

Claude

< for **HR** >

PROMPTS

PRACTICAL TIPS

USE CASES

YOUR ULTIMATE RESOURCE PACK

Learn how to use Claude to draft, analyze, compare, summarize, and think through everyday HR tasks with more confidence.

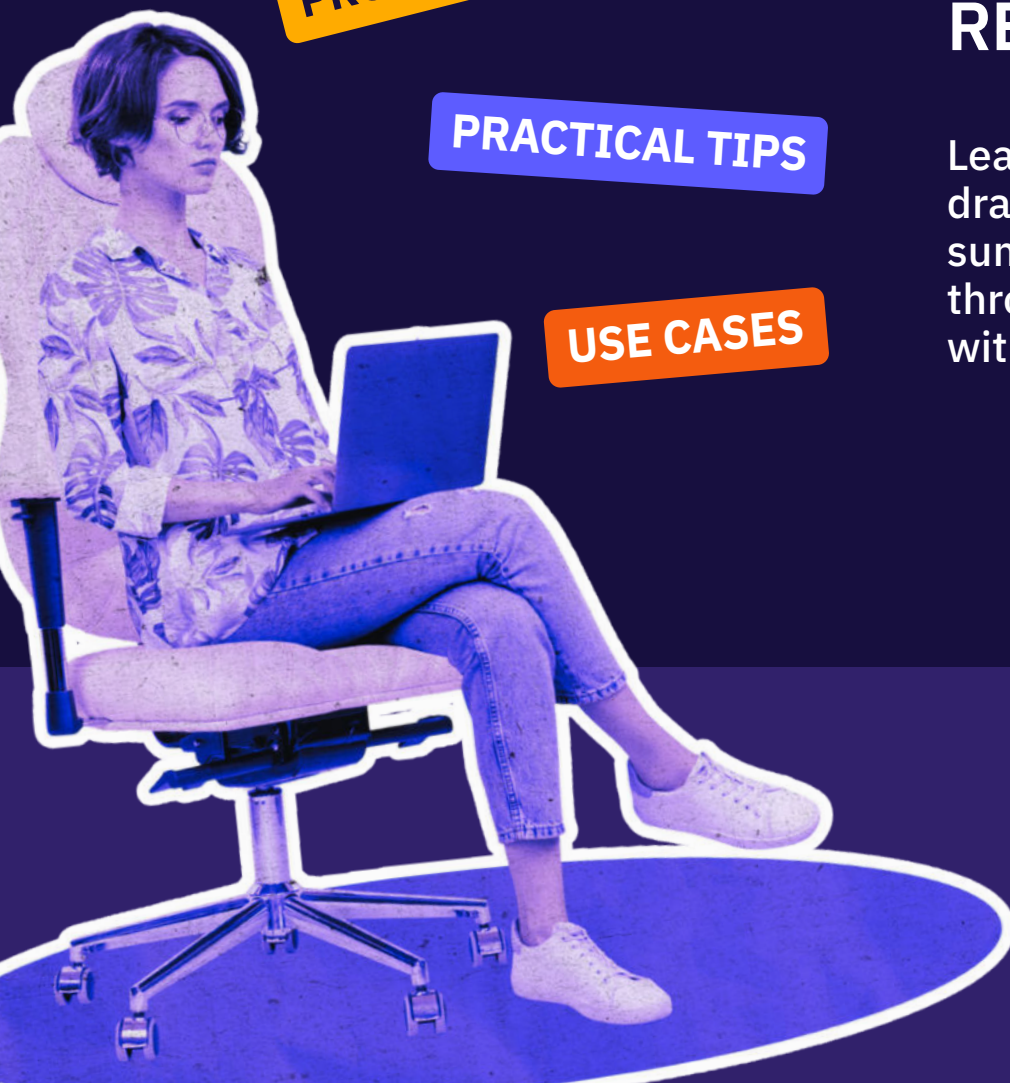


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Master Claude for HR

in One Weekend



Level 1

Claude Chat

SATURDAY MORNING

Start with a simple prompt:

"I want to [TASK] for [SUCCESS CRITERIA].
Use AskUserQuestion before you start."



By lunch you have a working assistant connected to the tools you already use.

