

WORKPLACE CULTURE AND AI ADOPTION - WHAT TO KNOW

“You rise to the level of your preparation.”

Innovate responsibly, stay compliant with regulations, build trust, prepare people.



Artificial Intelligence will only Become more Pervasive

Organizations already adopting AI, that have strong policies in place, are ahead of the curve, not scrambling to catch up. There is no going back.

The Business Case for AI Adoption and Policy

AI is reshaping industries quickly and brings both upsides and risk. A strong AI strategy builds trust, drives growth and ensures workforce readiness. It attracts employees, customers and investors. And, regulators and investors are watching closely.

Leadership Role and Responsibility

Leadership sets the tone for AI adoption, communicating the WHY, WHAT, WHEN and HOW; ensuring AI adoption is aligned with values and that a Change Management Strategy is in place.

Bringing AI into the Workplace

Identify the problem to be solved or opportunity to embrace. Start with what you already have embedded in the technology you use, encourage people to talk about AI usage, and go from there.

Policy Considerations

Good policy development builds trust and reputation, provides employee guidance and reduces risk. Engage different perspectives in developing and testing policies.

The ACHIEVE Framework

A guide to strengthening your AI policy and strategy. **A**cceptable Use, **C**ontrols, **H**uman Roles & Responsibilities, **I**nnovation & Ethics, **E**ducation & Training, **V**alidation & Review, **E**nforcement & Consequences.

Guardrails

AI guardrails provide critical protections in adoption enhance public safety and trust and promote the responsible use of AI.

People and Engagement

Human-centric policies and an understanding of the role of worldviews means you get the most out of your IT investment and the people who work in your organization. Providing training in the AI and the policies invites people to engage fully.

5-Point Employee Checklist

Guidance for both policy development and employee behaviors and actions.

Use Cases and Case Studies

How are companies already using AI. Examples provide inspiration for all the possibilities.

Learn more...

THE BUSINESS CASE FOR AI ADOPTION AND POLICY DEVELOPMENT

1. Protecting the Business/Risk Management

AI brings both upsides and risk. Leaders who are not on top of policy and adoption risk regulatory fines, reputational damage and exposure to biased or unsafe systems. Regulators and investors are watching closely - being proactive protects the business.

2. Trust and Ethical Responsibility

Employees, customers and partners are paying attention to how organizations use AI. Clear policies signal transparency, fairness and accountability. Mishandling AI - whether through bias, surveillance or poorly explained decisions - can erode trust and brand credibility.

3. Strategic Alignment

Without a clear AI strategy and policy, different departments may experiment in silos, leading to duplication, inefficiencies or conflicting practices. A company-wide approach ensures AI efforts align with business goals, ethics and values.



4. Competitive Advantage

AI is reshaping industries quickly. Companies that experiment, learn and integrate AI effectively can unlock efficiencies, productivity and new value streams. Those that lag risk being left behind as competitors move faster, reduce costs or deliver better customer experiences.

5. Workforce Readiness and Culture

AI isn't just a tool; it changes how people work. If leaders do not proactively plan adoption - through training, reskilling and culture building - employees may resist, misuse or feel threatened by AI. Done right, AI Adoption can boost engagement and innovation. Done poorly, it can create fear, resistance and talent loss.

6. Driving Growth

AI is no longer optional - it's a growth driver. Competitors are already using it to speed up decision-making, streamline operations and create new revenue models. The C-Suite has to set the pace or risk being out-innovated.

IT BEGINS AND ENDS WITH LEADERSHIP



Set a clear purpose for why you are bringing AI into your team or organization.



Be transparent about any impacts you anticipate and how you will deal with them. Address issues like job security, fairness and bias.



Model the way. Use the tools. Promote discussions about AI usage.



Stay true to your organization's values, ethics and culture.



Communicate. Communicate, Communicate. What you know and what you don't know. The vision, purpose, changes, strategies.



Build trust in the goals and the process through consistency and transparency.



As a leader, if you demonstrate vision and confidence, address concerns, provide a learning environment and model appropriate adaptability, you will begin building a foundation of trust in the process.



Listen for how people are using AI and any concerns they may have. Take this into account in your AI adoption and change strategies.



AI adoption is change. Have an adjacent change management strategy in place that takes worldviews, behavioral science, neuroscience and typical reactions to change into account.

BRINGING AI INTO THE WORKPLACE

Identify the problem to be solved

AI should address existing challenges, not be adopted as a trend. If you start with AI and try to figure out what problems it can solve, you'll end up with a solution in search of a problem.

Use what you already have

Microsoft has co-pilot. Google has Gemini. Organizations have intranets and many have in-house Chatbots. Use and training can begin with what you already have. Upskill people, including in developing more effective prompts to get better results.

