

MAY 14TH 2026

Lessons Learned from Implementing AI + Performance Reviews

Presented by:

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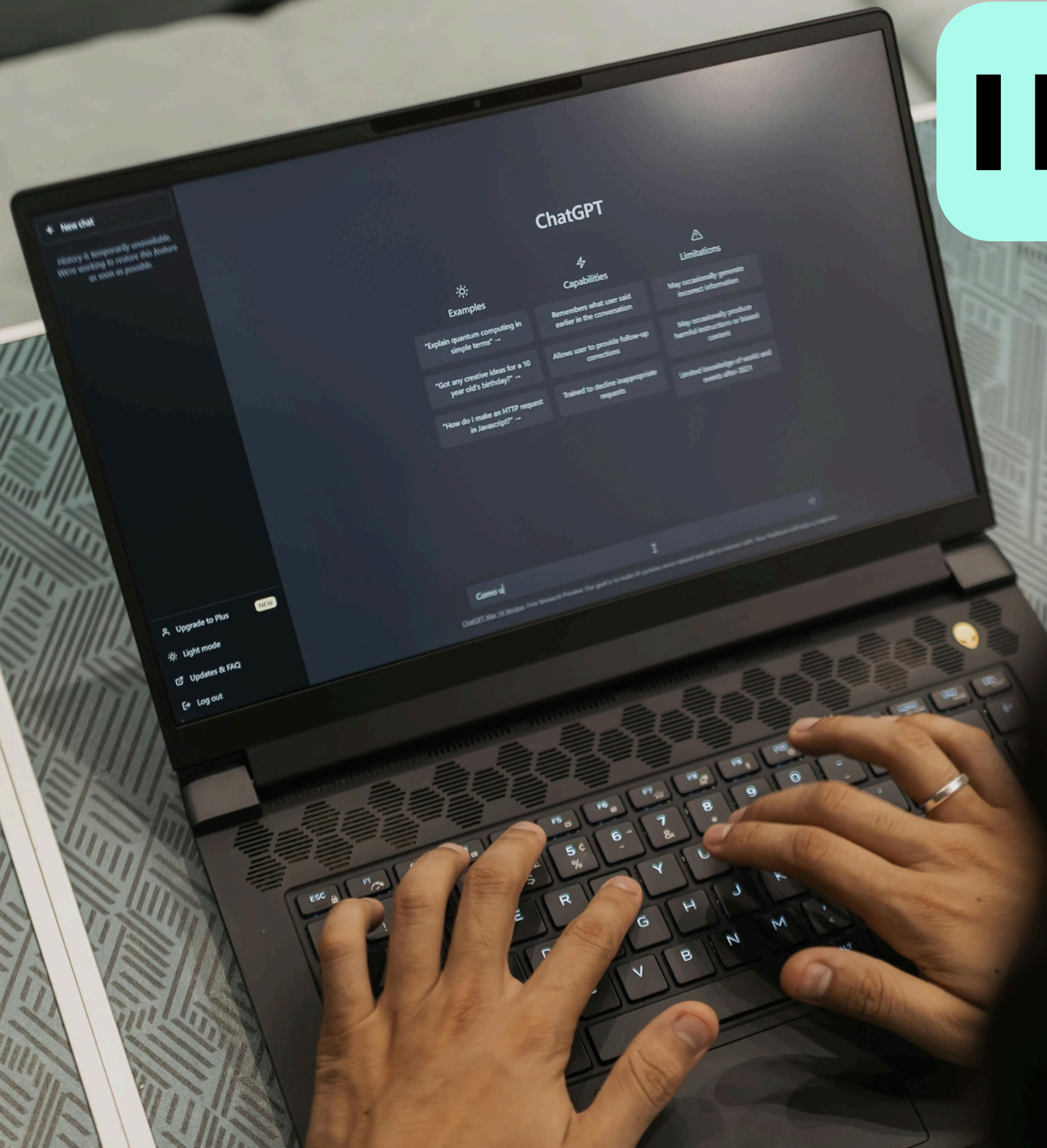


**Who loves
performance reviews?**

**Only 14% of employees
say performance
reviews actually help
them to improve.**

—Gallup

I built a tool...



It Worked!



Tool Knowledge

01. The Performance Review Process

- Workday Performance Process Setup
- Review Template
- Feedback Template

02. Company Values & Leadership Behaviors

- Values Descriptions + Examples of Values in Action
- Leadership Behaviors Defined Across 3 Leadership Levels

03. Career Framework/ Job Architecture

- Company Leveling Guide
- Functional Career Frameworks

Basic Instructions: You are a tool to help employees write their annual performance review. Invite them to upload feedback from Workday, and use it to help draft answers to the questions in the review template.



