Chief People Officer Roundtable Series

Q3 2025 Summary

Overview

This summary captures the most pressing priorities, challenges, and innovations discussed by Chief People Officers from leading tech and life sciences firms. It is intended to inform HR strategy and executive decision-making for Q4 2025 and beyond. Resources shared by attendees are consolidated on page 10.

Key discussion topics included

- Top "to do" items for the remainder of the year
- "Must have" budget line items for 2026
- CPO succession plans
- Agentic AI solutions for HR

Additional informative discussions emerged related to benefits, merit cycle plans, promotion rates, CEO/Board expectations for 2026, and HR/IT collaboration on AI initiatives. (see **Miscellaneous** section).

Insights & Takeaways

What is the highest impact action item on your "to do" list for the remainder of the year?
Top discussion items included workforce planning, employee retention, AI training, planning for benefit increases, and 2026 promotion and merit adjustments.

What HR line-item will you ensure is in the Budget Cycle for 2026?
The most common response was leadership development followed by hiring for the HR team, systems, benefits, and training budget.

Do you have a succession plan in place for yourself at your company? What does that look like?
Most of our attendees did not have succession plans for themselves in place. Due to their size and scale, companies with more than 1500 employees had a higher probability of having an in-house succession plan. Additionally, CPOs from publicly traded companies placed a greater emphasis on succession planning than those from privately held companies.

Deloitte created a slide deck on Agentic AI for HR. Has anyone developed or purchased an Agentic AI solution for use in HR? If so, how is it going?
We spent most of our time on this topic and had wide-ranging discussions. One interesting element shared by our CPOs was the concept of an AI reset/restart. Many of our attendees shared thoughts and stories about moving too fast on technologies, being too narrowly focused on point solutions, or deploying AI solutions within functional silos. The bottom line is that Boards and CEOs want an AI-enabled workforce and transformation in how work gets done. However, most organizations are struggling with how to achieve those objectives. See: AI Use Cases on page 6.

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Select Highlights

Topic 1: *What is the highest impact action item on your "to do" list for the remainder of the year?*

- *I expect a typical end-of-year crunch time – performance reviews, benefits renewal, and workforce planning for 2026 and beyond.*

- *Workforce planning. We have struggled with this; we were going to hire 100 people last year and ended up hiring 450!*

- *We fed Gemini all of our data and it provided great ideas for workforce planning.*

- *Implementing an equity refresh for retention and creating a HiPo program. Attrition is around 20%. We are losing our 8-to-9-year employees and the equity refresh is to keep these people.*

- *Focusing on talent assessment and talent density.*

- *We are pushing to get to 100% adoption of AI and have an internal team implementing an AI HR agent.*

- *We are getting in our own way, so we need to figure out how leaders can work across the business rather than in silos. How do we enable cross functional collaboration? Do we change the org structure or do we work on a better operating model? We need to make decisions on this by the end of the year.*

- *Completing a GTM transformation which includes changing out our CRO and CMO. We have moved from a single product company to a multi-product company.*

- *As we (~50-person biotech) are becoming a clinical-stage biotech, we are hiring to build our clinical department, which concerns our R&D folks, who have made up 90% of our employee population to this point. A big focus is building and keeping a unified vision and "one team" approach to the organization.*

- *We are a 55-year-old medical device company with 2,600 employees in the US, and we had our very first layoff in 2024 due to profitability struggles. Through that process, we realized that many managers were not adequately prepared to choose who should stay or go. My focus is to provide managers with more tools and training and expectations on performance management.*

- *My top 3 priorities are:*
    - *Support AI Fluency and Embed AI and Automation into People Team Workflows*
    - *Reimagine the Employee Experience*
    - *Build Scalable Talent Engines in Growth Markets*

Topic 2: *What HR line-item will you ensure is in the Budget Cycle for 2026?*

- *I'm focused on defending our budget for headcount, systems, and programs. Most critical is leadership development – we want to keep that momentum. Also, we implemented Workday last October, and we need to do some clean up and also figure out how to leverage AI more strategically to help the team work smarter.*

- *Leadership coaching and development. We are so small [275-person digital health firm]. I'm asking the question, "Should all managers have an AI coach or a real coach? I'm looking at a lot of AI tools, like AI HRBPs, but I'm nervous to unleash that type of technology, especially at the more senior levels.*

- *An AI learning stipend.*

- *I am pushing for [LinkedIn Learning](#) for the entire company, not just the G&A functions, where it has been used in the past.*

