HR DELIVERY
Making Sure HR Delivers

THE CLIENT BROCHURE SERIES

Your Client Documents

Keep your deliverables, versions and next steps together

Understand how HR Delivery prepares, reviews and shares your project documents, with clear client collection access, version references and human support for the administrative steps surrounding your service.

EXPLORE. PLAN. PUT IT TO WORK.

Website resources · specialist support · portal tools
Practical examples and client journeys

START WITH YOUR PRIORITY

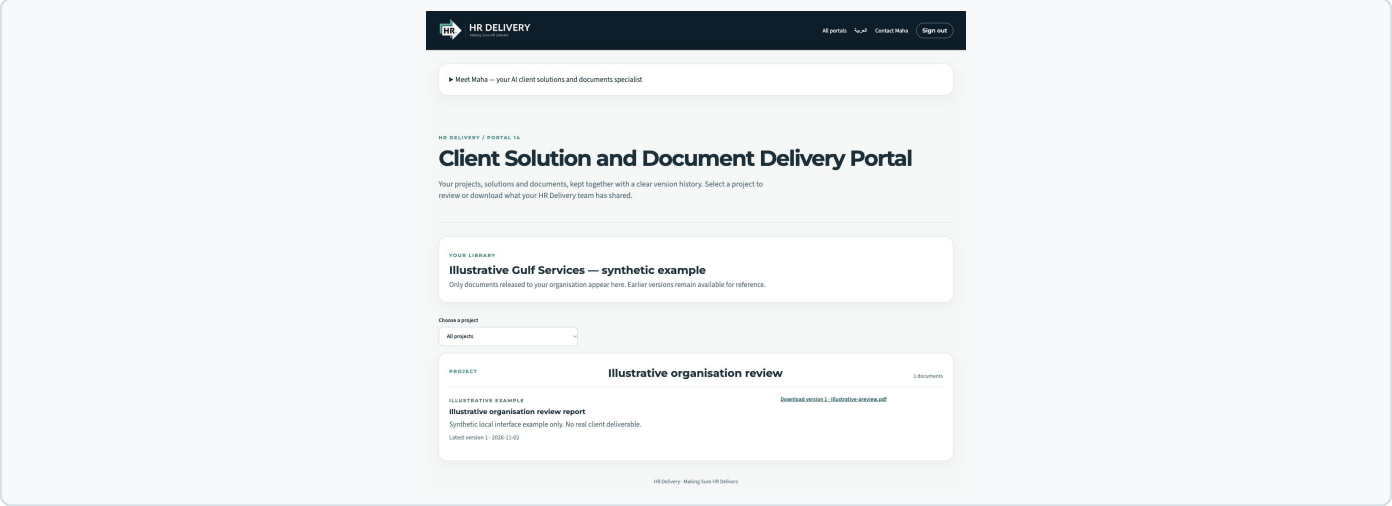
Find the right document and know what happens next

A useful handover gives you more than a file. It identifies the project, explains what has been delivered and makes the latest shared edition easy to recognise. Your client document collection brings released material together so the people receiving the work can return to the relevant project, review the document context and raise a focused follow-up question.

This brochure also explains the staff preparation and administration behind that experience. HR Delivery staff manage working documents, release decisions, commercial records and appointment coordination in their authorised workspaces. Clients use the separate access arrangements issued for their agreed service and document collection, with reception helping to clarify the next conversation, deliverable or handover.

WHO THIS GUIDE IS FOR

- Client sponsors receiving an HR Delivery assignment
- Project contacts coordinating review and handover
- Colleagues who need access to released project material



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

THE QUESTIONS TO BRING

- Which document and version should our team use?
- Who prepares, reviews and releases the deliverable?
- Which access details and support route apply to us?

WHAT YOU CAN WORK TOWARDS

- A clear route to your released project documents
- An understood version and handover process
- Agreed contacts, access and next steps

A GUIDE TO YOUR GUIDE

Find the support you need

Explore the service, understand the tools and arrive at a focused conversation with HR Delivery.

01 / GET TO KNOW THE SERVICE

Introduction 002

Foreword from Dr Phillip 004

Meet Lama: your first point of contact 005

About HR Delivery and our five pledges 006

02 / EXPLORE AND USE THE SERVICE

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03 / BRING IT INTO YOUR ORGANISATION

Two practical client journeys 074

Service arrangements and useful links 077

Your next conversation with HR Delivery 078

USE THE PDF AS A WORKING GUIDE

The contents and page-foot links are clickable. PDF bookmarks give direct access to every tool, studio, resource and client example.

