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Spring 2024

Celebrating



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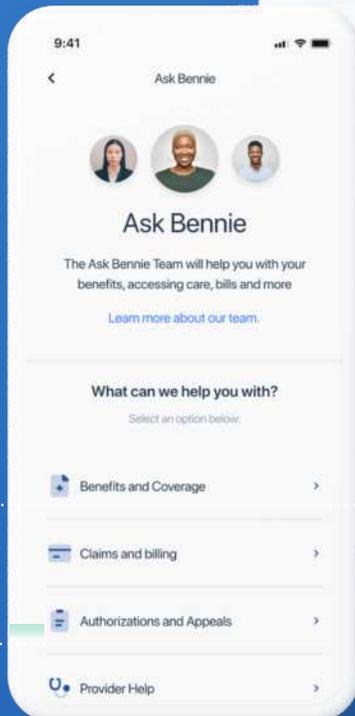


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Minimizing Risk:
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Publisher's Note

10,000 MEMBERS

A Milestone Worth Celebrating

By Denise Anema



In the spirit of celebration, I am thrilled to announce that we have crossed a significant threshold – 10,000 HR Advisory members! When I first stepped into HR Advisory, we celebrated a humble milestone of 1,000 members. The exponential growth we've witnessed since then is a testament to the strength and vitality of our community. What sets our community apart is not just the amount of members but the vibrant individuals who make it what it is – each one of you.



The Heart of Our Community – You

As we celebrate this milestone, it's essential to recognize the heart and soul of our community – you, the members. Your commitment, engagement, and willingness to share your knowledge and experiences have been the driving force behind the community's success. From seasoned professionals to those who just started their HR journey, everyone plays a crucial role in shaping the diverse and inclusive tapestry that defines HR Advisory.

Maintaining Integrity Amidst Growth

One of the most extraordinary aspects of our community is its ability to grow without losing integrity. As we've expanded, the core values of collaboration, respect, and support have remained steadfast. The camaraderie within the HR Advisory community is genuinely awe-inspiring. It's heartening to see experienced members generously offering guidance and support to newcomers, creating an environment where everyone feels valued.

A Year of Expansion and Connection

2024 promises to be an even more exciting year for HR Advisory. To connect with members coast to coast, we are

holding not one but two HRA24 events this year. These events will be a unique opportunity for us to come together, learn, and grow. The lineup of speakers covers a diverse set of topics ranging from 'The Power of Questions' to 'Taking Care of HR: Prioritizing Your Mental Wellness.' We believe these events will not only enrich your professional knowledge but also strengthen the bonds within our community. Our HRA24 events will delve into crucial aspects of HR, offering insights into 'Building a Comprehensive Parental Program' and exploring the concept of 'HR Through Others.' These topics are carefully curated to address the evolving landscape of human resources and empower you with the tools and knowledge needed to navigate the complexities of your roles.

In Closing

Words can't express the appreciation we hold for each member of our HR Advisory community. We are truly grateful for the privilege of engaging with such an exceptional group of professionals. Here's to a season of growth, learning, and continued collaboration.

THANK YOU

for making HR Advisory the incredible community it is today.

HR ADVISORY

JOURN

1000

1,000
MEMBERS



MARCH 2021

2,000
MEMBERS



OCTOBER 2021

3,000
MEMBERS



JANUARY 2022

4,000
MEMBERS



MAY 2022

KEY TO



000
MEMBERS

5,000
MEMBERS

8,000
MEMBERS

10,000
MEMBERS

2022

SEPTEMBER 2022

AUGUST 2023

MARCH 2024

HR ADVISORY

STORIES FROM OUR HR ADVISORY COMMUNITY



**RYAN
MATHIEU**

Q: What is the most valuable part of being an HR Advisory member?

A: As a People Team of One, I'm really looking forward to being able to bounce ideas off of other leaders. This will be a great resource for me as I have teams in the US and UK. It's also been really eye-opening to see how different industries operate. I see it as being a great place to learn and help.

Q: What makes HR Advisory stand out from other HR communities or groups?

A: I just joined, but the level of engagement seems to be high. I've also enjoyed that the conversations seem overwhelmingly positive. Members genuinely want to help each other problem solve.



**NATASHA
JOHNSON**

Q: What are the most impactful things you've learned as a result of community?

A: I've learned to have patience for myself. Initially, it felt like I had to have everything perfect all the time, the right answer prepared, and be able to handle people and resolve problems like some sort of superhero. However, this community has shown me that there are others handling similar issues to myself, and that I need to offer myself the same grace and patience.

Q: How has being a part of HR Advisory helped you in your HR journey?

A: It's an amazing resource, especially for someone relatively new to the field like myself. There's so much advice, so many people to reach out to, and when I need a laugh, the #random and #petlovers channels always lift my spirits when I'm feeling stressed. I especially like browsing the help and advice sections when I have the time available, as it helps me better prepare for handling various problems in my career.

HR Advisory is now over 10,000 members strong! Community and connection make HR Advisory the resourceful, engaging space that it is, and each member helps make this possible. As we celebrate this milestone moment, let's take a journey through stories from members who joined at different times and hear how HR Advisory has impacted their HR journey.



**MARGARET
KURTZ**

Q: How has being a part of HR Advisory helped you in your HR journey?

A: HR Advisory has opened up my network to thousands of experts. As an HR leader, we know that there is no limit to continued professional growth, and HR Advisory has given me access to other leaders whose knowledge and experience amplify my own as I drive strategic and innovative HR solutions in my own organization

Q: What is the most valuable part of being an HR Advisory member?

A: In my opinion, the most valuable part of being an HR Advisory member has been the live access to all the members in the network. Being able to ask a question to the Slack platform of thousands of professionals and tap the knowledge of people who have solved for the same things you are solving for has been invaluable. While every organization is different, the challenges that we face often are similar, and utilizing the platform to harness the collective knowledge of the HR Advisory members is an incredible benefit for not just the members, but the HR industry at large.



**DARON
MOORE**

Q: What makes HR Advisory stand out from other HR communities or groups?

A: What truly sets HR Advisory apart is our commitment to fostering an inclusive environment where your background or location doesn't matter, but your voice absolutely does. We prioritize active engagement, enabling members to not only share their expertise but also learn from the wealth of experience present in the community.