- ✓ Go to **claude.com/download**. Install the app.
- ✓ Pay the \$20. Select **Opus 4.6 + Extended Thinking**.
- ✓ Connect **Microsoft 365, Slack, Gmail** through Connectors.



Level 2

Claude Cowork

SATURDAY AFTERNOON

- ✓ Set Global Instructions (**Settings → Cowork → Edit**):

"Always read my files first, user clear versioning, never edit originals, deliver everything to CLAUDE OUTPUTS."



No need to provide context anymore: Claude now knows who you are + your work context

- ✓ **2 subfolders**: Project & Templates
- ✓ Go to **'Settings', 'General'**, and fill in your name and what best describes your work.
- ✓ Go to **'Capabilities'**, make sure **'Memory'** is switched on.
- ✓ Next, describe who you are and your organization under **'Import memory'**



Level 3

Skills + Plugins

SUNDAY MORNING

- ✓ Open Cowork. Type:

"Use the skill-creator to help me build a skill for [your most repeated task]."

- ✓ Claude interviews you. Answer and be specific.
- ✓ Before building the skill, tell Claude to run an **'eval'**. Claude will now run simulations to test your new skill.

- ✓ Generates the SKILL .md. Test it: "When would you use this skill?" If the description is vague, fix it.
- ✓ Upload: **Settings → Capabilities → Skills → Upload**. Now it fires automatically. No slash command.
- ✓ Install Plugins: **Cowork > Customize > Browse plugin**

Skills with about-me .md. Skills handle your process.



You've just built your second brain inside Claude.



Level 4

Claude for HR Plugin

SUNDAY AFTERNOON

- ✓ Open **Cowork → Customize → Browse plugins → install Claude for HR**.

12 pre-built skills appear, ready to fire on a slash command or auto-trigger when Claude recognizes the task:

/compensation-benchmarking → market rate for any role

/comp-analysis → band placement + equity modeling on your internal data

/employee-handbook → policy answers from your connected knowledge base

/interview-prep → competency questions + scorecard

/job-description → JDs aligned to your leveling framework

/org-planning → headcount cases, reorg scenarios

/performance-review → structured review drafts

/onboarding-plan → first-week calendar, tool access, buddy template

/offer-letter → terms, equity, benefits in one draft

/policy-drafting → new policy from scratch, jurisdiction-aware

/people-analytics → attrition, engagement, headcount patterns

/employee-comms → announcements, change comms, sensitive messages



This is your starting point, not your ceiling. Every skill is a SKILL .md file. Open it, read it, rewrite it.

- ✓ Add your leveling framework, your bands, your EVP language, your tone guide.
- ✓ Point **/employee-handbook** at the right Drive folder.
- ✓ Replace the generic JD structure with the one your TA team actually uses.

Claude for HR Cheat Sheet

Get better output with the BRIEF framework



Background:

Tell Claude who you are, the situation, and the role it should play.

Example:

"You are an HR Manager at a mid-sized tech company preparing for a recruitment drive."



Request:

Be clear about the task and outcome you need.

Example:

"Create a job description for a software engineer role with sections for responsibilities and qualifications."



Instruction:

Guide the format, tone, reading level, and structure.

Example:

"Use short paragraphs, plain language, and a professional but approachable tone."



Expectation:

Show Claude what good looks like.

Example:

"Use this format: summary, key points, action steps, and closing sentence."



Focus:

Set limits, priorities, and boundaries.

Example:

"Keep this under 300 words, use inclusive language, and avoid legal claims."

Prompt words to use

Draft:

Create a first version of a document, message, plan, or guide.

Summarize:

Turn long notes, surveys, policies, or reports into key themes.

Rewrite:

Improve clarity, tone, structure, or reading level.

Compare:

Review two documents, roles, datasets, or policies side by side.

Analyze:

Find patterns, risks, gaps, or inconsistencies in HR information.

Structure:

Organize scattered information into tables, checklists, plans, or briefs.

Flag:

Identify issues that need human review, legal input, or further validation.

Convert:

Turn dense content into training material, microlearning, or employee-friendly copy.

Prioritize:

Rank roles, risks, actions, or recommendations based on clear criteria.

HR use cases for Claude



Talent intelligence:

Build sourcing briefs, identify likely candidate objections, and compare talent markets.



