

## Document review and approval with people + AI agents

**How to discuss, reconcile, approve, and publish a company document when your employees already work with AI**

Your people already draft with AI. Your review and approval process still assumes they do not. This guide closes that gap for one document at a time.

### Inside

1. **The pain you already see.** What changes in document work once employees use personal AI assistants, and the six quiet failures HR notices first.
2. **One managed flow.** Who does what from draft to official version, with two company AI agents, the Moderator and the Facilitator, keeping the shared process visible.
3. **How 8Hats Lab runs it with you.** A shared working room for people and AI agents, and a first cycle on one document you own.

**For:** CHROs, Heads of People, HR business partners, L&D and People Operations leaders

**Use with:** manager guidance, an HR policy, an onboarding module, a workforce plan, or any document HR owns

**Time to first result:** one document, one cycle, two weeks

**The one rule.** Personal AI assistants help each person prepare and challenge. Company AI agents coordinate the shared process. People approve.

# The document keeps changing. Nobody can say who changed it.

Nothing broke loudly. Your HR business partners got faster. Legal answered sooner. Managers stopped waiting for the FAQ. And somewhere in that speed, one question lost its answer: **which version is the company’s position, and who approved it?**

## One document you know: year-end review guidance for managers

|             | Today                                                                                                              | With a managed flow                                                                                             |
|-------------|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
| Drafting    | An HRBP drafts with a personal AI assistant. A second HRBP starts a parallel version.                              | One working version, held by a named document owner. Every contribution carries a name.                         |
| Discussion  | Legal comments by email. Compensation rewrites a section in chat. A manager’s AI-edited FAQ circulates on its own. | One place for claims, objections, and questions. Each one has an owner and a status.                            |
| Reconciling | Whoever has the file last merges what they remember.                                                               | Accepted and rejected changes are listed with reasons. Disagreements stay visible until a person resolves them. |
| Approval    | The CHRO approves a version that changes again the same afternoon.                                                 | A named decision owner approves one specific version. Approval is on the record.                                |
| Release     | Three files are called final. Managers use the one they received first.                                            | One official version, with a location, an audience, and a list of what it replaces.                             |

## Six quiet failures HR sees first

1. **Parallel drafts.** Two people improve the same document in private and neither is wrong.
2. **AI text with no accountable source.** A paragraph reads well, nobody remembers who added it, and no policy supports it.
3. **Disappearing comments.** Objections live in email, chat, and private AI threads, and none of them reach the working version.
4. **No named reviewer.** The claim about leave law is in the document. Nobody was asked to check it.
5. **Unclear approval.** “Looks good” in a thread became a release decision.
6. **A final that keeps changing.** The approved version and the used version are not the same file.

This is not a discipline problem. It is a design problem. Documents do not go wrong because people use AI. They go wrong because nothing holds the process: no shared place, no named roles, no gates.

# Three kinds of participants. One rule.

Draw the working system before you draw the flow. Every participant sits in one of three groups, and each group has a job the others do not take.

|  People |  Personal AI assistants   |  Company AI agents |
|------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| Decision owner · Document owner · Contributors · Reviewers and approvers                 | One per person. Chosen and directed by that person.                                                        | Two named roles: the <b>Moderator</b> and the <b>Facilitator</b> . Provided by the company.           |
| <b>Decide.</b> Set the decision, draft, challenge, review, approve, and release.         | <b>Help one person.</b> Research, draft, compare with sources, rehearse objections, summarize.             | <b>Run the shared process.</b> Keep the discussion legible and keep the work moving.                  |
| Accountable for every consequential claim and every decision.                            | Private to the person. Their work enters the process only when the person submits it under their own name. | On the record, visible to everyone in the process, always in a named role.                            |
| Approve their own area, never their own unchecked claim.                                 | Never speak for the person. Never enter the shared record on their own.                                    | Never decide. Never approve. Never grade a person.                                                    |

## The people roles

| Role                    | Holds                                                                                                             |
|-------------------------|-------------------------------------------------------------------------------------------------------------------|
| Decision owner          | The decision the document supports. Accepts, rejects, or returns unresolved items. Approves one specific version. |
| Document owner          | The single working version. Integrates accepted changes. Prevents a second “final.”                               |
| Contributors            | Evidence, context, analysis, draft language. Each contribution is named and sourced.                              |
| Reviewers and approvers | Named people who check the claims in their area, such as Legal, Compensation, or a business leader.               |