Align with business strategy

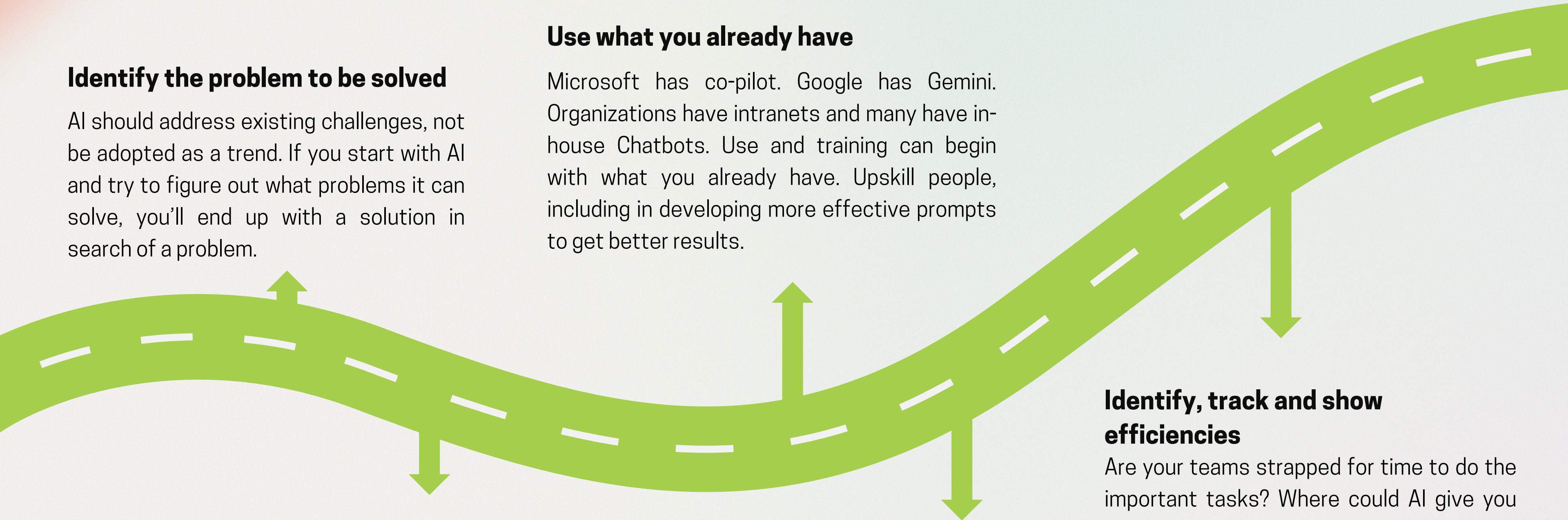
Show how AI is aligned with the goals in your strategic or operational plan. How can AI help speed up analysis or response times related to those goals and which is the best AI tool to use?

Make it okay for people to talk about what they are already using

Create an expectation that people will use the tools available and share their experiences - what works and where problems arise. That way, everybody learns.

Identify, track and show efficiencies

Are your teams strapped for time to do the important tasks? Where could AI give you and your teams time back? Does it take too long to do the online, social, and industry research you need done for your decision-making timelines? AI helps speed up the research process leaving people more time for value-added activities.

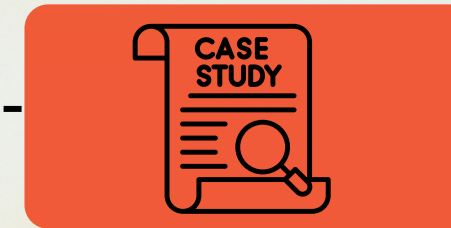
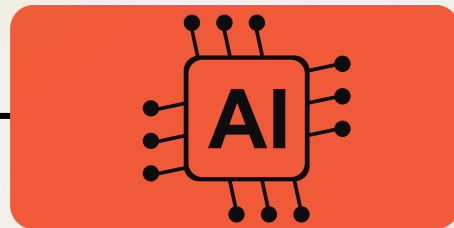
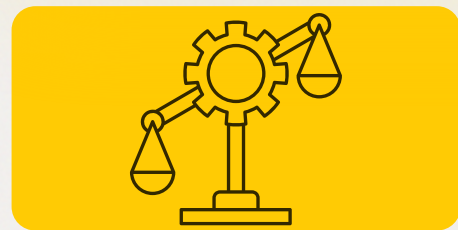


WHAT TO BE AWARE OF WHEN DEVELOPING AI POLICY

AI models may reflect or amplify existing biases, leading to discrimination in hiring, lending or customer service.

Data privacy and security needs to be protected by ensuring compliance with regulations when collecting and using customer or employee data.

Governments are rapidly introducing AI-specific rules, so policies need to be flexible and adaptable.



Limit AI-driven productivity tracking to avoid workplace surveillance concerns - but do use it to improve usage.

Clearly define approved use cases and forbidden practices.

Consider creating an AI ethics or risk committee.

Development of AI policy is not just an IT task. It requires an interdisciplinary, cross-functional team to ensure all worldview perspectives and experiences are taken into consideration.

