

Webinar

# How Lattice Uses AI to Improve Manager Effectiveness and Employee Performance



# Welcome!

- We'd love to answer your questions! Please submit your questions on the Q&A tab.
- If you would like to see a demo of Lattice press the "Request a Demo" button on the top right of your screen
- There are some great articles and ebooks in the "Docs" tab.
- This session is being recorded and you'll receive the recording via email after the event.
- We will share the SHRM and HRCI credits at the end of the session.



# Introductions

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**Mollie Duffy**

Director of Learning & Development  
**Lattice**



**Allison Krausman**

Director, Product Design  
**Lattice**



**Kenny Yu**

Customer Account Management,  
Manager  
**Lattice**



Tell us in the chat...

**How are your teams using  
AI today?**



# Agenda

## 01 The Big Picture: AI Across the HR Workday

Where AI actually fits across performance, feedback, and manager workflows

## 02 From Theory to Practice: How Lattice Uses AI

A look at the tools and approach we use internally

## 03 Real Workflows in Action

How we use AI for performance reviews, manager coaching, and daily work

## 04 Driving Adoption Across Your Org

What actually gets managers to use AI (and what doesn't)

## 05 Getting Started + What's Next

Simple ways to start using AI today + a quick look ahead



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# Why AI Matters for HR Right Now



# HR teams are being asked to do more with less.

“Can you help our managers give better, more consistent feedback, without adding more meetings?”

“We need to run a high-quality performance cycle across the entire org, but we don’t have the bandwidth to support every team.”

“Expectations keep increasing, but our team isn’t growing, how do we scale impact without burning out?”



# How AI can help HR and managers in their day-to-day workflows

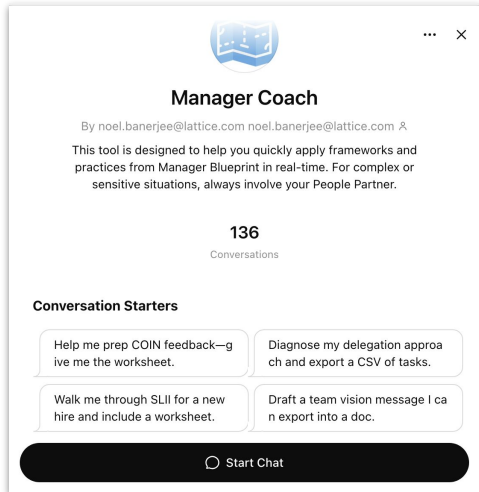


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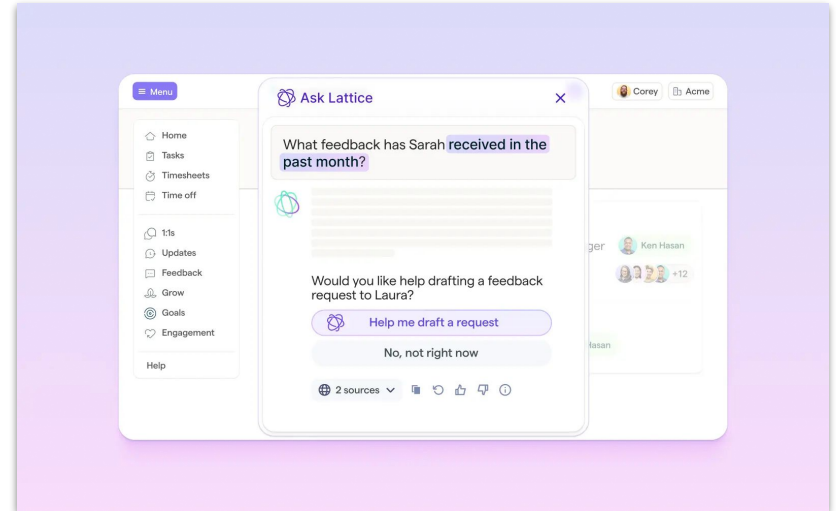
# How we're using AI at Lattice



# AI Tools We Use at Lattice



ChatGPT Manager Coach



Lattice AI



# Top 3 Ways to Use AI to Develop Manager Skills

## Deliver clear, actionable feedback

Use AI to draft specific, behavior-based feedback with concrete examples and next steps, so guidance is easier to understand and act on.