## The two company AI agents

| Moderator keeps the discussion legible                                          | Facilitator moves the work                                                          |
|---------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| Records claims, objections, questions, decisions, owners, and unresolved items. | Requests missing evidence. Routes each claim to the right reviewer.                 |
| Keeps one list of what was accepted, rejected, and left open, with reasons.     | Enforces review gates: nothing moves to approval without the required reviews.      |
| Records who approved which version, and when.                                   | Assembles the release candidate and the list of open items.                         |
| <b>Never decides.</b> Never ranks the arguments. Never scores a person.         | <b>Stops and escalates</b> when the authority to decide is missing. Never approves. |

**Keep them apart on purpose.** A personal AI assistant works for one person, in private. The Moderator and the Facilitator work for the process, in the open, under a named role. The first makes an individual sharper. The second makes the shared work legible.

# The flow, part one: frame, discuss, reconcile

Five steps take a document from a blank brief to an official version. Each step ends at a gate. A gate is a check by a named person, not a formality.

## Step 1. Frame and draft

Write the decision, the accepted sources, the roles, and the definition of done before anyone drafts.

| Who                            | Does what                                                                                                                         |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| People                         | The decision owner states the decision and names the reviewers. The document owner opens one working version. Contributors draft. |
| Personal AI assistants         | Help each contributor research, draft, and compare against accepted sources.                                                      |
| Moderator · company AI agent   | Opens the record: brief, roles, sources, and the definition of done, in one place.                                                |
| Facilitator · company AI agent | Checks the brief for missing pieces, such as an unnamed reviewer or an unstated decision, and asks before drafting starts.        |

**Gate:** the decision owner confirms the brief. Every contribution enters with a name and a source.

## Step 2. Discuss and challenge

Put the draft in front of the people who will have to defend it. Disagreement is the point of this step.

| Who                            | Does what                                                                                                                                   |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| People                         | Contributors and reviewers raise claims, objections, and questions against the working version.                                             |
| Personal AI assistants         | Help each person find weak claims, missing evidence, and counterarguments before they speak.                                                |
| Moderator · company AI agent   | Records each claim, objection, and question with its owner. Keeps the thread in one place.                                                  |
| Facilitator · company AI agent | Requests the evidence a claim lacks. Brings in the reviewer a claim needs. Redirects comments that arrive by email or chat into the record. |

**Gate:** every consequential claim has a named reviewer. No comment lives only in email, chat, or a private AI thread.

## Step 3. Reconcile comments and changes

Turn the discussion into one set of accepted changes and one visible list of what is still open.

| Who                            | Does what                                                                                                         |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------|
| People                         | The document owner integrates accepted changes. Contributors revise their own sections.                           |
| Personal AI assistants         | Help each person redraft their section and check it against the accepted sources.                                 |
| Moderator · company AI agent   | Maintains one list: accepted, rejected with reason, needs decision.                                               |
| Facilitator · company AI agent | Assembles the release candidate and attaches the open-items list. Holds the step if a required review is missing. |

**Gate:** every comment has a status. One release candidate exists. A disagreement may stay open. It may not stay ownerless.

# The flow, part two: approve, publish, learn

## Step 4. Review and approval

A named person approves a specific version. Nothing else counts as approval.

| Who                            | Does what                                                                                                                                                            |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| People                         | Reviewers approve their area against the release candidate. The decision owner accepts, rejects, or returns each open item, then approves one version.               |
| Personal AI assistants         | Help each reviewer read the whole candidate, not only their section, before they sign.                                                                               |
| Moderator · company AI agent   | Records each review, each resolution, the approved version, and who approved it.                                                                                     |
| Facilitator · company AI agent | Enforces the gate: no approval request goes out until every required review is in. Stops and escalates when the person asked to approve does not hold the authority. |

**Gate:** a named decision owner approved a specific version, on the record.

## Step 5. Publish and learn

Release one official version, retire the rest, and keep what the cycle taught you.

| Who                            | Does what                                                                                                       |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------|
| People                         | The document owner publishes the official version and retires earlier drafts. Managers use it.                  |
| Personal AI assistants         | Help managers work from the official version, not from a copy in a private thread.                              |
| Moderator · company AI agent   | Carries corrections, repeated questions, and changes to the review standard into the record for the next cycle. |
| Facilitator · company AI agent | Confirms the location, the audience, and the list of retired versions.                                          |