CONSIDERATIONS FOR EFFECTIVE AI POLICIES

Principles of fairness, accountability and transparency



Rules for data privacy, security and compliance



Because AI isn't static, regular **audits** and **updates**



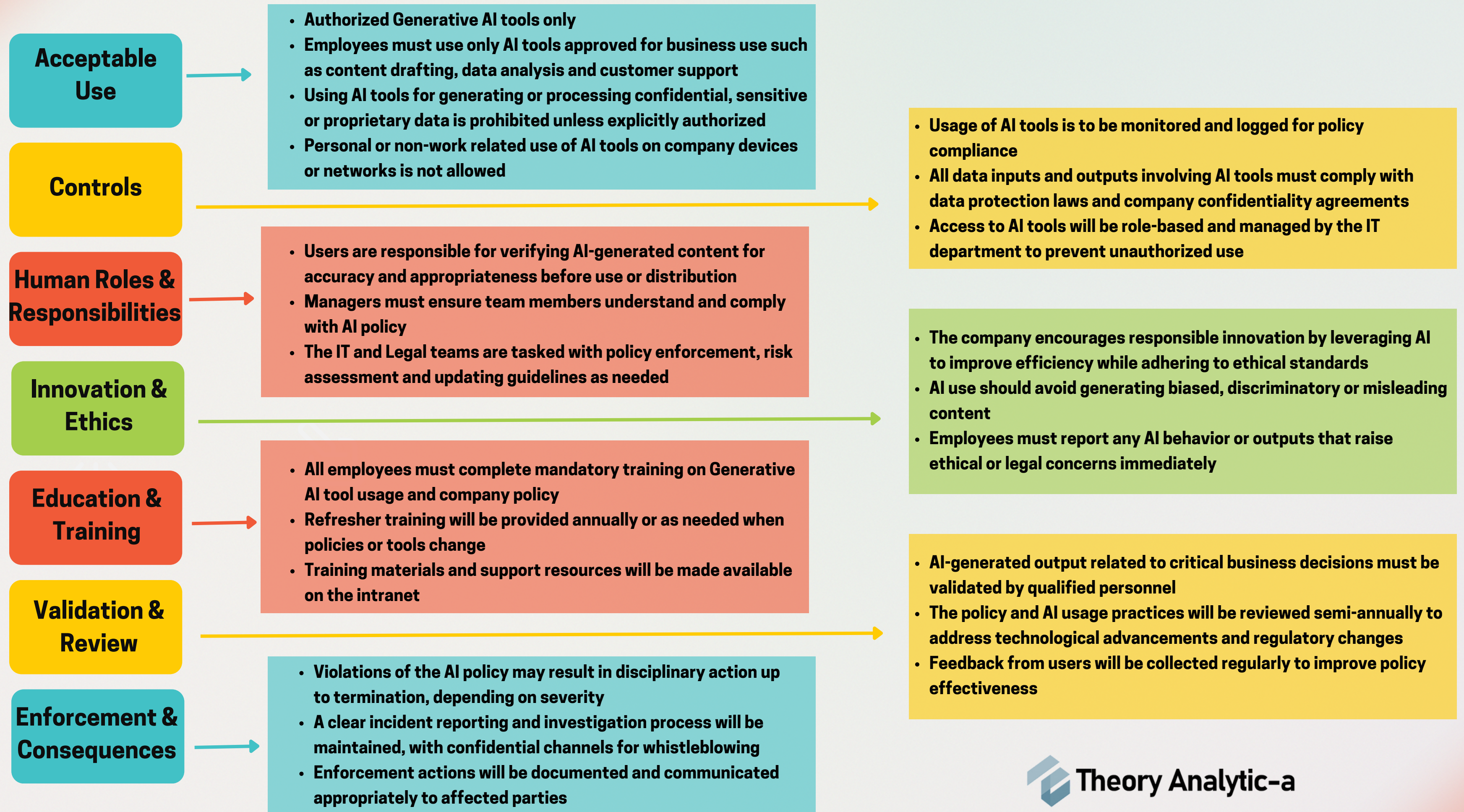
Training in AI use, questioning and policies