Q: What are the most impactful things you've learned as a result of community?

A: The exchange of ideas, best practices, and real-world experiences has been invaluable. I'm sure to find someone who has gone through, is going through or soon will go through any one of the many challenges we face. Here, we don't have to face them alone.

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JESS HAZLETT
VP People, Endless West

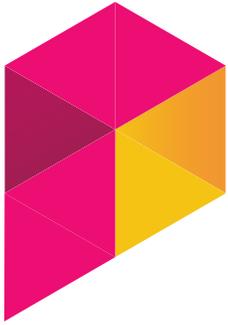
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How Technology and Automation Elevate ON's Employee Experience & HR Strategy

By Kristina Dinabourgski



ON

Natasha Ubaldo is the Head of People at ON, a conversational AI platform startup based in San Francisco. Just as the organization uses cutting-edge technology in its products, the innovative and tech-forward mindset also extends to People operations and strategy. Let's learn a little more about Natasha, her role at ON, and how she guides her People team to leverage technology to help their people thrive in the workplace.

Getting to Know Natasha

For Natasha, every day at ON looks a little different. The day can involve meetings with leadership, discussing high-level strategy and operations, or with team members, doing pulse checks. It can also include checking in with her People team to set up strategy from a people perspective or creating space to execute all people-related tasks.

For Natasha, HR was the ideal combination of the two fields she studied - business and psychology. She's now been in HR for over eight years and loves the impact she's able to make. While she initially started out working in the healthcare space, after pivoting to tech, she found that it was a perfect match for her.



“Once I found myself in the tech space, that was just a match made in heaven. And the rest is history from there. I saw a space where I could truly make an impact.”

Impact drew Natasha to People Operations, and it's what she finds most rewarding about

her role. Working in startup environments has been especially rewarding because she sees the impact more directly.

“When you're in a smaller, growing, scaling organization, you get to be a part of laying the foundation and building out the structure that people need to really thrive and succeed within their roles.”

ON's People Team and Core Values

ON is an industry-leading enterprise-grade conversational AI platform trusted by the world's leading retail, sports, and media & entertainment brands. The platform allows brands to connect with their customer base via chat experiences through the channels that customers love. Though the organization began in the sports industry, it has now expanded into the luxury fashion retail space.

The startup company is based in San Francisco but has a distributed team spread out across 15 different US states and, most recently, has expanded its presence into the EU. ON's People team is small but mighty and includes Jackie, ON's People Operations Manager, as well as Tasha, the team's Technical Recruiter. The IT department also reports to the People team, given there's a lot of overlap with onboarding.

“Our culture is definitely highly collaborative. I think we are a curious bunch. It is one of our core values. So we're always trying to learn new things, figure out what technologies and trends to stay on top of, and implement and utilize those within our organization to increase efficiencies.”



ON's Core Values

- Celebrate Diversity
- Communicate Often
- Take Ownership
- Keep Curious
- Stay Loose

Technology integrates effortlessly into ON's core values, empowering the team to stay curious, never stop learning, and take ownership of their roles. This creates an environment where innovation can thrive.



How ON's People Team Uses Technology to Improve the Employee Experience & HR Function

“ We’re always trying to find ways to make our day-to-day lives easier internally so that we can, in turn, provide a faster, better, and more efficient service to our customers. ”

At ON, Natasha’s team leans into automation anywhere it can. This allows the People team to take redundant tasks off its plate to focus on higher-level initiatives, strategies, and execution. Natasha and her team are constantly looking for new technologies and tools that can help increase the team’s efficiency.

There are various tools that the People team uses to alleviate manual HR tasks and make processes smoother and more convenient for employees. They utilize automation in their HRIS system, which allows for streamlining things like onboarding, requests, documentation, and more. ON also has a learning and development benefit, which includes a stipend that employees can use any way they want for their professional development. Natasha has seen that the stipend is increasingly used for learning new technologies.

“ That’s actually a combination of both of our values and taking ownership to use their own stipend to learn to do something that is beneficial for the business and the direction that the company is moving in. So we love to see that. ”

Additionally, Natasha streamlines benefits by partnering with Bennie, which allows employees to get benefits support through an app and streamlines the open enrollment process. Various project management tools also assist the HR team and employees in managing and organizing their workload.

Natasha's Advice for Small HR Teams Looking to Automate More



“Start small and figure out what your biggest pain points are.”

Small HR teams of growing companies, especially teams of one, need to automate or hand off tasks where possible.

For many professionals, that is the only way to accomplish their more significant initiatives and have time for

more strategic work without getting weighed down by small, repetitive tasks.

But it's not always easy to know where to start or what to automate first. Natasha recommends identifying what task takes up the most time and feels repetitive. Once you determine what that is, begin your research and find tools or platforms to take this task off your plate. Having an HRIS that can automate your processes will also go a long way. That may mean you need to reevaluate which system you use, or your current HRIS may already have many of those capabilities, and you just need to explore the different features a bit more. Even within communications platforms like Slack, there are apps and tools that can automate communications, tasks, and more.

AI and automation may seem like complicated areas to get started in, but at the end of the day, they are designed to make your life easier. The research and implementation phases may take time and collaboration, but the payoff will make it worthwhile. Remember, you may already have programs and platforms in place that can do much more than they are currently used for, so take some time to explore the possibilities. Small steps can lead to significant outcomes. ■

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WHAT THE EMERGENCE OF DATAFICATION MEANS FOR HR

By Jennifer Wiseman



Welcome to the age of evidence-based, data-driven HR, where the things that once seemed difficult or even impossible to measure accurately are now quantifiable. It's thanks in large part to leaps in datafication technology and methodology. Better algorithms and new tools, including AI, are making it much easier to comb through all that data in search of significant trends and potential outcomes. Used right, datafication leads to a better, more efficiently run business. In one Salesforce survey, 73% of business leaders found that utilizing data reduced uncertainty and improved and accelerated overall decision-making.¹

So, the promise is there, but what is datafication, and what does it mean for HR? Broadly, datafication is the process of turning just about anything – from the streaming or purchasing habits of consumers to an individual organization's employee satisfaction ratings – into measurable, trackable values. As an HR professional, data collection is probably well-trod ground for you. Demographic data and key performance indicators (KPIs) like time-to-hire rates or absence cost have been standard for some time. What's newly interesting about them is how vital they've become

to strategic decision-making, particularly within human resources.

