DARCYLUOMA
CREATING HIGH PERFORMING PEOPLE + TEAMS

Introducing AI
TOOLKIT

Helping Your Team
Work Smarter *With* AI.
Not *For* It.

Making AI Part of the Team

A Practical Guide for HR Leaders to Integrate AI with Clarity and Trust

Using the Four Stages of Team Development to Lead the Shift

Introduction

AI has arrived in your workplace — but not everyone's on the same page. Some team members are curious. Others are anxious. Most are somewhere in between.

This guide gives you a simple, thoughtful path to bring AI into your team in a way that supports people — not replaces them. Based on Bruce Tuckman's Stages of Team Development, it walks you through each phase so you can "onboard" AI tools onto their teams.

This isn't just a tech rollout. It's a culture shift.

Let's make sure your team feels supported — and that your tools serve your people, not the other way around.
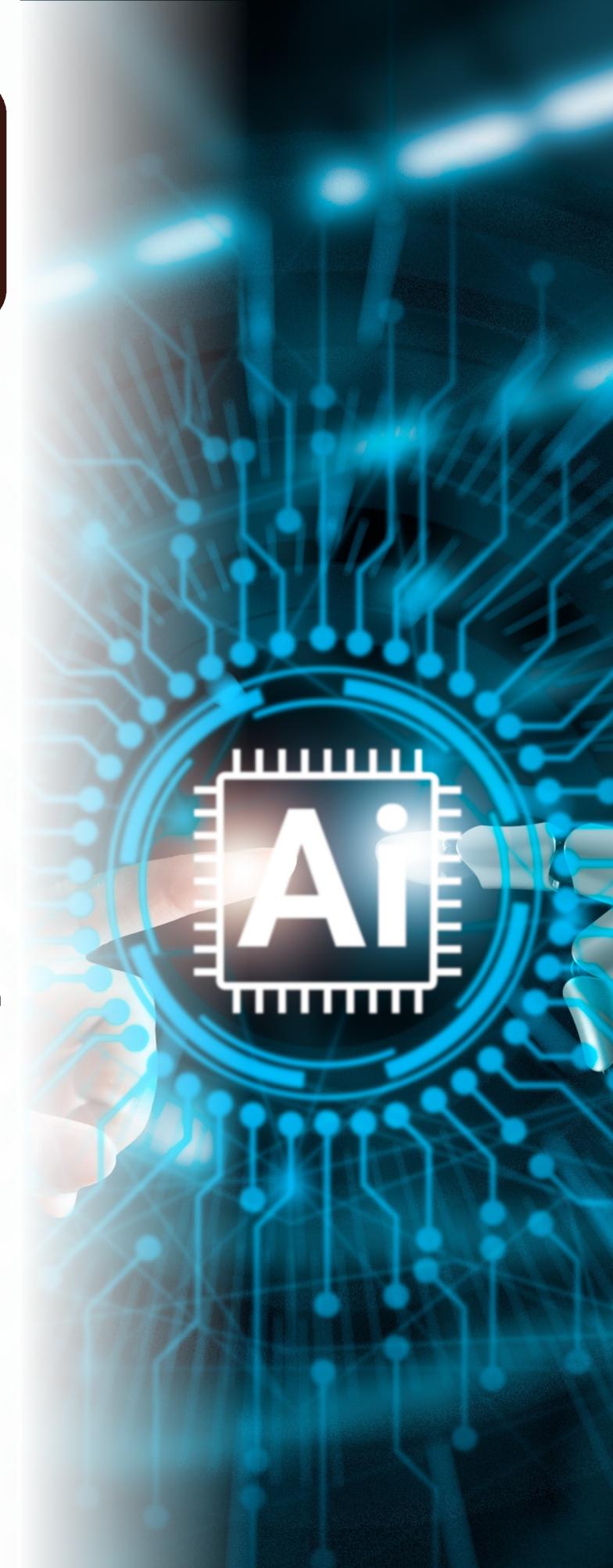
Thoughtfully Fit® Strength:
Consciously Choosing How You Engage with AI (and everything else)

Strength is one of the six practices of being Thoughtfully Fit. It's about making deliberate choices—especially when the easiest option is to react on autopilot.

Strength is essential every time you pause and ask, *"What's the best way to show up right now?"* Whether that's deciding how to respond to a teammate, how to spend your time, or whether to bring a new tool (like AI) into the mix.