## Navigate tough convos with confidence

Prepare for difficult discussions by using AI to role-play scenarios, anticipate reactions, and refine messaging.

## Strengthen core management skills

Leverage AI as a coach to improve coaching, delegation, and decision-making, helping managers lead more effectively day to day.



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# Lattice AI Agent Real Workflows: Let's see it in action



# How Lattice AI Helps You Draft Better Performance Reviews

*AI creates the starting point, managers bring their judgement and perspective.*

1. **Get a faster first draft** by collaborating with the agent.
2. **Reduce recency bias** with more complete context by pulling feedback and data from across Lattice and integrations.
3. **Improves completeness and consistency** while giving teams more time for thoughtful refinement and convo prep.



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# Reflection on Performance Reviews with AI



Lattice AI Agent enhanced rather than replaced human work, allowing for more efficient initial drafting while still enabling thorough editing and refinement



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# Enabling Managers



# How Lattice enables managers to deliver better performance reviews & feedback

1. Built prompt frameworks and templates

2. Embedded AI into existing workflows

3. Reduced reliance on HR for support



## Overview ①

# Lattice's "Always On" tools are a differentiator

Lattice stands out from competitors with its 'Always On' tools, enabling managers to continuously monitor and provide feedback on their reports' engagement and progress, unlike periodic reviews. These tools also let employees regularly request feedback, reflect on their work, and track their goals, making Lattice a favorite for its seamless, ongoing support.



## Usage requirements and impact

# 1:1s



## Managers

**Weekly or bi-weekly:** Have 1:1s with all reports.

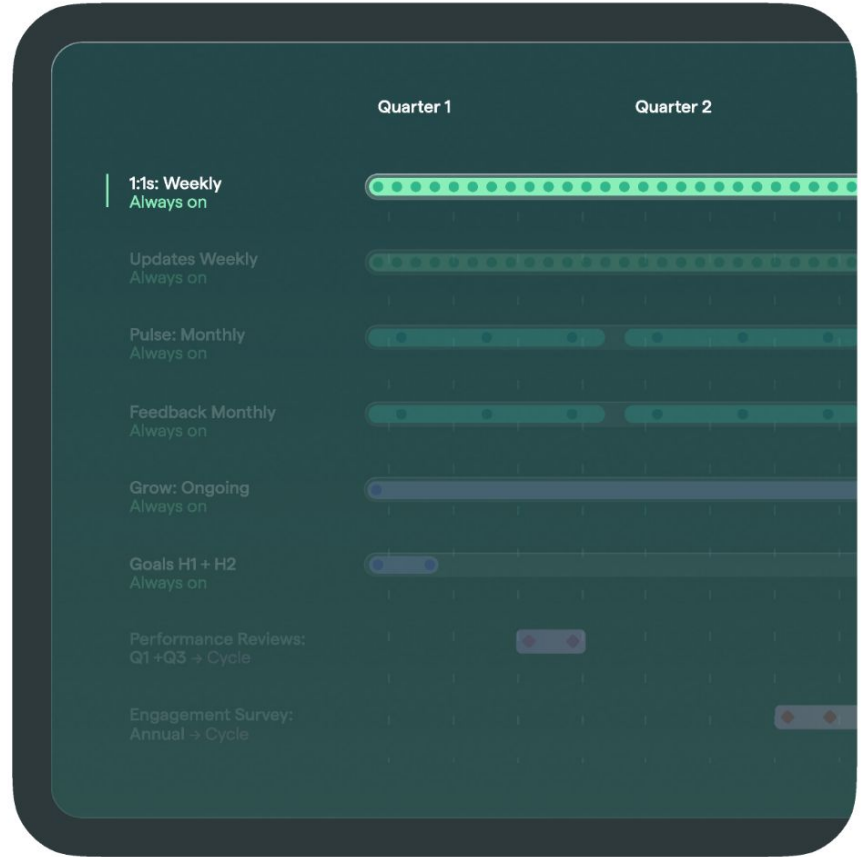
**Why:** 1:1s allow your reports to add agenda items so you can come prepared. You can also have standing agenda items, and use shared company 1:1 templates.