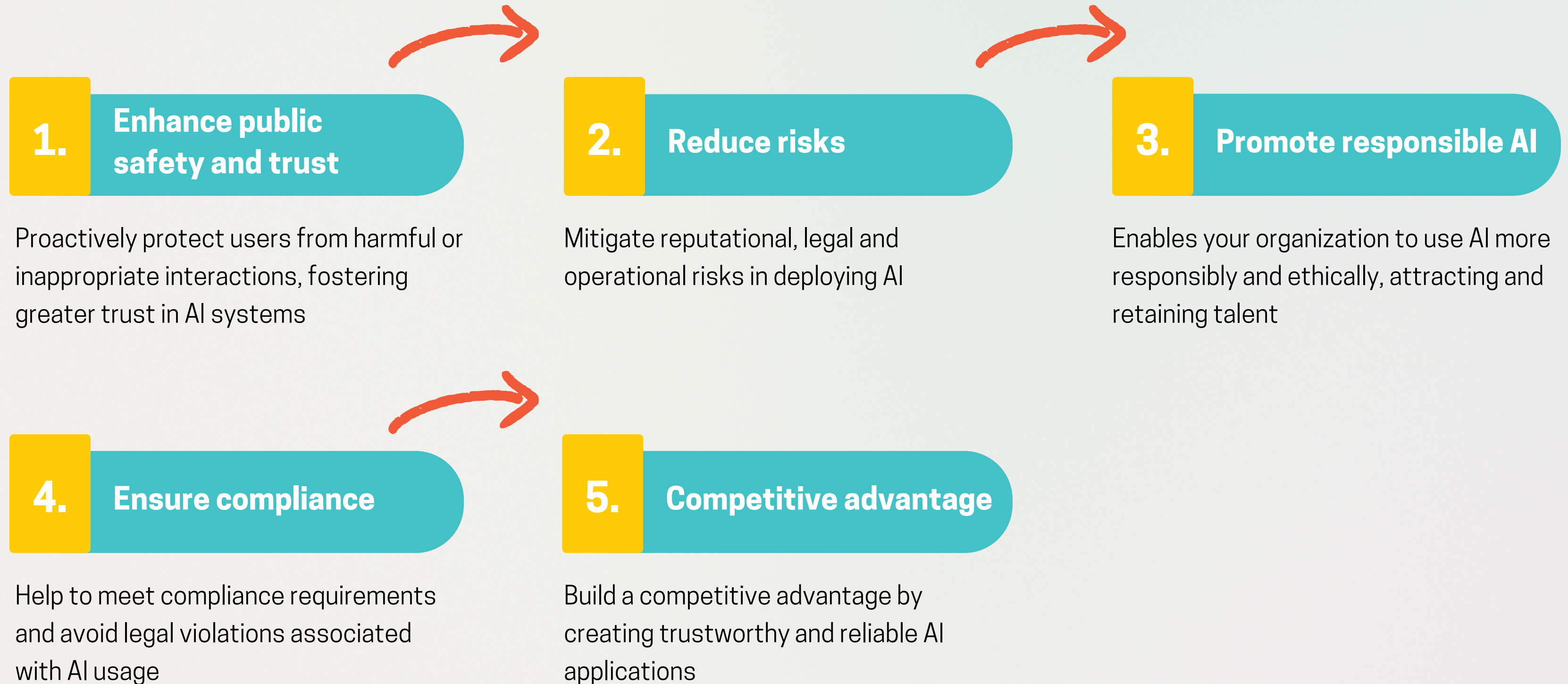
Promote **AI as an assist** with people making the final call, maintaining **human responsibility** and **accountability**



ACHIEVE - Practical Resource for Building Generative AI Policies



GUARDRAILS - WHY THEY MATTER



WHAT GUARDRAILS DO

Content Moderation

Intercept and evaluate user prompts and AI model responses to block toxic, offensive or inappropriate content.



Data Privacy

Prevent the exposure or leakage of sensitive confidential or proprietary data from AI applications.



Bias Mitigation

Identify and correct biases within AI outputs to ensure fairness and alignment with human values and societal norms.



Security

Protect against various vulnerabilities, including prompt injections, which are attempts to manipulate AI behavior through malicious inputs.



Compliance

Ensure AI systems adhere to legal requirements, industry standards and government regulations, such as General Data Protection Regulation (GDPR) or Health Insurance Portability and Accountability Act (HIPAA).



Reliability

Improve the factual accuracy of AI outputs by checking for hallucinations and grounding responses with contextual information.