Headcount planning:

Find risks in workforce plans, test assumptions, and model staffing scenarios.



Onboarding plans:

Create 30-60-90 day plans based on role, scope, priorities, and manager expectations.



Offboarding checklists:

Build structured offboarding steps for HR, IT, Finance, managers, and employees.



Exit interview summaries:

Turn anonymized notes into themes, recurring concerns, and retention risks.



Performance conversations:

Help managers prepare clear, factual, and respectful conversation guides.



Manager feedback:

Rewrite vague feedback into behavior-based, actionable feedback.



Skills gap analysis:

Compare current role profiles with target roles and recommend development actions.



Learning programs:

Create practical L&D outlines with modules, outcomes, activities, and assessments.



Policy-to-training content:

Convert dense policies or frameworks into microlearning scripts.



HR dashboard insights:

Translate HR dashboards into executive-ready talking points and risks.



Compensation benchmarking:

Review pay ranges, market data, compression risks, and benchmark assumptions.

Claude for **Everyday HR Work**

Claude best practices for HR

01 Start with privacy:

Do not paste personally identifiable information, confidential employee details, salary data, or sensitive HR notes into a public AI model.

08 Refine your prompts

The first prompt rarely gives the best result. Add clearer context, tighter instructions, and stronger boundaries.

07 Separate evidence from interpretation

Ask Claude to clearly distinguish between what the data shows and what it may suggest.

02 Check company policy:

Follow your organization's AI, security, legal, and data usage requirements before using Claude for HR work.

03 Treat output as a first draft:

Claude can help structure and draft content, but HR must review tone, accuracy, and fit.

04 Assess for bias:

Review outputs for biased language, assumptions, or criteria that could disadvantage candidates or employees.

05 Use human judgment:

Claude should support people decisions, not make them. HR, legal, and business leaders remain accountable.

06 Be careful with sensitive topics

Use extra caution for compensation, discipline, accommodations, terminations, investigations, and employee relations.



Claude prompt examples for HR

Example prompt #1



Create a 30-60-90 day onboarding plan for a new [role title] in [department]. Include goals, learning priorities, key meetings, early deliverables, and manager check-in prompts.

Example prompt #2



Summarize these anonymized exit interview notes into main themes, recurring concerns, positive feedback, and retention risks. Separate evidence from interpretation.

Example prompt #3



Rewrite this vague manager feedback into behavior-based feedback. Include what happened, why it matters, what good looks like, and what the employee should do next.

Example prompt #4



Convert this policy into a short microlearning script for [employee group]. Include a plain-language explanation, three key takeaways, one workplace example, and two knowledge-check questions.

100 Tips to Master Claude

Cowork Setup

- 01 Download the desktop app. Not the browser.
- 02 Create a shared folder on your PC called 'COWORK' that you can access from your work phone.
- 03 3 subfolders: Projects, Templates, Outputs.
- 04 Drop in your HR + org strategy, HR goals, and policy documents.
- 05 Add an "About Me" file: your role with clear responsibilities, your company, your HR stack.
- 06 One template per deliverable: JD, policy, performance review, offer letter.
- 07 Name files by what they do, not what they are. "JD-senior-HRBP" beats "Document1-final-v3".
- 08 Point Claude at the COWORK folder once. It works from there.
- 09 Update the About Me file every quarter. Your role shifts. Claude needs to know.
- 10 Keep the folder lean. 20 great files beat 200 mediocre ones.

Prompting

- 21 Stop writing long prompts. Files > prompts.
- 22 One task per prompt. One. Not five.
- 23 Say "Does NOT sound like" to kill the corporate -AI voice in your comms.
- 24 Give the task, not the method. Let it figure out the approach.
- 25 Show an example of what "good" looks like. Tell > explain.
- 26 Tell Claude who the output is for. "For the CHRO" and "for line managers" land differently.
- 27 Ask for the output format up front. Table, bullets, memo, Slack message.
- 28 If the first draft misses, don't start over. Tell it what's wrong.
- 29 "Be critical" beats "be helpful" when you're pressure-testing a decision.
- 30 Save your 10 best prompts. Reuse them. Upgrade them into skills. Don't reinvent.