## ICs

**Weekly or bi-weekly:** Input any agenda items the day before the 1:1 so your manager can have time to review.

**Why:** 1:1s are an anchor for knowing when and how you can connect with your manager.



## Usage requirements and impact 🕒

# Updates:



## Managers

**Weekly:** Review updates before 1:1s, and add any responses to your 1:1 agenda that you want discuss further.

**1x quarter:** Swap out Weekly Update questions ([List of Suggested Updates Questions](#)).

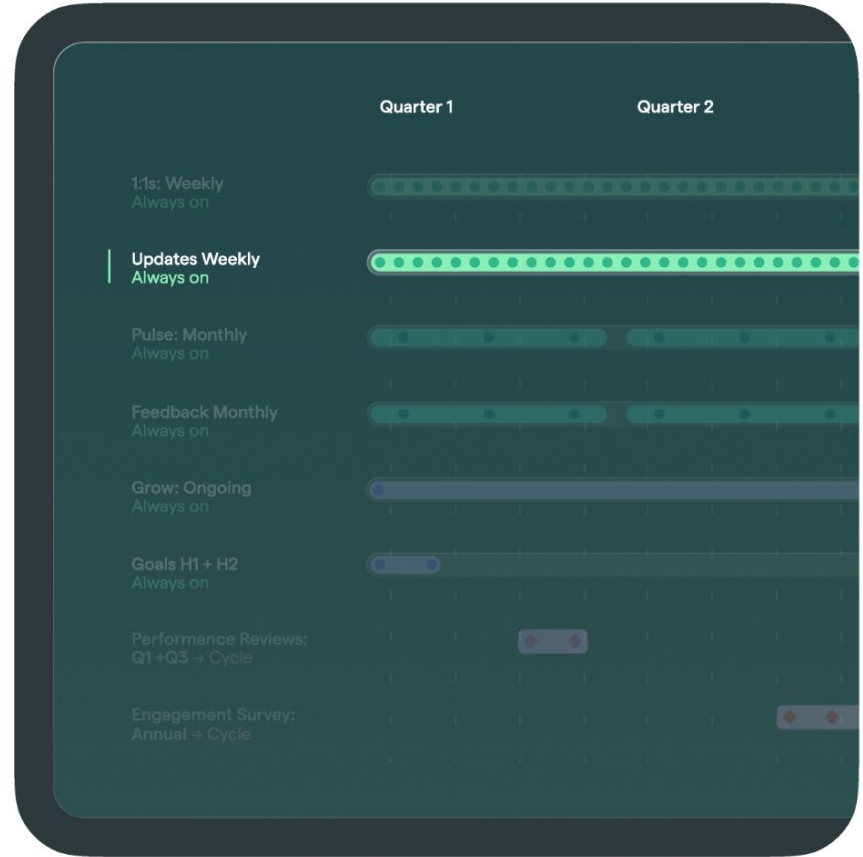
**Why:** Updates offer your reports a way to reflect on their work experience in writing, and they often share things in updates they don't share verbally in 1:1s.



## ICs:

**Weekly:** Complete your weekly update.

**Why:** Use your Weekly Updates to reflect on your week. Share how you're feeling about your work by calling out wins, learnings, and areas where support is needed.



