



Lattice AI Agent: Admin Launch Guide

Launching to Managers

- [Lattice AI Agent: Admin Launch Guide](#)
 - [What the AI Agent Does](#)
 - [Before You Launch](#)
 - [Recommended Launch Timeline](#)
 - [Launch Communication Templates](#)
 - [Manager Email](#)
 - [Slack Announcement](#)
 - [FAQs](#)
-

What the AI Agent Does

The Lattice AI Agent is an always-on assistant embedded in Lattice. For managers and individual contributors alike, it's most valuable as a performance tool — surfacing insights from 1:1s, feedback, reviews, goals, and grow, as well as delivering on-demand coaching grounded in their team's actual data.

What's live today:

- **Performance Insights** — Summarizes performance trends, surfaces risks, and identifies growth opportunities for direct reports, including the ability to ask about data in reviews, grow, and goals
- **On-Demand Coach** — Actionable coaching grounded in career paths, past performance data, and individual development plans
- **Quick Actions** — Act on insights instantly: ask Agent to help draft updates, send feedback, 1:1 agenda items, and create growth areas
- **Engagement Insights** — Surfaces key drivers, comment trends, and suggested actions from engagement data
- **Writing Assistance** — Check for grammar, clarity, and bias when writing feedback, updates, or reviews

- **HR Help Desk**— Answers HR and benefits questions (requires Knowledge Vault setup — optional, not required for launch)

The performance use cases above work out of the box. [Lattice AI Knowledge Vault](#) is optional and can be configured at any time.

Before You Launch

1. [Set up the AI Agent](#) – apply any desired custom configurations.
2. **Test it yourself** – Here are some [suggested prompts](#).
3. [Activate the AI Agent](#) – Check your access to the Lattice AI Agent for all employees (or a specific group of employees). It's only visible to super admins in “testing mode” until you enable it for employees.

[Optional] Set up the [Knowledge Vault](#) – Only needed if you want the Agent to answer your company’s HR policy questions. You can sync documents from Google Drive, SharePoint, or Dropbox, or upload manually. You can skip this entirely for your initial rollout and add it later — managers will still get strong value without it.

Recommended Launch Timeline

Week	What to do
Week 1	Test performance use cases. Set up Knowledge Vault if using it.
Week 2	Enable AI Agent for all employees. Send launch communications (examples below) and optionally hold a training (template)
Week 3	Monitor usage , collect feedback, and send a nudge if adoption needs a push.

Launch Communication Templates

Manager Email

Subject: Your AI Agent in Lattice is live

Hi [team/manager name],

Starting today, you have access to the Lattice AI Agent — a tool that lets you ask questions about your team's performance data directly in Lattice.

Here's why it's worth your time

Managing a team shouldn't mean constant context-switching — last-minute 1:1 prep, writing feedback from scratch, or piecing together conversations from weeks ago. The AI Agent eliminates that friction. By pulling from your Lattice data, it gives you instant, relevant answers so you can focus on your team, not your notes.

Use it to:

- **Prep for 1:1s:** *"Summarize my last three 1:1s with [employee]"*
- **Understand feedback patterns:** *"What feedback has [employee] received in the last 6 months?"*
- **Get team visibility:** *"Who on my team hasn't received feedback this quarter?"*
- **Support development conversations:** *"Based on [employee]'s feedback, where should they focus for growth?"*
- **Take quick action:** Draft updates, write feedback, or create 1:1 notes directly from insights

To get started, simply type your question into the Lattice Agent panel on the right side of the Lattice home page, or the search bar on any Lattice page.

[Prompt guide](#)

[Demo for Managers](#)

[Demo for ICs](#)

In addition, all managers have access to a free [AI-Ready Manager Challenge](#) course from Lattice University with short, practical lessons to help you start using Lattice AI Agent to level up your people management skills. Its only 10 minutes a day for 5 days to fit into your busy schedule. We encourage you all to take advantage!

Questions? [Contact or Slack channel]

— [HR/People Team]

Slack Announcement

 **Lattice AI Agent is now live — and we recommend all managers give it a try.**

It connects to your real Lattice data (1:1s, feedback, updates) so you can prep for conversations faster, spot patterns on your team, and spend less time starting from scratch.

Open the **Ask Lattice** bar at the top of Lattice to get started.

[Prompt guide](#)

[Demo for Managers](#)

[Demo for ICs](#)

FAQs

Will I be able to track which questions are asked? When employees ask questions routed to the Knowledge Vault, it will reference documents uploaded or synced to your Knowledge Vault. Only these questions will be visible in the Admin dashboard for your review to ensure response accuracy. To protect the privacy of your employees, questions that specifically reference performance data in Lattice as a source are not logged in the Admin dashboard.

Do we have to set up the Knowledge Vault to launch? No. The performance use cases (1:1 prep, feedback summaries, coaching, quick actions) work without any Knowledge Vault setup.

Does the Agent make things up? No. It only pulls from Lattice performance data and any documents you've uploaded. Responses include cited sources that users can click through to verify.

Can we control who sees the Agent? Yes. You can permission it to specific groups before rolling it out broadly.

Does the AI Agent replace Lattice's Customer Care chat? No. Both will exist in the interface. Customer Care isn't going away.

Is our data safe? Lattice is SOC2 Type II Certified. OpenAI powers the underlying model but does not use your data for model training.

What if the Agent can't answer a question? Configure a custom default response under Admin settings to point users to the right contact or channel.