A PERSPECTIVE ON CLIENT DOCUMENTS

Foreword from Dr Phillip Welsh

PROPOSED WORDING FOR DR PHILLIP'S REVIEW

"A clear handover helps your team find the right document, understand its purpose and take the next practical step."

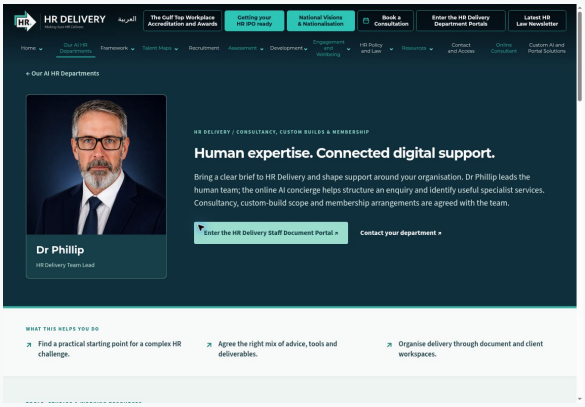
Good professional work should remain useful after the meeting ends. When we share a report, framework or implementation document, clients need to understand its purpose, locate the right edition and know which questions to raise next. A clear handover helps the people who were involved in the assignment explain the work to colleagues who are using it for the first time.

The client document collection is one part of that relationship. Behind the shared material sit preparation, review, project records and administrative coordination. These responsibilities should be clear: staff manage working files and release decisions, while clients receive access to the material shared for their project. Commercial documents, meeting records and progress updates help both sides maintain a common understanding of the work and its next stage.

My proposed invitation is straightforward: bring the project name, the document you need and the decision or action it will support. Tell us who will use the material and where further explanation would help. Through reception and the human team, we can clarify the relevant deliverables, access arrangements and follow-up conversation so that the handover supports practical use in your organisation.

DR PHILLIP WELSH

Human team lead, HR Delivery



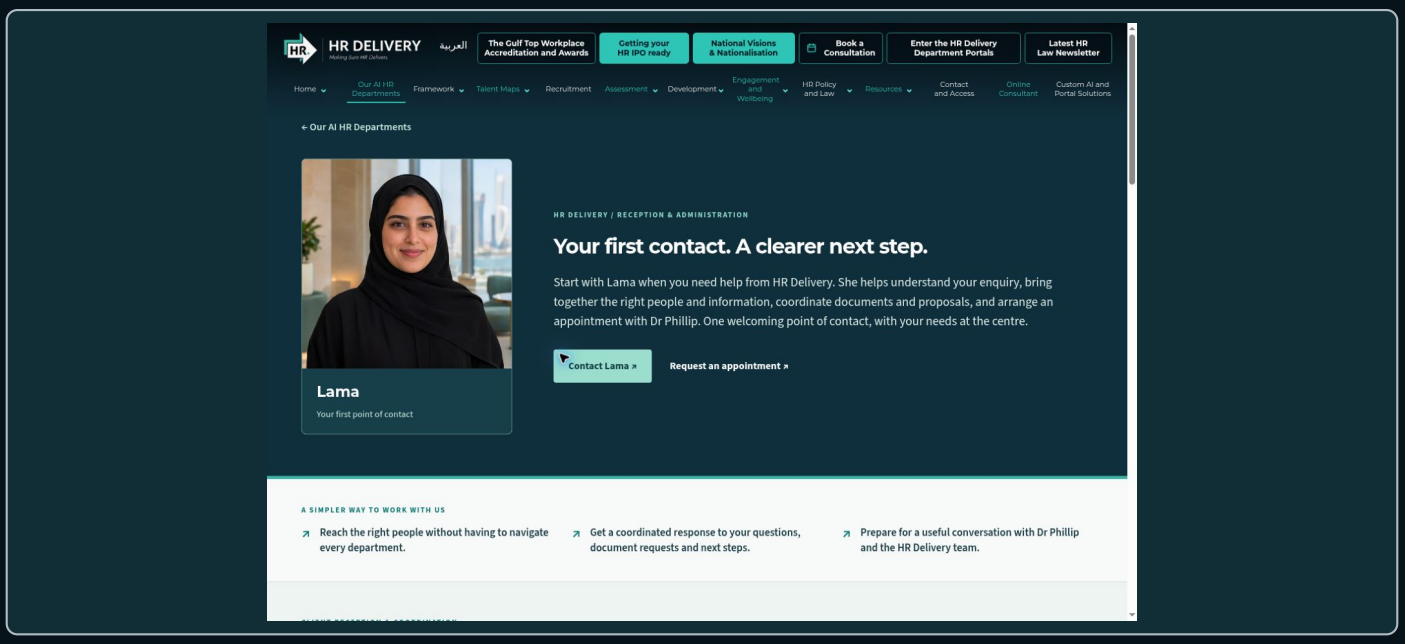
WEBSITE SCREEN / Dr Phillip Welsh: HR Delivery's human team lead.

