



Suhas Bhairav

AI Employee Handbook FAQ Search Setup

A practical guide to deploying an internal policy FAQ chatbot from your PDF handbook.

A safe, explainable internal AI chatbot that answers handbook policies using source-based retrieval from the PDF.

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suhasbhairav.com

What to Automate & Review

Outline which handbook questions can be answered automatically and which require human review. Establish data needs, tools, and governance for safe operation.

Key move **Action: appoint a policy owner to oversee handbook alignment and bot behavior.**

PRACTICAL CHECKLIST

- 01** Automate: direct policy questions with explicit passages (PTO, holidays, pay dates) from the handbook.
- 02** Human review: keep interpretation, exceptions, and nuance for human checks.
- 03** Data/tools: PDF handbook, OCR if needed, vector store, QA model.
- 04** Versioning: track handbook updates and bot responses.
- 05** Guardrails: restrict to official policy passages; DISCLAIMERS for changes.
- 06** Quality gates: require a policy owner sign-off before deploying changes.

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Weekly Adoption Plan

Plan small, repeatable weekly steps to validate and improve the chatbot. Start with a limited policy scope and expand gradually.

Key move **Guardrails first: validate policy origin and data access before public use.**

PRACTICAL CHECKLIST

- 01** Week 1: Ingest handbook, configure access controls, and define privacy boundaries.
- 02** Week 2: Build intents for PTO, leaves, benefits; map to exact policy passages.
- 03** Week 3: Enable human-in-the-loop; create escalation and review queue.
- 04** Week 4: Run a limited HR pilot; capture feedback and adjust.
- 05** Week 5: Implement governance: versioning, change approvals, and update audits.
- 06** Week 6: Measure usage, accuracy, and user satisfaction; report findings.

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Governance, Metrics, & Ownership

Define owners, approvals, and metrics to measure chatbot health and policy integrity. Establish a simple escalation and update process.

Key move Always pair bot outputs with policy passages and clear disclaimers.

PRACTICAL CHECKLIST

- 01** Ownership: assign HR policy owner and bot custodian with roles and hand-offs.
- 02** Approvals: formal sign-off for handbook updates and bot responses.
- 03** Metrics: accuracy, escalation rate, uptime, and user satisfaction.
- 04** Safety: no PII handling, no legal advice, and clear disclaimers.
- 05** Updates: routine review schedule and version-controlled releases.
- 06** Pilot criteria: define milestones to scale from pilot to broader deployment.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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