When paired with empirical research and the insight and judgment of experienced leaders,² good, well-analyzed data can help HR professionals improve retention, quality of hire, productivity, and the overall employee experience.³ Analytics and AI are still growing, so now is a great time to add data-driven decision-making to your HR toolbox – but where to start?

BETTER RESULTS START WITH BETTER DATA

People analytics, the niche of data analytics most relevant to us as HR professionals, has no shortage of metrics to measure. When deciding where to datafy your workflow, it's important to ensure you will be gathering *good data*. By that, I mean, you want your data portfolio to contain consistently tracked metrics that are clear, actionable – in other words, they're factors that can realistically be improved with training, support, or process adjustments – and relevant to your organization's goals.

What exactly this portfolio of metrics looks like will depend on your industry, your business, and your people. That said, there are a few spaces in HR where the power and impact of datafication shines brightest...



1. Refining Recruitment and Talent Acquisition

Datafication has very nearly revolutionized recruiting and hiring. Traditionally, bringing in new talent involves many tedious but still necessary tasks, and final decisions are often made at least in part on “gut feelings” about candidates. Now, you can supplement the skills of talented recruiters and experienced managers with tools like applicant tracking systems (ATSes), lead generators, and advanced data analytics to greatly expedite and improve your hiring process.

ATS software can comb through countless resumes and skill assessments, highlighting candidates that best fit the needs of a given role in seconds, while metrics like time to hire, cost to hire, offer acceptance rate, application completion rate, and source of hire, will give you meaningful insights into the efficiency of your current recruiting strategy. Spot bottlenecks in your application process and correspondence practices, track the success rates of your candidate sourcing avenues, and outline ways to tighten up the entire process for candidates and recruiters.

2. Enhancing the Employee Experience

Employee engagement and satisfaction have a huge impact on business, affecting everything from brand reputation to the bottom line. Unsurprisingly, assessing these complex, layered factors is no small feat, but datafication can make your approach much more agile.

By collecting data from employee surveys, performance reviews, exit interviews, and other feedback systems, you can more quickly assess and respond to your employees’ needs, correcting pain points before they become problems and boosting successful strategies. See a path to improved retention when you pinpoint the specific causes of turnover. Build a better benefits package by evaluating both the benefits your employees are asking for and the ones they’re actually using. Identify ways to build a more diverse and inclusive workplace by studying candidate, promotion, and turnover demographics.

3. Boosting Development, Mobility, and Productivity

Investing in your people, in their learning and development, is a worthwhile pursuit that builds a more loyal, engaged, and productive workforce. By looping data-driven practices and analytic software into your learning and development plans, you can build better training programs faster, and ensure the best people are promoted into new roles at the right time.

Datafication in the form of skill and role mapping allows you to spot existing skill gaps, identify promotion and succession candidates, and ensure that your people are well-supported while they work. Harvesting and analyzing data from past training, performance reviews, and employee surveys will guide management in setting more realistic, relevant goals for their teams. All of this together, combined with metrics like time to productivity (the time it takes for employees to become competent in a skill) and learner satisfaction, will allow you to build better, more personalized training programs for your people.

DIVING INTO DATA? EMBRACE CONTINUOUS LEARNING

By embracing data-driven techniques in our day-to-day lives, we can automate our most time-consuming responsibilities,

reduce mistakes in recordkeeping, and back decisions with numerical evidence. It's an exciting prospect. Here's how you can get started:



• **Start building skills.** Invest some time in learning how to source, understand, and interpret data. Data literacy will help you to pick the right tools now and get the most out of them later.



• **Shore up those soft skills** – they're likely to become all the more crucial to your business.⁴ AI-driven data analytics, in particular, is still imperfect and susceptible to biases and errors. Critical thinking, communication skills, and emotional intelligence will be crucial to making the right decisions with your data.



• **Set clear objectives.** Before shopping for new software, establish specific goals – like improving retention or shortening the time to hire a new candidate. Adopting new technology for the sake of it, with no clear objective in mind, may cost you extra money or time in the long run.

Datafication is changing how we manage people, but remember, it's here to support, not replace, people. The human element is still crucial. To successfully ride this new wave of AI-powered tech and evidence-based decision-making, be adaptable, be empathetic, embrace continuous learning, and focus on what's necessary for your business. ■

- 1 *Salesforce. (2023, August 31). 73% of business leaders believe data reduces uncertainty and drives better decisions – so why aren't they using it? <https://www.salesforce.com/news/stories/data-skills-research/>*
- 2 *Waters, S. (2023, December 21). Make Better Decisions with Evidence-Based HR. SHRM. <https://www.shrm.org/topics-tools/news/hr-magazine/make-better-decisions-evidence-based-hr>*
- 3 *CIPD | People analytics: driving business performance with people data. (n.d.). CIPD. <https://www.cipd.org/uk/knowledge/reports/people-data-driving-performance/>*
- 4 *Cardon, P. (2024, January 22). New study finds AI makes employers value soft skills more. Fast Company. <https://www.fastcompany.com/91012874/new-study-finds-ai-makes-employers-value-soft-skills-more>*

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We celebrate those in the Human Resources profession who work hard
together, we're empowering people to make the best choices for improving





A Coast-to-Coast Tour of Artificial Intelligence in Employment Litigation

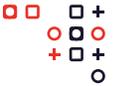


By Jason P. Brown
Partner, Fisher & Phillips LLP

Artificial Intelligence has the potential to fundamentally change the workplace as we know it, and as new applications are discovered, it should be expected that we will see challenges appear more frequently in the dockets of the Court system. These cases, for the most part, will not be based on new laws; rather, they will apply existing laws to the suite of AI products that businesses are testing in the workplace. In this article, we explore the state of employment litigation challenging the use of artificial intelligence and algorithm-based screening tools and what it means for the future of AI in HR.