It's tempting to jump on the latest tech trend, say yes to every request, or default to habits that keep us "busy" but not productive. Strength helps you break that cycle. Because, let's be honest, sometimes it's a heavy lift!

This practice is especially important when integrating something or someone new into your team. **AI is just the latest example.**
Think of it like hiring someone new:

- Do you throw them into the deep end with no direction?
- Let them do whatever they want because they're "smart"?
- Hope they just magically click with everyone else?

Of course not. You're thoughtful. You onboard them. You check in. You make sure they understand what matters to your team.

That's what Strength looks like in action. You consciously choose how to engage.

Integrating AI Through the Stages of Team Development

Bringing AI into your organization isn't just a technology shift. It's a team shift.

Just like when a new person joins the team, there's an adjustment period. People learn how to work together, communication patterns change, and trust takes time to build. The same is true when AI enters the mix. It doesn't automatically "fit in." Teams have to form, storm, norm, and perform *with* it.

These four stages of team development, first identified by Bruce Tuckman, describe the natural evolution of how groups learn to work together effectively. Understanding these stages gives leaders and HR professionals a roadmap not to rush through change, but to guide their teams through it with more awareness, patience, and confidence.

The Four Stages of Team Development... with AI

1
Forming: Get to Know the New "Team Hire"
Treat bringing AI onto the team like onboarding a new team member. The focus is on clarity: defining the AI's role, purpose, and expectations before it jumps into the work

2
Storming: Preparing For and Navigating the Chaos
The excitement wears off, and reality sets in. Confusion, overlap, or resistance pop up. This isn't failure—it's growth. The key is to talk about the friction, not avoid it.

3
Norming: Defining the Ground Rules Together
After the storm, patterns start to form. The team aligns on what's working, what's not, and how humans and AI collaborate best. Clear norms turn past conflict into structure.

4
Performing: Recognizing Success
AI becomes part of the team's rhythm. People know when to lean on it, when to rely on their own judgment, and how to adapt when things change.

FORMING

Get to Know the New "Team Hire"

When a new person joins the team, there's always a learning curve. The same goes for AI. Before jumping straight into workflows, it's important to pause and get oriented.

Think of AI as your newest teammate: one with plenty of potential, but no emotional intelligence. It doesn't know your culture, your tone, or your values. They have to be taught because they won't just pick up on it the way a person might. So how will AI be brought into the fold?

Forming is all about clarity and connection. It's where you set expectations, define purpose, and start building understanding — both for the humans and the technology.

Questions to Ensure the AI Tool is the Right Hire

- What specific problem are we hiring this AI to solve?
- Is the goal to make the team's work easier, faster, or better?
- What will success look like 30, 60, and 90 days after bringing it onboard?
- How does this AI align with our organization's values?
- How does this AI integrate with our existing systems and workflows?
- What level of oversight will this AI need, and who will be responsible for it?
- What data will this AI access, and how will that data be protected?
- What are the risks of over-relying on this AI, and how can we mitigate them?

Questions to "Form" with the Team

- What role will AI play on our team day-to-day?
- What's the expectation for each team member in working with AI?
- When won't we use AI—and why?
- Why did we choose this particular AI tool? How does it make sense for our team right now?
- How will everyone get to know what this AI can (and can't) do?
- How will we share what we're learning as we start using it?
- What support or training does the team need to feel comfortable experimenting?
- How will we celebrate early wins or lessons learned as we get started?
- Who can team members go to with questions, feedback, or frustrations as we learn?

STORMING

Preparing for and navigating the chaos

Every team storms. It's part of learning to work together. The same is true when AI joins the mix. Once the excitement of trying something new wears off, reality sets in: confusion, overlap, resistance, or uncertainty about how this all fits.

Storming isn't a sign something's gone wrong but rather proof the team is growing. This is when unspoken expectations surface, workflows get messy, and communication patterns shift. The goal isn't to avoid the storm, but to navigate it with honesty and curiosity.

As a leader or HR professional, your role is to normalize the friction, keep conversations open, and help the team learn from what's not working yet. Each storm reveals what needs to be clarified before you can move forward with more confidence and trust.

