

ROKT

AI Playbook

People

How the People team moved from baton-passing to a connected talent ecosystem

Built by the people who lived it.

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People Team Dashboard

The Context / Challenge

The People team was managing priorities, calendars, and progress updates across a patchwork of spreadsheets and documents. With multiple sub-teams (Talent Acquisition, People Partners, People Ops, L&D;) each owning different parts of the employee lifecycle, there was no single place to see what everyone was working on, what was on track, and what needed attention. Team leads spent time chasing updates instead of driving outcomes.

Our Approach

Rather than commissioning a tool from engineering or purchasing software, the People team lead opened Claude Cowork and described what was needed: a single dashboard where the entire team could see priorities, the calendar for the year, and everything each sub-team was working on. In approximately 30 minutes, a fully functional dashboard was built that replaced the collection of spreadsheets and documents the team had been using.

SAMPLE PROMPT

"I want to build a People team dashboard that replaces our current system of spreadsheets and docs. It should include all team priorities for the quarter grouped by sub-team, a calendar view of key dates and deadlines for the year, a progress tracker where team members can update status on their initiatives, and a section for cross-team dependencies so we can see where work overlaps. Make it clean and simple."

Results

The dashboard was built in a single 30-minute session, replacing multiple spreadsheets and documents. Team members now have one place to check priorities, update progress, and see what everyone else is working on. The shift from static documents to a living dashboard reduced the time spent in status update meetings and eliminated the need to chase people for progress reports. The most significant outcome was demonstrating that anyone could build tools like this without engineering support.

Rokt Central

The Context / Challenge

As the People team started building AI-powered tools with Claude Cowork, they quickly ended up with dozens of separate products and workflows. The next problem became: how do you take 50 different tools to employees and leaders in a way that feels useful rather than overwhelming? Employees were being asked to navigate multiple systems for different processes, and each tool lived in a different place.

Our Approach

The People team worked collaboratively with G&A; Enablement to build Rokt Central: a single platform where leaders and employees go for everything people-related. Rather than launching each tool separately, the team consolidated them under one roof. Rokt Central became the home for approvals, performance tools, promotion requests, resource planning, and more. The platform was built iteratively using Claude Cowork.

SAMPLE PROMPT

"We have built multiple people-related tools and processes, and we need a centralized platform where leaders and employees can access all of them in one place. Build a portal called Rokt Central that includes an approvals hub for all people-related requests, performance management tools, promotion request workflows, resource planning views, and clean navigation so users can find what they need without training. This should feel like a product, not an internal tool."

Results

Rokt Central became the single destination for everything people-related at Rokt. Instead of launching 50 separate tools, the team delivered one platform that employees and leaders already know to go to. It solved the distribution problem that many internal teams face: building great tools is one thing, getting people to actually use them is another. By consolidating under one brand and one URL, adoption was immediate.

Leader Dashboard

The Context / Challenge

For three years, the People team had been trying to give leaders a single view of their team's data. The information existed, but it was spread across multiple systems: engagement data in Culture Amp, HR data in BambooHR, performance data in a separate platform, and headcount data in spreadsheets. A leader who wanted to make a decision about their team had to log into multiple systems, cross-reference data manually, and piece together the picture themselves.

Our Approach

With Claude Cowork, the team revisited the problem they had given up on. They described the challenge: pull data from every people system into one view so a leader can see their entire team in one place. Claude built a dashboard that integrates data from Culture Amp (engagement), BambooHR (HR records), and the performance platform into a unified leader view. The dashboard surfaces the information leaders need for succession planning, promotions, performance management, and headcount planning.

SAMPLE PROMPT

"Build a leader dashboard that pulls in data from our people systems and gives managers a complete picture of their team in one place. It should include employee profiles with key HR data from BambooHR, engagement scores and trends from Culture Amp, performance ratings and review history, headcount data and open roles, and a succession planning view. Leaders should be able to see everything about their team without logging into multiple systems."

Results

A problem the team had tried to solve for three years and given up on was built with Claude Cowork. Leaders now have a single view of their entire team, pulling data from every relevant people system. The dashboard supports data-led decisions on succession planning, promotions, performance management, and headcount planning. The biggest win was not just the tool itself, but the proof that problems previously considered too complex for a support function to solve were now within reach.

Performance Review System

The Context / Challenge

Every quarter, the performance review cycle required hundreds of spreadsheets managed across 150+ people leaders. Data flowed from Culture Amp to BambooHR through manual exports and re-uploads. Each leader received their own spreadsheet, filled it in, and sent it back. The People team then consolidated everything, checked for inconsistencies, and pushed the data back into HR systems.

Our Approach

The team used Claude Cowork to build a fully custom performance system that lives under Rokt Central. Instead of distributing spreadsheets, leaders now access their performance reviews through the centralized platform. The system pulls data automatically, presents it in a clean interface, and writes back to the source systems when reviews are complete.

SAMPLE PROMPT

"Our quarterly performance review process currently runs on hundreds of spreadsheets distributed to 150+ leaders. Build a performance management system that pulls employee data and prior review history automatically, gives each leader a clean interface to review their direct reports, supports our specific rating framework and calibration process, and writes completed reviews back to our HR systems. It needs to handle our full review cycle: self-evaluations, manager reviews, calibration, and final communication."

Results

The quarterly performance cycle moved from hundreds of spreadsheets to a single platform. Leaders access their reviews through Rokt Central with no spreadsheets to download, fill in, or email back. Data flows automatically between systems, eliminating manual exports and re-uploads. The system is fully custom to Rokt's review framework. The time spent by the People team on cycle administration dropped significantly, and the experience for leaders improved.

Automated Offboarding

The Context / Challenge

Every time an employee left the business, the People Ops team worked through over 100 individual steps to manage the offboarding process. These steps spanned access revocation, equipment returns, system deprovisioning, payroll adjustments, exit interviews, knowledge transfer, and compliance documentation. The process was entirely manual, took significant time per departing employee, and was prone to steps being missed.

Our Approach

The team mapped the entire 100+ step offboarding process and identified which steps could be automated. Using a combination of Google Apps Script, Claude Cowork, and n8n (a workflow automation tool connected to Rokt's HR systems), they built automated workflows that handle the repetitive, rules-based steps without human intervention. The remaining steps that require judgment stay manual but are triggered and tracked by the automation.

SAMPLE PROMPT

"Our offboarding process has over 100 steps per departing employee. Map the process and build automations for everything that doesn't require human judgment. The automated steps should include system access revocation across all platforms, equipment return notifications and tracking, payroll and benefits termination triggers, manager and team notifications at the right times, and compliance documentation generation."

Results

The automated offboarding process saves approximately two hours per departing employee. More importantly, the automation ensures consistency: every offboarding follows the same process regardless of volume or timing. Steps that were previously missed during busy periods are now handled automatically, reducing compliance risk and improving the experience for departing employees and their managers.

~2hrs

Saved per departure

100+

Steps automated

Zero

Missed steps