Usage requirements and impact ⓘ

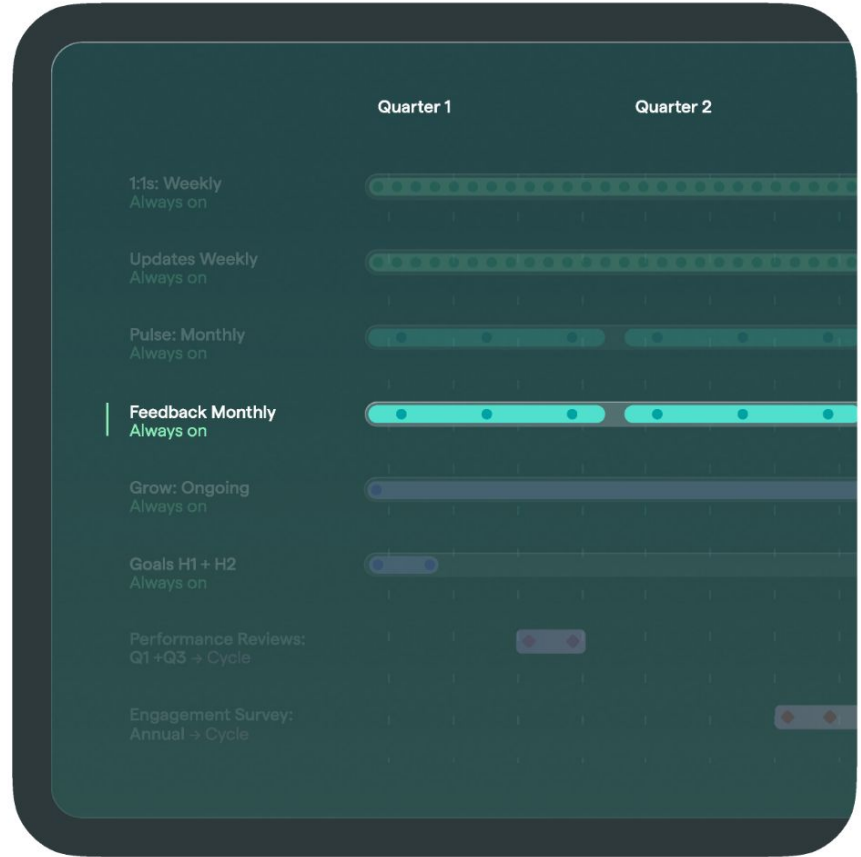
# Feedback:



## Managers and ICs

**Monthly:** Give and request both reinforcing (praise) and redirecting (constructive) feedback from your team and colleagues, and ensure your reports are doing the same.

**Why:** Continuously giving and requesting feedback allows you and your reports to change behaviors in real time, and means there's less likelihood of being surprised during a performance review conversation.



