to use ChatGPT

Start here!

## What Every Employee Should Know

- **How to prompt well:** Start with clear context, tone, and expectations
- **Where AI already exists:** Slack, Notion, Google Docs, Outlook, etc.
- **When to defer to a human:** For anything sensitive, strategic, or emotional
- **How to fact-check responses:** Always review AI output before sharing

Once your team is equipped to use AI responsibly, the next step is to ensure that your IT and legal stakeholders are aligned—so that your tools are secure, governed, and scalable.

## Rolling Out Your AI Assistant Internally

Once your AI assistant is set up, the next step is getting people to use it. A simple, phased rollout helps build trust and adoption.

### Step 1: Start with HR

Turn your HR team into confident power users:

They should:

- Test key workflows (answering questions, drafting docs)
- Spot any content gaps or response issues
- Respond to a common employee question using data from the HRIS

#### Quick Wins for HR to Try:

- Ask Winslow to summarize a policy in plain language
- Draft an onboarding checklist from a role description
- Respond to an employee question using context from the HRIS

### Step 2: Choose Where Employees Will Engage

The easier it is to use, the more your people will use it.

We recommend:

- **Slack / Teams:** Let people ask questions in the tools they already use
- **Intranet or portal widget:** Embed in your HR hub
- **Email:** Optionally enable email-based Q&A for broader access

## Section 9

---

### Step 3: Set Clear Expectations

Let people know what your tool can and can't do.

- Announce the rollout with a friendly launch message
- Share examples of helpful questions (e.g., “How do I update my benefits?”)
- Reinforce privacy—that it won't share personal data or replace HR

### Step 4: Monitor and Improve

As employees start using the assistant:

- Track common questions and surface new opportunities
- Use feedback to improve documents and refine workflows
- Start with a pilot team or location, then scale

**Rollouts don't have to be perfect—they just need to be clear, simple, and responsive to feedback.**

## AI Readiness Checklist

Before you launch, make sure you've covered the essentials:

- ✓ Identified your first use case (start with Q&A)
- ✓ Reviewed legal and IT requirements
- ✓ Centralized and cleaned your HR documents
- ✓ Organized policies by employee type or region
- ✓ Connected your HRIS for personalized answers
- ✓ Equipped your team with basic AI training
- ✓ Chosen where employees will interact with Winslow
- ✓ Communicated what Winslow can and can't do
- ✓ Piloted with a small team and gathered feedback

## Ready to See Winslow in Action?

Winslow's team can help assess your AI readiness, guide setup, and deliver value fast.

Visit [usewinslow.com](https://usewinslow.com) to learn more or book a demo.