C-TEN Executive Summary
Meeting Title: 2026 CHRO Fall Retreat
Meeting Date: September 2026

Overview

C-TEN members gathered in person in Atlanta for a networking dinner, full morning of sessions, connecting with attendees of CHRO Forum South, and then stayed on as VIP guests for the Forum's afternoon program. The speakers came at it from different angles: character and culture, employees empowered by AI, legal exposure, and the CHRO role under private equity ownership. Across all of it, the same message kept surfacing. As technology takes over more of the information work, **human judgment, trust, and intentional governance are what set HR leaders apart.**

Key Insights

1. Cultivating Excellence in the AI Era: Dr. Paul J. Voss, Georgia State University & Ethikos

- Excellence has two parts: *what* we do (résumé virtues like skills, credentials, and results) and *how* we do it (eulogy virtues like honesty, integrity, kindness, and humility). Reputation has to be earned. It can't be bought, borrowed, or faked.
- People buy from, and work for, people they know, like, and trust.
- Leaders create an *experience*, not just an outcome. Dr. Voss challenged members to identify their signature gesture, the small differentiator that turns a "yellow cab" into an "Uber."
- "Cognitive outsourcing" carries a real risk. Handing off thinking, writing, creativity, and even relationships to technology can dehumanize. Culture, storytelling, and leadership are how organizations re-humanize.
- Using the peppered moth as a metaphor, he argued that adaptation is continuous, and that inertia is what weakens careers and organizations.
- Members reflected on their own résumé and eulogy virtues, and on what they want to add in 2026-27.

2. Group Discussion: How AI Is Impacting Employee Behaviors: Michael Stephens, CHRO, Alston & Bird LLP

- Organizations no longer control the flow of workplace information. Employees now have on-demand access to legal guidance, HR expertise, benchmarking, and drafting help.
- Employees arrive better informed, and often already decided. AI-assisted rebuttals, leave analyses, and accommodation requests are showing up quickly and read more like legal documents.
- Speed expectations have shifted. Delays are increasingly read as obstruction rather than process, and managers who can't explain decisions are being challenged.
- HR's mandate is shifting, not shrinking: from gatekeeper to interpreter, adding organizational context, telling informed advocacy apart from real legal exposure, and preparing leaders for employees who have done their homework.
- Questions put to the room: How has your HR team's prep for employee meetings changed? Are managers ready? What does this change about how HR measures its own effectiveness?

3. Game On: Leveraging Gamification to Engage a Frontline Workforce: Dipankar Bandyopadhyay, CHRO, Unifi Aviation

- Originally on the CHRO Forum South program, this session was brought to C-TEN members after the two events were combined for the morning.
- Dipankar walked through Unifi's innovator and successful engagement app for their disparate frontline workforce who often don't have access to computers.

4. Investigations and Privilege in the Age of AI & Modern Communication Platforms: Terri Stewart, Regional Managing Partner, Fisher Phillips

- Everyday tools, including generative AI and collaboration platforms like Teams and Slack, can quietly erode privilege protections without anyone noticing.
- Two federal district courts reached different answers on February 10, 2026. *U.S. v. Heppner* (S.D.N.Y.) found no privilege or work-product protection for a defendant's use of a consumer AI tool. *Warner v. Gilbarco* (E.D. Mich.) treated AI as a tool and protected work product. No appellate court has ruled, so her prudent approach is to treat AI as a third party until the law settles.
- The consumer vs. enterprise line matters. Enterprise tools with negotiated confidentiality terms offer a stronger, though still untested, argument. Protected use also depends on attorney direction and a documented legal purpose.
- Collaboration platforms bring their own risks. Courts won't grant blanket "channel privilege," legal-hold coverage can be fragmented, and AI transcription can quietly create discoverable records of privileged conversations. Her recommendation: default AI transcription to off.
- Employees are the biggest risk vector, often because they don't know what destroys privilege. Training needs to be practical, scenario-based, and recurring.
- The 2025 federal rules amendments make privilege a "Day 1" issue in litigation planning.

