

7 Steps To Getting Started With AI In HR

A practical guide to piloting, scaling, and realizing the value of AI in your workforce strategy



Introduction: From Curiosity To Capability

Artificial intelligence is no longer a theoretical concept: it's reshaping how organizations plan, operate, and deploy talent. But while excitement about AI has surged, most corporate initiatives still fail to deliver measurable value.

[Research from MIT](#) shows that 95% of corporate AI initiatives deliver zero return. The gap isn't about technology; it's about readiness, clarity of purpose, and execution.

This guide, based on insights from Beamery's recent webinar, [From Pilot to Progress: How to Scale your Workforce Strategy with AI](#), walks you through seven practical steps to move from curiosity to capability: helping you pilot AI safely, strategically, and successfully.

Step 1: Define The ‘Why’ Behind Your AI Effort

Before you choose a tool or start a pilot, clarify why you’re introducing AI in the first place. Ask yourself:

- What specific problem are we trying to solve?
- Who will benefit from the insights or automation we’re creating?
- How will success be measured?
- Who really needs to be involved in the project?

The organizations that succeed with AI are the ones that start with purpose, not just a mandate to ‘use AI.’

Start small. Identify one or two clear business challenges, such as improving workforce planning accuracy, reducing time to fill roles, or identifying automation opportunities.

Step 2: Assess Your Readiness

Every organization is at a different stage of AI maturity.

Smaller, more agile teams might be ready to experiment immediately, while large or highly regulated enterprises may need to move more cautiously, accounting for governance and compliance.

Readiness is about more than data quality. It includes leadership buy-in, access to talent, and a clear governance framework for responsible AI use.

If you’re not sure where to start, pilot projects are a low-risk way to build confidence and momentum while demonstrating value quickly.

Step 3: Use A Forward-Deployed Team

AI transformation succeeds when it combines executive oversight, consulting expertise, and engineering capability.

Beamery’s AI pilots pair these three roles intentionally:



EXECUTIVES

ensure strategic alignment and sponsorship.



CONSULTANTS

help interpret data and connect insights to business value.



ENGINEERS

operationalize the technology, solve technical challenges, and explore new use cases.

This embedded approach shortens feedback loops and enables pilots to run effectively in just 4–8 weeks, instead of months.

Step 4: Focus On Tasks, Not Just Roles

AI works best when applied at the task level, so you need to truly understand work at your company through the lens of tasks.

Breaking work into its component tasks gives you a more accurate view of how effort is spent, which tasks could be automated, and where duplication exists across teams.

For example:

- A pharmaceutical company found that 30% of its tasks were automatable, unlocking significant productivity potential.
- A financial services firm discovered duplicative tasks across departments, streamlining workflows and improving collaboration.

Focusing on tasks helps ensure AI supports people: freeing them from repetitive work and enabling redeployment into more strategic roles.

Step 5: Model Workforce Impact With A Digital Twin

A digital organizational twin allows you to visualize your workforce dynamically: showing how skills, tasks, and roles interconnect and evolve.

Like a factory twin that predicts equipment failures, a digital twin of your workforce lets you simulate how organizational changes will affect people and performance – before you make any big swings.

You can model how a merger might affect redeployment and role design, or where skills gaps (or surpluses) will emerge if you enter a new market. A digital organizational twin shows the impact of automating specific tasks: the roles and talent that will be most affected, the upskilling or redeployment routes that make sense, and the gaps you need to find another way to fill.

Beamery builds this view using AI-driven skills and task intelligence, integrating your internal HR data with market benchmarks to ensure results are relevant and current.





Step 6: Pilot Fast, Learn Fast

Don't wait for perfect data or fully mature infrastructure: pilots are designed to test, learn, and iterate quickly.

Keep your pilot time-bound (8 weeks should be enough) and focused on one outcome, like identifying automation opportunities or mapping future skill needs.

During this phase:

- Use real data to model workforce scenarios – ideally from your entire organization
- Gather feedback from leaders and users
- Document early wins and lessons learned

Step 7: Scale With Purpose

Once the pilot has proven value, the next step is to expand it – responsibly and strategically.

- Share insights with leadership and cross-functional partners.
- Prioritize high-impact use cases for broader rollout.
- Keep your forward-deployed team involved to support scaling, governance, and change management.

Scaling isn't just about technology adoption: it's about embedding AI into decision-making across the employee lifecycle, from hiring to mobility to workforce planning.

Conclusion: Turn Insight Into Action

AI deployment doesn't have to be daunting. With a clear purpose, a cross-functional team, and a structured approach to piloting and scaling, organizations can turn data into decisions and insights into action.

By following these seven steps, HR leaders can unlock AI's potential to plan smarter, operate more efficiently, and deploy their people where they'll have the greatest impact.

Struggling to get buy-in for AI in your organization?

[Read our report](#)





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