OVERVIEW

This workshop combines conceptual teaching with hands-on assessment exercises.

Students will actively rate AI risks, score work design characteristics, and evaluate role transformations using validated IO psychology methods. The goal is not just understanding but practical competency in applying these frameworks.

01 | **Context**

02 | **Job Analysis**

03 | **Work Design**

04 | **AI Impact**

05 | **Composite Roles**

06 | **Selection Design**

WORKBOOK

CASE STUDY

MERIDIAN FINANCIAL SERVICES

Meridian Financial Services is a mid-sized wealth management firm with 400 employees. They recently deployed an AI platform that assists with client portfolio analysis, regulatory compliance checking, and report generation. The firm has asked us, as IO psychology consultants, to help them understand how this AI integration affects their Financial Advisor role.

The Financial Advisor Role (Pre-AI)

Financial Advisors at Meridian manage client portfolios, conduct investment research, ensure regulatory compliance, prepare quarterly reports, and maintain client relationships. They typically hold CFP or CFA certifications and have 5+ years of experience. The firm has 120 Financial Advisors across 8 regional offices.

The AI Platform Capabilities

- Portfolio Analysis: Automatically aggregates data, identifies trends, generates performance comparisons
- Compliance Checking: Scans transactions for regulatory issues, flags potential violations
- Report Generation: Creates draft quarterly reports, executive summaries, and client communications
- Recommendation Engine: Suggests investment adjustments based on client goals and market conditions

CONTEXT

Why This Is an IO Psychology Problem

The critical factor in successful AI integration is not the technology itself, but how organizations redesign work around it. IO psychology provides established methods for analyzing jobs, designing work, developing selection systems, and creating training programs. These methods apply directly to AI integration challenges.

Source	Key Finding
McKinsey, 2025	88% of organizations now use AI in at least one business function
McKinsey, 2025	Organizations that redesign workflows capture significantly more value than those that simply add AI to existing processes
Microsoft, 2025	78% of leaders are considering creating new AI-related roles
Microsoft, 2025	46% of leaders report using AI agents to automate entire workstreams

EXERCISE 1

INITIAL ASSESSMENT

BEFORE LEARNING CASE DETAILS, RECORD YOUR INITIAL PREDICTIONS ABOUT AI IMPACT ON THE FINANCIAL ADVISOR ROLE.

Exercise 1: Initial Assessment

Overall AI Impact on Job Tasks: How much will AI change what Financial Advisors do day-to-day?

Risk of Skill Atrophy: How likely are advisors to lose important skills they no longer practice?

Need for New Competencies: How much will this role require skills that weren't previously needed?

Impact on Job Satisfaction: How likely is AI integration to affect advisors' job satisfaction?

Selection System Change Needed: How much will hiring criteria need to change?

Very Low   Very High

How Replacing Developers With AI is Going Horribly Wrong

Copy link

Tech's Wrong Bet

Watch on YouTube

JOB ANALYSIS

What Is Job Analysis?

Definition: Job analysis is the systematic process of collecting, documenting, and analyzing information about the content, context, and requirements of a job. It answers fundamental questions: What do workers do? How do they do it? What do they need to know and be able to do?

Why it matters: Job analysis is the foundation for virtually all HR systems. Without accurate job analysis, we cannot develop valid selection systems, design effective training, establish fair compensation, or evaluate performance meaningfully.

