

One Record, Every Stage: The AI Employee Lifecycle Playbook

A WORKPLACEAI STRATEGY PLAYBOOK

From Offer Letter to Exit Interview, Without the Dropped Handoffs

Most HR failures are handoff failures: the laptop that is not ready, the access that is not revoked, the signal that never reaches the manager. Here is how to connect every stage, keep the controls tight, and leave every decision about a person to a person.

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Key Takeaways

- Most employee-lifecycle failures are handoff failures. A start date passes before the laptop is ready, a departure leaves access open, a warning signal never reaches the manager. The stages work. The gaps between them do not.
- Treat the lifecycle as one system built on a single employee record. Events such as offer accepted, start date, role change, and resignation trigger the same checklists every time, across HR, IT, finance, and the manager.
- AI helps with reading, drafting, summarizing, and reminding. It never makes a decision about a person. Hiring, ratings, pay, promotion, discipline, and termination stay with accountable humans.
- Fairness and privacy are design requirements, not afterthoughts. Limit what each step can see, test for uneven outcomes, tell employees how AI is used, and keep a record of every automated step.
- Offboarding is a security and payroll control as much as an HR task. Revoking access and stopping pay on the right day depends on the event reaching every system at once.
- The signals HR collects, from pulse surveys to attrition patterns, only matter when they reach the manager who can act. Close that loop and the lifecycle starts improving itself.

Contents

1. The Handoff Tax
2. The Principle: One Record, Event-Driven Handoffs, People Decide
3. The Spine: A Shared Record and Lifecycle Events
4. Stage 1: Hire
5. Stage 2: Onboard
6. Stage 3: Develop and Review
7. Stage 4: Listen and Retain
8. Stage 5: Role, Pay, and Leave Changes
9. Stage 6: Exit and Close
10. Who Hands What to Whom
11. An Illustrative Walkthrough
12. Fairness, Privacy, and Trust
13. Where This Breaks
14. Measuring the Lifecycle
15. What You Need to Build This
16. A 90-Day Roadmap
17. Conclusion: Connect the Stages, Keep People in Charge

An employee passes through a dozen processes in a few years, each run by a different person with a different tool. Recruiting hands to HR, HR hands to IT and the manager, the manager hands feedback back to HR, and finally everyone hands off the departure. Every handoff is a place where something drops. Individual AI tools help with each stage. This playbook connects them.

It builds on [The Employee Lifecycle Handbook](#), which maps the functions of HR and operations and the guides for each. Where the handbook shows what to automate, this playbook shows how to link the pieces into one controlled system.

The Handoff Tax

Three costs recur in nearly every people operation.

- **Dropped handoffs.** A new hire arrives without a laptop. A manager learns of a resignation from a rumor. Access stays active for weeks after someone leaves. Each is a small failure with a visible cost.
- **Repeated data entry.** The same name, title, manager, and start date get typed into the applicant system, the HRIS, the payroll system, the identity system, and a spreadsheet. Each copy can drift from the others.
- **Signals that stop at HR.** Survey results, exit themes, and review patterns sit in reports that managers rarely read, so the lessons arrive a quarter late or never.

AI can shorten each of these, with a condition. People data is among the most sensitive a company holds, and decisions about people carry legal and human consequences. The design question is not how much HR can automate, but which parts are safe to automate, which must stay with a person, and how the pieces stay in sync.

The Principle: One Record, Event-Driven Handoffs, People Decide

The playbook rests on three commitments.

One Record

A single source of truth for each employee, usually the HRIS. Other systems read from it and write back to it. No one retypes the same fact.

Event-Driven Handoffs

Lifecycle events, such as offer accepted or notice given, trigger the same set of tasks for every team that needs to act. Nothing depends on someone remembering.

People Decide

AI reads, drafts, summarizes, and reminds. A person decides every hire, rating, pay change, promotion, and termination, and is accountable for it.

The third commitment is the one regulators and employees care most about. Several jurisdictions regulate automated tools used in employment decisions, and the rules keep changing. Involve legal counsel, and design so a human always makes, and can explain, the decision. The [agent governance guide](#) covers the underlying control pattern.

The Spine: A Shared Record and Lifecycle Events

Before you automate any stage, settle two things: where the record of truth lives, and which events move an employee from one stage to the next.

Choose the system of record

Pick one system, typically the HRIS, to hold the authoritative fields: legal name, role, manager, location, status, and dates. Every other system either reads from it or receives updates from it. When two systems disagree, the record wins and the other is corrected. Without this rule, automation spreads errors faster than manual work ever did.

