

## **The Executive Research Association Policy for the Use of Generative AI in Research and Talent Acquisition**

### **1. Purpose**

This policy and guidance document has been created for the use of members and member organisations of the Executive Research Association. It may be adopted or referenced by ERA member firms in the absence of their own policy or as a guidance document for the use of generative artificial intelligence.

The purpose of this policy is to provide guidance on the use of generative AI in talent acquisition and candidate engagement processes. It aims to ensure that the use of AI is ethical, fair, transparent, and compliant with relevant laws and regulations.

This policy is provided as guidance from the ERA and is not intended to supersede policies or guidance issued by your employer, clients you provide a service to, or any regulatory body.

This document has been created at a point in time for the benefit of the ERA's members. Please refer to any legislation or regulation that may have been created or implemented after the creation of this document.

### **Limitation of Liability**

This policy is provided for informational purposes only and the Executive Research Association assumes no responsibility for any actions taken based on the information provided within this document. The Executive Research Association shall not be liable, in law or in equity, to you or any third party for any direct, indirect, incidental, lost profits, special, consequential, punitive, or exemplary damages including, but not limited to, damages for loss of profits, goodwill, use, data or other intangible losses resulting from guidance or content provided in this document.

### **2. Scope**

This policy applies to all Research, Talent Acquisition, Executive Search, and HR personnel involved in research, talent acquisition, and candidate engagement processes.

### **3. Example uses of generative AI in Research**

Generative AI has many applications within the field of Research, Talent Acquisition, and Executive Search. Some examples have been provided below:

- To support in the creation of target company lists, or to create profiles on companies or data tables on companies for use in understanding and reviewing the market.
- To support in the creation of attraction, marketing, or other promotional material including job advertisements. This may include text / copy as well as generated images.
- To expedite desk research, compiling lists or data that can be useful to a research strategy or go-to-market strategy for hiring.
- To summarise or make notes from meetings or calls.

## **4. Policy**

### **4.1 Ethical Use**

Generative AI must only be used ethically and will not be intentionally or knowingly used to discriminate against candidates based on race, gender, age, religion, disability, or any other protected characteristic. If evidence of accidental discrimination within an AI system is identified, use of the AI system should be immediately revoked.

Use of AI should include AI bias testing to comply with the Equality Act 2010.

It is best practice for researchers, talent acquisition, and HR professionals to communicate their stance on the use of generative AI to candidates and all other stakeholders involved in the recruiting process.

### **4.2 Transparency**

Candidates must be clearly informed whenever generative AI is being used in the recruitment process. Researchers, talent acquisition, and HR professionals operating on behalf of or as employees of a company or employer will clearly communicate where, when, how, and why AI is being used at every stage of the assessment or hiring process.

Use of generative AI will be communicated to clients of companies providing research, talent acquisition, executive search, or similar services. This includes the use of AI for interacting with candidates (E.g. chatbots), screening resumes, conducting interviews, or any other part of the research or recruitment process including all variations of assessment.

Use of generative AI will be clearly outlined within any proposal, scope of work, or contract.

Any use of generative AI throughout the process should be auditable and open to scrutiny from users, candidates, clients you are providing a service to, and approved 3<sup>rd</sup> parties including regulatory bodies such as the Information Commissioner's Office (ICO) in the UK.

### **4.3 Data Privacy**

Use of generative AI should respect the privacy of candidates. Personal data should only be used with the consent of the candidate and in accordance with data protection laws. Use of AI should be aligned with the General Data Protection Regulation, and valid consent should be obtained, or lawful basis should be provided prior to processing personal data in any context.

Where AI is used, companies should create and maintain an adequate Data Protection Impact Assessment (DPIA) with specific considerations and inclusion of AI to identify and minimise potential privacy risks associated with processing personal data using AI.

Candidate personal data, client data, as well as your own company data should not be shared with generative AI platforms or services that incorporate submitted data into the large language model or saves data that is inputted by users and makes it available or accessible to others. Client and

company data may only be used in generative AI platforms where company and client legal, compliance, and information security teams have granted approval, and only then is the use of data with lower categorisation of sensitivity able to be used in the approved generative AI platform for the approved use-case.

The ERA guidance is that candidate personal data should never be included or shared with generative AI platforms. For example, uploading candidate CVs into open-source generative AI platforms such as ChatGPT, Gemini, or CoPilot. This is because generative AI platforms may store and index candidate's personal data as part of their large-language model and candidate's sensitive data may be shared by generative AI.

The ERA advises that you should treat generative AI in the same way you would with any open website, for instance Wikipedia or Reddit. E.g. sharing a candidate's CV or confidential client information with a generative AI platform is equal to uploading that data to a publicly discoverable and accessible website or information repository. Some AI platforms will allow the user to opt-out, or will automatically exclude any provided data being used as part of the AI's training data and The ERA advises companies using such platforms to check the policy of each provider to fully understand this functionality.

#### **4.4 Accuracy**

Generative AI should be regularly tested and calibrated to ensure its accuracy. Any inaccuracies or biases in the AI should be promptly addressed.

Information provided by generative AI should be checked and the source should be reviewed and confirmed prior to use. Following the provision of data or information from a generative AI platform, the ERA advises using the prompt "Please quote and provide links to any sources of data or information" or similar to ensure transparency and the ability to check accuracy.

Cases of misleading, or false data being presented by generative AI platforms have been well documented.

As generative AI uses a combination of pre-existing data to answer queries or create content (E.g. Reddit, Wikipedia, books and other online publication), any generated content may replicate or even enhance misleading, false, or incorrect information existing in the source data.

Accidental creation of incorrect or misleading information that is presented as fact is referred to as "hallucination". Criminal actions, falsely attributed quotations, and news has been incorrectly attributed by generative AI to individuals and has been the subject of multiple ongoing court cases.

#### **4.5 Human Oversight**

Generative AI should not replace human decision-making in the recruitment process. Instead, it should be used as a tool to assist professionals in the conduct of their role. The ERA advocates for a "human-in-the-loop" approach to all use of generative AI in the hiring process. This approach includes a human actively participating in the development or operation of an AI or machine learning model, providing feedback, corrections or other forms of input to ensure AI does not operate without human oversight and involvement.

Prior to any content created by generative AI being sent to, shared with, or used to inform, support, or influence candidates or clients you are providing a service to, the content should be fully reviewed and approved for distribution by a human.

## **5. Employee Training**

The ERA advises that individuals involved in research, talent acquisition, and candidate engagement processes should receive training on generative AI and be provided with an adequate policy or guidance, such as this document.

Candidate use of generative AI to apply to roles, answer interview questions, complete assessments and tests, as well as in general communication is already prevalent in the recruitment industry and the ERA expects candidate use of AI to accelerate as the technology becomes more widely accessible. The ERA recommends that all members complete regular training to maintain awareness of the advances of generative AI.

## **6. Incident Response Protocol**

In the event of an incident involving or relating to AI systems, or systems that AI uses to access data (e.g. unauthorised use or data access), this should be immediately reported to the Data Protection Officer (DPO). Companies should follow best practice when responding to an incident, including:

- Containing the incident by suspending affected systems or processes
- Investigate the root cause and assess the impact and any associated risks
- Notify affected individuals and regulatory authorities as required
- Document the incident, steps taken in response, and any lessons learned
- Implement corrective measures to prevent recurrence

## **7. Document Information**

Please note that this is a general guidance and may need to be tailored according to your organization's specific needs and legal requirements.

This guidance document was initially created on 18/10/2023 and updated on 18/07/2025. Generative AI was used in the original creation of this document, with significant human-generated additions, revisions, corrections, and amendments along with a thorough human review.