YOUR FIRST POINT OF CONTACT

Meet Lama

Bring your business question. We will help you find the right next step.

Begin with Lama's reception route when you need a document, access guidance or a conversation about an existing project. Share the organisation and project name, the document or version involved and the help you need. Reception can organise a focused request for the human team and clarify whether the next step is information, a consultation or a document handover.



WEBSITE SCREEN / Lama's public reception and administration service route.

A USEFUL FIRST BRIEF

- Organisation and project name, plus your role in the assignment
- Document title, version or a description of the missing material
- The colleagues who need access and their intended use
- Your question, preferred contact route and relevant timing

HOW LAMA HELPS

- Route a document or access enquiry to the relevant team
- Prepare the context for an appointment or follow-up discussion
- Clarify the next agreed handover and who will receive it

Use the confirmed communication route for your request, and check any appointment time with reception. Automatic notifications and specialist channels depend on their current connection arrangements.

ABOUT HR DELIVERY

Expertise that turns people priorities into useful work

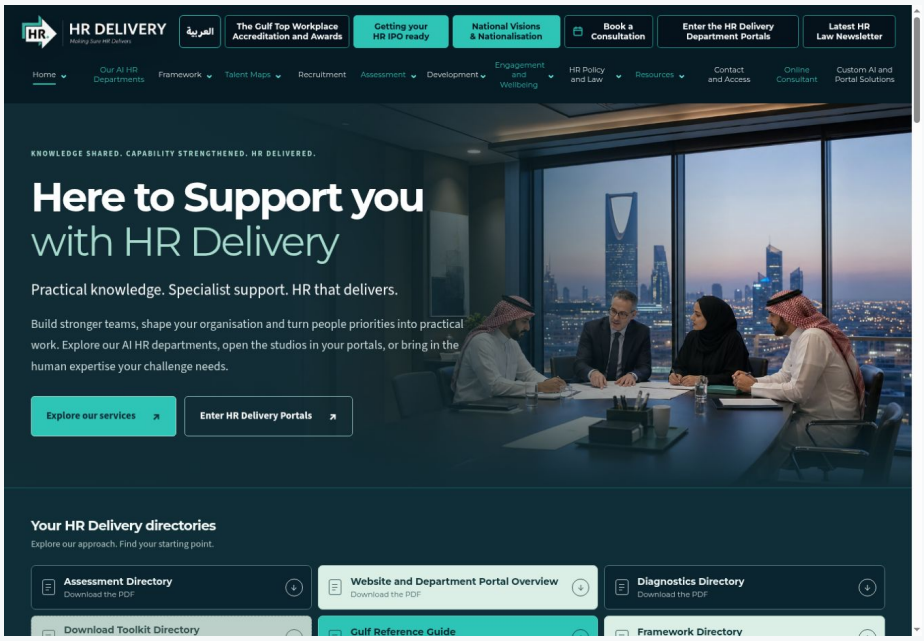
A multidisciplinary HR service led by Dr Phillip Welsh, connecting professional advice, practical resources and hands-on support.

OUR MISSION

Help organisations develop their people, strengthen HR capability and put plans into practice through expert advice, useful tools and direct delivery support.

OUR VISION

Organisations with the leadership, capability and culture to help people thrive and sustain their success.



WEBSITE SCREEN / HR Delivery: the public service directory and department routes.

THE WAY WE WORK

Your organisational context comes first. HR Delivery draws together psychometrics, organisation development, learning and development, project delivery and HR practice. Advice and resources are adapted to the assignment, its people and its operating environment.

OUR VALUES

Expertise · generosity · accountability · adaptability · respect for local context

OUR COMMITMENT TO YOU

Five pledges.
One working relationship.

What these commitments mean when you work with HR Delivery.

01 Deep expertise

Bring relevant professional knowledge to your question and combine evidence with considered judgement.

02 Always helping

Offer useful resources and a level of support that fits the challenge you are trying to resolve.