Connectors

- 41 Settings → Connectors → Browse → Add.
- 42 Start with Atlassian, SharePoint, or Drive. That's where your HR policies already live.
- 43 Connect Slack, Microsoft 365, Miro, Gmail.
- 44 Free on all plans. No extra cost.
- 45 Claude reads your actual files. No more exporting and re-uploading.
- 46 Most enterprise connections are still being built — this will only get better.
- 47 Connect Gmail for drafting responses in your voice. It reads your sent folder.
- 48 Connect Notion if your people ops playbook lives there.
- 49 Disconnect what you don't use. Fewer surfaces, cleaner context.
- 50 Be deliberate about what Claude can see. Permissions matter in HR.

Claude in Excel

- 61 Install "Claude by Anthropic" from the Microsoft Marketplace.
- 62 It reads every tab. Explains headcount formulas in plain English.
- 63 Drop a PDF salary survey in. Claude extracts the tables for you.
- 64 No macros. Claude highlights every cell it touches.
- 65 Use it to audit comp bands. It'll flag outliers you missed.
- 66 Ask it to explain what a predecessor built. Saves days of reverse-engineering.
- 67 Use it for attrition analysis. It spots patterns across tabs.
- 68 Never paste sensitive pay data into the web chat. Use a paid corporate account.
- 69 Always double-check the math on anything that changes a paycheck.
- 70 Treat it as a junior analyst. Fast, capable, still needs review.

Claude in Excel

- 81 Headcount dashboards, attrition trackers, comp models — inside the chat.
- 82 They work automatically in Cowork.
- 83 Preview before you export. Edit it live. Then copy.
- 84 Share with non-Claude colleagues through the share button.
- 85 Use Artifacts for one-pagers to the CHRO - better than slides.
- 86 Build a quick interactive calculator when a stakeholder asks "what if."
- 87 Use them to visualize survey data before you write the exec summary.
- 88 Only share confidential Artifacts within your team plan. Never publicly.
- 89 Iterate inside the Artifact. Don't restart the conversation.
- 90 Save the best Artifacts as templates. Reuse beats rebuild.

Cowork Setup

- 11 Opus 4.7 + Extended Thinking for complex (workforce) planning and policy drafting.
- 12 Sonnet = job description edits. Haiku = scanning CVs and policies.
- 13 The model matters less than the prompt.
- 14 Extended Thinking for anything related to advanced policies.
- 15 Skip Extended Thinking for drafting emails and meeting notes. It will overcomplicate.
- 16 If the task has a right answer, use the smallest model that gets there.
- 17 If the task needs judgment, upgrade the model before you upgrade the prompt.
- 18 Switch models mid-chat. Ideate and draft with Opus, edit with Sonnet.
- 19 Keep Opus usage limits in mind.
- 20 Split complex tasks into smaller steps for better output.

AskUserQuestion Tool

- 31 Start every first prompt with "Start with AskUserQuestion."
- 32 Claude builds you a clickable form. Click your answers.
- 33 It asks the right questions so you don't have to spec every detail.
- 34 If the direction is wrong, say so. It rebuilds instantly.
- 35 Use it for JD drafting. It asks about level, scope, must-haves.
- 36 Use it for policy writing. It asks about jurisdiction, audience, tone.
- 37 Use it when a stakeholder hands you a vague brief. Let Claude narrow it.
- 38 Skip it for tasks you've done 50 times. You already know the spec.
- 39 Works best with Opus. The questions are sharper.
- 40 BUT a complete prompts always beats AskUserQuestion.

The HR Plugin

- 51 Cowork → Customize → Browse → Install.
- 52 Pick the HR plugin. Compensation benchmarking, policy drafting, job architecture.
- 53 Type "/hr" to trigger any plugin command instantly.
- 54 Customize to match your company voice and EVP.
- 55 Comp benchmarking plugin: verify the sources. More input = better benchmark.
- 56 Policy plugin: still get legal review. Plugins draft, you edit, lawyers approve.
- 57 JD plugin: feed it your leveling framework, competency framework, similar jobs.
- 58 Build an internal plugin for your competency model. Reuse forever.
- 59 Read the detailed skills, most of the skills are a first draft, not production-ready.
- 60 Duplicate plugin skills to improve them & share them with the team.