Define the lifecycle events

Event	Triggers
Offer accepted	Hire record created, equipment ordered, accounts staged, background steps started, manager notified.
Start date	Access activated, onboarding plan opened, buddy and check-ins scheduled.
30, 60, 90 days	Manager and employee check-ins, pulse questions, progress summary for the manager.
Review cycle	Review packets prepared, deadlines tracked, calibration data assembled.
Role or pay change	Records updated, access and approvals adjusted, payroll notified, manager and employee informed.
Leave begins or ends	Coverage plan, access adjustments, benefits and payroll updates, return plan.
Resignation or termination	Exit checklist opened, access revoked on the effective date, final pay prepared, knowledge handover started.
Last day	Equipment returned, accounts closed, records archived, exit feedback captured.

Each event carries a fixed checklist with named owners. The automation platform watches the record for the event and creates the tasks. That is the whole mechanism, and everything else in this playbook is a stage that plugs into it.

Stage 1: Hire

Recruiting generates volume, and volume is where AI helps: summarizing résumés against the written requirements, answering candidate questions, and scheduling. It is also where bias and legal risk concentrate, so the controls matter more than the speed.

WHAT AUTOMATION CAN DO

- **Structure the requirements:** turn the job description into a written, role-based set of criteria before any screening begins.
- **Summarize and highlight:** show a recruiter how each application maps to the criteria, with evidence quoted from the document.
- **Handle logistics:** scheduling, reminders, candidate updates, and interview packets.
- **Prepare the handoff:** when an offer is accepted, create the hire record and fire the first lifecycle event.

WHAT STAYS WITH PEOPLE

- Deciding who advances, who is interviewed, and who is hired.
- Rejecting any candidate. The system may surface and rank evidence, but a recruiter makes the call.
- Judging fit, potential, and context that a résumé does not show.

Test screening aids for uneven outcomes across groups before and after launch, keep records of how each recommendation was produced, and tell candidates when automated tools are used. The [résumé screening guide](#) covers a build designed around these limits.

Stage 2: Onboard

Onboarding is the most mechanical stage and the best place to start. The task is to make sure everything the new hire needs is ready before day one and that nothing falls through during the first ninety days.

Offer accepted → Accounts and equipment staged → Day one ready → Check-ins at 30, 60, 90 days

- **Before day one:** the offer-accepted event creates tasks for IT, facilities, finance, and the manager, each with a due date relative to the start date.
- **On day one:** access turns on, the plan opens, and the new hire receives a short, personal schedule instead of a stack of documents.
- **During the first ninety days:** an assistant answers routine questions from approved policy and handbook content, and scheduled check-ins surface problems early.

- **For the manager:** a short weekly note shows what is complete, what is overdue, and what the new hire asked about.

Answers come from approved content with sources shown, and questions about pay, benefits eligibility, leave, or complaints go to a person. The [onboarding assistant](#) and [onboarding transformation](#) guides cover the builds.

Stage 3: Develop and Review

Development and performance work suffers from inconsistency: different managers write different quality of feedback, and review season produces a rush of rushed prose. AI can raise the floor without touching the judgment.

WHERE AI HELPS

- **Gathering evidence:** collect the goals, projects, and feedback an employee already has on record, so the manager starts from facts.
- **Drafting and tightening:** turn a manager's notes into clear, specific feedback, and flag vague or loaded phrasing.
- **Consistency checks:** highlight where similar work is described in very different terms across managers, so calibration discussions begin with data.
- **Skill and growth mapping:** compare role requirements with demonstrated skills and suggest learning options for the employee and manager to consider.

The rating itself never comes from AI. The manager forms the judgment, a calibration step reviews it, and the employee sees feedback written by a person who stands behind it. The [performance review assistant](#) and [skill gap detection](#) guides cover the builds.

Stage 4: Listen and Retain

Employees tell you what is wrong long before they leave, through survey answers, patterns of time off, slowing participation, and departing colleagues. The task is to hear it early and get it to someone who can act.

- **Short, frequent pulse questions** that people respond to, not annual surveys that arrive too late. See [the pulse survey guide](#).
- **Theme summaries**, drawn from free-text answers, with minimum group sizes so no individual can be identified.

- **Manager nudges** that suggest a conversation, with context, instead of a score.
- **Pattern alerts** to HR when a team shows rising turnover, falling response rates, or concentrated complaints.

Be careful here. Predicting who will quit, scoring individuals, or monitoring communications to infer sentiment crosses from listening into surveillance, and it erodes the trust the survey depends on. Work at the team level, aggregate before you analyze, and tell employees exactly what is collected and why.

Stage 5: Role, Pay, and Leave Changes

Mid-lifecycle changes are where records drift. A promotion updates one system and not another. A transfer leaves old access in place. A leave of absence starts without a coverage plan. Treat each as an event with a separate checklist.

