



# Leading with AI

a charter summit

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Artificial intelligence is transforming how leaders make decisions, manage teams, and drive business outcomes. At Charter's Leading with AI Summit, executives, AI researchers, and workplace experts came together to share actionable strategies and tips for integrating AI into leadership and work.

This playbook distills the most useful takeaways into practical steps and approaches you can implement today. Here's a preview of a few:

- Every's Dan Shipper discussed how he puts transcripts of meetings into ChatGPT or Claude and asks them for feedback on his leadership style and effectiveness. "It's really, really insightful," Shipper said, noting "how empathetic and sensitive these tools are to nuances of social dynamics."
- "AI can open a file. It can read a particular kind of column in Excel. It can make computations right back into the file and it can actually compose an email and set it up," explained JPMorganChase's Manuela Veloso. "We have to move into thinking that way." Veloso cited meeting scheduling as an area ripe for AI agents to handle. Nichole Sterling and Helen Lee Kupp from Women Defining AI demonstrated how OpenAI's Operator agent collected data from around the web and created a spreadsheet for them of grants they could apply for.
- ServiceNow found that workers were much more likely to use AI tools when they were built into their existing systems, not requiring them to "swivel chair" into another service, explained Kellie Romack. Examples of this working successfully include AI-powered meeting summaries or AI-driven task prioritization in project management tools.
- AI tools can provide women, who are traditionally under-mentored, with an on-demand career coach, offering tailored advice on leadership, negotiation, and professional development. "You can learn something new. The administrative tasks that burden women at work and at home, you can offload a lot of that," suggested Charter's Erin Grau.

In the pages that follow, there are many more tactics and approaches designed to help you turn AI from an abstract concept into a tangible advantage in your leadership role. You'll find additional context and strategic thinking about how AI is reshaping the job of managers, as well as choice quotes and links to videos from sessions. We hope you find it useful and join us for the next Charter Leading with AI Summit.

How are you applying AI in your leadership? We'd love to hear from you at [hi@charterworks.com](mailto:hi@charterworks.com).

Interested in partnership or sponsorship opportunities for future AI-focused events? Reach out to [partner@charterworks.com](mailto:partner@charterworks.com).

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“

The systems thinking of AI is very interesting to me for leaders. What I mean by that is if this thing is as big as we say it is, if it's going to be as impactful as we say, we need to think not only about the technology, we should think about the theory of the firm. We should think about what it looks like to be a leader and a manager. We should think about what a career looks like. We should think about what education looks like, and we certainly should think about what policy needs to look like.”



**JARED SPATARO**  
CMO, AI at Work, Microsoft  
Chair, Leading with AI Summit



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**WATCH RECORDINGS OF SESSIONS FROM LEADING WITH AI HERE.**

01

GenAI 102





*Many leaders have used genAI to write emails and summarize documents. But the experimentation often ends there. Dan Shipper, co-founder and CEO of media and tech startup Every and host of the "AI & I" podcast, and James Cham, partner at venture capital firm Bloomberg Beta, shared some of the more advanced and creative ways they use genAI in their work.*

## Key insights

- **Experimentation with genAI remains critical, as no one knows all of the valuable applications yet.** Cham said that investment capital has moved into AI so quickly that we've "rushed in to solidify a whole set of use cases," and he warned that "the moment you solidify on something, you get stuck with a set of ways of working." He emphasized that we're still discovering what these models do well and poorly, and that anyone can discover new applications. "We're in a very weird time where the guy who runs OpenAI...and you could be the one to discover the actual use case that works. Because you have access to the exact same tools he's using right now," Cham said. Shipper agreed that it's crucial to maintain room for exploration: "Things are changing so quickly, even from two years ago to now, that being in a place where you can experiment and play with these tools without having the 'I need to make it work for my business in a really big way'...is still really, really important."
- **Leaders need to use AI more to understand what's actually possible for their organization.** Shipper said that leaders who haven't themselves used AI enough sometimes overestimate its capabilities: "They think that the AI is God and they're just like, 'We just press a button and it just does all the work.'" Those organizations aren't making as much progress, he said. "The organizations where the CEO—or whoever's leading—is in the tool every single day, those organizations are able to make much better decisions about where it actually can be leveraged in a realistic way that will actually work."