03 Delivery guaranteed

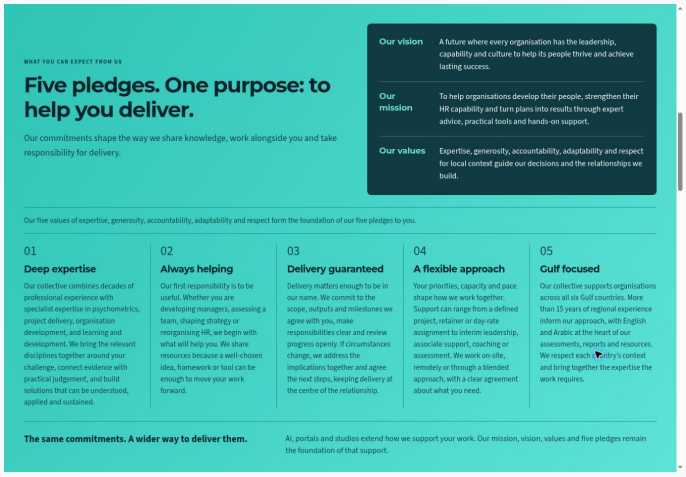
Agree the work, outputs, responsibilities and review points, with clear communication about progress.

04 A flexible approach

Shape the delivery arrangement around your requirements, whether advisory, project based, ongoing, remote or in person.

05 Gulf focused

Take account of the six Gulf countries, the local organisational context and the language needs of the assignment.



WHAT YOU CAN EXPECT FROM US

Five pledges. One purpose: to help you deliver.

Our commitments shape the way we share knowledge, work alongside you and take responsibility for delivery.

Our vision	A future where every organisation has the leadership, capability and culture to help its people thrive and achieve lasting success.
Our mission	To help organisations develop their people, strengthen their HR capability and turn plans into results through expert advice, practical tools and hands-on support.
Our values	Expertise, generosity, accountability, adaptability and respect for local context guide our decisions and the relationships we build.

Our five values of expertise, generosity, accountability, adaptability and respect form the foundation of our five pledges to you.

01	02	03	04	05
Deep expertise	**Always helping**	**Delivery guaranteed**	**A flexible approach**	**Gulf focused**
Our collective combines decades of professional experience with specialist expertise in psychometrics, project delivery, organisation development, and learning and development. We bring the relevant disciplines together around your challenge, connect evidence with practical judgement, and build solutions that can be understood, applied and sustained.	Our first responsibility is to be useful. Whether you are developing managers, assessing a team, shaping strategy or reorganising HR, we begin with what will help you. We share resources because a well-chosen idea, framework or tool can be enough to move your work forward.	Delivery matters enough to be in our name. We commit to the scope, outputs and milestones we agree with you, make responsibilities clear and review progress openly. If circumstances change, we address the implications together and agree the next steps, keeping delivery at the centre of the relationship.	Your priorities, capacity and pace shape how we work together. Support can range from a defined project, retainer or day-rate assignment to interim leadership, associate support, coaching or assessment. We work on-site, remotely or through a blended approach, with a clear agreement about what you need.	Our collective supports organisations across all six Gulf countries. More than 15 years of regional experience inform our approach, with English and Arabic at the heart of our assessments, reports and resources. We respect each country's context and bring together the expertise the work requires.

The same commitments. A wider way to deliver them. AI, portals and studios extend how we support your work. Our mission, vision, values and five pledges remain the foundation of that support.