Change	What must happen	Common miss
Promotion or transfer	Update record, title, manager, cost center, and approvals. Adjust access to the new role and remove the old.	Old access remains and permissions accumulate.
Pay change	Approved by the right people, recorded once, flowed to payroll, communicated to the employee. Compare against pay bands.	Payroll and HRIS disagree for months.
Leave of absence	Coverage plan, access adjustments, benefits and payroll updates, planned return date.	Work stalls, or access is revoked inappropriately.
Manager change	Notify the employee, transfer notes and open items, update approval chains.	Approvals route to someone who has left the team.

The [payroll reconciliation guide](#) shows how to catch disagreements between the HR record and payroll, and the [pay equity guide](#) covers monitoring gaps before they compound. Pay decisions stay with people, and any analysis of pay by group belongs under the direction of counsel.

Stage 6: Exit and Close

Departures are the point where a missed handoff has security and financial consequences. Access left open, pay issued after termination, and knowledge that walks out the door are

all preventable with a reliable event.



A RELIABLE EXIT CHECKLIST COVERS

- **Timing:** the effective date and time, set once in the record, driving every other step.
- **Access:** accounts, devices, shared credentials, and vendor tools, revoked at the effective time, with a log of each.
- **Pay and benefits:** final pay, accrued time, and benefits notices prepared for review by payroll, not issued automatically.
- **Knowledge:** a handover plan for projects, accounts, and documents, drafted from the employee's open work and reviewed by the manager.
- **Feedback:** an exit conversation, with themes summarized across departures and fed back to Stage 4.
- **Records:** archive and retention rules applied, with legal holds respected.

Involuntary exits need extra care. Revocation and notification are sequenced with HR and legal, and a person runs the conversation. The [offboarding guide](#) covers a deprovisioning build.

Who Hands What to Whom

The lifecycle crosses four groups, and each has a distinct role. Write down who is responsible for each handoff, because shared responsibility tends to mean none.

Group	Provides	Receives
HR	The record, policies, event triggers, and employee communication.	Signals from managers, surveys, and exit themes.
IT and Security	Accounts, equipment, access changes, and logs.	Events with dates, role details, and approval records.
Finance and Payroll	Pay, benefits, and cost data.	Approved changes, with effective dates, from the record.
Managers	Goals, feedback, check-ins, and judgment on people.	Checklists, evidence, drafts, and alerts at the right time.

An Illustrative Walkthrough

The scenario below is illustrative, not a company case. It shows the stages sharing one record.

A candidate accepts an offer. The recruiter marks it accepted, and the **hire record** is created in the HRIS. That event opens tasks: IT stages accounts and orders a laptop due three days before the start date, facilities arranges a desk, finance confirms the cost center, and the manager receives a plan and a draft welcome note to edit.

On day one, access turns on and the new hire gets a short schedule. At thirty days a pulse question asks how the first month is going, and the answer goes to the manager as a suggested conversation, not a score. At six months the employee is promoted. The promotion event updates the record, adjusts access, informs payroll of the approved change, and notifies the new manager chain.

Two years later the employee gives notice. The exit event sets the effective date, drafts a handover plan from open work for the manager to review, queues access revocation for the effective time, and sends final-pay details to payroll for review. Exit themes join the quarterly summary that reaches team leads. At no point did the system decide anything about the person. It moved information to the people who did.

Fairness, Privacy, and Trust

Employee data is sensitive, and employees are entitled to know how it is used. Involve legal counsel, privacy staff, and employee representatives where applicable, and consult counsel on the rules in each location where you employ people.

PRACTICES THAT PROTECT PEOPLE AND THE COMPANY

- **Keep humans accountable.** A named person makes and answers for each decision about hiring, ratings, pay, promotion, discipline, and termination.
- **Test for uneven outcomes.** Check screening aids and any scoring for different results across groups, before launch and on a schedule after.
- **Minimize access.** Each step sees only the fields it needs. Keep health, leave reasons, and complaint details out of general workflows.
- **Avoid inference about people.** Do not use AI to guess protected characteristics, health, or intent to leave, and do not monitor private communications.
- **Be transparent.** Tell candidates and employees where AI is used, what it does, and how to reach a person.
- **Log and review.** Keep a record of each automated step and sample the output regularly, including the cases employees dispute.
- **Respect retention.** Apply deletion and retention rules to every copy, including drafts and logs.