Claude Skills

- 71 Skills are reusable instructions Claude loads on demand.
- 72 Install from the skill library or write your own.
- 73 Name the skill for the job, not the tool. "comp-band-analysis" beats "my-skill-v2".
- 74 The description field is everything. It's how Claude knows when to trigger the skill.
- 75 Write skills for tasks you repeat weekly: JD drafting, inbox cleaning, policy reviews.
- 76 Put your leveling framework, tone rules, and must-include clauses inside the skill.
- 77 One skill per job. Don't build a mega-skill that does everything badly.
- 78 Test the trigger. Ask a fresh question and see if Claude picks the right skill unprompted.
- 79 Share skills across your HR team.
- 80 Version your skills like policies. Date them. Review quarterly. Retire the stale ones.

Advanced Mastery

- 91 Keep your files under 200 lines. Shorter is better.
- 92 Avoid AI slop. Just... don't.
- 93 Review every output critically.
- 94 Claude does 80% of the busywork. You do the 20% that needs judgment.
- 95 Never let Claude make a termination, promotion, or hire decision. Ever.
- 96 Don't let Claude make any decisions with consequences — you're in charge and responsible.
- 97 Always have a human in the loop for anything an employee or colleague will read.
- 98 Document your prompts like you document your processes. They're IP now.
- 99 If an output feels generic, it is. Rewrite the brief, not the output.
- 100 Teach your team to spot AI voice. It's the new plagiarism.

Claude for HR Use Cases

01 > Run a compensation analysis



Connect your spreadsheet or HRIS export to Cowork, type **/comp-analysis**, then enter role, level, and location details. Claude for HR will read the data, benchmark against available market data, and surface gaps.

HR tip

Use for junior/mid roles only; validate senior benchmarks externally before making offers.

02 > Draft an offer letter



Connect DocuSign to Cowork, type **/draft-offer** and complete the form with info on the role, comp, start date, and key terms. Claude for HR will generate a formatted draft, which will save to your files and be ready for review.

HR tip

Always review for legal accuracy and load your letter template to improve output quality.

03 > Generate an onboarding checklist



Type **/onboarding** with role details, department, location, and start date. Claude will generate the plan and deliver it to Google Drive, or send it via Slack (based on your configuration) to the hiring manager.

HR tip

Tailor inputs carefully and connect HRIS/policies for role-specific, compliant plans.

04 > Create a people report



Connect your Excel, Google Sheets, or HRIS export, type **/people-report**, then specify the period, audience, and metrics to include.

HR tip

Specify the audience upfront and add your organizational context to interpret trends correctly.

05 > Structure a performance review



Type **/performance-review** with the employee's role, review period, goals, and feedback. Claude will generate the draft and save it to your files for manager review.

HR tip

Treat it as a draft only; managers must check and personalize every performance review document.

06 > Find and explain company policy



Connect policy documents in Google Drive to Cowork, then type **/policy-lookup** and enter your question (e.g., "How does parental leave apply to fixed-term contract employees?"). Claude will search your documents, find the relevant section, and rewrite it in the format you tell it you want.

HR tip

Keep source documents updated and review responses for cases that are sensitive or carry legal risk.

CLAUDE
FOR HR
MINI COURSE



NEW!

Learn how to use Claude effectively and responsibly across every part of your HR role with the Claude for HR mini course.

> EXPLORE COURSE



Claude Prompts for HR

TALENT ACQUISITION AND HEADCOUNT PLANNING

01 Strategic sourcing brief

Prompt You are a TA leader planning a search for a [role title] at a [industry] company with [headcount] employees. Create a pre-search talent intelligence brief covering likely talent pools, compensation positioning, sourcing channels, and candidate objections. Use the job description, salary band, target start date, and competitor companies provided.

02 Headcount model risk review

Prompt You are an HR workforce planning analyst reviewing a multi-tab headcount plan. Identify formula errors, inconsistent assumptions, duplicate roles, unexplained variances, and issues that could affect budget or hiring timing. Summarize the main risks and list any items that need human review.

03 Headcount prioritization support

Prompt You are an HRBP preparing for a headcount prioritization meeting. Rank the proposed roles based on business criticality, service impact, workload pressure on the current team, compliance risk, and realistic time to fill. Recommend a hiring sequence and explain the key trade-offs.

