

AI Review Quick Guide

Use an approved AI tool and minimised factual context

1. Build your context

Use role title and review period, verified achievements, strengths, development areas, support and future goals. Use placeholders and avoid unnecessary personal information. Never enter confidential employee information into unapproved AI tools.

2. Choose the draft you need

Choose Full performance review, Review summary, Discussion talking points, Development plan or SMART goals. Choose a tone appropriate to the discussion. Both builders use Role + Task + Context + Output + Safeguards.

3. Copy and run the prompt

In Excel, select A34 and copy the cell text. On the website, select Generate My Prompt, then Copy Prompt. Paste into an approved AI tool. The kit does not call an AI service, require an API key or send data automatically.

4. Check the result

Verify evidence, dates, measures and names. Remove unsupported achievements or concerns. Keep employee comments for the employee to provide. Distinguish agreed priorities from AI proposals. Review tone, fairness, support needs and policy alignment.

5. Complete the record

Discuss and agree the final wording, goals, owners and dates with the appropriate people. Store the approved record securely. AI must not make legal, disciplinary, pay, promotion, dismissal or other employment decisions.

Example context

Fictional: Marketing Coordinator, Q3 2026. Delivered the September campaign on schedule. Strength: clear weekly updates. Development: consistent handover documentation. Manager support: review a checklist before the next campaign.

Broader learning

AI Productivity for HR Professionals by Mercer Lane covers the wider AI method, HR prompts and workflows. Visit Mercer Lane Press for the book and complete HR Manager Toolkit.