5. The Realities of Leading HR in Private Equity-Backed Organizations: Shelton Guinn, Partner, L. Maxwell

- Post-acquisition, the job resets almost overnight. A new thesis and a new operating partner change what "good" looks like and how fast decisions are expected.
- The strongest CHROs run their own diligence. They learn the sponsor's thesis and hold horizon early and rebuild their priorities around the value-creation levers.
- The hundred-day plan often stops matching the business well before the hold ends, and the mandate moves from basics to value creation, often without the shared services CHROs relied on before the deal.
- Every decision runs against the sponsor's clock. Talent strategy must build lasting capability while the hold rewards speed. Guinn urged CHROs to scope the role with real authority and earn the trust to be handed real territory before the next ownership change.

6. AI and Workforce Pressure Require Balance

- Members discussed increasing pressure to control hiring and workforce costs based on expectations surrounding AI and technology.
- The conversation raised concerns about organizations over-indexing on technology and financial efficiency while underinvesting in workforce capability, leadership capacity, culture, and productivity.
- Both aggressive technology investment without workforce preparation and a "wait and see" approach can create risk.
- The key question is not simply how to adopt AI, but **how technology changes the capabilities, roles, behaviors, and human capital investments required to execute the strategy.**

7. Change Management and Organizational Readiness Are Critical

- Human capital investments cannot succeed without leadership commitment, stakeholder readiness, clear communication, and an understanding of why change is occurring.

- Members noted that change can produce a “freeze” response as employees focus on protecting their roles rather than adapting to new expectations.
- Organizational readiness should therefore be assessed before major workforce, technology, or transformation initiatives move forward.

Cross-Cutting Themes From the Retreat

1. **Informed employees change the HR conversation.** Preparation, manager readiness, and credibility all matter more.
2. **Governance before tools.** Clear policy, approved platforms, and training keep AI from becoming a hidden risk.
3. **Speed and durability pull in opposite directions.** Both the AI-speed expectations Stephens described and the sponsor's clock Guinn described make CHRO judgment the differentiator.
4. **Human skills are the constant.** Trust, storytelling, and the "how" of leadership matter more, not less, as technology takes on more of the "what."

Solutions & Best Practices Highlighted

Get AI Governance in Place

- Name prohibited consumer AI tools and define approved enterprise ones.
- Route legal-related AI use through counsel, and document the purpose.
- Turn AI transcription off by default for privileged conversations, and separate legal channels from general business channels.

Prepare HR and Managers for the New Dynamic

- Update how HR prepares for employee meetings, including PIPs, leave, accommodations, and complaints.
- Equip managers to explain decisions clearly to employees who have consulted AI first.
- Rethink how HR measures its own effectiveness.

Lead with Intention

- Define your "eulogy virtues" alongside your résumé, and decide what to add in the year ahead.
- Identify your signature experience as a leader.
- In PE-backed environments, learn the thesis early and rebuild priorities around what the sponsor is underwriting.

CHRO Forum South Afternoon Sessions

C-TEN members joined the Forum as VIP guests for afternoon sessions on turning learning content into coaching (Cornerstone), moving from employee surveys to workforce intelligence (HSD Metrics), identifying talent risk before it becomes a business problem (Orion Talent), using AI and workforce data for high-stakes decisions (Melissa Garza, CHRO, Powerfleet), and building internal mobility and skills-based workforce models (Shana Krumwiede, CHRO, ArchWell Health). The day closed with a networking reception.

Next Steps / Takeaways

- Review your organization's AI policy for named consumer-tool restrictions, approved enterprise tools, and attorney-directed use.
- Check the default settings on AI transcription and collaboration platforms.
- Refresh how HR and managers prepare for conversations with informed, AI-equipped employees.
- Take stock of your résumé and eulogy virtues, and choose what to build in 2026-27.
- If you lead HR in a PE-backed company, run your own diligence on the thesis and the clock.