Where This Breaks

Failure	What happens	Prevention
Two systems of record	Fields drift and automation sends conflicting information.	Name one source of truth and sync outward from it.
Event never fires	A departure is entered late, and access and pay continue.	Make the event part of the manager's required process and reconcile weekly.
AI used as a decider	A screening score becomes the effective rejection.	Require a human decision and keep reasons on record.
Surveillance creep	Listening turns into scoring and monitoring individuals.	Aggregate by team, set minimum group sizes, and publish what is collected.
Over-broad access	Automation can read sensitive records it does not need.	Scope each step to its fields and review permissions quarterly.
Checklists without owners	Tasks are created and ignored.	Assign a named owner and due date to every task, and escalate overdue ones.
Signals stop at HR	Findings never reach managers.	Send team-level summaries to managers on a fixed cadence.

Measuring the Lifecycle

Measure whether handoffs work and whether people are better served. Take a baseline first, so you can see what changed.

Metric	What it shows
Day-one readiness	Share of new hires with accounts, equipment, and plan ready at start.
Time to productivity	How quickly new hires reach the expected output, as defined by their managers.
Onboarding task completion	Whether checklists are done on time, by owner.
Access revocation time	Gap between effective date and last access removed.
Record mismatch rate	Disagreements between the HR record and downstream systems such as payroll.
Review cycle timeliness	Reviews completed by deadline, and manager time spent.
Early attrition	Departures within the first year, by team, with exit themes.
Manager action rate	How often team-level signals lead to a documented action.

Watch the handoff metrics first. They show whether the system works and are less sensitive to individuals than outcome metrics are.

What You Need to Build This

The system needs a small set of components, and most companies already have the main ones. Start by writing the events, checklists, and owners on paper. None of that requires a new tool.

HRIS

The system of record for employee data, with an interface for reading and updating records.

Applicant Tracking

The system that holds candidates and hands the hire to the HRIS on acceptance.

Identity and Access

The directory and tools that stage, change, and revoke accounts.

AI Step

A model that summarizes, drafts, and answers from approved content, returning structured output with sources.

Workflow Engine

An automation platform that watches for events and creates tasks, reminders, and alerts.

Communication

Email and chat channels for employees, managers, and the teams doing the work.

Approved Content

Policies, handbooks, and FAQs, each with an owner and review date.

Logging and Reporting

Records of automated steps and a dashboard for the metrics above, with retention rules.

Plan for ongoing costs

Running the lifecycle system costs more than the purchase of any template. The automation platform, whether an n8n instance or a Zapier plan, is billed separately by its vendor and scales with the number of events and tasks. AI model usage is billed by your provider per request, and Zapier counts AI steps as multiple tasks depending on the model tier. Estimate your headcount, hiring volume, and event count before you build, and verify current pricing on each vendor's page.

A 90-Day Roadmap

DAYS 1 TO 30: SETTLE THE SPINE

- Name the system of record and map which systems read from or write to it.
- List the lifecycle events and write the checklist for each, with owners and due dates.
- Measure the baseline: day-one readiness, access revocation time, and record mismatches.

DAYS 31 TO 60: AUTOMATE ONBOARDING AND EXIT

- Build the offer-accepted and start-date events with tasks for IT, facilities, finance, and the manager.
- Build the notice-given and last-day events, with access revocation logged and payroll notified.
- Run both in parallel with the manual process and fix the gaps.

DAYS 61 TO 90: ADD THE SIGNALS

- Add the 30, 60, and 90-day check-ins and the team-level pulse summary.
- Add the review-cycle packet and drafting aids, with managers keeping every judgment.
- Hold a monthly review of failures, access times, and employee feedback, and update the checklists.

Add recruiting aids and pay analysis only after the spine is stable, and only with legal review. Those stages carry the highest risk.

Conclusion: Connect the Stages, Keep People in Charge

The employee lifecycle is a chain of handoffs between people who rarely see each other's work. AI is good at carrying information across those gaps, drafting the routine, and nudging the person who has to act. It is the wrong tool for deciding anything about a person.

Hire → Onboard → Develop → Listen → Change → Exit

Build the shared record first, define the events, automate onboarding and exit, and add signals and reviews last. The result is a company where new hires arrive ready, departing employees leave cleanly, and managers hear what their teams are saying while there is still time to act.

One record. Event-driven handoffs. A person behind every decision.

Where to Go From Here

Working builds are available for the main stages: résumé screening, onboarding, performance reviews, pulse surveys, payroll reconciliation, and offboarding. The Signal Exchange Playbook covers how HR signals reach other functions.

[Onboarding Assistant →](#)

[Offboarding →](#)

[Pulse Surveys →](#)

[Lifecycle Handbook →](#)

[Signal Exchange Playbook →](#)

[Agent Governance Playbook →](#)

[Finance Back Office Playbook →](#)

Unvarnished Reviews

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