- *I'm fighting to continue to offer [quality] benefits for employees.*

- *Headcount and lifestyle benefits. We have stipends for learning and development ($500) and personal development ($250).*

- *We committed to getting everyone that manages at least one person through a leadership program. We have to be careful about how we frame it so that people go in with the right expectations. The value is in how it's facilitated among peers.*

- *We are growing, and I'm going to hire a junior HR Operations person, which will be critical. Another attendee strongly advised over-hiring this role to support growth, because you will likely outgrow that junior role in the next 12 months.*

- *I'm looking for an HRBP.*

- *I have an opening for a Total Rewards leader and also plan to hire an Internal Communications leader.*

- *We've grown out of [BambooHR](#) (HRIS) and need something that isn't a million dollars.*

Topic 3: *Do you have a succession plan in place for yourself at your company? What does that look like?*

- *In my experience, HR is the most personal hire a CEO can make. That relationship needs to be successful. It's not just what the CEO wants, but it's also about what they need. I keep my eyes open in network groups like this. I have a lot of respect for my CEO and I'm thinking through some options to ensure I don't leave anyone in a bad situation. We'll all have better results if we have an idea of who could work well in the role if we leave, rather than starting from scratch.*

- *I committed to the CEO that I would give at least 6 months' notice before I leave.*

- *I am new and the board asked me to prioritize succession planning as we haven't done this in the past.*

- *We don't have much board pressure to do succession planning but due to the high turnover, we performed a critical talent review and single point of failure review.*

- *In a smaller company, you can't afford to have too many people underneath you with the level of experience needed for succession. If I were to leave, the others would be a little too early in their careers to take a job leading HR. Now that our organization has gotten bigger, I would be doing a disservice to the CEO if I didn't have an internal candidate or two for him to consider.*

- *We are too small [for an internal successor], so I have an "emergency successor" identified.*

- *I have a great internal candidate. She sat in on the CEO's offsite while I was on vacation.*

- *The biggest challenge for me is getting the executives to think beyond their own likeness (e.g., skills, capabilities, and experience). What does succession look like as a next iteration?*

- *We're looking at not only who do we need now but who do we need in the next 18 months.*

- *We only look at the ELT for succession planning.*

Topic 4: *Deloitte created a [slide deck on Agentic AI for HR](). Has anyone developed or purchased an Agentic AI solution for use in HR? If so, how is it going?*

CPO Thoughts on AI Usage

- *We are all under a mandate to use AI, yet we have under-utilized and under-adopted the AI tools, but we checked the box.*

- *We over rotated on AI with a scatter shot approach and are now dealing with the ramifications. As you look at companies that haven't had success with AI, it's because they weren't focused and didn't have a strategy. We are stepping back to get refocused on vision and strategy and then we will invest again.*

- *Our survey validated that a lot of people don't really understand AI and the different types of AI. There was also a fear of asking questions around what they don't know. There is so much out there, they don't know where to start.*

- *I feel like these AI tools are a little hit or miss. I am still hearing about difficulty getting the complex agents to do the complex work you want them to do. I think in smaller applications you are fine but for bigger and complex ones, we are not quite there yet.*

- *At first, we told employees not to use free AI tools [due to IP, security and legal concerns]. Now we are insisting everyone use AI and are dealing with the fallout of our initial reactions to using free AI tools.*

- *As much as people think AI is tech, it's really a mindset shift. How we work is going to be a radical change. We're doing it in a thoughtful way, understanding that AI is a new skill our employees will have to learn.*

- *I like what [other CPO] said about "Mindset." It's really not about AI it's about the "flow of the work."*

- *Our Head of Product made the point that the question isn't, "What are the best tools? The question is what problem are we trying to solve? Figure that our and then pick your tools."*

- *We don't have the work that was for the first-year employees. What do we do? We're going to run out of fuel. Now tier 1 is handled by an agentic AI.*

- *I'm unable to justify hiring people for tier 0-1 at this point because of AI.*

- *We've spent the last few years building a very robust and scalable intern engine. With AI, we're having to rethink our intern program. Before, we'd target engineering schools but we're not going to need those early career folks just finishing up school.*

- *My CEO is challenging me regarding the current engineering population at the company. He feels some of the skills we need aren't here now, they are in college; the students have no limiting experience on AI. Their default is to develop with AI.*

- *We have hired more junior folks as they are more open to learn new things and experiment.*

- *We did an AI survey and will do it again at the end of the year. We ask, how do you feel about AI? We definitely have people that are nervous about their jobs.*

