

AI Agents in HRIS & Workday

Part 1: Building Your HR AI Agent Strategy



SWIPE TO START BUILDING YOUR
AGENT STRATEGY





Why this series?

AI agents are changing how HR and HRIS teams work. They can handle questions, organize tickets, and even trigger actions in Workday.

But the impact and risks of agents are significant. Giving an autonomous agent access to sensitive data needs to be handled with caution. This series explains how to start using them safely and effectively in your HR strategy.

What's next?

- Part 2: Demystifying the Tech Stack
- Part 3: Governance & Security
- Part 4: Risk & Ethics
- Part 5: Tools of the Trade (Azure, Google & more)

Follow Rick, Matt and Incubane to continue learning about Agents.



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WHY CARE ABOUT AGENTS? →



Why care about AI agents in HR?

- **Free up HR time:** AI agents handle repetitive questions, triage tickets, and draft responses, letting HR focus on strategic work.
- **Better employee experience:** Instant, personalized answers 24/7 (e.g., PTO balance, policy guidance) improve service quality and reduce frustration.
- **Faster, data-driven decisions:** Agents surface insights and coordinate actions, like reminding managers to give feedback or completing onboarding tasks.
- **Proven value:** Over half of early adopters say AI agents help HR deliver more strategic value and improve service quality (from research & Workday experience).

WHAT IS AN AGENT?



What is an AI Agent?

- **Digital HR assistant:** Uses AI to understand natural language and complete HR tasks.
- **Connected to Workday:** Can pull data, draft responses, and trigger processes through Workday's APIs or Extend apps.
- **Connected to other systems:** It can also work with other systems. For example having a natural conversation on Teams to help prepare for your next check-in.
- **Learns and adapts:** Uses company knowledge (policies, tickets, Workday Community) to give accurate, context-specific support.
- **Acts, not just answers:** Goes beyond chat—can send reminders, draft communications, or organize support tickets.

HOW DO THEY WORK?



How Do They Work? (Part 1)

- **Foundation Models:** Core engine is a Large Language Model (LLM) like GPT-4 (Azure OpenAI, etc.). It understands natural language and generates human-like responses.
- **HR & Workday focus:** Models can be tuned to HR terminology and Workday context for accurate answers.
- **Domain Knowledge:** Uses retrieval-augmented generation (RAG) to pull real data from sources like Workday Community, policy docs, and internal FAQs. This keeps answers grounded and reduces “hallucinations.”
- **Smart memory:** A vector database or search index stores these documents so the agent can quickly find the right information.

HOW DO THEY WORK



How Do They Work? (Part 2)

- **Tools & Integrations:** Agents connect to Workday REST APIs, reports, and even Jira or Teams. This lets them do more than chat, like looking up records or posting messages.
- **Build vs. Platform:**
 - Custom Build: Use frameworks like LangChain and open-source LLMs for full control.
 - Ready-made Platforms: Azure AI Foundry offers built-in models, connectors, and secure deployment.
- **Result:** Agents can answer questions and take action, working as a digital coworker for HR.



EXAMPLE USE CASES



Example Use Cases

There are many use cases that can benefit from agents. When choosing where to use an AI agent, focus on work that is repetitive and slows HR down. Look for tasks like answering FAQs, handling high-volume tickets, or guiding employees through basic steps such as onboarding forms.

Start with low-risk but high-volume processes where mistakes have limited impact but time savings are clear. The goal is to prove value quickly, measure results like time saved or reduced ticket volume, and then expand to more complex HR workflows as confidence grows. A few examples:

- **Employee Q&A:** 24/7 support for policies, PTO, payslips, benefits, reduces helpdesk tickets.
- **Ticket Triage:** Drafts initial responses and routes issues, speeding up HRIS support resolution.
- **Onboarding Support:** Guides new hires through forms and processes, automates simple tasks.
- **Recruiting Follow-ups:** Reminds managers to give feedback and helps coordinate interview steps.
- **Manager Assistance:** Surfaces team insights and pending actions right inside Teams or Workday Assistant.

WHY GOVERNANCE MATTERS



Why governance matters

AI agents can access sensitive HR data and even trigger actions in Workday. Treat them like digital team members: define exactly what they can see and do.

Use role-based access, monitor their activity, and keep an audit trail for compliance.

Workday's Agent System of Record and similar tools help manage permissions and oversight.

Note:

We'll go deeper into Governance & Security in the next part of this series.

BUILDING YOUR STRATEGY



How to Build Your HR AI Agent Strategy (1/2)

Step 1: Define the “Why”

- Map out key HR challenges (ticket backlog, onboarding delays, repetitive Q&A).
- Pick one or two low-risk, high-volume use cases to prove value quickly.
- Agree on measurable goals (e.g., 30% fewer tickets, faster onboarding).

Step 2: Build Your Team

- Include HRIS, IT/security, and HR operations.
- Assign a strategy owner to drive adoption and track success.

Clarity and ownership are the foundation of any AI agent plan.

BUILDING YOUR STRATEGY



How to Build Your HR AI Agent Strategy (2/2)

Step 3: Choose Your Approach

- Decide between custom build (full control, more effort) or ready-made platforms (Azure AI Foundry, Google Vertex AI).
- Align with your IT and Workday roadmap.

Step 4: Pilot & Scale

- Start small: launch one agent, track KPIs, gather feedback.
- Use success to expand into more use cases and deeper Workday integrations.

Start small, learn fast, and scale what works.

If you need support on building your strategy you can reach out to Incubane.

WRAPPING UP

Ready to start building?

AI agents are here to stay. They can save time, improve HR service, and free your team for work that matters.

This was Part 1: Building Your HR AI Agent Strategy.

Next in the series, we'll cover:

- Tech Stack (how it all works)
- Governance & Security
- Risk & Ethics
- Tools of the Trade (Azure, Google & more)

Follow Rick, Matt & Incubane to catch every part of this series and share your top HR AI agent idea in the comments.