ONBOARDING AND OFFBOARDING

04 30-60-90 day onboarding plan

Prompt You are an HRBP onboarding a new [role title] in [department]. Create a 30-60-90 day plan that helps the employee understand the role, build key relationships, and make measurable progress. Include goals, learning priorities, important meetings, early deliverables, and manager check-in prompts.

05 Exit interview summary

Prompt You are an HR analyst reviewing anonymized exit interview notes from [team or business unit] covering [date range]. Summarize the main themes, recurring concerns, positive feedback, and possible retention risks for current employees. Separate what the notes directly support from your interpretation.

06 Offboarding checklist

Prompt You are an HR Operations Specialist preparing an offboarding checklist for a [role title] leaving on [date]. Cover HR, IT, Finance, manager, and employee actions. Include access removal, knowledge transfer, final pay, benefits, equipment return, exit interview, and any items that may need legal review.

PERFORMANCE MANAGEMENT

07 Manager effectiveness scorecard

Prompt You are an HR analytics partner reviewing manager effectiveness across [team or business unit]. Use engagement themes, attrition, internal mobility, absence trends, performance distribution, and employee relations notes to identify manager effectiveness signals. Separate confirmed patterns from hypotheses that need further review.

08 Actionable feedback rewrite

Prompt You are an HRBP coaching a manager before a performance review. Rewrite the vague feedback below into behavior-based feedback. For each point, explain what happened, why it matters, what good looks like, and what the employee should do next. Keep the tone respectful and practical.

09 Difficult performance conversation plan

Prompt You are an HRBP helping a manager prepare for a difficult performance conversation with an employee in [role title]. Create a 30-minute conversation plan with an opening script, key points tied to examples, questions to ask, likely employee responses, next steps, and documentation notes.

LEARNING AND DEVELOPMENT

10 Skills gap analysis

Prompt You are an L&D partner supporting internal mobility. Compare the employee's current role profile with the target job description for [target role title]. Identify current strengths, gaps, priority areas, and development actions such as projects, coaching, mentoring, or formal learning.

11 Learning program outline

Prompt You are an L&D Specialist building a program for [audience] on [topic]. Create a practical program outline that includes module titles, learning outcomes, key content points, activities, resources, and assessment ideas. Focus on how learners will apply the skill on the job.

12 Microlearning script

Prompt You are an L&D Content Writer converting the attached [policy or framework] into a short microlearning module for [employee group]. Explain the content in plain language, include three key takeaways, add one realistic workplace example, and write two knowledge-check questions.

PEOPLE ANALYTICS AND COMPENSATION BENCHMARKING

13 Executive dashboard talking points

Prompt You are an HR analytics partner preparing for an executive meeting. Review the HR dashboard covering headcount, turnover, hiring, absence, engagement, and performance. Create three executive-ready insights, two risks leadership should know about, and likely questions leaders may ask.

14 Compensation benchmarking review

Prompt You are a Compensation Analyst comparing internal pay ranges with benchmark data for [role family], [location], and [level]. Classify each range as below market, within market, or above market. Flag compression risks, unclear benchmark assumptions, outdated data, and small benchmark samples.

15 Turnover and headcount planning analysis

Prompt You are an HR Workforce Planning Analyst reviewing turnover, vacancy, hiring, and headcount data for [period]. Identify teams at the highest staffing risk in the next [3, 6, or 12] months, likely drivers, impact on the headcount plan, and HR actions to consider.

How to Draft an Offer Letter With Claude

1 How to get the Claude for HR plugin



Download and install the Claude Cowork app

Go to claude.com/download and select the version for your OS (Cowork is included).



Switch to Cowork mode

Open the app, use the mode selector on top to click the 'Cowork' tab, then click 'Customize' in the left sidebar (you manage plugins, skills, and connectors here).



Install the HR plugin

Click 'Browse plugins,' find the 'Human Resources' plugin (published by Anthropic), and install it.



Connect your tools

Also via the Customize menu, add connectors for Google Workspace, Microsoft 365, DocuSign, Slack, and any other tools you use.



Set your global instructions

Go to Settings > Cowork > Global Instructions to specify your preferred output formats, tone, and any company-specific context for Claude.



Start using slash commands

Type / in the Cowork chat to see all available HR commands, and trigger any workflow instantly.