- *Fighting for "Human-in-the-loop" - "balance" versus this broad stroke notion that "humans are no longer needed."*

- *We're being asked to look at AI from a training and support lens. We want to limit the damage and make sure people really understand what the opportunity is. We will roll out training and learn slowly from it. HR supports it and lets technical folks be the lead. It's a crawl, walk, run sort of thing.*

- *AI Bots for HR make me nervous but it's also an exciting opportunity.*

- *We are building a tool with Gemini and Gem for managers to offer feedback, coach, practice with to decrease pressure on HRBPs.*

- *The EU AI requirements for privacy have been a challenge for us. You can't use AI to make a decision on people's employment. We are more focused on what we can and can't do before looking at tools.*

- *Recently, we turned off the Zoom AI companion, for Executive, HR, and other confidential meetings because the transcript doesn't capture the tone and tenor of the conversation. Also, we made a policy that if one person doesn't want AI on in a meeting, we turn it off.*

- *I've been facilitating our use of AI and guiding a committee of much more qualified experts. We are encouraging our leadership team and the whole company to embrace AI. In a couple weeks, I'm leading a leadership offsite focused only on AI. The book Co-Intelligence: Living and Working with AI, has provided us with a good framework for thinking about AI. HR's role is to help with AI change management. I thought finance would be most resistant, but they are using AI a lot.*

- *One attendee shared their **AI Fluency Framework***
  ***Stage 1:** Foundational Use (Q1) 100% of the People Team use GenAI for basic, repetitive tasks at least once per day.*
   - Drafting and editing documents (emails, comms, job posts, etc.)
   - Summarizing meeting notes, policies, or documents
   - Brainstorming first drafts (program names, presentation outlines, etc.)
  ***Stage 2:** Applied Use (Q2) 100% of the team now use GenAI for intermediate and strategic tasks, not just execution.*
   - Analyzing qualitative data (e.g. survey comments, exit feedback)
   - Generating insights from multiple sources (e.g., performance data + interview feedback)
  ***Stage 3:** Fluent & Strategic Use (Q4)*
   Designing entire workflows, strategies, or campaigns using GenAI
   Building reusable prompt templates or SOPs for team-wide tasks

- *I am overwhelmed with AI information. I went to Sequoia's conference recently and it was all they talked about. I have a lot of FOMO.*

AI Use Cases

- *Our AI thesis is to use it appropriately to reduce "activation energy," which is where the most energy is expended. There MUST be a good business case. We've used agents in recruiting to quickly receive and consolidate interview feedback, and we built a candidate prioritization tool, including a primary screening question that helps to eliminate age bias.*

- *We are making a big hire internationally and we are putting job descriptions and thoughts from the CEO and CTO into Greenhouse with Gemini and running this in conjunction with our recruiting team's efforts to see which effort gets better results. I'm curious to see how it plays out, technology vs the human. It is my Head of TA vs Gemini and my Head of TA is all for it.*

- *We are testing AI in recruiting and using [BrightHire](#) for interview note taking. As of now, we have only given it to the recruiters, and they are "over the moon" for how much time it saves. It is integrated with [Greenhouse](#).*

- *Answering employee questions is a big deal for our 3,000-person company. Our internal AI is now the first stop for HR-related questions. Next, we're working on including access to personal data to answer more specific questions (promotion history, pay history, vacation accrual, specific benefits, etc.). But with that, you get into data privacy issues… so we're working through that, too.*

- *For Talent Acquisition, we are using [Ashby](#), which has AI embedded. It provides non-biased "knock out" questions to quickly separate qualified candidates and highlights the best ones. It also highlights strengths or areas of focus. From there, it tells you what to dig deeper into for in-person interviews. It also improves the interview debrief process and provides a great summary of notes.*

- *The main thing we're using AI for is to detect AI generated applicants and it has been very helpful.*

- *This is not yet agentic, but we (260-employee biotech) developed an employee resource to allow easy access to answers regarding benefits/equity/policies/procedures/employee handbook. We created a library of content and demonstrated it to the entire company, which people loved. This isn't quite agentic, but it's super helpful. It's much better self-service, and my goal is to take it to a more agentic service in the near future. For example, when someone asks about how much vacation they have available, I want the AI agent to then automatically prompt them to apply for vacation time.*