## Usage requirements and impact

# Grow:



## Managers

**Ongoing:** On a regular basis have a Grow conversation with each report to create and review progress on Growth Areas.

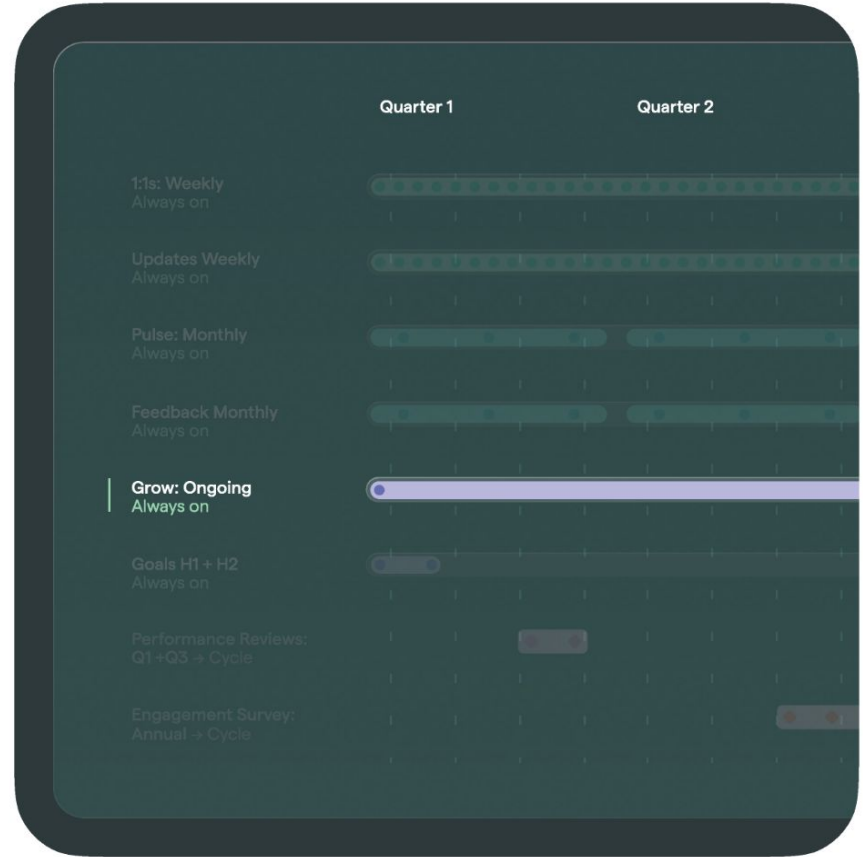
**Why:** Grow conversations add structure to development conversations and make them more regular and productive. Creating and discussing Growth Areas lets you define and track development goals for your reports based on the competencies in their specific Grow tracks.



## ICs

**Monthly:** Ask for feedback about your Growth Areas and update progress on Growth Areas.

**Why:** Grow conversations are dedicated time to focus on your development. Creating and updating Growth Areas helps you track your development progress in measurable ways.



## Usage requirements and impact 🔗

# Goals:



## Managers

**Beginning of H1 + H2:** Set and align goals as a team (that are cascaded from the company goals/V2MOMs).

**Monthly:** Update team goals with progress.

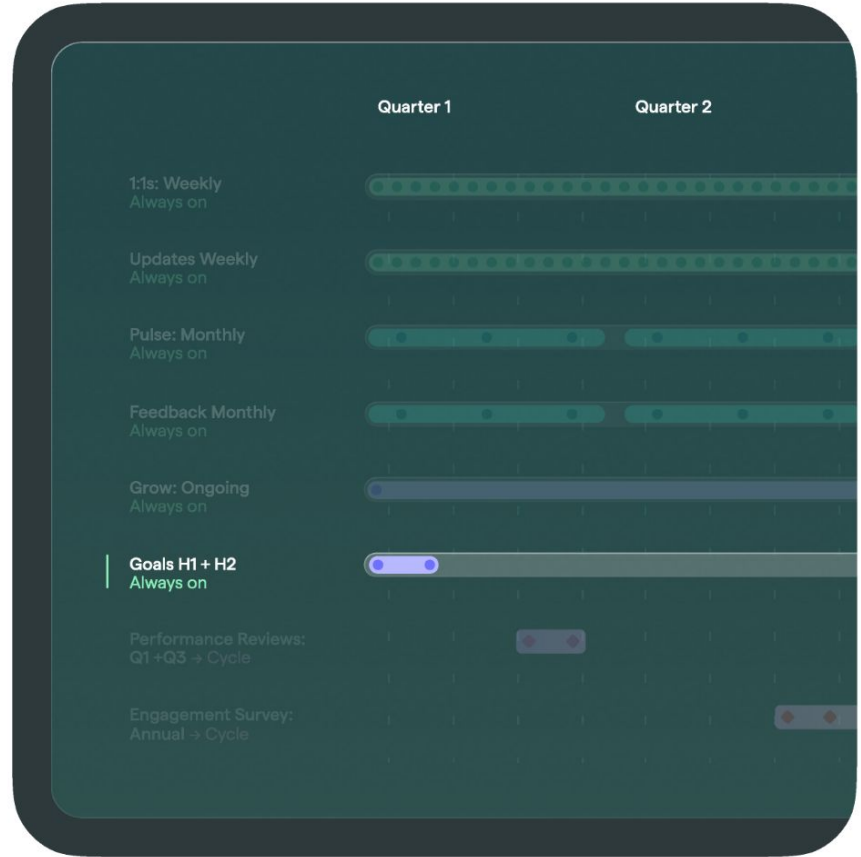
**Why:** The goal setting process gives your team an opportunity to see how they can help move the company forward. Updating goal progress regularly keeps everyone focused on goal-related activities.