Here are some completely and totally normal storms that every team will experience when they bring AI into the mix:

	Tip:	Question:
Overwhelms with content	Establish norms for what's worth sharing and when. Not everything needs to be generated—or sent.	How can we use AI to create clarity, not clutter?
Creates conflict standards	Choose a few approved tools and agree on shared guidelines for tone, formatting, and review.	What does "good" look like for us when AI is involved?
Increases mistakes under pressure	Make "human review" a non-negotiable step in every workflow, even under tight deadlines.	Where do we still need human eyes before anything goes out the door?

	Tip:	Question:
Undermines accountability	Assign ownership early. AI can help produce, but a person must always sign off.	Who's ultimately responsible for what this AI produces?
Creates version chaos	Decide where final versions live and how drafts are labeled or archived. Keep it simple and consistent.	How can we make sure everyone knows which version is "the one"?
Exposes gaps in process	Slow down to align on strategy before generating outputs. AI can't fix unclear direction.	Have we agreed on the "what" and "why" before we ask AI for the "how"?
Automates the wrong things	Define boundaries together. What should always stay human? What's safe to delegate?	What tasks require context, tone, or empathy that AI can't replicate?
Reduces live engagement in meetings	Set expectations that recordings support participation—they don't replace it.	How can we keep people present and engaged, even with AI summaries available?
Misses the real message	Pair AI outputs with human context. After transcriptions, check for tone and intent before sharing.	What's missing here that only a human can hear or feel?

These are just a few examples of the storms that can roll in when AI joins a team. Yours might look different, and that's okay. What matters most isn't avoiding the turbulence, but acknowledging it and talking about it openly. Every storm is an opportunity to learn where expectations need adjusting, where communication can improve, and where trust is still taking shape. And you can't move on to Norming without the Storms.

NORMING

Defining the Ground Rules Together

Once a team works through the storm, clarity begins to take shape. Roles feel more defined, communication gets easier, and trust starts to build. This is where teams begin to establish their shared rhythm—deciding how to work together, not just what to do.

When AI is part of the team, this stage is about setting new ground rules that reflect what the team has learned. After navigating tension and confusion, everyone now has a better sense of how AI fits into the work, where it adds value, and where it doesn't.

Norming doesn't mean the team has it all figured out. It means they've learned enough from the storm to make clearer agreements and stronger habits moving forward.

Norming Questions That Can't Effectively Be Answered Until You've Stormed

1 **Roles & Responsibilities**
- What tasks make the most sense for AI to handle—and which still need a human touch?
- Who owns the final product when AI contributes?
- Where do we draw the line between "AI assist" and "AI authored"?

2 **Quality & Review**
- How do we review AI's work before it's shared or published?
- What's our standard for "good enough" when AI drafts something
- Who has the authority to say, "This meets our standard"?

3 **Communication & Transparency**
- When do we tell others that AI was used in creating something?
- How do we communicate AI's role internally and externally?
- What language or tags do we use to keep everyone aware?

4 Trust & Collaboration

- What helps us feel confident relying on AI's input? What undermines that trust?
- How do we discuss frustrations or concerns about AI openly?
- What does accountability look like when both humans and AI contribute?

5 Learning & Improvement

- How do we share patterns we notice about where AI helps (and where it hurts)?
- How often do we revisit our norms to adjust as the tools evolve?
- How do we capture what we're learning so new team members can get up to speed?

6 Boundaries & Ethics

- What types of information or situations should we *never* delegate to AI?
- How will we safeguard confidentiality, fairness, and tone?
- Who do we go to if something AI produces crosses a line?

Different Tools, Different Teams, Different Norms

There's no single "right" way to work with AI. Every team—and every tool—requires its own approach. What matters most is that you talk about how you'll use it together. The examples that follow show how norms can take different shapes depending on the technology and the team. Use them as inspiration, not instruction. Your norms should reflect your people, your culture, and the kind of collaboration you want to build.

Sample Team Norms for Working with ChatGPT

- We use ChatGPT to draft, not for final drafts.
- We treat ChatGPT like a collaborator, not an authority.
- We flag any final drafts that sound too much like AI.
- When we try something new with ChatGPT, good or bad, we share what we learned so everyone benefits.
- We never share client names with ChatGPT.