2 Draft an Offer Letter

Provide details on job role, level, compensation, start date, and terms. Claude for HR will generate a formatted offer letter draft for your review and DocuSign routing. The quality depends on your setup; customizing the plugin with your standard template produces a much tighter output.



HR Tip: Be sure to review the final document before it reaches your candidate, because Claude for HR can't verify the accuracy of compensation or jurisdiction-specific legal requirements.

3 How to use it



- 1 Connect DocuSign to Cowork
- 2 Type /draft-offer, and complete the form with info on the role, comp, start date, and key terms.

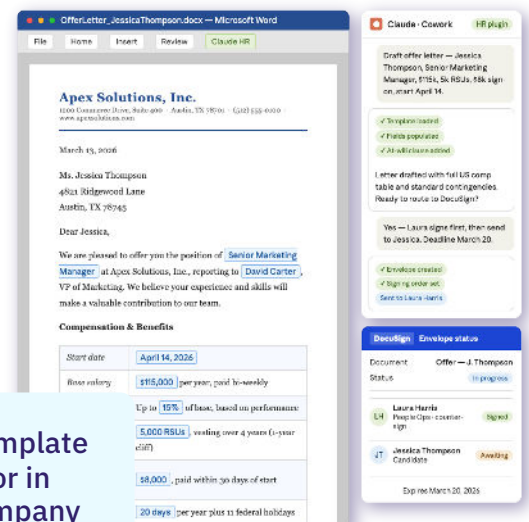
Claude for HR will generate a formatted draft, which will save to your files and be ready for review.

4 Expected output

- ✓ Fully formatted offer letter with all specified terms
- ✓ Direct path to DocuSign routing once you've approved the letter



Practical Tip: Load your standard offer letter template into the plugin setup first. It's the single biggest factor in improving output quality and aligning it with your company standards.



How to Run a Compensation Analysis With Claude

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4 Connect your tools

Also via the Customize menu, add connectors for Google Workspace, Microsoft 365, DocuSign, Slack, and any other tools you use.

5 Set your global instructions

Go to Settings > Cowork > Global Instructions to specify your preferred output formats, tone, and any company-specific context for Claude.

6 Start using slash commands

Type / in the Cowork chat to see all available HR commands, and trigger any workflow instantly.

2 Run a compensation analysis



Connect your pay data (Excel, Google Sheet, or HRIS export), specify role, level, and location, and Claude will build a structured analysis. This includes internal pay versus market ranges, outliers, equity gaps, and a plain English summary.



HR Tip: Use it only as an initial orientation for junior and mid-level positions, and validate it against a dedicated benchmarking platform before making any offer.

3 How to use it

Connect your spreadsheet or HRIS export to Cowork, type /comp-analysis, then enter role, level, and location details. Claude for HR will read the data, benchmark against available market data, and surface gaps.

4 Expected output

- 1 Pay vs market table with flagged outliers & equity gaps
- 2 Plain English summary, e.g., "Sales team median pay is 12% below market; recommended range: \$80k–\$90k"
- 3 Stated assumptions and data sources to help you know exactly what to validate.



Practical Tip: Your compensation analysis data updates automatically when you update the connected spreadsheet. Before setting offers, always cross-reference senior-level outputs against third-party comp platforms such as Figures, Mercer, or Ravio.

figures

Mercer

ravio

The screenshot shows the Claude Cowork interface with a compensation analysis table and a summary. The table has columns for Name, Role, Level, Current base, and Market P50. The summary includes a plain English summary, assumptions, and a total adjustment.

Name	Role	Level	Current base	Market P50
J. Williams	Software Engineer	L4	\$128,000	\$130,000
M. Johnson	Senior PM	L5	\$138,000	\$152,000
K. Davis	UX Designer	L3	\$101,000	\$99,000
T. Anderson	Data Analyst	L3	\$88,000	\$97,000
B. Martinez	Engineering Mgr	L6	\$178,000	\$175,000
S. Thompson	Recruiter	L3	\$72,000	\$81,000
C. Wilson	Finance Analyst	L4	\$112,000	\$110,000

Summary:

- Flag anyone below market P50 and calculate the cost to bring them to P50.
- ✓ Market data loaded
- ✓ Spikes flagged
- 3 employees are below P50:

 - M. Johnson — +\$14k needed
 - T. Anderson — +\$9k needed
 - S. Thompson — +\$9k needed

- Total adjustment: \$32,000
- Flagged rows highlighted

Assumptions:

- 3 employees are below P50:
- M. Johnson — +\$14k needed
- T. Anderson — +\$9k needed
- S. Thompson — +\$9k needed

Total adjustment: \$32,000

Flagged rows highlighted

Drafting memo...

