AI Bootcamp – ACTIF Exercise | HR Productivity & Digitalization

1. The initial business request

Senior HR leadership has identified two major priorities:

1. **Optimize workforce capacity / headcount**
2. **Accelerate daily work by digitalizing processes, reducing inefficiencies and minimizing bureaucracy**

The organization is therefore looking for opportunities through **process improvement, digitalization, automation and AI**.

At first sight, the request is clear from a strategic perspective. However, it is not yet sufficiently defined to determine what should be changed, automated or supported by AI.

The first step should therefore be to **understand the problem before selecting the technology**.

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2. My transformation logic

I see the two priorities as strongly connected rather than as two separate objectives:

Inefficient work
↓
Process simplification
↓
Automation / AI
↓
Capacity released
↓
Better allocation of workforce
↓
Potential headcount optimization

The key principle is:

> **Digitalization is the mechanism through which we release capacity; workforce optimization is one of the potential business outcomes.**

Therefore, the objective is not simply to automate existing work or reduce headcount.

The first question should be:

> **How can we eliminate, simplify and automate low-value work so that existing workforce capacity can be redirected toward higher-value activities?**

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3. ACTIF Prompt

I work in an international HR organization with multiple countries, teams, processes and digital systems.

Senior HR leadership has identified two strategic priorities:

1. Optimize workforce capacity / headcount

2. Accelerate daily work through digitalization, by reducing inefficient processes and minimizing bureaucracy

They are interested in exploring process improvement, automation and AI as potential enablers.

Before proposing any technology or solution, I want to understand the underlying business problem.

Using the ACTIF method, help me identify the most important questions I should ask the stakeholders before defining a solution.

The questions should help clarify:

- what “headcount optimization” actually means;
- where workforce capacity is currently being consumed;
- which activities are repetitive, manual, duplicated or low-value;
- which processes create unnecessary bureaucracy or delays;
- which activities could potentially be eliminated or simplified before considering automation;
- which activities could then be automated or supported by AI;
- who is affected by these processes;
- what business outcomes are expected;
- how success should be measured;
- which systems, data and tools are currently involved;
- what organizational, security, compliance and change constraints need to be considered.

Do not propose solutions at this stage.

Prioritize the questions that could materially change the scope, business case or solution design.

Avoid generic consulting questions. The objective is to help me understand the real problem before deciding whether AI, automation, process redesign or another approach is appropriate.

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4. Most valuable questions identified

After reviewing the AI output, I selected the questions that would have the greatest impact on the business discussion.

A. Understand the workforce challenge

1. What does “headcount optimization” mean in our specific context?

Are we looking for:

- headcount reduction;
- productivity improvement;
- better workload distribution;
- capacity release;
- or a combination?

2. Where is workforce capacity currently being consumed?

Which activities are taking significant employee time without generating proportional business value?

3. Which activities are repetitive, manual, duplicated or administrative?

For example:

- manual data entry;
- reporting;
- reconciliation;
- document preparation;
- follow-ups;
- approvals;
- transferring information between systems.

B. Understand the process inefficiencies

4. Which HR processes currently create the most unnecessary workload or bureaucracy?

5. Where are unnecessary steps, approvals, handovers or manual controls creating delays?

6. Where are employees entering or maintaining the same information in multiple systems, files or processes?

7. Which processes still depend heavily on Excel, email or manual follow-up?

8. Which activities should be eliminated or simplified before we even consider automation?

This is a critical question because **automating an inefficient process does not necessarily make it an efficient process.**

C. Identify where technology can create value

9. After simplifying the process, which activities are still repetitive enough to be automated?

10. Where could AI provide additional value beyond traditional automation?

For example:

- information analysis;
- summarization;
- knowledge retrieval;
- decision support;
- document generation;
- identification of risks or anomalies.

11. Which processes would generate the highest value if their workload or processing time were significantly reduced?

D. Define measurable outcomes

12. What does “faster” actually mean?

For example:

- fewer process steps;
- shorter cycle time;
- fewer approvals;
- fewer emails;
- fewer manual transactions;
- fewer errors or rework.

13. How will we measure the capacity released?

Possible indicators:

- hours saved;
- FTE capacity released;
- reduction in processing time;
- reduction in transaction volume;
- reduction in rework.

14. If capacity is released, where can it be redirected to create greater business value?

This connects digitalization directly to workforce optimization.

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5. My assessment of the AI result

The most valuable part of using ACTIF was not generating a solution. It was **improving the quality of the questions before making a decision**.

The initial request could easily lead to a technology-first approach:

> “We need to optimize headcount → let's find an AI solution.”

The exercise helped me reframe it as a transformation problem:

> **Understand the work → challenge the process → simplify → automate where appropriate → measure capacity released → redirect capacity → optimize the workforce.**

This also creates an important distinction between **automation and AI**.

Not every inefficient process needs AI. Some problems may be better solved by:

- eliminating unnecessary steps;
- standardizing the process;
- improving system integration;
- implementing workflow automation;
- improving data quality;
- or using AI where cognitive work is involved.

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6. Key takeaway

> **The right starting point is not “Which AI solution should we implement?”**

It is “Which work should no longer need to be done manually, and why?”

Only after answering this question should we decide whether the appropriate enabler is **process redesign, digitalization, automation, AI, or a combination of these**.

Ultimately:

Digitalization → releases capacity → capacity can be redirected → workforce is optimized.

This creates a stronger and more sustainable transformation approach than treating AI simply as a tool for reducing headcount.