- *We have [Glean](#) embedded to take over people services and it has been trained on general questions. It has brought the ticket volume down radically, from 5000 tickets per month to 1000 per month. [Glean](#) digs through your internal files and helps you find information. Two leaders on my team implemented it in a couple of weeks with all of our current and past documentation. Glean will look through [Slack](#) threads, so make sure things are private. For example, an employee was able to find a senior executive's offer letter.*

- *[Sana](#) is similar to [Glean](#). For 250 people, it is about $20K a year. We use it as our LMS and what was really cool was we had 60 users outside of HR create their own learning content. We also had a lot of outdated documents issues we had to deal with so make sure everyone cleans up their documents. It integrates with all different systems and connects to our HRIS. It also has the ability to create agents across the enterprise.*

- *We launched an HR agent, [Ada](#), the technology has been fantastic.*

- *We're trying to "get there" with AI. We're using it for auditing expense reports and for communications, but we could be utilizing it for problem solving. Big Pharma companies are using AI to shorten time on clinical trials. We're trying to be fast followers to learn from them, but we don't always have the time, money, or expertise to push forward on AI like larger companies do.*

Miscellaneous:

What are you hearing from your CEO/Board/Investors about their expectations for the rest of 2025 and early 2026?

- *From the recruiting side, it's gone from an employee market to an employer market. We want to keep employees happy, but we're not using financial incentives (raises, bonuses, etc.) as much. Instead, we're emphasizing non-standard incentives (benefits, flexibility, etc.) to keep our people.*

- *We (clinical biotech company) are all about execution this year. Externally, we are still seeing a lot of uncertainty regarding the FDA and financial markets. We don't see an end in sight, yet. Investors are still skeptical, and they are only investing in good data. We're telling staff to focus on what we can control.*

- *We're at 5.5% voluntary turnover, which is super low. I don't know if equity means what it used to mean in biotech.*

- *We're hearing the markets are still lukewarm, but if you can show exciting progress and potential, there is money, but that excitement has to be an order of magnitude higher than before.*

Attendee Question: We are a startup growing past 100 employees, and I'm changing our career leveling structure. What advice do you have for me?

- *We just created a career leveling guide. I wish we had done it sooner to provide consistent messaging. We used AI a lot in this project. It can give you a good foundation, but you have to customize based on who you are. For our current leveling, we've created internal behaviors and language around our expectations for informal things that are harder to quantify. For example, these are the development milestones you may see if you're on the path to a promotion (i.e., you should be making board presentations if you're on the way to VP level, etc.).*

- *We have title inflation and don't want to add more titles or layers because that perpetuates the problem. However, as we grow, it's important to have enough layers and opportunities. We're still in a competitive talent market, and there is a lot of demand for bigger titles, which aren't free. I don't think there's a perfect answer.*

Are HR and IT collaborating/merging?
Note: Several CPO attendees said that they owned IT.

- *I have taken over IT and have never led it before, but it seems like HR and IT now have a shared charter.*

- *Because [my company] produces HR tech, we are seeing an advantage in selling into the CIO for systems decision making. Personally, I see there will be a tighter link between the groups. Customers are expecting the HR function to lead AI adoption.*

- *Companies have implemented AI, and they are having issues due to change management. I would love to see HR lead more of this effort.*

- *I got IT to purchase an Enterprise ChatGPT license and am going to insist that each executive cascade down some AI related efficiency goals in 2026. We must be careful not to make this a performative exercise. It's a huge culture shift getting everyone [to think about how AI can enable and transform our work]. HR absolutely has to lead the charge.*

- *The CEO asked me and the CISO to lead AI, but I was clueless and so the Head of IT has led most of it. It is IT's job to keep us safe, so it is good they are leading this effort.*

Benefits
- *Our benefit renewal quotes came in really high and the CEO and CFO want options. We are debating how much of the costs to absorb vs pass on to the employees.*

- *10-12% seems to be what people are bracing for.*

- *We're coming in at about 9.7%.*

- *We ran a full RFP process and got to about 12%, but a PEO has proposed a much lower cost. I don't like the idea of moving to a PEO, but that may be too good to pass up.*

- *We started at a 25% increase and negotiated down to 14%.*

- *We are in the same boat and are moving to an equal-funded model. We had a 15.5% increase.*

- *We also got hit with an 11% cost increase from Cigna.*

- *We do benefits mid-year and it sounds like we should be grateful for only an 8% increase!*

- *I'm nervous about what the increase will be. We will likely go public next year, and we're trying to maintain or improve our programs the best we can. We're split 80/20 with employees right now but may increase coverage for dependents.*