EXERCISE 2
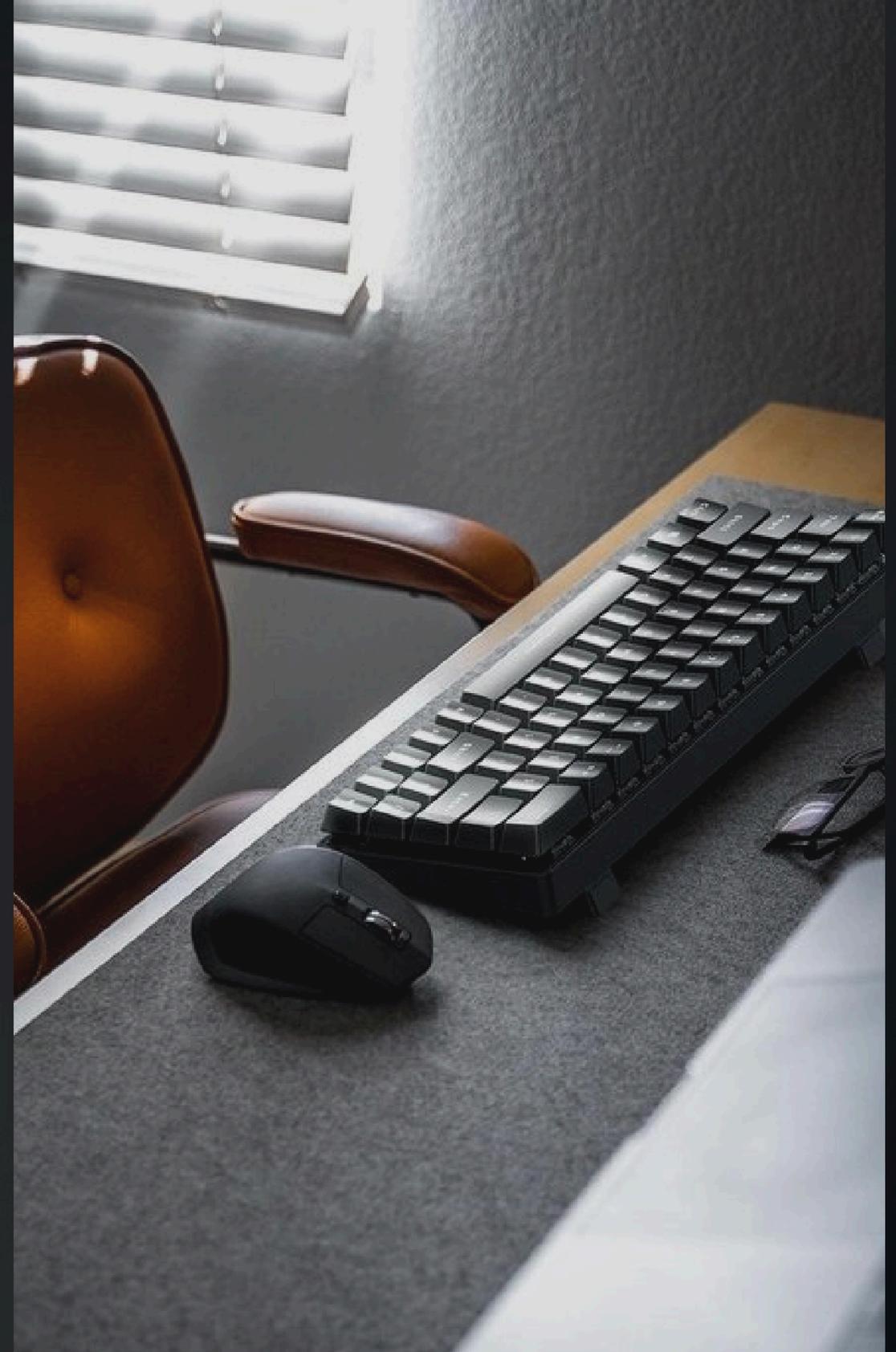
TASK INVENTORY RATING

Rate each Financial Advisor task on three dimensions. Consider the post-AI context.

Frequency: 1=Rarely, 2=Monthly, 3=Weekly, 4=Daily, 5=Multiple times daily
Importance: 1=Minor, 2=Moderate, 3=Important, 4=Very Important, 5=Critical
AI Impact: 1=No change, 2=Slightly automated, 3=Moderately automated, 4=Heavily automated, 5=Fully automated

Task	Frequency	Importance	AI Impact
1. Gather and aggregate client financial data			
2. Analyze portfolio performance against benchmarks			
3. Review compliance requirements for transactions			
4. Generate quarterly performance reports			
5. Communicate portfolio recommendations to clients			
6. Build and maintain client relationships			
7. Research investment opportunities and trends			
8. Validate and verify AI-generated analyses			
9. Handle complex situations beyond AI capabilities			
10. Override or modify AI recommendations			

EXERCISE 2

SMALL GROUP DISCUSSION

Task with the highest group disagreement?