- **AI is raising baseline expectations for work quality—and junior workers are the biggest power users.** “Now the people who work for me, to be honest, the bar is just much higher,” said Cham. “The set of things that they do, the polish that they have with it is just fundamentally different.” He said he’s been impressed by how much productivity has increased among individual contributors, particularly junior workers: “My lived experience is that the 23-year-old is using this much, much more in a much, much more native way than even my smartest 45-year-old manager.”

## Tactics and practices:

- **Use Claude or ChatGPT for insights into your leadership.** Shipper explained that he uses Granola to transcribe meetings and he’ll sometimes upload an entire day’s worth of meeting transcripts into Claude or ChatGPT’s o1 model and ask them for feedback. “‘What do you notice about how I’m showing up?’...Or if there are things that I’m working on as a leader—so for me, conflict avoidance: ‘Are there things that I’m avoiding that I should be dealing with?’”
- **Throw transcripts of YouTube videos into a chatbot and ask it questions about the material.** Cham told us he does this “maybe five times a day.”
- **Let early adopters pave the way for the cautious 80%.** Shipper said that when it comes to AI adoption, people often fall into three buckets: 10% are early adopters, 10% won’t use it, and 80% “are like, ‘I will do this if you tell me what to do.’” He explained that people in the 80% bucket face a choice between doing their work in a reliable, familiar way or experimenting with new AI tools. He added that successful organizations give people in that group time to experiment in a “risk-free way,” and they give them workflows that have already been developed by the early adopters.

## Choice quote:

“

**One of the undersung things about this wave of AI is how empathetic and sensitive these tools are to...nuances of social dynamics, which is so important if you're leading people.”**



**DAN SHIPPER**  
Co-founder and CEO, Every

## Additional reading:

- Charter’s playbook [“AI in the workplace: How companies and workers are getting it right”](#) for examples of companies encouraging and rewarding employees for experimenting with genAI.
- Shipper’s [article](#) on how you can use genAI to help you make “one-way door” decisions.
- Our [article](#) on how genAI allows everyone to a little bit of everything —and what that means for companies.

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## 02

## How ServiceNow uses genAI



*ServiceNow stands at the forefront of AI adoption, providing a useful case study for other companies to learn from. Chief digital information officer Kellie Romack offered an inside look at the tech company's journey, revealing how she and her colleagues identify high-impact opportunities and measure ROI.*

## Key insights

- **Every ServiceNow employee could have their own AI agent soon.** “Why wouldn't [you] have [your] own agent that helps you when you wake up in the morning, helps you understand what your day looks like,” said Romack. She explained they're already doing some of this today: “For our sellers, we go and look at their calendar, we go look at the customers they are going to talk to, [and] we get them ready. We're like, ‘This might be a more challenging conversation...this is a way to help [with] adoption for this customer.’” When asked when she thinks every ServiceNow employee will have their own agent, Romack expressed confidence it would happen this year, noting the company is “real close.”
- **GenAI can remove the need for certain processes.** Romack said that updating ServiceNow sellers on their variable sales compensation used to be a four-day process. Now, they can use genAI search on the company's platform to find that information in seconds.

## Tactics and practices:

- **Avoid “swivel-chair” tools and use cases.** Romack said that when ServiceNow originally built tools for the company's sellers, they were outside of their normal workflow. “That doesn't work.” Now sellers have a place called Sales Hub on My ServiceNow where they can find AI-summarized meeting notes and information about their customers, as well as AI-generated next-best actions based on those materials—all on their phone. “It has to be in the workflow of what you're doing. So that's exactly what we did. Where they show up every day is where the technology is,” explained Romack.

- **Connect AI to your company's data.** Romack described the company's genAI search as one of her favorite use cases. She said that over 80% of ServiceNow employees have used it, and that it has generated about 12 million results for employees. She noted that she personally used it during the company's compensation review cycle. "When are things due? Where do I need to go? Where do I put this in? I don't have to ask anybody or look through emails or look through Teams messages. I just type my question, and it gives me the answer I need to know."