Our first stop is the Northern District of California, home to Silicon Valley, where the case to follow is *Mobley v. Workday, Inc.* As recently as January 19, 2024, Judge Rita F. Lin of the U.S. District Court for the Northern District of California issued an order dismissing a lawsuit challenging Workday’s algorithm-based applicant screening tools as discriminating against applications on the basis of race, age, and disability. Judge Lin’s dismissal was a win for Workday as a technology provider because the Court found that Workday, in providing the resume screening tools, was not an employment agency, agent, or indirect employer sufficient to render them liable for the ultimate employment decision.

The inverse of the decision also must be considered: the employers (who are ultimately responsible for hiring decisions) will be responsible for their decisions, whether made by humans or by delegation to AI or algorithm-based tools. Businesses will continue to turn to artificial intelligence and/or algorithm-based tools to enhance recruiting and hiring decisions, but those hiring decisions will always be scrutinized by spurned or rejected candidates. The role of



technology in that process will be at the vanguard of new litigation – and an employer’s decision makers will always be scrutinized, whether human or algorithm. The liability will fall on the employer either way.

Our second stop is Washington D.C., home to the EEOC, where the agency has been closely watching the development of artificial intelligence in the workplace. Throughout 2023, the EEOC continued to prosecute complaints of Title VII discrimination resulting from the use of AI tools and issued new guidance to employers as to how it would evaluate a claim of AI or algorithmic-based discrimination.¹

In the first case of its kind, EEOC v. iTutorGroup, the EEOC settled a case with an online tutoring employer to resolve charges that its AI filtered applicants disproportionately by age in accepting candidates to its job postings.

Staying in D.C., we visit the United States Supreme Court. Under Title VII, an employer’s decision can be illegal if it results in a “disparate treatment,” or intentional discrimination against an applicant, or “disparate impact,” in which a seemingly neutral test still has discriminatory results. In the famous case of *Wal-Mart Stores v. Dukes*, 564 U.S. 338 (2011), the U.S. Supreme Court held that plaintiffs could not certify a nationwide class of Wal-Mart employees to litigate claims of disparate treatment because that would require looking at the individual decisions by thousands of different managers across thousands of Wal-Mart locations. The Supreme Court reasoned that class action treatment wasn’t possible because there was no “glue holding the alleged reasons for all those decisions together.” But what happens when a single AI is involved in multiple decisions, and the AI is alleged to be biased? If AI becomes the decision maker, is AI the glue?

Our next stop is New York City, where employers are banned from using AI tools to guide hiring or promotion decisions unless those tools are tested annually to ensure they are unbiased. New York City also requires employers to notify workers before subjecting them to an AI tool and give them the option to request an alternative selection process or accommodation. While this new law has not been litigated yet to our awareness, it is only a matter of time before a particular AI application, or the “annual testing” to ensure it is unbiased, is challenged by an employee passed over for promotion, or not hired at all in the Big Apple.

Finally, our last stop is everywhere all at once.

This is the particular realm of the LLM (Large Language Model) made famous by Open AI’s Chat GPT as just one example. New lawsuits claim that LLMs are finding confidential information, intellectual property, and copyrighted materials and then reading it, learning from it, and incorporating it for the benefit of its users. Recently, the New York Times sued Microsoft and Open AI over Chat GPT’s use of the Times’ copyrighted materials in generating content. In another case, software developers sued Github, on the grounds that the LLM Copilot incorporated independently drafted source code as part of the “billions of lines” of publicly available code that the AI read and absorbed.

While these lawsuits are being filed against the AI companies themselves, they hold a glimpse into a future where utilizing AI for work product can create significant risk for employers. Trade Secrets and Confidentiality issues are already a major concern, and the entry of LLM in the development of work product is the newest frontier in the protection (or abuse) of proprietary information. Employers should be vigilant about how LLM tools are being used in the generation of their work product, and whether their policies on protection of proprietary or confidential information are modern enough to account for AI. AI in employment litigation is here to stay, and this is just the beginning.

Jason Brown is a partner in the San Francisco office of Fisher & Phillips, LLP, an international labor and employment law firm representing employers that received the “Innovations in Knowledge Management” award from Law.com’s Tech Law Awards 2024.. Jason is a member of the firm’s Artificial Intelligence practice group, and counsels and trains clients on AI trends in litigation and risk management among all other aspects of HR in California, nationally, and globally.

¹ Equal Employment Opportunity Commission. (2023, May 18) *Select Issues: Assessing Adverse Impact in Software, Algorithms, and Artificial Intelligence Used in Employment Selection Procedures Under Title VII of the Civil Rights Act of 1964.*

<https://www.eeoc.gov/laws/guidance/select-issues-assessing-adverse-impact-software-algorithms-and-artificial>





MINIMIZING RISK:

Breaking Down the Value of P&C Insurance

A Q&A with Jack Lansdale, *Head of P&C at Bennie*

By Kristina Dinabourgski

Jack Lansdale leads Better Insurance, which offers property and casualty consulting for all lines of coverage. He has nearly 20 years of experience as a property and casualty broker/consultant and extensive experience in the healthcare, public entity, transportation, and hospitality verticals. While employee benefits are often a hot topic of discussion, in this Q&A, Jack breaks down what employers should know about P&C insurance and how to determine if the coverage they have is adequate.

► **Q: What role does property and casualty insurance play in ensuring business continuity and resilience, especially in the face of unexpected events or disasters?**

A: It plays a huge role. For the most part, this is the place for businesses to transfer risk. I view liability as a byproduct of doing business. As your business grows, you start stacking these liabilities, and in most cases, it makes more financial sense to insure these risks rather than be exposed to taking the financial hit directly. So, this is the place to put together your corporate insurance program, especially if you're a smaller mid-tier business, to transfer all of those risks that could negatively impact your budget or even close your doors if uninsured. Whether you're insuring the building or discussing liability for people getting hurt, professional liability exposures, and even your employment practices exposures, this is the number one place to find a solution for those exposures and risks.