Why did disagreements occur?

What other information would you need?

WORK DESIGN

Job Characteristics Model: Five core job dimensions predict motivation and satisfaction: (Hackman & Oldham, 1976)

SKIL VARIETY

Degree to which job requires different activities and skills

TASK IDENTITY

Degree to which job involves completing a whole piece of work

TASK SIGNIFICANCE

Degree to which job has substantial impact on others

AUTONOMY

Degree of freedom and independence in scheduling and procedures

FEEDBACK

Degree to which work provides direct information about performance

WORK DESIGN

Work Design Questionnaire Additions
(Morgeson & Humphrey, 2006)

The WDQ expands to include social characteristics
(interdependence, social support) and contextual
characteristics (physical demands, work conditions).

For AI-augmented work, we add technology-related
dimensions.

Research suggests automation can either enrich
or impoverish jobs depending on implementation
(Parker & Grote, 2022).

When AI automates parts of a job, which
characteristics are enhanced, diminished, or
transformed?

EXERCISE 3

WORK DESIGN IMPACT ASSEEMENT

Assess how AI integration affects each work design dimension for the Financial Advisor role.

Scale: -2=Significant Decrease | -1=Slight Decrease | 0=No Change | +1=Slight Increase | +2=Significant Increase

Dimension	Definition	Rating	Justification
Skill Variety	Degree job requires different activities and skills		
Task Identity	Degree job involves completing whole pieces of work		
Task Significance	Degree job has substantial impact on others		
Autonomy	Degree of freedom in scheduling and procedures		
Feedback	Degree work provides direct performance information		
Problem Solving	Degree job requires unique solutions to novel problems		
Social Support	Degree to which the job enables connection		
Interdependence	Degree to which the job requires collaboration		
Information Processing	Degree job requires attending to and processing data		

Is the overall effect of AI on work design positive, negative, or mixed?

THE
BREAK

10 MIN

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AI IMPACT

Apply systematic risk assessment methodology to evaluate AI integration risks.

Risk Category	Description
Skill Atrophy	Risk that human expertise degrades when AI handles routine applications
Over-Reliance	Risk that workers accept AI outputs without appropriate scrutiny
Accountability Gaps	Risk that responsibility becomes unclear when AI contributes to decisions
Error Detection	Risk that AI errors go unnoticed due to automation complacency
Job Meaning	Risk that role becomes less meaningful or identity-defining

Anthropic Research

EXERCISE 4

RISK SCORING

For each risk, we assess two dimensions:

- Likelihood: How probable is this risk given current implementation?

- Severity: If this risk materializes, how serious is the impact?

Risk	Likelihood	Severity	Score (L×S)
1. Skill Atrophy			
2. Over-Reliance			
3. Accountability Gaps			
4. Error Detection			
5. Job Meaning			

BOUNDARY PROBLEM

Traditional job design assumes clear boundaries: between departments, between roles, between tasks. Jobs are defined within organizational units, and coordination happens through formal structures (hierarchy, meetings, handoffs). AI disrupts these assumptions by enabling work that flows across boundaries without traditional coordination costs.

What Are Composite Roles?

Composite roles emerge when AI integration enables individuals to perform work that previously required multiple specialists or coordination across units. These roles are defined not by position in a hierarchy, but by capability to orchestrate human-AI systems across traditional boundaries.