## Choice stat:

**ServiceNow reports that it has seen \$325 million in annualized value from its genAI and agentic use cases, a number that includes things like productivity improvements and increases in case deflection.**

## Additional reading:

- Charter's [article](#) about how AI startups use genAI.
- Our [article](#) about adapting workflows for AI.
- Our [article](#) on what AI startups can teach you about adoption.
- Our [interview](#) with Reejig CEO Siobhan Savage about how her company uses AI agents to automate part of their sales outbound process.

► WATCH A RECORDING OF THE FULL SESSION HERE.



## 03

## How to close the gen(der)AI gap



*Research suggests that women are significantly less likely to use genAI than their male counterparts, even when comparing within the same occupation. Charter co-founder and COO Erin Grau and Karin Klein, founding partner at venture capital firm Bloomberg Beta, discussed their work to close this gap—and shared what businesses can do about it today. Grau and Klein had convened a group of senior technology executives, researchers, and authors at Gloria Steinem’s apartment on the eve of the AI summit for a talking circle about how to increase women’s influence over AI’s trajectory. During the summit session, they shared photos and takeaways from that conversation as well.*

## Key insights

- **AI could be an equalizer for women—if they start using it now.** Women are historically under-mentored in the workplace, but AI can change that. “You can set up ChatGPT or Claude or whatever [tool you choose] to help mentor you,” said Grau. GenAI can serve as an on-demand career coach, offering tailored advice on leadership, negotiation, and professional development—filling gaps where traditional mentorship falls short. But women must actively engage with the technology to reap its benefits. “If you’re not educating yourself or educating the people you’re around, you’re not doing anyone favors,” said Klein. Without proactive adoption, women risk missing out on one of the most powerful career accelerators of the decade.
- **Women are more likely to follow AI compliance rules—sometimes to their own detriment.** When legal teams at corporations set strict guidelines around AI usage, the impact isn’t evenly distributed. “If your general counsel is saying, ‘Don’t use generative AI,’ who’s more likely to follow the rules?” Klein asked. Research suggests women tend to adhere to workplace policies more strictly than their male counterparts, which can inadvertently slow their adoption of AI tools.

- **Perfectionism is holding women back from AI adoption.** “Boys are raised to be brave and girls are raised to be perfect,” Grau reminded the audience, referencing Reshma Saujani’s well-known insight about gender and risk-taking. Leaders must create structured learning opportunities that normalize AI experimentation and explicitly encourage women to dive in. “We have to set it up so that people feel comfortable,” said Klein.

## Tactics and practices:

- **AI is already reshaping leadership—and women must shape AI.** If AI is built primarily by men, it risks reinforcing gender biases in workplace technology. Ensuring women are part of AI’s development, training data, and governance isn’t just about representation—it’s about making AI work better for everyone.
- **Making AI adoption explicit in the workplace is critical.** Leaders can’t assume employees will instinctively understand how to integrate AI into their work. This means incorporating AI training into onboarding, offering hands-on workshops, and normalizing AI use. If companies fail to do this, the AI adoption gap will widen, disproportionately impacting women and other underrepresented groups in the workplace.

## Choice quote:

“

**Women are under-mentored. Guess what? You can set up ChatGPT or Claude or whatever [tool you choose] to help mentor you. You can learn something new. The administrative tasks that burden women at work and at home, you can offload a lot of that.”**



ERIN GRAU  
Co-founder and COO, Charter



## Additional reading:

- [“Why We Need More Women In The AI Revolution”](#) in TIME by Grau and Klein.
- [“Tactics for narrowing the AI adoption gender gap”](#) in Charter.
- [“The AI training gender gap”](#) in Charter.
- Charter’s research playbook of case studies [“AI in the workplace: How companies and workers are getting it right.”](#)

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Talking Circle with Gloria Steinem: AI's Hidden & Missing Architects event (Photo by Nina Wurtzel Photography)

## 04

## Three ways of using genAI you have to try at work tomorrow





*At the Charter Workplace Summit 2024, [Helen Lee Kupp](#) and [Nichole Sterling](#), co-founders of [Women Defining AI](#), demonstrated several ‘aha!’ ways that AI can unlock solutions to our biggest work problems. Kupp and Sterling returned for *Leading with AI* to demonstrate three actionable AI use cases that attendees can try for themselves.*

## Key insight

- **People think AI has improved productivity or effectiveness at the individual level more than the team and company level,** according to a poll Kupp and Sterling conducted among summit attendees:



Source: Women Defining AI

## Tactics and practices:

- **Collaborate on prompts by integrating LLMs into the apps your team uses.** Kupp and Sterling showed attendees a [GPT](#) they built that writes social media posts, informed by the context they gave it on Women Defining AI, like their mission and values. That can increase an individual's productivity, but there are many projects on which you need to collaborate with colleagues. So they integrated the GPT into their Slack with [Runbear](#), and Kupp asked it to generate a LinkedIn post about Charter's AI summit. Then, she and Sterling together proceeded to give it feedback to improve its post.