Sample Team Norms for Using HappyFox

- **We track every request in HappyFox.** Every internal or external support issue gets logged so we maintain visibility and accountability.
- **One person owns it until it's done.** The person assigned to a ticket ensures it moves forward even if they need help from others.
- **We keep communication in the ticket thread.** Conversations live inside the ticket—not emails outside the system—so we preserve context and history.
- **We use canned responses thoughtfully, not blindly.** Templates help speed, but we add personal context and check for tone before sending.
- **We focus on learning, not blame.** If something slips, we fix the process before pointing fingers.
- **We review our dashboards weekly.** Patterns tell stories about bottlenecks, common issues, or process gaps. We use the data to improve, not just to measure.
- **We revisit our workflow monthly.** We check what's working, what isn't, and update our processes and HappyFox configurations accordingly.

Sample Team Norms for Using Eightfold AI

- **People make the decisions.** Eightfold only provides recommendations.
- **We decide what matters.** Eightfold follows the priorities we define.
- **Every match gets human review.** No automatic hires or promotions.
- **We explain the "why."** Everyone understands how and why AI insights are used.
- **Eightfold supports relationships. It doesn't replace them.** People still connect, listen, and assess.
- **Misses are learning moments.** We speak up when a mistake is made in order to adjust the process.
- **We evolve with the tool.** We revisit how we use Eightfold monthly to keep improving.

PERFORMING

Recognizing Success

When a team reaches the performing stage, AI isn't a novelty anymore but rather it's a natural part of how work gets done. The team has learned how to communicate, set boundaries, and trust both the process and each other. People know when to lean on AI for speed or structure, and when to rely on their own judgment and creativity.

This stage is about refinement, not perfection. Teams that perform well don't eliminate mistakes—they adapt quickly, share learning, and continue improving together.

For HR and leaders, this is the moment to shift from troubleshooting to fine-tuning: supporting growth, celebrating wins, and tracking how the human–AI partnership is actually changing the way work feels and flows.

So, how do you know you're in the *Performing* stage?

Here are some clear signs:

☑ **AI is supporting—not replacing—your team's strengths.**
It handles the repetitive stuff so your people can think, create, and connect.

☑ **Everyone knows the tools, the rules, and the expectations.**
No one's hiding their use. No one's confused about what's okay.

☑ **You've baked AI into your workflow—not slapped it on.**
It's integrated into your systems and processes, not duct-taped to the side.

☑ **You review, refine, and share what's working.**
Wins and weirdness are part of the team conversation.

☑ **The team's output is better and human.**
You're moving faster *and* staying true to your voice, values, and vibe.

Reaching the performing stage doesn't mean the work is done. It just means the team now has the skills, trust, and structure to navigate whatever comes next. Every new AI tool, update, or shift in direction will send the team back to forming—and that's normal. There will be new storms, new questions, and new norms to build. But the difference now is confidence. A team that's reached performing knows how to talk through the hard parts, adapt together, and move forward with intention. That's what real performance looks like.

Bringing It All Together

Working with AI isn't a one-time rollout. It's an ongoing relationship. Each new tool, update, or shift in your work will take your team through these stages again: forming, storming, norming, and performing. That cycle isn't a setback; it's how growth happens.

The goal isn't to avoid conflict or move faster. It's to stay connected, curious, and clear as you adapt together. Teams that succeed with AI don't just manage change; they talk about it. They experiment, reflect, and refine.

If your team can keep having those honest conversations about roles, trust, and what "good" looks like, you'll keep finding your way back to performing. Not because things get easier, but because you've built the capacity to navigate whatever comes next, together. Every new AI tool is another teammate to get to know. And every conversation you have about how to work with it keeps your team strong.

Want Help Putting This Into Practice?

DLCC offers customized support for leadership teams navigating AI integration and culture shifts. Whether it's a team retreat, a **Team Dynamics Snapshot**, or team coaching we can help your team align — and thrive.