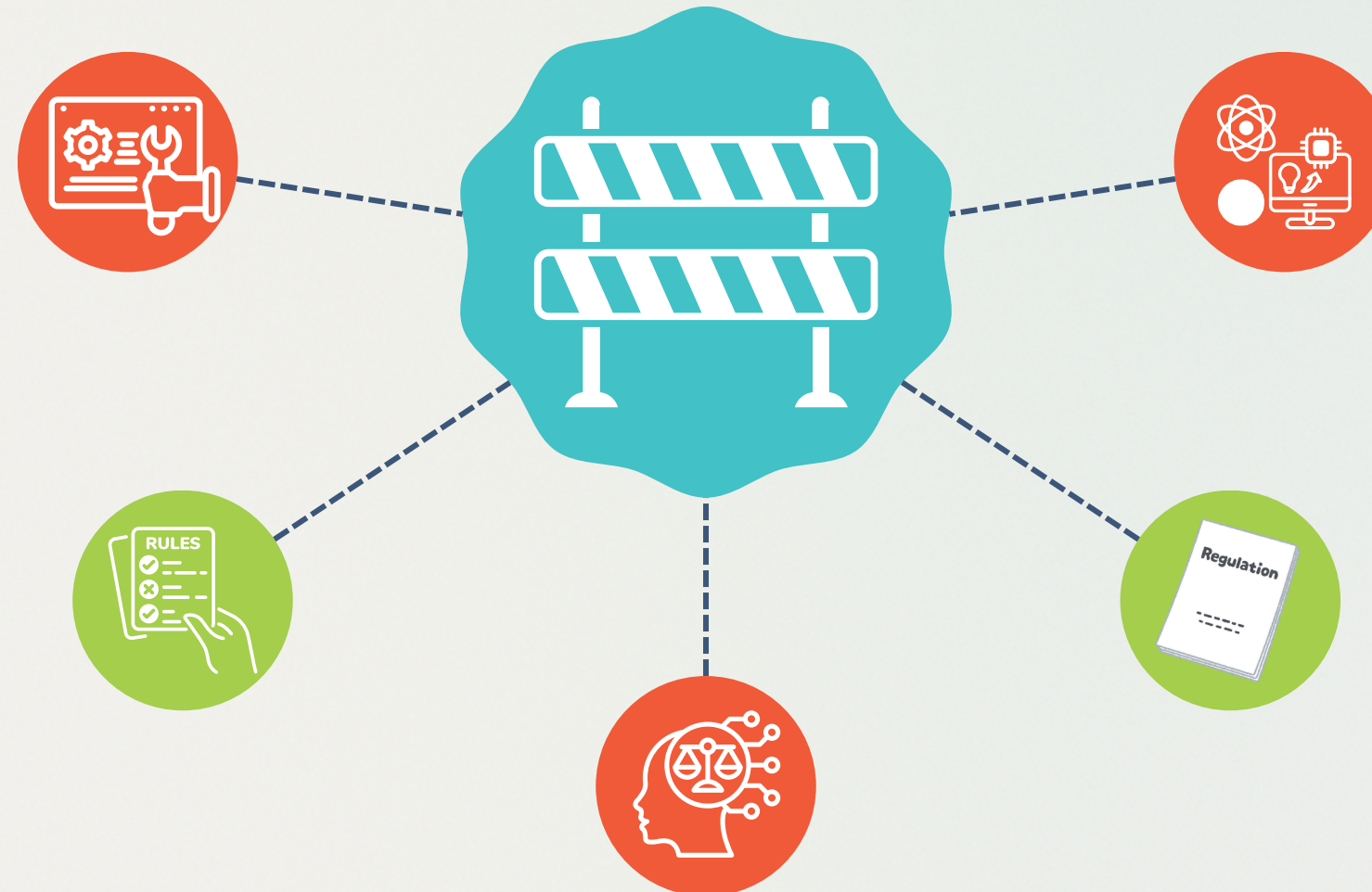
HOW GUARDRAILS WORK

Technical Guardrails

Software-based measures that monitor the AI's inputs and outputs for suspicious patterns or known attack techniques.

Operational Guardrails

Established procedures, such as human oversight, protocols for handling AI failures, and regular audits of the AI's decision-making processes.



Ethical Guardrails

Focus on aligning AI responses with human values and societal norms to ensure ethical behavior.

Soft & Hard Guardrails

Soft guardrails are hidden prompts or instructions embedded within the system to subtly guide AI's output. Hard guardrails are post-processing filters that block or stop AI output if it violates defined rules.

Regulatory Guardrails

Imposed by external bodies through industry standards and government regulations to ensure legal compliance.

THE HUMAN IMPACT

Change and Uncertainty

AI implementation is change. A change management strategy that acknowledges this while building capacity for adaptability and growth supports the successful adoption of AI. Understanding worldviews, neuroscience, behavioral science and typical reactions to change - think Change Curve - provides a solid foundation to move AI adoption forward.

Employee Engagement - Early On

Involve everyone in early conversations about AI adoption and AI policy development. Illuminate the various worldview perspectives - often on a continuum - that exist about AI adoption. Bring employee groups and unions into the conversation from the start - not as an afterthought.

Bring in All Voices

Bringing in different voices from across the company and all departments - including customers - can reduce bias, surface potential blind spots, and make policies more trusted and inclusive.