► **Q: How does P&C insurance foster a secure and protected working environment for employees, and what impact does this have on overall productivity and morale?**

A: Insured organizations tend to have best-in-class risks in operations, so people who buy good insurance products tend to adhere to best-in-class risk management practices, follow OSHA regulations, and have fewer claims. They tend to follow all the rules and see value in their associates and the insurance that protects them. The trickle effect of that is a secure and protected working environment. So, I wouldn't say that when you buy insurance, you are automatically dropping an umbrella over an organization that provides a secure and protected feeling for the employees, but from a legality and liability standpoint, it can provide medical and indemnity coverage if an employee were to get injured.

In addition to that, because these employers are buying work comp, they're following all the good OSHA protocols and procedures. Again, they're following all the good regulatory aspects they should be. That is the part that fosters a secure

environment for the employees. The last thing you can have is people getting hurt at work and telling other employees that it was a bad experience or that they weren't covered. So, when it comes to productivity and morale, it's critical to have excellent programs that ensure you have the type of limits and coverage that extends to keep people well-protected and taken care of.

► **Q: How do you know if your current business insurance is sufficient for your organization or industry?**

A: You have to talk to an expert. You need to speak to somebody who's an expert in risk management & business. Typically, not just an insurance agent, but somebody who's a little more in-depth than just an insurance agent. Any agent can place insurance; the value that a consultant offers is understanding people's businesses. If you don't have a risk manager or somebody on staff who's a risk expert, talk to somebody who's a consultant.

Make sure you're talking to somebody who's just not trying to sell you a bunch of stuff but really can just say, "Look, if this is my business, these are the things that would be of concern to me, or I'd want to keep an eye on." If you're looking at ten different exposures and you might need to buy ten different lines of coverage, the expert can guide you on where to start. You need somebody who understands your industry vertical and how to navigate the global marketplace within the coverages for that specific vertical.

► **Q: What factors should business owners consider when selecting the right insurance policies for their industry and operational needs?**

A: You want to consider where you have been, where you are going with the business, and the insurance companies that you're looking at partnering with. Are they the type of partners that can follow you? You're looking at 12-month terms. So, if you're looking at regional carriers and you're in the southeast, but you're considering opening operations up in the northeast, then maybe that insurance company is not going to be able to extend those coverages in those states, causing you to have to buy separate insurance policies to cover those states.

What does their rating look like? Every single line of coverage you buy has a rate, which means you have an exposure. They're taking that exposure, and they're multiplying that exposure up against the rate. That's how they come up with your price. If you're dealing with somebody who is not tracking your exposure and rates, you're probably not getting

a good deal. Focus on what I call the "simple stuff." Focus on your risk profile and the rate. For the most part, you can get the insurance companies to do all the coverages you need, but the pricing/rate is a critical component that I like to start the conversation with.

Do you want to insure everything, or do you want to insure the bare minimum? Make sure you're with somebody you trust who can explain what insurance products are available to protect your organization and which ones are not a good spend for you. If you have specialty enhancements in your current policies, such as manuscript policy forms, they will take a front seat to pricing. The more specific/restrictive your coverage gets, the less competition there will be for your account in the marketplace.

► **Q: How does the cost of P&C insurance compare to the potential financial consequences of not having adequate coverage, and what advice do you have for businesses looking to balance cost and coverage effectively?**

A: I think the point of P&C insurance is to remove that "what if" and remove that potential unexpected financial damage. So, it depends on the size of the organization. When you're smaller, I think this type of insurance is more valuable; it also hurts because it's expensive, and you don't have a lot of money to play with. You're also in a position where you must have insurance since you cannot afford to take the financial hit. When thinking about cost and coverage, ask

yourself a few questions. Do you want to be protected everywhere? Do you want to be only protected for what you need contractually? What's your appetite for risk? How does your organization view risk? Those are all questions I, as a consultant, like to ask right up front. You want to figure that out so you can help maximize the financial impact on the organization through either transferring risk or building best-in-class self-insured programs based upon predictable risk/past performance.

Last but maybe most important would be to track your TCOR (total cost of risk). This is the way to measure your cost of risk vs. annual revenue. As you grow, your TCOR should improve. Your cost will go up, but the percentage of spend to gross annual revenue should be going in the right direction. Track your rates by the line of coverage and then your TCOR at the top (all in, including claims costs, broker fees, etc.). Most of the time, these things aren't being tracked at all, and we can guarantee better outcomes when you have a broker who does. ■

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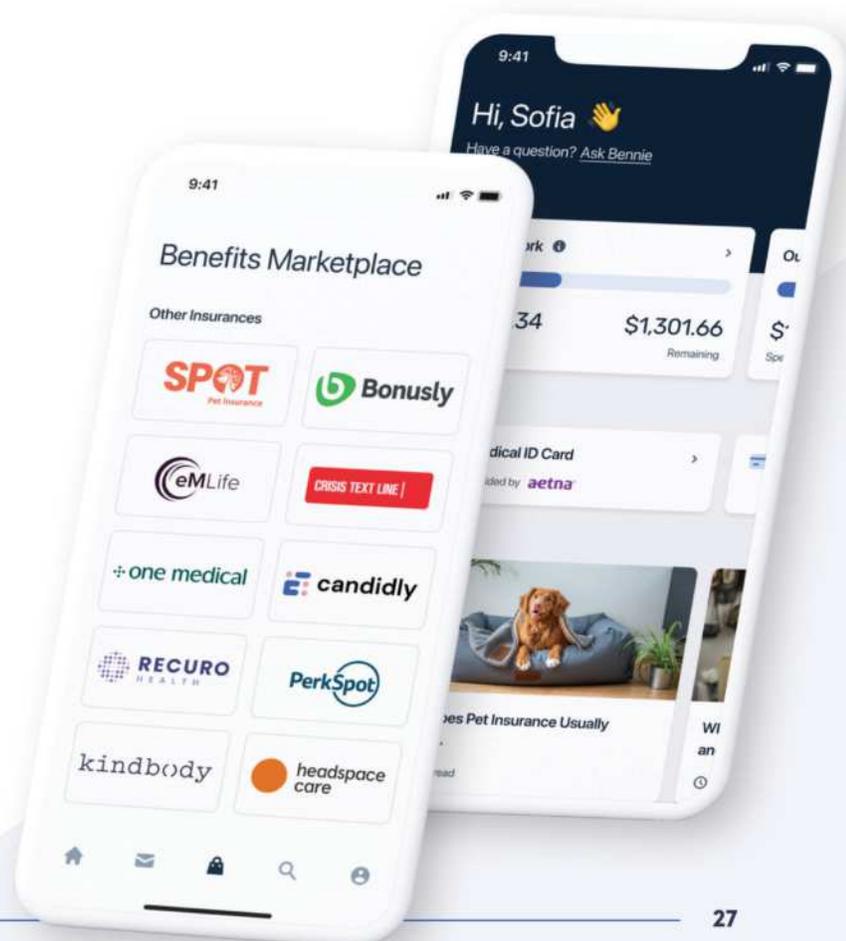
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HOW TO BUILD AN