Book a 15-minute strategy call with our team

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Mistakes to Avoid When Introducing AI to Your Team

A Human-Centered Guide for HR Leaders Navigating the Future of Work

By Darcy Luoma Coaching & Consulting
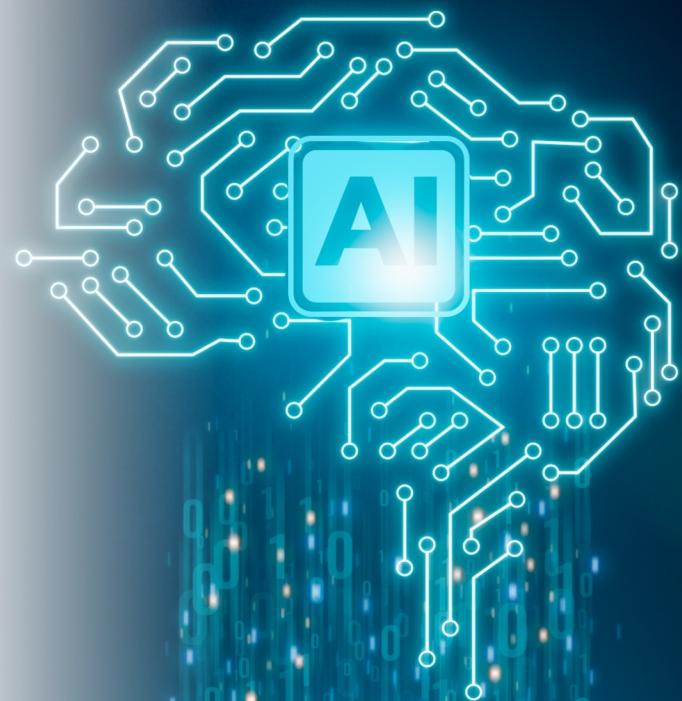
Introduction

Bringing AI into your organization isn't just a tech decision. It's a **people decision.**

And while most teams focus on the tools, what often derails progress is the lack of clarity, communication, and trust. We've worked with hundreds of leaders navigating change, and one thing is clear: **your culture will make or break your AI adoption.**

This guide shares the 5 most common (and avoidable) mistakes organizations make when rolling out AI and how to lead your team through the shift thoughtfully and effectively.

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❌ Mistake #1: Throwing AI Into the Workflow With No Context

Why it's a problem:
Suddenly introducing AI into meetings, messaging, or task management, without any real explanation, creates confusion and suspicion. People don't know what's happening or why.

What to do instead:
Treat AI like a new team member. Onboard it. Introduce it. Clarify how it will help and what it won't replace. Communicate early, and often.

"We're exploring AI to help draft content and summarize meetings. Not to replace roles or eliminate decision-making."

❌ Mistake #2: Focusing on the Tool, Not the Team

Why it's a problem:
AI rollouts often get stuck in the weeds of functionality. But the biggest barrier to adoption isn't capability, *it's comfort, trust, and team dynamics.*

What to do instead:
Lead with empathy. Make space for emotions, questions, and pushback. Ask your team what support they need to feel confident using new tools.

"What are you excited about? What concerns you? What would help build trust in these tools?"

Mistake #3: Assuming Everyone Is Using AI the Same Way

Why it's a problem:
Without shared norms, people start experimenting on their own. That's fine. Until it leads to inconsistency in quality, tone, or data handling.

What to do instead:
Set AI norms like you would for any team process. Define what tools are approved, when human review is needed, and where AI use should be disclosed.

"All AI-generated drafts should be reviewed by a team member before sending externally."

Mistake #4: Skipping the "Storming" Phase

Why it's a problem:
Leaders often expect a smooth rollout but tension is natural. Skipping over the discomfort means unresolved resistance festers or goes underground.

What to do instead:
Name the friction. Expect the mess. Encourage honest conversations about what's confusing, frustrating, or unclear and make adjustments.

"It's okay that we're not all aligned yet. That's part of the process."

![Darcy Luoma logo — CREATING HIGH PERFORMING PEOPLE + TEAMS]

# ❌ Mistake #5: Not Connecting AI Back to Purpose and Values

Why it's a problem:
When AI feels like a detached experiment, or a leadership mandate with no grounding, it can feel disconnected from the mission.

What to do instead:
Reconnect to your team's "why." Frame AI as a way to support your people, free up time for high-value work, and serve your mission more effectively.

"We're not here to adopt tech for tech's sake. We're here to serve people better with the help of the right tools."

AI is a Team Integration Challenge, Not a Software Update

✓ You don't need to be an AI expert.

✓ You don't need to master every new tool.

✓ But you *do* need to be thoughtful about how you lead your team through this shift.

✓ Want a step-by-step model to guide your AI integration?

Need help navigating this shift in your org?

DLCC offers:
- The Team Dynamics Snapshot
- Executive Coaching
- Team Coaching

Let's talk

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