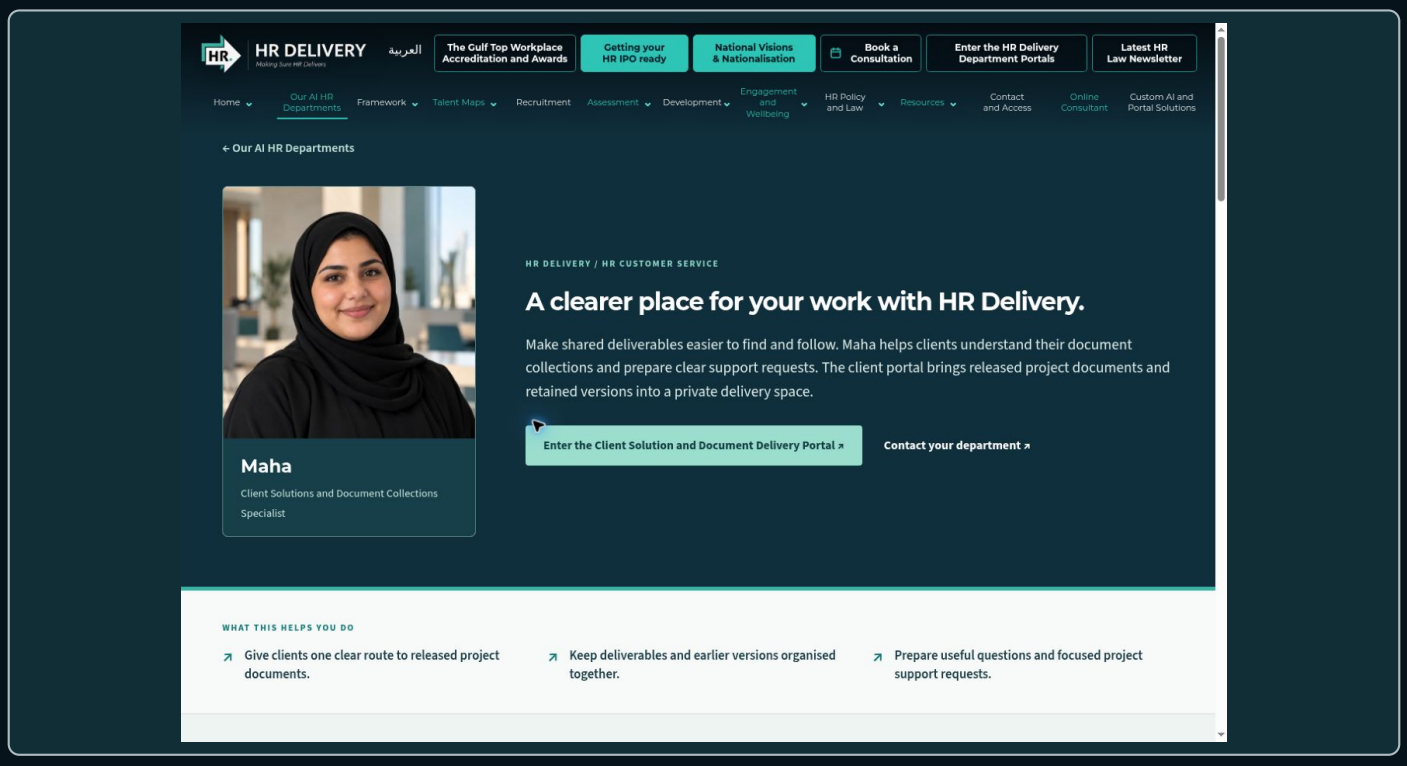
WEBSITE SCREEN / HR Delivery's published mission, vision, values and five pledges.

L / CLIENT DOCUMENTS

01

Explore the website resources

Find your deliverables, understand versions and access, and see how the team coordinates the work behind your service.

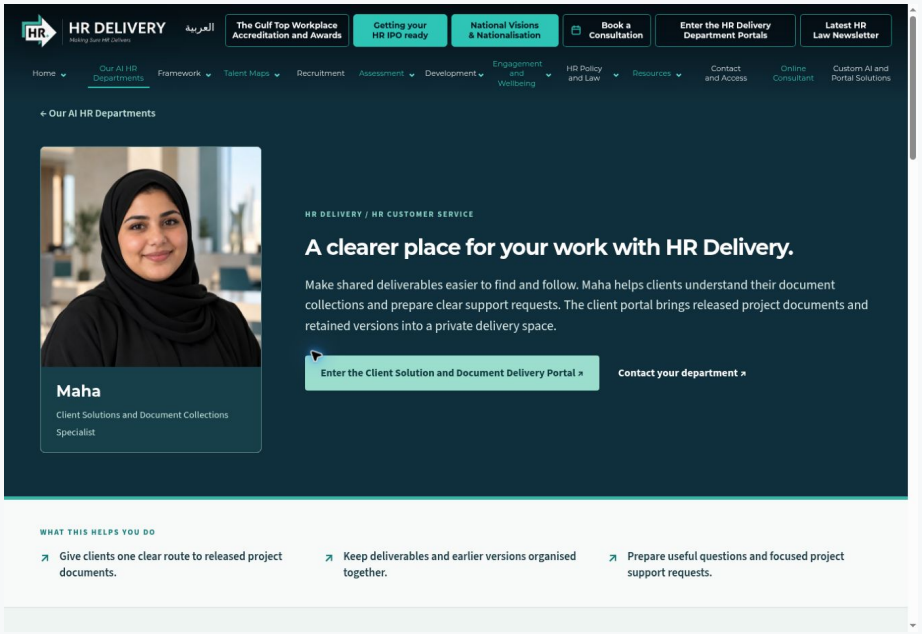


WEBSITE SCREEN / Maha department profile

WEBSITE / ORIENTATION

Understand the service before entering your collection

The public client-service information explains how project documents are prepared and shared, while Maha's profile helps you frame a question about a collection, document or version. Lama's reception route provides a starting point for enquiries and appointment requests. Use these pages to identify what you need and the context the team will require. Your private collection is reached separately using the client reference and access code issued for the handover.