ONGOING TRAINING PROGRAM

By Jennifer Wiseman

Work is changing again. New leaps in automation have launched a major shift in what we consider core competencies for workers. The World Economic Forum estimates that nearly half of these essential skills will change by 2027, and more than half of workers will need new training to keep up.¹ Even if we weren't riding a seemingly endless wave of major change, there's still no more surefire way to prepare your organization for the future than investing in its people, which is why an ongoing training program is the way to go.

Well-implemented ongoing training ensures your people aren't left at the front door once onboarding has finished. By tracking competencies, encouraging development, and continuously offering opportunities to learn, an ongoing training program provides employees with the tools they need not just to complete their daily work but to grow, as well.

When you create a culture of constant learning at work, the benefits can be felt throughout your business. In some ways, this is obvious. Continuous learning programs improve overall job performance, for example.² Beyond that,

though, consider that investing in employee growth and development...

- **ATTRACTS TALENT AND BOOSTS RETENTION.**

48% of American workers say they would switch jobs if they found a position that offered training opportunities, and 65% believe that the presence of training opportunities is very important when evaluating new jobs.³

- **IMPROVES INNOVATION AND PRODUCTIVITY.**

Research conducted by Deloitte between 2005 and 2011 found that companies that "overinvest" in Learning & Development rated highest in innovation, retention, and long-term profitability.⁴

- **BOOSTS ENGAGEMENT.**

Gallup found that organizations with high-development cultures saw major boosts in employee engagement – sometimes increasing by as much as 50% over time.⁵

Continuous investment in employee development wins over one-off training, but the path to implementing such a program may not be as easy as the decision to try it was. Let's outline a plan of action.

1. BUILD A MAP OF YOUR BUSINESS' NEEDS



You can't hit a bullseye if there's no target to begin with, so start by identifying where your business needs improvement.

First, identify any current knowledge or skill gaps. There's a purpose-built test for this, a skills gap analysis, which compares your workforce's current competencies against the skills necessary for them to succeed at work. Skill assessments,

surveys, employee and manager feedback, and performance reviews can all be used to measure the current competence of your workforce. Once you've assembled this database, whether in a spreadsheet or with performance management software, you'll know where best to focus your training efforts.

Next, familiarize yourself with upcoming initiatives and operating objectives. Knowing where your business is going will help you to determine which skills will be most worth investing in. Are you expanding? Build on training that prepares interested employees for management. Are there plans to adopt new tools or tech, like AI? Data literacy and soft skill training are great focal points.⁶ Being able to trace training back to specific company objectives will also help with leadership buy-in later.



2. LOOP YOUR PEOPLE INTO THE DISCUSSION

Get employees involved and invested in their own development. Ask them which skills they feel would benefit them in their current roles, what their career goals are, what they feel are the best ways to pick up new skills, and

any relevant skills they'd like to learn more about. Not only will your interest in their involvement be appreciated, but your workers almost certainly have a good idea of what they specifically need to succeed.

3. SET CLEAR AND MEASURABLE OBJECTIVES

Using the knowledge you've gathered, decide what you want your training program to achieve. In addition to serving business objectives and closing skill gaps, goals should be concrete, concise, measurable, and realistically achievable. For example, you may want to utilize safety and compliance training to decrease accident incidence on a worksite or train service associates on a given technique to improve customer satisfaction by a certain percentage.

Clarity is key. Those participating in training should know what they need to achieve and the steps they'll need to take to get there. If you're setting multiple objectives, be sure to rank them based on importance, so learners know where to focus.

With your goals in order, it's time to establish measuring criteria. This is a great spot to crack into data analytics. Key performance indicators (KPIs) can be used to track specific improvements as well as overall changes in productivity and job satisfaction. You may also want to investigate a learning management system (LMS), which automates content delivery and progress tracking. Consistent tracking and measurement make it easy to evaluate the effectiveness of your training program and dynamically adjust for success.



4. CREATE FLEXIBLE LEARNING PLANS

As you build out the steps necessary for employees to complete their training, remember that learning and development are not one-size-fits-all. For the best results, training should be tailored to specific goals, to teams, and to individuals. Flexibility is important, too. Offering a variety of training methods ensures that your people are able to get the most out of the program.



In-person classes, online workshops, and webinars are good starting points. Some employees may respond better to platforms that gamify training, while others might benefit more from the personal touch that coaching brings. In general, coaching tends to produce better outcomes than traditional training alone.⁷ A variety of

platforms, like Sayge, offer easily scaled coaching that matches your people to certified professional coaches.

5. ENCOURAGE A CULTURE OF LEARNING



You've found the skill gaps, set the goals and the steps to achieve them, and established measuring criteria

for the whole thing. Now, it's time to put your plan into action. Success hinges on cultivating a culture that embraces learning and development. Such cultures are marked by open, continuous feedback between managers and employees. They encourage learning and mentorship opportunities where they can and recognize effort and achievement. By weaving employee growth into the fabric of your business, you're futureproofing your people, your teams, and your business as a whole and setting everyone up for success. ■

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HOW AI WILL SHAPE HR & THE WORKPLACE IN 2024



By Christine McCallum-Randalls

Recently, employees asked those of us in the HR department to be a part of a live chat where they could ask HR-related questions and expect a response from us. The answer from all of us was an immediate and over-enthusiastic “No!”

With live chat comes the expectation of immediate response. None of us are willing to put our existing job duties on hold to answer HR questions all day, every day. We do, however, understand that employees have questions that need answering. So, we suggested an alternative - a bot that answers their most common HR questions.