Listen to Ideas and Concerns

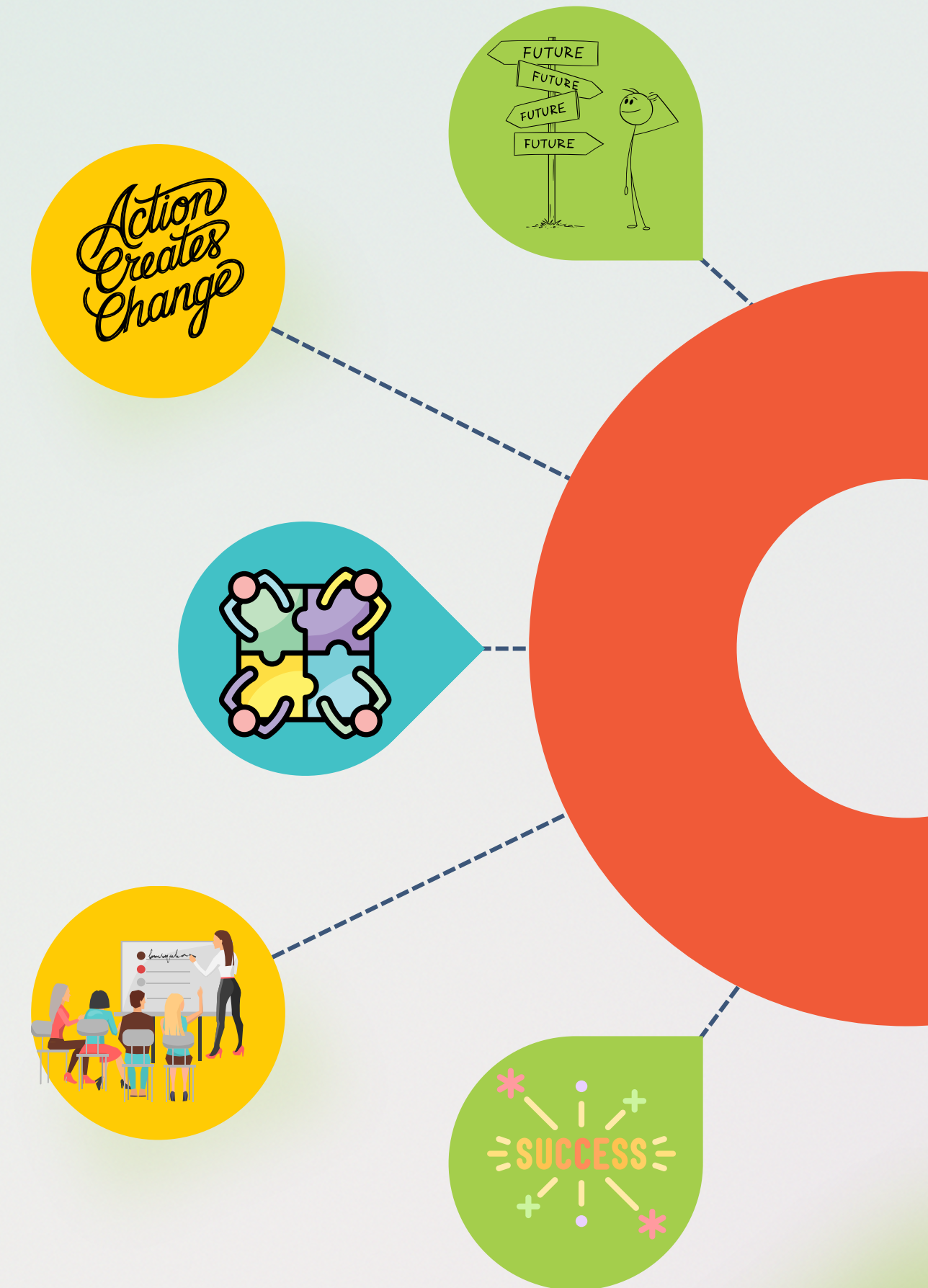
Co-create solutions instead of presenting final decisions. Show how AI can improve work flow, process and efficiency for employees, and not just the company. Respond to concerns as they arise. Establish an AI team to provide guidance and ongoing communication.

Adaptability and Capacity Building

Keep communication open as AI tools evolve, making sure employees and union reps are part of the review process, the organization remains adaptable to changing circumstances and continues to build capacity..

Training - on the AI and Policies

Provide training on the AI for skill development and consistency of use. Also provide training on the policies and on what to do when policies are not followed - or are not working.



5-POINT EMPLOYEE CHECKLIST

1. Use only company-approved AI tools for work tasks.

Always check if the AI software is authorized before using it for any business activity.

3. Review and verify AI-generated content before sharing or acting on it.

Make sure outputs are accurate, appropriate and free from bias.

5. Report any concerns or mistakes with AI tools right away.

If you spot something unethical, unsafe or that breaks the rules, tell your manager or IT team immediately.



2. Never input confidential or sensitive company data into AI tools unless specifically allowed.

Protect privacy by keeping personal, financial or proprietary information secure.

4. Complete required training and stay updated on AI policies.

Take all provided AI courses and read policy updates posted by the company.

DEMONSTRATED AI USE CASES

Streamline Repetitive Tasks

Automating routine workflows so teams can focus on higher-value work. This could include AI drafting responses to common customer service inquiries, typical requests or customer relationship management basic inquiries. People then have time to respond to more complex issues.

Enhanced Knowledge & Search Behind the Company Firewall

Secure, internal AI searches to improve speed and accuracy of information access. In call centers, customer service teams can instantly find past solutions to resolve cases faster and the AI learns from each query.

Regulatory & Jurisdictional Research

Quickly scanning, comparing, and summarizing complex regulations or looking through data bases for specific references to follow up on. Legal or compliance teams can save hours - even days - of research time and focus attention on the crafting of new documents, legislation or other higher-value tasks.

1.



4.



2.



5.



3.



6.



Data Processing at Scale

Analyzing large, complex datasets to uncover insights. This could mean turning thousands of employee survey responses into clear trends, compiling customer surveys or public engagement feedback. It removes personal subjectivity and the changing nature of perceptions from the first dozen surveys read to the last dozen.

Financial & Comparative Analysis

Supporting better investment, budgeting, and forecasting decisions by rapidly comparing financial models across multiple business scenarios. Providing a comparison analysis of multiple programs or options to determine best offers or understand distinguishing characteristics.

Decision Support

Delivering actionable insights to guide leadership. AI synthesizing customer feedback, market data, and financials to inform product strategy is one example.