WEBSITE SCREEN / Maha department profile

HOW TO EXPLORE

1. **Identify the material.** Name the project, document and intended use, or describe what you are trying to find.
2. **Choose the support route.** Use reception for an enquiry, appointment request or guidance about an agreed document collection.
3. **Confirm the next step.** Check the responsible contact, access route and any appointment arrangements with the human team.

ILLUSTRATIVE CLIENT USE

Illustrative example: a project sponsor needs the version of an organisation design report shared after a workshop. She identifies the project and workshop date, checks the collection guidance and sends reception a focused enquiry, helping the team locate the relevant release and explain the next step.

SPECIALIST SUPPORT

Meet Maha & Lama

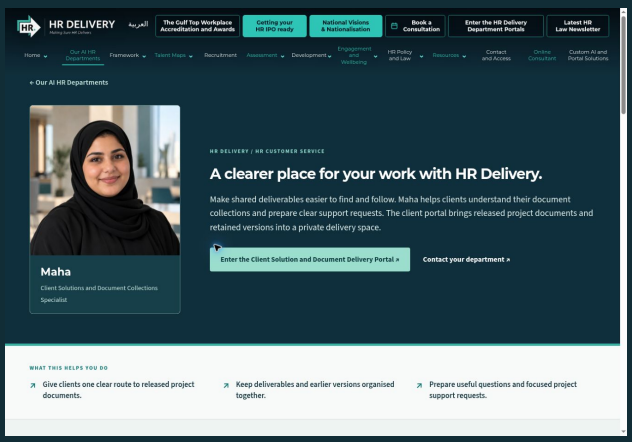
Use the specialist area to prepare a focused question and connect it with the service you need.

MAHA / FICTIONAL SPECIALIST PROFILE FOR CLIENT SOLUTIONS AND DOCUMENT COLLECTIONS

- Which project collection should contain the material we need?
- Which document title and version should we reference?
- What should we include in a focused handover or support enquiry?

LAMA / FIRST-CONTACT AND RECEPTION ROUTE FOR COORDINATED ENQUIRIES

- Who should receive our document or access question?
- What information will help prepare the next conversation?
- How should we request an appointment or agree a handover?



WEBSITE SCREEN / Maha department profile

ACCESS IN THREE STEPS

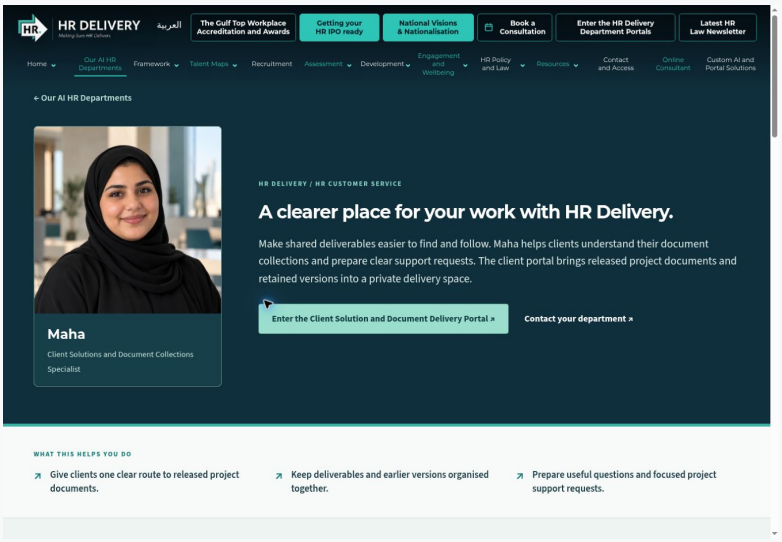
- Review the relevant public profile and identify your question.
- Provide the project, document and contact context through the confirmed reception route.
- Use the collection or service access details specifically issued for your organisation.

Maha's live AI connection remains pending. The human team confirms reception arrangements. Specialist service codes, shared department welcome access and private client collection credentials are separate; use only the route issued for your agreed service.

FIND THE RIGHT DELIVERY CONTEXT

Meet Maha - Client Solutions and Document Collections

Use Maha's public specialist area to frame a question about a project collection, shared document or handover so the human team can understand the support required.