This is where AI shines. It frees us of our most tedious and monotonous tasks. It acts as our trusty sidekick by providing folks with the necessary information without our intervention. AI allows us to focus our efforts on work that requires the critical thinking skills and creativity of a real-life human. Ironically, one of this year’s efforts requiring those skills is AI itself.

AI isn't perfect. When automated candidate screenings first came out, it was going to find the perfect candidates for us. But there were problems. Amazon created and then scrapped a program that favored male candidates even if they didn't have the applicable skills for a job.¹ Another unsuccessful AI program included being named "Jared" and having played high school lacrosse as top indicators of job success. The U.S. federal government has warned us about programs that discriminate against candidates with disabilities.²

ChatGPT competitors like Black-owned Latimer and Black-women-owned Spark Plug are hitting the market to give voice to populations that tech giants continue to overlook. The government is stepping in, too. The EEOC continues to provide AI guidance aimed at mitigating bias in technology as legislation is introduced to do the same.³

To be in HR is to experience constant contradictions. We are sought out for advice only to have that advice ignored. We are told we only care about the company when a huge part of our job is advocating for employees. We are overworked and yet routinely tasked with additional duties far outside of our job descriptions. We are not technologists, yet we will be expected to know how AI affects our organizations.

This year, HR will have to dive deeper into the AI tools our companies use and create policies around AI use. We will likely be responsible for policies discerning its proper use, recognizing the consequences of bad data, mitigating bias, and assessing risk.

While it can seem overwhelming, it puts us at an advantage. HR is better positioned than most to ensure company practices are clear, useful, lawful, and unbiased. It stands to reason that policies on AI practices are a natural extension of the work we already do. And unlike being the default executive lunch planner, understanding how AI can work for our organization will provide us with direct benefits.

This is the key to it all - understanding AI. At its core, AI works because machines "learn" how to behave based on patterns and make predictions from those patterns to increase productivity and efficiency.

Simple! And yet, not at all. AI is designed by humans for humans. We have biases, and we make mistakes. We also have a bad habit of unconsciously inputting those biases and mistakes into AI.

Take self-driving cars. It's a multi-billion dollar industry, and yet most vehicles on the road are still driven by humans. Why? Is the technology really that bad? Not exactly. Humans are. Self-driving cars are amazing at understanding road signs and predicting the behavior of other self-driving cars because what they do is logical and lawful. A study conducted at the University of Copenhagen's Department of Computer Science found that the real struggle has been their ability to ride alongside human drivers.⁴ Humans often make unpredictable driving decisions, which the AI has a



hard time understanding. How many times have you been at a four-way stop and someone goes out of turn, or you end up locking eyes with another driver, both of you waving for the other one

to go. AI can't see and experience that interaction the way humans do, which puts it at a disadvantage, at least, it will until the AI has enough data to predict the unpredictable.

As mentioned, Amazon created and then scrapped a recruitment AI tool that was extremely biased toward men. But why did it fail so spectacularly? It all goes back to data, patterns, and predictions. Amazon programmers used resumes from the past 10 years, most of whom were from men, as key data in the AI. Unsurprisingly, during those past 10 years more men were hired than women. And so the AI did exactly what it was asked to do - use the data it was given to identify patterns and make predictions.

Humans use context to give us important information we might otherwise disregard. It's the ability to lock eyes with another driver to know when it's safe to go regardless of whose turn it is. It's our ability to read a resume and know that even though you've hired three Jareds already, being named Jared isn't a useful indicator of job success.

AI struggles to understand this context. We must provide it if we are to get results that are truly equitable and useful. When examining AI tools, question the data it uses to determine patterns. Question the parameters of the directives it is given. Do your research to understand an AI tool's strengths and limitations. This will help you make better policies and decisions.

We are more apt to use something to our advantage if we understand it. AI is already here. This year embrace it. Learn

about it. Utilize it. No, it isn't a substitute for you in HR investigation interviews with employees. You are too valuable for that. Let it answer common employee questions. Let it be your assistant executive lunch planner. Learn enough about AI and the law - especially anti-discrimination law - to improve your company and your fellow employees.

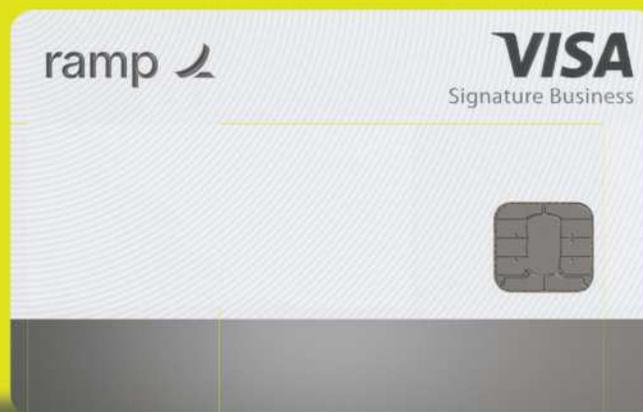
Make AI work for you so that you, too, can enjoy a more productive and satisfying work experience.

HR, you deserve it! ■



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- 3 *EEOC. Artificial Intelligence. https://www.eeoc.gov/search?search_keywords=Artificial+Intelligence&langcode=*
- 4 *NPR. (30 May 2023). Self-driving cars lack social intelligence in traffic. <https://science.ku.dk/english/press/news/2023/self-driving-cars-lack-social-intelligence-in-traffic/>*

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Tackling Job Insecurity as an HR Professional



By Erica Woods

This is certainly an interesting time to be an HR/People professional. Even if your company is cruising right along and hasn't experienced any turbulence in the last couple of years, you and your colleagues are watching companies conduct layoffs or make other structural changes that may leave your employees feeling unsettled or insecure. In 2024, too many of us know someone who has been (or is about to be) impacted by a Reduction in Force (RiF), and regardless of whether your company is doing wonderfully or preparing for layoffs, your team members are likely feeling some sense of job insecurity.

In our roles, we are often "Chief Comfort Officers." Here are a few practical tips to help your humans process through their emotions around job insecurity and ease their sense that something must be wrong.