Opening a new Word doc with a 1-page compensation equity memo — pre-filled with these figures and a recommended approval ask.

Ask Claude...

How to Create a People Report With Claude

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2 Switch to Cowork mode

Open the app, use the mode selector on top to click the 'Cowork' tab, then click 'Customize' in the left sidebar (you manage plugins, skills, and connectors here).

4 Connect your tools

Also via the Customize menu, add connectors for Google Workspace, Microsoft 365, DocuSign, Slack, and any other tools you use.

3 Install the HR plugin

Click 'Browse plugins,' find the 'Human Resources' plugin (published by Anthropic), and install it.

5 Set your global instructions

Go to Settings > Cowork > Global Instructions to specify your preferred output formats, tone, and any company-specific context for Claude.

6 Start using slash commands

Type / in the Cowork chat to see all available HR commands, and trigger any workflow instantly.

2 Create a people report



Feed in the metrics you're already tracking, such as headcount, attrition, time to fill, and engagement. Claude for HR will generate a readable narrative report with trends surfaced, formatted for your audience.



Insight: Claude for HR can pull data from Excel, build the narrative, and generate a board-ready PowerPoint in a single workflow.



Claude can't interpret business context. For instance, a spike in attrition means different things in different climates, so you must craft the narrative yourself.

3 How to use it



- 1 Connect your Excel, Google Sheets, or HRIS export.
- 2 Type /people-report, then specify the period, audience, and metrics to include.

4 Expected output

- ✓ Structured people report covering headcount, attrition, diversity, and organizational health.
- ✓ Optional board-ready PowerPoint generated from the same data, with no manual reformatting required.



Practical Tip: Specify your audience upfront. A board report reads differently from a CHRO update, and Claude for HR will calibrate depth and language accordingly.

What Claude Does Well vs. Where HR Should Be Cautious



Works Well

Offer Letter Drafting



- Creates first-draft offer letters using approved templates
- Reduces repetitive admin work
- Helps standardize formatting and tone



Always review compensation and legal wording before sending.

Onboarding Plans



- Builds onboarding checklists and 30-60-90 day plans
- Saves HR teams time
- Supports consistency across hires



Works best when aligned with real role expectations.

People Reporting



- Turns HR data into structured summaries and reports
- Helps simplify recurring reporting workflows
- Useful for leadership updates



HR still needs to interpret the “why” behind the data.

Performance Review Drafts



- Helps managers draft reviews faster
- Improves consistency across review cycles
- Reduces blank-page syndrome



Final reviews should always reflect real manager feedback.

Policy Search & HR Knowledge



- Finds relevant handbook and policy information quickly
- Reduces time spent searching documentation
- Supports consistent employee responses



Only works well when policies are regularly updated.



Use With Caution

Compensation Benchmarking



- AI can summarize compensation data
- May miss market nuance or seniority context
- Should not replace compensation strategy decisions



Always validate compensation data with trusted sources.

Interpreting HR Trends



- Can identify patterns in attrition or engagement data
- Cannot explain organizational context
- Requires HR judgment to drive action



Data alone does not equal insight.

Legal & Compliance Accuracy



- Employment law varies by country and situation
- AI-generated outputs may contain inaccuracies
- HR review is still essential



Never send AI-generated legal content without verification.

Output Quality Without Setup



- AI works best with strong templates and instructions
- Connected systems improve relevance
- Governance and review processes still matter



AI amplifies existing HR processes for better or worse.



Build future-ready AI skills to streamline your workflows, advance decision-making, and improve the quality of your work with the AI for HR Certificate Program.

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HR NEEDS

< AI SKILLS >

NOT JUST TOOLS.

Bridge the gap by learning how to effectively
apply in your day-to-day workflow with the
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