WEBSITE SCREEN / Maha department profile

WHAT IT GIVES YOU

Maha is presented as a fictional specialist focused on client solutions and document collections. The profile helps clients identify the project, document and version involved, then prepare a focused support enquiry or handover checklist connected to the delivered material.

THE CLIENT VALUE

A focused enquiry makes it easier to explain what is needed and helps the team connect the question with the correct project and released material.

YOUR OUTPUTS

- Project and document support brief
- Relevant version reference
- Questions about delivery or next steps

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client cannot tell which report supports an upcoming workshop. Maha's public profile helps the client frame the enquiry around the project, report title and version. The question then goes through the confirmed human support route while live AI connection remains pending. What project, document and version will help the team understand your question?

SERVICE CONTEXT / Specialist profile available; live AI connection pending

SOURCE: HR.DELIVERY / DEPARTMENT HR CUSTOMER SERVICE

A FOCUSED BRIEF HELPS THE TEAM RESPOND

Bring the essentials for a useful first conversation

Prepare the organisation, challenge and intended outcome so the first conversation can focus on the support your organisation actually needs.

WHAT IT GIVES YOU

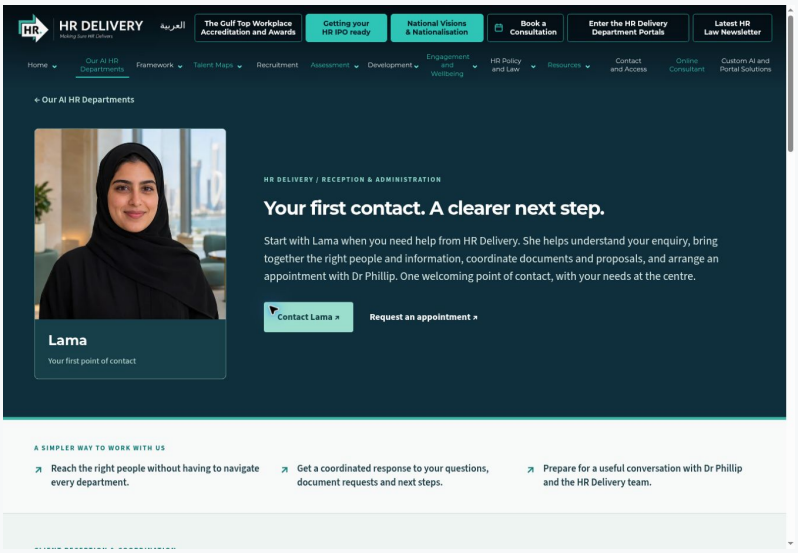
Bring the country, affected team, service question, existing documents and timing constraints. This gives reception and the human team a clearer basis for the next conversation.

YOUR OUTPUTS

- Organisation and country context
- A defined question and intended output
- Relevant documents and timing requirements

HOW TO USE IT

1. **Describe the context.** Identify the organisation, country and people or work affected by the question.
2. **State the outcome.** Explain the decision, document or improvement the organisation needs to achieve.
3. **Bring useful material.** Identify relevant documents, existing work and any practical timing constraints.



RELATED SERVICE VIEW / Lama - first point of contact department profile.

WHY THIS HELPS

A focused brief helps the team understand priorities and supports a more useful discussion about the evidence and assistance required.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: an HR manager requests support with a new employee handbook. She brings the country, workforce context, current document and intended review date. Reception can use this information to prepare a focused conversation with the human team about scope, priorities and the next step. Which existing document and intended outcome would make the first conversation useful?

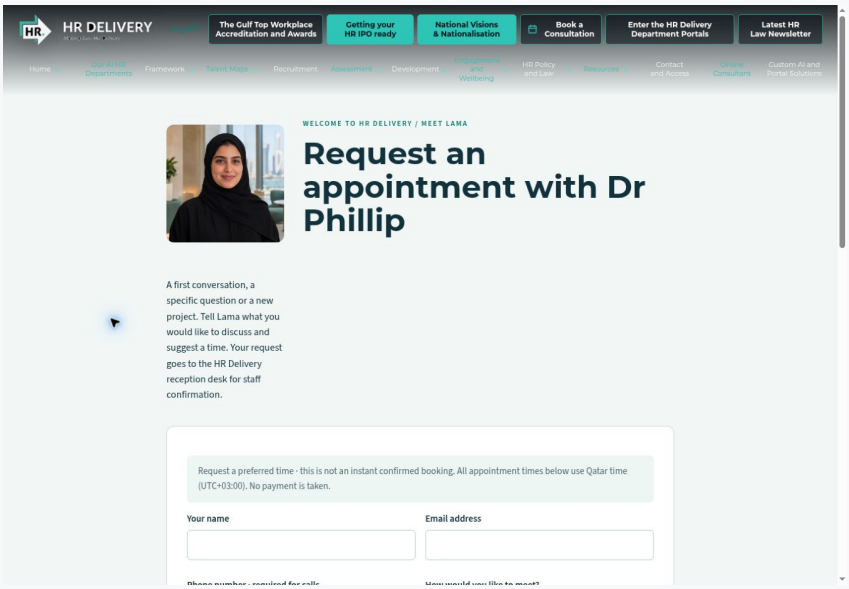
SERVICE CONTEXT / Information for a human-reviewed enquiry