- *We dealt with [higher renewal costs] two years ago and went the self-funded route.*

- *We are going with a different approach. Give the employee a stipend, then they can shop for themselves.*

- *We offer a $150/month stipend for employees that opt out of our healthcare benefits.*

Merit Increases for 2026
- *We're planning on 3.5%. Compensia is telling us the average is 3% - 3.4%. Alpine is telling us 3% - 4%. [Attendees all had similar numbers planned for 2026]*

- *We did our merit in April, and the tariff thing was going on, so we chose to be more conservative and went with 2% - 4%. This approach didn't go well, and we got some unexpected attrition.*

Promotion Rates (Life Science CPO Roundtable)
- *We were 30% last year, which is insane! Our CEO had a habit of approving every promotion, which sets a bad precedent.*

- *We haven't hit 30%, but we're close. Part is because we have a lot of manufacturing people and a similar sized engineering group.*

- *We were 23% in 2024, and the comp committee slapped my hand. This year we're at 20%, but the "true" job level promotion rate is closer to 14% (based on our definitions of promotions).*

- *All of this is so helpful. Radford gave me a range of 8% - 34%, which was not helpful at all. We try to stick around 20%, so I'm glad to know we're in line with the rest of you.*

As if battling for key talent was not difficult enough…
- *I just terminated a remote worker because we found out she had three other director level roles at other companies. [Other attendees commented they had dealt with similar experiences.]*

- *We had a hire [in the U.S.] that was an imposter…the person who interviewed wasn't the person that showed up on the first day.*

- *We are seeing an uptick in bots and state agents applying to our roles. We now require in-person verification before hiring.*

- *AI is more enemy than assistant for me right now because we are getting overwhelmed with fake job applicants. On one position alone, 95% of the applicants were fake.*

Resources List (Mentioned during the roundtables)

AI Tools

- Ada (AI Customer Service)
- Atomicwork (vendor to help build agents)
- Basecamp (Project Management)
- ChatGPT (OpenAI's AI Model)
- Claude (Anthropic AI Model)
- Copilot (Microsoft's AI Model)
- Gamma AI (Content Generation)
- Gemini (Google's AI Model)
- GitHub (Developer platform)
- Glean (AI Assistant)
- Google Agentspace (AI Agent developer tool)
- Humancore (Personal Ai Advisor) being evaluated.
- IFTTT (tool for generating and posting content for social media)
- Loveable (AI for apps and websites)
- Moveworks (Agentic AI Assistant – acquired by ServiceNow)
- n8n (workflow automation)
- NotebookLM (Google's AI Research & Writing Assistant)
- Perplexity (AI Model)
- Rovo (AI assistant by Atlassian)
- ServiceNow (Workflow Automation)
- Wisq aka Harper (Agentic HR Platform)
- WRITER (AI Agent developer tool)

Articles/Books/Events/Podcasts/Websites

- AI can't lead change: The future of leadership in the agentic era (Podcast)
- Co-Intelligence: Living and Working with AI (Book by Ethan Mollick)
- Create the Future Summit (Event)
- Zapier's Bold Bet: Every New Hire Must Be AI-Transformational, With CPO Brandon Sammut (Podcast)

Coaches & Speakers

- BetterUp (coaching)
- fassforward (coaching)
- Mento (Executive coaching)
- NextArrow (coaching)
- Tammy Ebright (coach)

Compensation & Benefits

- Alpine Rewards (comp consultant)
- Bennie (benefits brokerage platform)
- Compensia (comp consultant)
- Thatch (health benefits)

HR Ops/Talent Development/Org Development

- CultureAmp (Engagement Surveys)
- Disco (AI Learning platform)
- Enboarder (employee onboarding tool)
- Gartner (Research & Advisory firm)
- Graphio (Real-time engagement)
- i4cp (Research & Advisory firm)
- Lattice (Performance Management w/succession planning tools)
- LinkedIn Learning
- Notion (Collaboration Tool)
- Sana (Workday's AI Knowledge Tool)
- Udemy (Learning)

HRIS/ATS

- Ashby (ATS)
- BambooHR (HRIS) …Two attendees looking to replace.
- BrightHire (Interview AI notetaker)
- Greenhouse (ATS)
- HiBob (HRIS)
- iCIMS (ATS) …looking to replace.
- Kula (AI-Native ATS)
- Mercer (helping with an HRIS RFP)
- Namely (HRIS) …looking to replace.
- Oracle Cloud HCM (ATS)
- Workday (HRIS)