**Gate:** one official version. The next cycle starts from the record, not from someone's chat history.

## When the Facilitator stops

The Facilitator does not decide. It stops the flow and hands the question to the person who can.

| Situation                                                             | Facilitator does                                                   | Who decides                                        |
|-----------------------------------------------------------------------|--------------------------------------------------------------------|----------------------------------------------------|
| A required reviewer has not answered                                  | Holds the step and asks again, with the deadline visible           | Decision owner                                     |
| A change touches pay, discipline, hiring, accommodation, or leave law | Routes to Legal or the accountable owner before the step continues | The accountable owner, under existing policy       |
| Approval is requested by someone without the authority                | Stops and escalates                                                | The named decision owner                           |
| A claim cites a source outside the accepted list                      | Asks for the source to be accepted or the claim to be changed      | Decision owner                                     |
| A new tool, data access, or policy change is needed                   | Stops. This is outside the document flow.                          | Technology, Security, Legal, or the business owner |

**What stays out of the process.** Private AI threads stay private. The shared record holds what people submit, not what they asked their assistant. Company process agents do not inspect private assistant histories. No AI agent scores an employee or makes an employment decision. People decide those, under the policies you already have.

# How 8Hats Lab runs this with you

The flow needs a place. Email and chat are where the comments got lost in the first place. We use [Agents Coworking](#): a persistent room where a team and its personal AI agents work from shared context without hiding who contributed or who decides.

## The guide, inside the room

| In this guide | In the room                                                                                                                                                                                                                                                         |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Roles         | Everyone in the room is a person or an AI agent, in a named role. Every message carries four facts: human or AI agent, whose, which session acted, and when.                                                                                                        |
| Artifacts     | One current brief and one working version. What an AI agent prepared and what a person approved are visibly different.                                                                                                                                              |
| Handoffs      | When a reviewer is offline, the Facilitator holds the gate or the decision owner reassigns it. A personal AI assistant may prepare a sourced provisional view only for its person to submit. No review or approval carries the person's name until they confirm it. |
| Review gates  | Scope, money, and commitments never move without a human. Decisions still wait for a person.                                                                                                                                                                        |
| Decisions     | Made by a named person, in the room, on the record.                                                                                                                                                                                                                 |

## The Moderator and the Facilitator in your room

They are company AI agents configured for your first document. 8Hats Lab sets them up with your document owner and runs them with you through the first cycle. They keep the record and move the work. They never take a seat that belongs to a person.

## Three steps, one document

1. **A 20-minute working session.** Bring one document HR owns. We map who contributes, where AI agents help, who reviews, who decides, and where the first gate goes. You keep the map either way.
2. **Set up the room for that document.** The brief, the roles, the accepted sources, the reviewers, and the two company AI agents, named and visible.
3. **Run the first cycle with you.** Two weeks. Your team, your document, the flow in this guide. You leave with an approved official version—or a release candidate with named unresolved items—plus the record of how it got there and a readout on where the process held and where it did not.

**Fit.** If it is not a fit, we say so on the call. If your people have never worked with an AI agent, that part is ours. Nothing here assumes you already run AI agents.

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# Start with one document

Choose one document that creates repeated questions, parallel drafts, or a late executive argument. Then work down this list. Every unchecked box is a management question you found before it became a document failure.

- ☐ The document is named. So is the decision it supports.
- ☐ One person is the decision owner.
- ☐ One person is the document owner and holds the only working version.
- ☐ The accepted sources are listed. Anything else needs a reason.
- ☐ Every reviewer is named by area, not by who happens to be available.
- ☐ Every contribution enters with a name, whether a person or their personal AI assistant helped write it.
- ☐ Comments, objections, and decisions live in one record, not in email, chat, or private AI threads.
- ☐ Every comment ends with a status: accepted, rejected with reason, or needs decision.
- ☐ Approval names a person and a specific version.
- ☐ One official version is published, and the drafts it replaces are retired.

## What you have at the end

**A map.** Who contributes, who reviews, who decides, and where the gates are.

**A record.** Every claim, objection, and decision, with an owner.

**An official version.** One document the company can stand behind, and the next cycle starting from it.

Personal AI assistants help each person prepare and challenge. Company AI agents coordinate the shared process. **People approve.**

Ready to test one document?

Book a 20-minute working session: <https://calendar.app.google/2Nn9ui6bcnK7xWyz5>

Prefer to write first? [di@8hats.ai](mailto:di@8hats.ai)

HR page and updated resources:

<https://new.8hats.ai/for-hr-leaders>