- **Create a voice agent that can answer questions about your company over the phone.** Kupp built a voice agent within the platform Vapi to answer questions about Women Defining AI based on custom instructions and documents, like FAQs about membership. She called the agent and had it answer questions about the organization in real time. She then explained that you could have the voice agent perform outbound calls by connecting it to a spreadsheet of phone numbers.
- **Start experimenting with Operator to see if it can help you with tedious tasks.** Sterling asked Operator, an agent from OpenAI that can complete tasks on the web, to find 30 different grants for which Women Defining AI can apply. She also asked it to put relevant details from all 30 grants—names, deadlines, etc.—into a spreadsheet. “It is a very tedious process, it’s painful,” said Sterling. “And the reason why an agent is so important is because each interaction with a grant is personalized, it’s bespoke, it’s a different question here, it’s a different question here.”

## Choice quote:

“

**Explore beyond what you think works today...New things are coming out. You have to get hands-on with these agents.”**



NICHOLE STERLING  
Co-founder, Women Defining AI

## Additional reading:

- Kupp and Sterling’s article about five ‘aha’ ways of using AI.
- Kupp’s article with Slack’s Christina Janzer about building a culture of AI experimentation.
- Charter’s guide to some of the ways we use genAI at work.
- Kupp and Sterling’s session from the Charter Workplace Summit 2024.

► WATCH A RECORDING OF THE FULL SESSION HERE.

## 05

## What AI agents mean for your workplace



*Predictions abound that 2025 will be the year of AI agents, systems that are able to autonomously perform actions on your behalf. What will agents be capable of and over what time frame? How will they change the way we work and collaborate with one another? What human skills will remain critical? Manuela Veloso, head of AI research at JPMorganChase and a renowned AI and robotics researcher and professor emerita at Carnegie Mellon, shared insights on the near-term reality of AI agents and how leaders should prepare their organizations for this next wave of workplace transformation.*

## Key insights

- **AI agents move beyond analysis to taking action.** AI today is largely about analyzing data and providing insights—but the future is about AI that acts. AI will not just process information but execute tasks, like booking travel, sending emails, or scheduling meetings. The shift to AI-driven action will make agents more like collaborators rather than just advisors.
- **The future of AI isn't a single agent—it's a network of specialized agents.** Workplaces will rely on multiple AI agents that specialize in different tasks and areas of knowledge. Each department or function should have its own AI agent that knows exactly how things work in that domain, Veloso explained. These agents will communicate with each other, sharing information and coordinating tasks across an organization. “Let the humans be in charge, but assign a little agent that can answer questions for all of these little silos of functioning,” she suggested.
- **AI tools need to ask for help.** Most AI models today present their answers with confidence, even when they're wrong or can't complete a task. Veloso sees this as a serious flaw: ChatGPT “never tells us, 'I don't know. Can you explain better?'” How come that thing knows everything?” she asked. Veloso suggested that we should default to asking agents to do things and, when they're unable to, then they hand it off to a human.

## Tactics and practices:

- **Humans must shift from task execution to higher-order thinking.** As AI agents take over routine tasks, human workers will need to redefine their value by focusing on creativity and invention. “We should refuse to not work only on great things,” Veloso said, emphasizing that AI should handle repetitive, digital-heavy work so that humans can focus on innovation.
- **Most meetings shouldn’t require human scheduling anymore.** Veloso pointed to meeting scheduling as a perfect example of inefficient human labor that AI should have already solved. “Why in the world do we schedule meetings ourselves by sending email? ‘Can you do at 10? Can you do at noon? Tomorrow at five?’ How are we in that business?” she noted. “It doesn’t make any sense because the calendar is digital.”
- **Define a structured portfolio of AI actions before automating workflows.** Veloso advises people to first identify the specific actions AI can perform within a given workflow. Organizations should create a library of these repeatable actions (e.g., open files, read a column of data, write an email subject line) and then build AI workflows around them.