## ICs:

**Monthly:** Update individual goals (if applicable) with progress.

**Why:** Updating goals allows you to communicate progress, and track how that progress contributes to the broader company goals.



Usage requirements and impact ⓘ

# Performance reviews:



## Managers

**Q1 + Q3:** Complete Lattice's continuous performance Quarterly Check-Ins.

**Why:** Dedicated time to reflect on how your reports are performing and identify what kind of support they need. You'll also get feedback from your reports and peers about your own performance and have a performance conversation with your manager.



## ICs:

**Q1 + Q3:** Complete Lattice's continuous performance Quarterly Check-Ins.

**Why:** These conversations are dedicated time to discuss your performance. To prep for the conversation, self-reflect on your goals and growth areas in Lattice, and on the feedback you've received in the past quarter.



# Hot Tips & Best Practices for Making AI Part of How Work Gets Done

**Where AI Shows up**

**How Teams Use It**

AI works best when it's embedded into everyday workflows, not an extra step.



# Getting Started with AI

## Start Here

- ✓ Performance reviews
- ✓ 1:1 prep and summaries
- ✓ Feedback writing

## How to roll it out

- ✓ Start small
- ✓ Focus on one workflow
- ✓ Build from early wins

You don't need a full AI strategy to get value



# What Actually Drives Adoption

## What works

- ✓ Clear use cases
- ✓ Prompt templates and examples
- ✓ Embedding AI into existing workflows

## Common Pitfalls

- ✗ Poor prompting → weak outputs
- ✗ Over-reliance without context
- ✗ Lack of manager enablement
- ✗ Treating AI as a shortcut

AI works best as an amplifier, not a replacement



# What's Coming Next

Lattice AI Agent

## Evidence-based AI Reviews

**Bethany Hale**  
Sales Manager

1. What are 1-2 areas or skills this individual should focus on to increase their impact?

2 highlights

**Leverage others to create clarity sooner**  
Bethany consistently demonstrates strong ownership and a deep team. To increase impact as a Sales Manager, she should focus on risks, and open questions earlier, using her manager and peers as rather than carrying uncertainty on her own.

Competency: Decision-making & Judgment

**Use group forums to drive alignment and influence**

I created this draft for you with the below sources.

**Leverage others to create clarity sooner**  
Surface risks and prioritization tensions earlier by pressure-testing assumptions sooner.  
3 sources Show details

**Use group forums to drive alignment and influence**  
Use group settings to actively shape decisions and surface concerns in real time.  
4 sources Show details

Is there anything you want to make changes to? Let me know!

Make it more friendly

Make it more concise

Make it more professional

Ask a question...

Lattice AI Agent

## Real-time Coaching and 1:1 Summarization

**Diana** / **Bethany** Meeting Agent Invited

Recap Summary Coaching

Coaching insights are personalized and only visible to you.  
Be more specific and concrete when delivering feedback.

**About Bethany**  
3.5

Action items

- Review the demo schedule
- 

Goals

We're continuing to build AI directly into your workflows!



# First Customers Program

Join the First Customers program for early access to new Lattice products!



# Q&A



# Thank you!

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