REAL WORLD EXAMPLES

Costly Mistakes

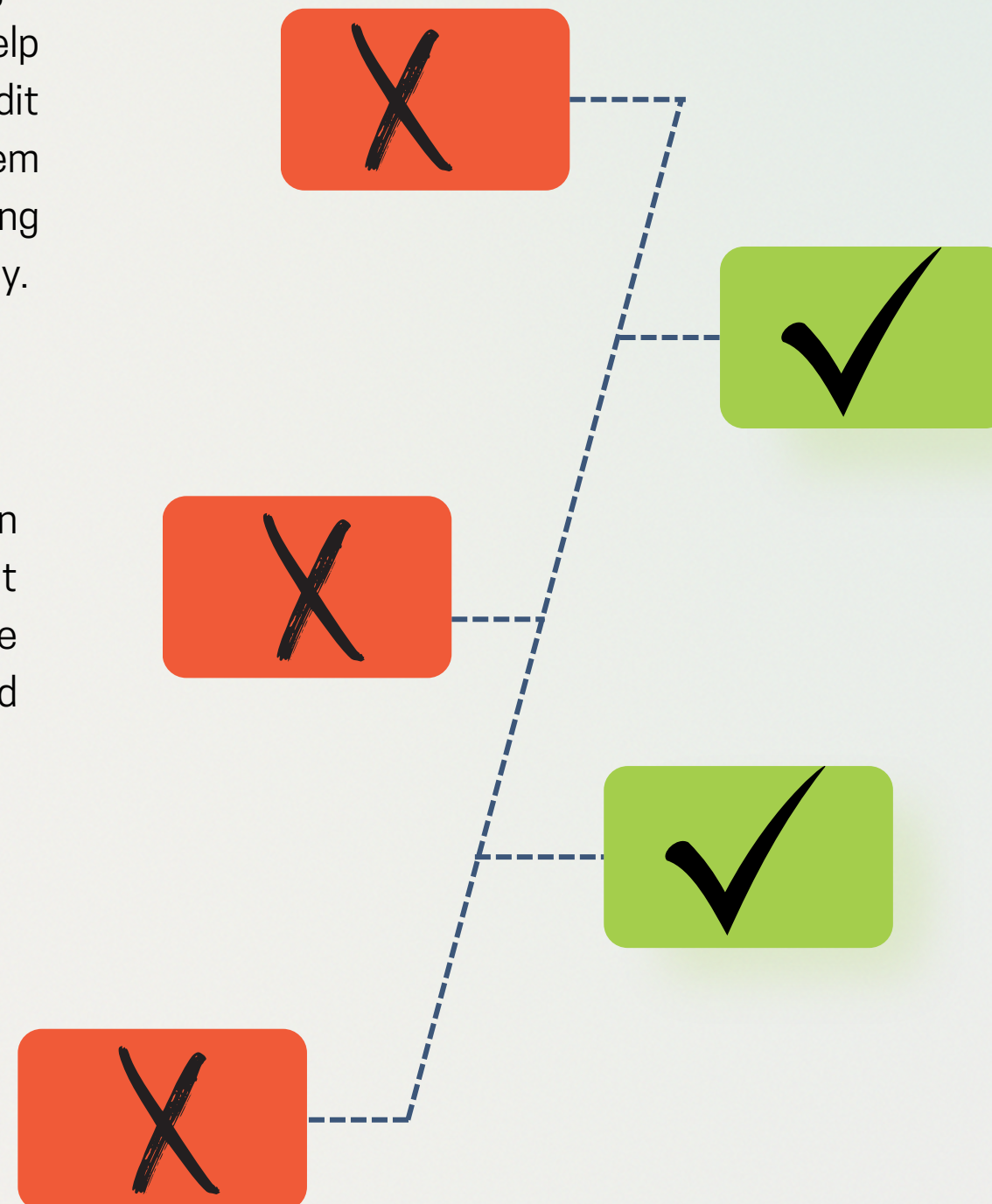
AI mistakes can be costly. A biased hiring algorithm, an automated loan rejection, or a misused chatbot can trigger lawsuits, regulatory penalties, and PR crises. Policies help prevent these scenarios. One example: a European credit agency faced investigation after its AI automated system was found to violate individual rights. Without strong oversight, what looked like efficiency became a legal liability.

Sharing Sensitive Data

Samsung's employees fed confidential client information into ChatGPT to draft reports. They didn't mean harm, but the data exposure risk was massive simply because there was no clear policy telling them what they could and couldn't do.

Trust and Reputation Risk

Amazon built an AI hiring tool to screen résumés. But its AI learned from past data and started penalizing women applicants, because historically more men had been hired. That tool was scrapped, but the reputational hit was real.



Transparent Principles

Microsoft made a point of publishing clear 'Responsible AI' principles. That transparency has helped them win contracts with organizations that demand trust and accountability.

Clear Guidelines Saved Hundreds of Hours

Kaiser Permanente gave staff clear AI use guidelines, and within months, employees were building safe automation tools that saved hundreds of hours of routine work.