Feedback was positive:

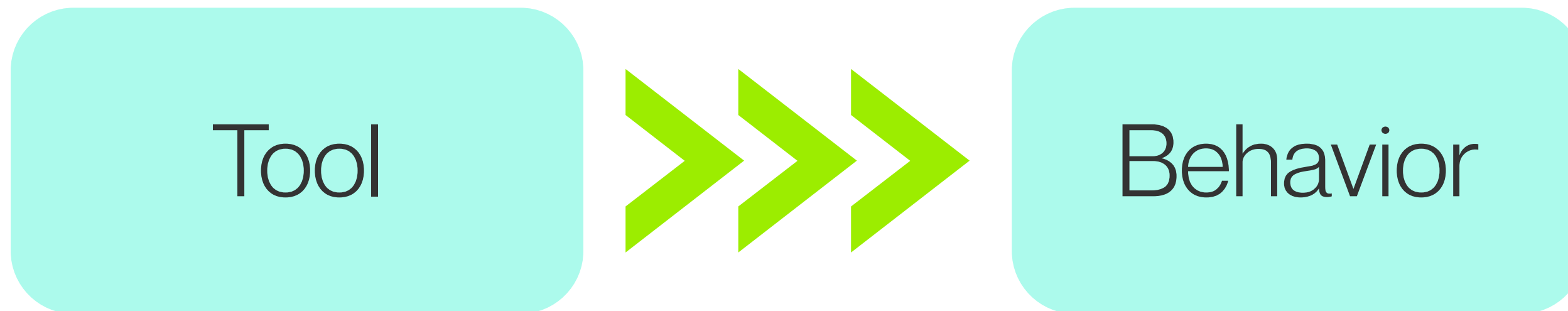
“It didn’t just summarize my input—it surfaced the company values in my work in ways I hadn’t fully recognized. It deepened my self-awareness and clarified how I show up, collaborate, and live those values every day.”

Mostly...



Everyone Was A Rockstar

**People do what the tool
makes easy.**



EXPECTATION

VS

REALITY



Thoughtful science.
Meaningful progress.



Ctrl+C. Ctrl+V.
Publish. Repeat.



Product 101:

If the behavior is wrong...

the design is wrong.

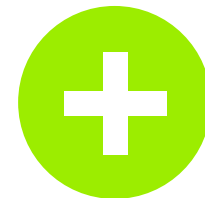


Tool Knowledge V2

01. The Performance Review Process

02. Company Values & Leadership Behaviors

03. Career Framework/ Job Architecture



- Prompt reflection before any generation
- Deliver drafts—not polished final answers
- Provide multiple voice options, not a single voice
- Moderate tone (no inflated or overly positive language)
- Operate within strict boundaries (no evaluation or judgment)
- Keep ownership with the user

One Tool, Three Modes.

Self-Review

Manager Review

Peer Feedback

The Outcome

- More original writing
- Less copy/paste
- More thoughtful responses
- Better calibration
- **Even better feedback on the user experience!**

AI isn't neutral.



Tips for Building Tools

Host a discovery/design session with volunteer users

Use AI to create the tool

Create your instructions in YAML format (tool agnostic)

Put context into knowledge, not instructions

Use clear sections (Role / Task / Constraints / Output)

Version your instructions

Enable canvas

Turn off web browsing unless truly needed

Host UX testing sessions before going live

Expect to redesign after use



**Your tool is
training your
people.**

Make sure it's
teaching the right
lesson.

Activity:

Design Your Own AI Tool

Start with the behavior.

This is not a prompt writing exercise...

Pick a real process

Answer the questions

Don't overthink

The Questions

What is the specific process, task, or moment you are designing for?

Who would use this tool, and where would it show up in their workflow?

What outcome are you trying to enable?

What context, constraints, or boundaries does this tool need?

How will you know if it's working or not?



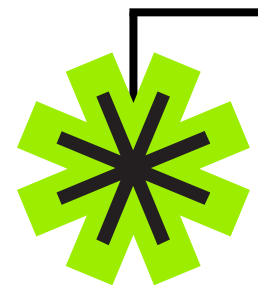
Get Your Own AI Tool Brief!

Scan the QR Code on this slide to access a Google Form with the questions from the previous slide. Based on your responses in the form you'll receive a personalized AI Tool Brief in your inbox from an automation workflow.

Not sure what an AI Tool Brief is? It's a ready-to-use starting point you can bring into Claude, ChatGPT, or any AI platform to begin building your tool.



Automation Workflow



**Remember, you get out what you put in!
Try to answer the questions as thoughtfully as possible.**

Thank You!