3 TYPES OF BOUNDARY SPANNING

Boundary Type	Traditional Approach	Composite Role Approach
Task Boundaries	Specialist roles: analyst does analysis, writer writes, reviewer reviews	One person orchestrates AI to perform multiple task types, focusing on integration and judgment
Organizational Boundaries	Work stays within departments; cross-functional needs require committees or liaisons	Individual accesses AI capabilities spanning multiple functional domains without departmental handoffs
Expertise Boundaries	Deep specialization; generalists coordinate but don't execute specialist work	'T-shaped' expertise: deep in one area, AI-augmented breadth across others

EXERCISE 5

MAPPING CROSS-BOUNDARY ROLE
FORMATION

PART A:
BOUNDARY ID

The Financial Advisor role
traditionally operates within
clear boundaries. AI enables
crossing these boundaries.
For each boundary type,
identify what's changing.

PART B:
COMPOSITE ROLE
DESIGN

If Meridian redesigned the
Financial Advisor as a
composite role spanning
these boundaries, what
would it look like?

PART C:
STRUCTURAL
IMPLICATIONS

Rate how significantly each
organizational structure
must change to support
composite roles.

PART D:
THE SPECIALIST
QUESTION

If composite roles absorb
work from specialists
(analysts, compliance
officers), what happens to
those specialists?

ADVERSE IMPACT

HUMAN+AI

Understand the concept of human and AI collaboration and assess competency requirements.

When AI integration reaches a threshold where human and AI capabilities are deeply intertwined, a qualitatively different type of role emerges. We term these composite roles - positions where the unit of work is fundamentally human-AI collaborative, not human with AI tools.

Meta Cognitive Monitoring

Workers must continuously evaluate AI outputs: When to trust? When to scrutinize? When to override?

Dynamic Task Allocation

The division of labor between human and AI shifts based on context, complexity, and risk
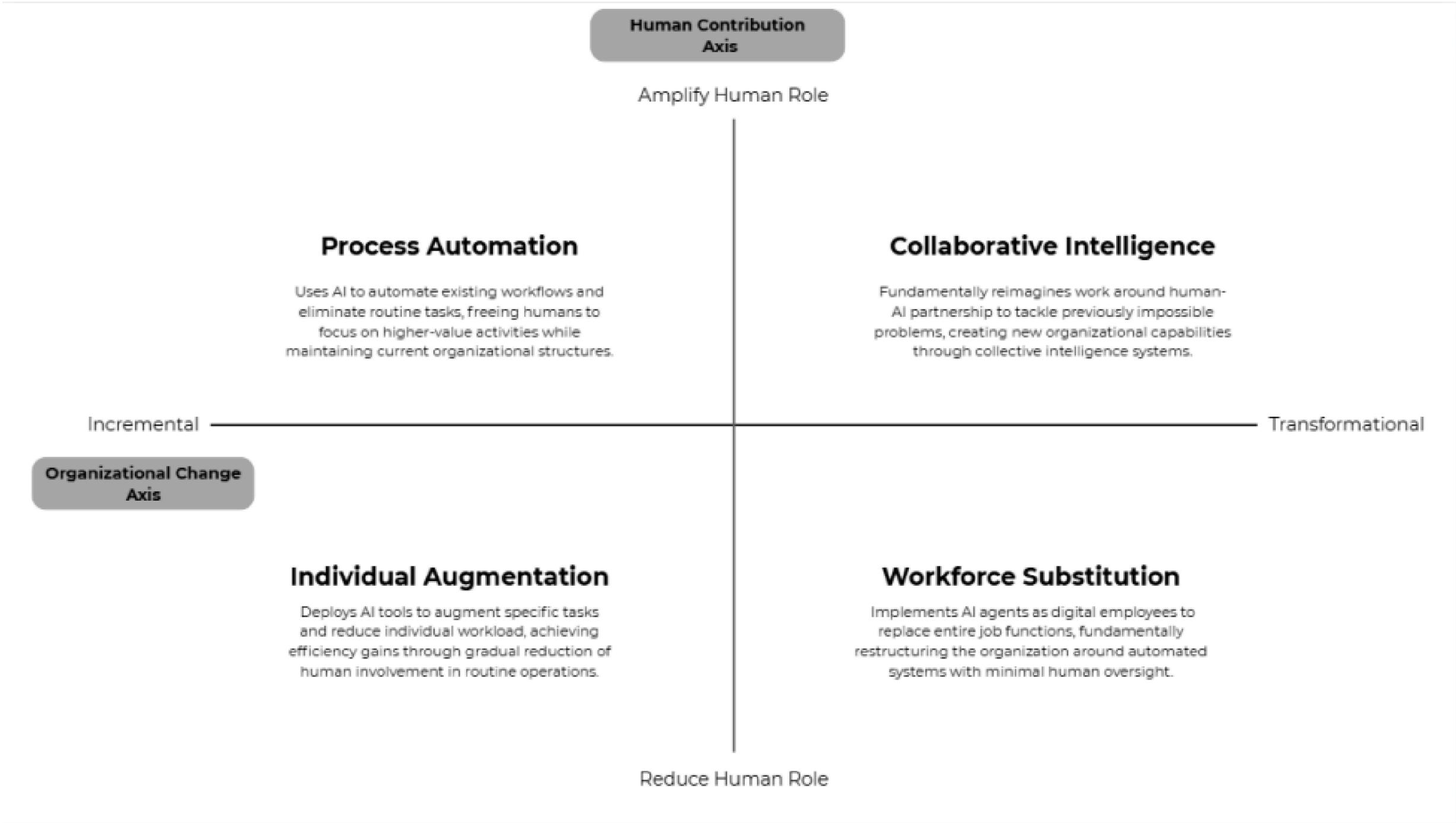
Residual Expertise