An Empathetic Ear

Sometimes, our employees simply need a place to vent their fears and frustrations, and if you give them a confidential space to express themselves, it is enough to buoy them through their uncertainty. When an employee brings their concerns to your office (virtual or brick & mortar), try to listen without judgments or comments and ask gentle questions to assess whether there is anything you can do to help. This may be enough to allow them to feel heard and understood, which may be all they need.

Speak Your Truth

When someone asks you about the health of the company, it is important to be truthful with them, even if your truth is that you don't know. When we feel uncertain and finally

work up the courage to ask a very hard question, it is helpful to receive as much information as we can as succinctly as possible. If, *"I haven't heard anything to suggest that we're doing layoffs in the near future,"* is all you've got, say so.

Remind Employees That They Are Valued

Too often, our most valuable employees don't know how important they, and their great work, are to the company. If they come to you with concerned questions, remind them that they are a valued member of the team/company (and perhaps have a chat with their manager to ensure that they are reinforcing their team member's value).

If you are working with a company that has recently completed or is about to conduct layoffs, I send you lots of empathy and offer the following suggestions for additional topics to consider addressing.

Survivors Guilt/Grief

Layoffs are hard on the humans who remain with the company. Too often, they miss their colleagues and have strong feelings about their departure. It is important to address these feelings as quickly as possible because they may lead retained employees to leave your company. This is a great place to use the above-mentioned empathetic ear.

Fear of Being Next

It is a natural thought, *"If it happened to them, it could happen to me."* Hopefully, your CEO has addressed this publicly with the remaining team post-RiF. However, if necessary, taking the time to assure remaining employees that their roles are safe and that they are valued members of the company is essential to helping your employees release their concerns.

Regardless of whether you are actively managing a RiF or working to keep your employees' concerns to a minimum, you'll go a long way toward that goal by ensuring that the messages delivered, whether by your executives, your HR team, or your managers are consistent, compassionate, direct, and presented with kindness. 🗨️



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AI IN HR:

Unleashing the Power of Transformation



BY JOE BAST

In the dynamic landscape of Human Resources, the integration of Artificial Intelligence (AI) is ushering in a monumental shift. As a seasoned HR leader in the pre-IPO startup realm, I wholeheartedly embrace AI as a transformative force. It enables us to streamline our teams, allowing AI to tackle the heavy lifting while our human expertise thrives. Amidst the potential challenges, I firmly believe AI is an indispensable tool, propelling HR towards an era of efficiency and strategic excellence. This article will delve into three key areas: **Talent Acquisition, Employee Development, and Performance Management.**





The Revolution in Talent Acquisition and Onboarding

Talent acquisition has witnessed a seismic transformation. AI has magnified the challenges of sifting through the flood of applicants, making the proverbial “needle in the haystack” problem even more daunting. While we used to deal with 150–200 applicants, now we grapple with 500–700 applications for a single role. Sorting through this manually while managing multiple open positions is a Herculean task. AI, powered by machine learning algorithms, has revolutionized talent acquisition, making it precise, efficient, and data-driven. It complements the skills of senior recruiters, allowing them to focus on in-depth skill interviews and candidate engagement.

AI has also revolutionized candidate outreach. Sourcing candidates was a time-intensive process with limited returns, but AI can now scrape professional networks, craft personalized emails, and generate warm leads, significantly

boosting efficiency. Moreover, AI-driven chatbots have streamlined onboarding, enhancing the experience for new hires. This automation frees HR professionals to focus on strategic endeavors, reshaping the landscape of entry-level HR roles.

Personalization in Employee Development

AI’s extension into employee development marks a departure from one-size-fits-all training programs. By leveraging AI, personalized learning platforms can curate development opportunities tailored to individual employee needs and career trajectories, ensuring a more engaged and proficient workforce. By looking at an employee’s current skill set, their desired career direction, and where the gaps are, AI can put together a better, more personal development plan than even an experienced and expensive executive or career coach could.

Transforming Performance Management

The traditional, often dreaded annual performance review is becoming a relic of the past. AI-driven continuous performance management systems provide ongoing feedback and insights, fostering a culture of continuous improvement and agility. However, it again does not replace

the experienced manager with great skill at giving feedback and having a performance conversation. While AI can potentially find the messaging on what employees need to work on, doing it better than some inexperienced managers, leadership skills at giving tough feedback and listening to an employee empathetically only come (for now) in a seasoned leader.

Ethical Considerations and Bias Mitigation

Despite its numerous benefits, AI in HR is not without challenges. The most prominent among these is the risk of inherent biases in AI algorithms and the ethical implications of AI decision-making. In just the two examples above, decisions are being made about who to pass through the hiring gates and potentially who to give hard ratings, feedback, or opportunities to. These are all places where even human bias creeps in. AI will need regular audits, ethical AI frameworks, and a commitment to unbiased AI practices, which are critical in mitigating these risks.

AI as a Collaborative Partner

AI should be viewed as a collaborative partner to human HR professionals, enhancing efficiency and automating routine tasks while preserving the human touch in understanding, empathy, and complex problem-solving.



The Challenge for Aspiring Professionals

As entry-level jobs yield to AI, the question arises: How do young professionals gain expertise? This challenge spans across professions, from HR to finance, law, engineering, and beyond. Universities struggle to prepare graduates for entry-level roles, let alone expertise. Our reliance on experience remains crucial.

Preparing for an AI-Driven HR Future

To leverage AI, experienced professionals can delegate basic tasks to AI while mastering AI capabilities, staying attuned to ethical considerations, and honing data analytics skills. We must adapt to an AI-augmented landscape with the understanding that our expertise is our safeguard.

Navigating the Pitfalls

While embracing AI's efficiencies and insights, we must remain vigilant against over-reliance, biases, and depersonalization. Establishing checks and balances, ensuring alignment with ethical standards, and complementing AI with human judgment are paramount.

In conclusion, AI's integration into HR represents an essential evolution, offering unparalleled opportunities for efficiency, personalization, and data-driven decisions. Our mission as HR professionals is to embrace this journey responsibly, harmonizing AI and human intelligence to create more effective, responsive, and humane people strategies. The future of HR is a fusion of AI and human expertise, shaping a brighter path for organizations in 2024 and beyond. ■



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