## Choice quote:

“

**I gave you pearls. This is precious. You need to understand that if I tell you this—be disciplined, use your actions, and build skills—you have to take it seriously.”**



**DR. MANUELA M. VELOSO**  
Head of AI research, JPMorganChase  
Herbert A. Simon university professor emerita,  
Carnegie Mellon University



## Additional reading:

- [“How AI agents will change the role of management and workers, and where Reid Hoffman is seeing impact already” in Charter.](#)
- Watch Charter’s AI Download: [“What AI agents mean for your business.”](#)
- Watch Charter’s AI Download: [“An interview with Blitzzy co-founders Brian Elliot and Siddhant Pardeshi.”](#)
- Watch Charter’s Davos discussion: [“Leadership When Everyone Has AI.”](#)

## 06

## How AI is redefining leadership and business strategy



*As organizations deepen their AI adoption, managers need to rethink how to lead effectively. Jared Spataro, Microsoft's chief marketing officer of AI at Work, shared concrete strategies for implementing AI and reimagining how work gets done. Spataro, the chair of the Leading with AI Summit, explained what leading organizations are doing differently and how cutting-edge executives are changing their approach to management.*

## Key insights

- **AI is driving business process transformation—not just productivity gains by individual workers.** According to Spataro, CFOs are saying, “Give us a process. Let's take a look at it. And if we can't save millions of dollars—in the large companies, tens of millions of dollars—we're moving on to find something else.” He pointed to Dow, which is using AI bots to analyze logistics invoices, catching discrepancies and projecting savings of tens of millions of dollars within the first 12 months. “It's very difficult for humans to do that type of cognitive work at scale,” Spataro explained.
- **AI agents are analogous to iPhone apps, with their modularity and personalization.** “We believe that people are only going to get comfortable with agents when they start to understand how they could use them,” said Spataro. “I'll be honest with you, trying to have an individual navigate even five agents at a time is going to get overwhelming for them.” So Microsoft Copilot, Google Gemini, and other AI platforms will provide the organizing layer for people's apps, Spataro explained.
- **GenAI can make companies flatter.** Microsoft has “very senior individual contributors [who] have no team or staff underneath them,” Spataro noted. “You used to essentially scale with [full-time employees]. ‘Hey, this is a really important part of the business. We're going to staff up a team to go after it,’” he said. “We instead will tell people, ‘We want you to do it differently. We want you to use a combination of AI, and in some cases we do use vendors.’” He gave an example of a team that creates demos for potential customers to visualize new technologies. That team has one senior individual contributor who uses a mix of AI and vendors, whereas before genAI, it might have had 10 to 20 people, said Spataro.

## Tactics and practices:

- **Implement a “tag in, tag out” system to prevent burnout on your team.** As AI is making work more like the continuous and fluid play of rugby than the starts and stops of American football, Spataro has adopted a “tag in, tag out” approach, where employees formally communicate when they’re stepping away from work—whether for a few hours or a full day. “That discipline can be incredibly invigorating for people because they don’t feel like they’re always on,” he explained.
- **Attend fewer meetings.** Spataro shared that there were meetings he used to attend in person where there were “10 minutes or five minutes in there that I probably need to represent or hear what was said.” Now the meetings are recorded in Teams and he can skip them and ask the Microsoft Copilot AI tool, “On this particular topic, what was the discussion and what was the decision?”
- **Use AI as a language coach.** “It’s like having a native speaker with you all the time,” Spataro said about his experience using AI tools to learn Spanish, so as a preacher he could better serve a Spanish-speaking congregation. “I love asking, ‘Hey, this is how I would tell this story. Can you tell me if it would sound native or not?’”

## Choice quote:

“

It feels like we're at peak knowledge work inefficiency at this moment.... We're going to start to bring a science to the work that we call knowledge work because AI will give us the tools to be able to do that.”