Workers must maintain expertise they rarely use directly but need for exception handling

System Level Accountability

Responsibility extends to AI outputs the worker approves, not just actions they personally take

Framework of AI Transformation Strategies

Human Contribution Axis

Amplify Human Role

Process Automation

Uses AI to automate existing workflows and eliminate routine tasks, freeing humans to focus on higher-value activities while maintaining current organizational structures.

Collaborative Intelligence

Fundamentally reimagines work around human-AI partnership to tackle previously impossible problems, creating new organizational capabilities through collective intelligence systems.

Incremental — Transformational

Organizational Change Axis

Individual Augmentation

Deploys AI tools to augment specific tasks and reduce individual workload, achieving efficiency gains through gradual reduction of human involvement in routine operations.

Workforce Substitution

Implements AI agents as digital employees to replace entire job functions, fundamentally restructuring the organization around automated systems with minimal human oversight.

Reduce Human Role

SELECTION DESIGN

Understand how selection systems are developed and evaluate assessment methods for AI collaboration competencies.

COGNITIVE ABILITY TESTS

General mental ability, learning capacity, problem-solving

SITUATIONAL JUDGMENT TESTS

Judgment in job-relevant scenarios, practical intelligence

WORK SAMPLES

Job-specific skills, realistic performance prediction.

STRUCTURED INTERVIEWS

Past behavior, situational responses, interpersonal skills

PERSONALITY INVENTORIES

Traits related to job performance (conscientiousness, etc.)

EXERCISE 6

ASSESSMENT METHOD MATCHING

Match AI collaboration competencies to appropriate assessment methods and rate expected validity for each method-competency pairing.

Key discussion point: Some competencies (like appropriate trust calibration) may require novel assessment approaches. Encourage creative thinking.

Competency	Best Method(s)	Confidence (1-3)	Why this method?
AI Output Evaluation			
Trust Calibration			
Exception Recognition			
Meta-Cognitive Awareness			
Task Allocation Judgment			
Expertise Maintenance			

Which competency is hardest to assess?
What new approach might work?

SYNTHESIS

What are your final reccomendations to Meridian?

AI integration is fundamentally an IO psychology problem. The critical factor is work redesign, not technology.

Established methods (job analysis, work design theory, selection system development) provide the foundation.

Composite roles require new competencies addressing human-AI collaboration specifically.

Systematic risk assessment helps prioritize interventions and allocate resources.

Inter-rater comparison reveals both consensus and legitimate differences in perspective.

THANK YOU