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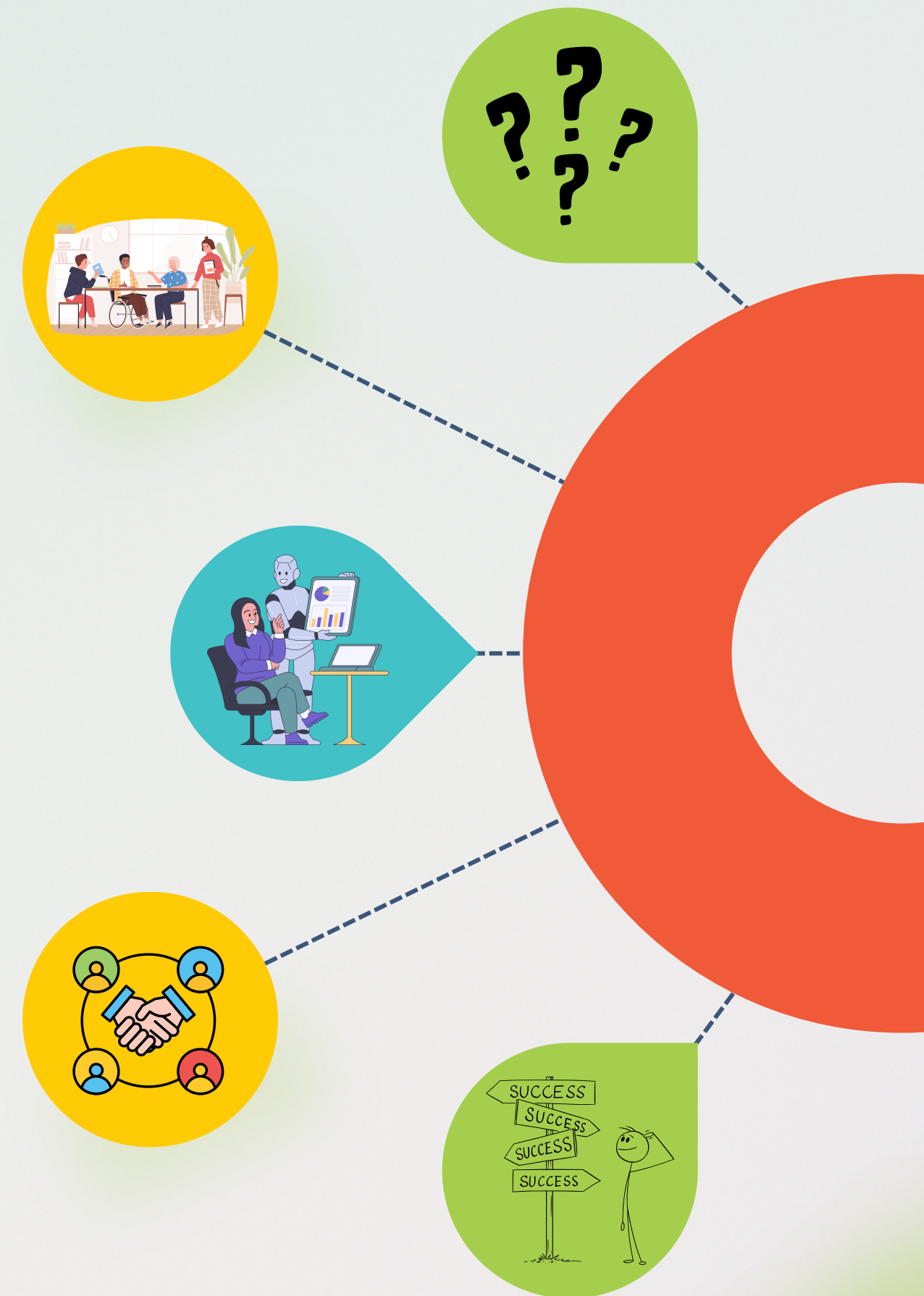
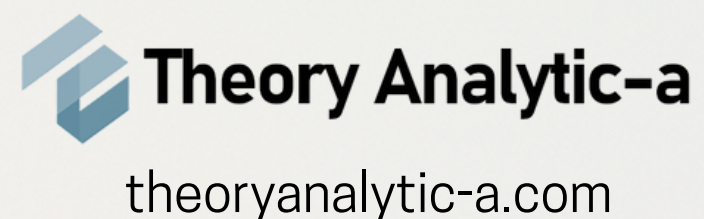
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A shout-out to our colleagues Christopher George
and William Stentz at Theory Analytic-a for their
great work on AI adoption and integration.



WHAT IS IT?

A work environment where employees feel valued, respected, and motivated to do their best work. Trust, collaboration, and well-being are strong, leading to higher productivity, lower turnover, overall job satisfaction and higher returns.

5 COMPONENTS

1. WORLDVIEW AND TEAM LEADERSHIP

Leaders set the tone for the team or workplace, building trust, relationship and accountability; understanding the power of worldviews and creating alignment of individual and organizational worldviews.

2. PSYCHOLOGICAL SAFETY AND BELONGING

When everyone is encouraged to speak up, knows their contributions are welcome and learns how to deal with conflict constructively, better ideas emerge and strategies are more comprehensive.

3. COMMUNICATION AND TRANSPARENCY

Communication requires consistency - no news is filled in by assumptions. Transparency in communication and decision-making is essential.

4. EMPLOYEE AND STAKEHOLDER ENGAGEMENT

Employees are engaged, have some influence or input over decisions that directly affect them and know how their work contributes to the organization's mission and goals.

5. METRICS AND ASSESSMENTS

Identifying metrics that matter and tracking them is essential to understanding the impact of systems, processes and practices and to continuous improvement.

Building and sustaining a Healthy Workplace Culture
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