JARED SPATARO  
CMO, AI at Work, Microsoft  
Chair, Leading with AI Summit



## Additional reading:

- Sign up for [Spataro's "AI at Work" newsletter](#).
- ["The skills managers need to succeed with AI,"](#) our Oct. 2023 interview with Spataro.
- ["How AI requires a new approach to work and management,"](#) our June 2023 interview with Spataro.
- [A March 2024 profile of Spataro](#) from the Charter 30 list.
- [Video of Spataro's session during the 2023 Charter Workplace Summit](#) and [the summit playbook with takeaways](#).
- ["Why boomers are catching up with AI faster than Gen Zers,"](#) by Spataro in Fortune.

► WATCH A RECORDING OF THE FULL SESSION HERE .

## 07

## How to train your workers in AI



*Only a quarter of workers have completed training in how to use AI at work, and three-quarters say they lack confidence in their ability to use the technology. Successful AI adoption hinges on worker's ability to use the tools effectively. Trena Minudri, chief learning officer of Coursera, and Rebecca Hinds, head of Asana's Work Innovation Lab, shared practical approaches to AI training and tactics for earning employees' buy-in.*

## Key insights

- **Companies should consider making AI training mandatory.** Minudri said that she's changed her thinking on this. She said that companies have early adopters who want to experiment and people in the middle who are willing to use AI if they know how it relates to their job. But there are also skeptics who will get left behind without training. "I'm worried about that...When we look at who's going to be left behind, it's women, it's underrepresented groups, it's people who don't have a college degree. It's the groups that we're trying to solve for in the first place." The training should be tailored, and for skeptics, it should address their concerns, said Minudri. "But I actually am leaning towards, because of the fear of losing them from this altogether, making it more mandatory so that we get them in the room and then it's up to us to make sure...that we can engage them."
- **There's a social contagion effect to AI adoption.** Hinds explained that a worker is more likely to adopt AI if their manager or their peers use it. That can be an effective lever to pull on to drive adoption. But, she said, the reverse is also true: "If you're in a group of skeptics, regardless of how beneficial the technology is to you and your job function, you're going to be less likely to adopt the technology."
- **Learning and development needs to advance beyond just content delivery.** Minudri explained that "AI training"—pushing out learning content—will always lag behind, as things are changing so quickly. "But if we think of ourselves as enabling learning, it allows us to open up new modalities. It allows us to bring in experts. It allows more communal learning."

## Tactics and practices:

- **Adapt AI messaging for different audiences.** Hinds said that while enthusiastic messaging can work for workers who are already embracing AI, it can backfire with skeptics. What works better for that group, said Hinds, is balancing an acknowledgement of their skepticism with a “moderately enthusiastic view” of AI.
- **Tie AI training to specific desired job outcomes.** Minudri said that when designing training, you should be asking yourself what you want workers to do, rather than what you want them to know. “Once we get to that point, it opens up a whole new world for workers to understand, ‘Oh, this is what I’m supposed to do.’ And it’s no longer AI, it’s my job. It’s just that AI is built into it.”
- **Build the five Cs into your AI training.** Hinds says a robust training program should address five different elements that make for an AI-mature company: comprehension, concerns, collaboration, context, and calibration. Comprehension refers to whether a worker knows how to use AI. AI training should address workers’ concerns about the technology, which will vary based on the group. Collaboration is about whether workers view AI as something they can collaborate with, like a teammate, rather than just a tool—workers who view it as a teammate report greater productivity improvements from using it, according to [Asana’s research](#). Context involves understanding the organization’s policies and principles around AI use, and calibration means measuring the results of AI efforts and training effectiveness.

## Choice quote:

“

**Technology doesn't break down because it's not technically capable. It breaks down because humans are resistant.”**



REBECCA HINDS  
Head of the Work Innovation Lab, Asana



## Additional reading:

- Charter's playbook "[AI in the workplace: How companies and workers are getting it right](#)" for case studies on Asana and Coursera.
- Our [guide](#) to the AI skills non-technical workers need.
- Our [interview](#) with Gabriella Rosen Kellerman, chief innovation officer and chief product officer at BetterUp, about how to talk about your organization's AI plans.
- Our [article](#) on how to address the AI adoption gender gap.

► WATCH A RECORDING OF THE FULL SESSION HERE.

# About Charter



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