

AI Workforce Transition Planner

Bring the business outcome and the people transition into the same decision. Use before approving an AI initiative expected to materially change work or staffing.

Initiative / business sponsor / CHRO lead / finance lead / decision date

Establish what will change

Planning question	Evidence required before committing
Which work changes?	Name tasks, volumes, affected roles, and the work that will still require human judgment or accountability.
What capacity is truly released?	Use pilot observations where possible. Deduct review, exception handling, rework, training, and new oversight demands.
How can the capacity be used?	Specify growth, service improvement, backlog reduction, redesigned roles, or a proposed staffing change.
What must remain protected?	Define service, quality, customer, and workforce measures that would trigger a pause or redesign.

Capacity check: For a common measurement period, net hours released = gross task hours saved minus added human work. Record the estimate range, evidence, and confidence level.

Hours spread across roles, locations, or peak periods may not combine into removable positions. Test workload distribution and coverage requirements before making a staffing assumption.

Baseline / estimated net capacity / evidence source / key uncertainty

Proposed use of capacity / decision owner / pilot review date

Companion to: [The CHRO’s Role in AI Must Include What Happens to People Next.](#)

Connect people to plausible work

Complete one worksheet per affected role group or cohort. Validate destination demand and timing before treating a pathway as available.

Affected role group / estimated people / location / timing of work change

Pathway	What makes it credible?
Redesign the current role	A defined future workload, necessary skills, manager support, and a plan for meaningful use of released capacity.
Move to an internal role	A funded receiving role, hiring-manager commitment, realistic skill bridge, and aligned start date.
Prepare for external work	Current employer demand, clear entry requirements, relevant preparation, and practical connections to hiring opportunities.
Pathway unresolved	An explicit gap, a named leader, a resolution deadline, and a decision on what can proceed while the gap remains.

Proposed destination / number of credible openings / demand evidence and date

Skill gap / preparation required / time available / support for participation

Receiving manager or partner / commitment secured / remaining dependency

Funded support / accountable leader / employee communication date

If timing does not align: Decide whether to phase implementation, provide a bridge, revise the pathway, or escalate the unresolved transition. Record the decision and its consequences.

Make the commitments reviewable

The CEO or delegated sponsor resolves tradeoffs. The CHRO leads transition design; business leaders implement it; finance includes transition costs in the investment case.

Business benefit / assumptions / costs of implementation and ongoing human oversight

Transition budget: paid learning time, training, internal moves, and external support

Decision: proceed, phase, redesign, or hold / conditions / owner / review date

Track outcomes alongside delivery

Measure	Definition to agree
Workforce coverage	People with a documented pathway / people expected to experience displacement. Show unresolved cases separately.
Internal placement	People who start a new internal role / people targeted for internal placement. Track retention after an agreed interval.
External reemployment	Among voluntary respondents, people reporting new work / respondents seeking work. Disclose the response rate.
Time and earnings	Among respondents, time from departure to new work and new earnings relative to prior earnings; report coverage and definitions.
Business performance	Net capacity realized, service quality, rework, and total costs against the approved case. Specify thresholds for intervention.

Review cadence / data owner / thresholds requiring action / escalation sponsor

Use voluntary participation and appropriate privacy protections for external outcomes. Keep unknown outcomes visible; avoid treating nonresponse as success or failure. Training completion and introductions do not establish that someone secured work.

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