SOURCE: HR.DELIVERY / DEPARTMENT RECEPTION ADMINISTRATION

KNOW WHAT THE NEXT STEP WILL BE

From enquiry to consultation and handover

Explain the need through the enquiry or appointment route, then confirm the next step with HR Delivery's human team.



RELATED SERVICE VIEW / Live appointment-request page with staff-confirmation notice and first contact fields.

WHAT IT GIVES YOU

Reception reviews the request. The agreed next step may be a consultation, detailed brief, proposal or document-collection guidance, depending on the support required and arrangements agreed.

YOUR OUTPUTS

- Enquiry or appointment request
- Confirmed next conversation or information needed
- Agreed service or document handover route

HOW TO USE IT

1. **Submit the request.** Use the relevant route and explain the purpose of the enquiry.
2. **Confirm the next step.** The human team reviews the request and confirms the appropriate arrangement.
3. **Prepare for the handover.** Agree the information, participants or documents needed for the next stage.

WHY THIS HELPS

An explicit next step helps clients know what to prepare and how the enquiry connects with the work that follows.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client enquiry begins with a request for a consultation and later becomes an agreed proposal and document handover. Reception coordinates the information required at each stage. The client confirms the appointment and delivery route with the team rather than assuming automatic notifications. What should happen after your enquiry: clarification, a consultation, a proposal or a handover?

SERVICE CONTEXT / Appointment requests require confirmation; delivery connections pending

SOURCE: HR.DELIVERY / BOOK DR PHILLIP

L · YOUR CLIENT EXPERIENCE

Start with Lama for a coordinated response

Lama's reception route helps you arrange information, documents, proposals and a conversation with the relevant HR Delivery team.

WHAT IT GIVES YOU

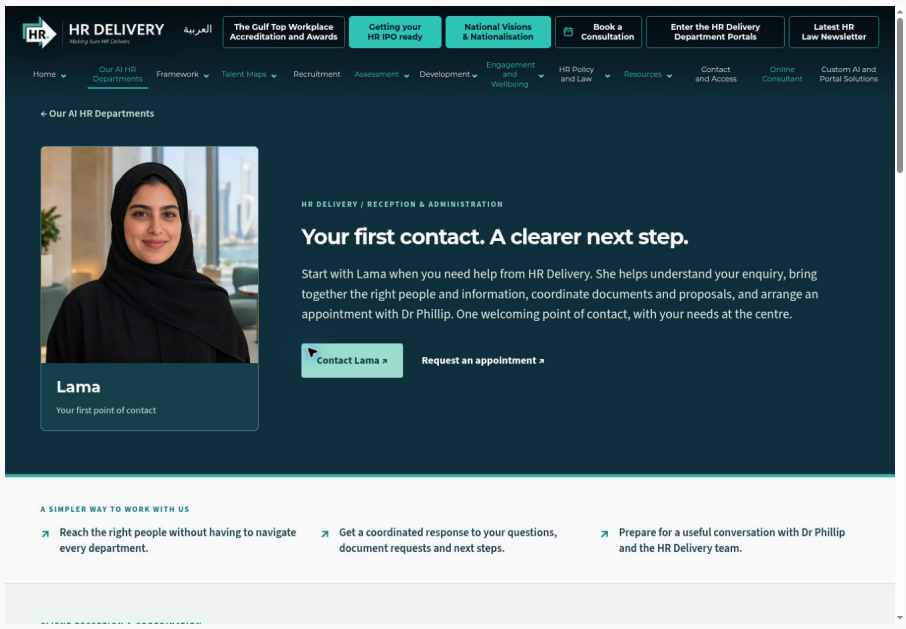
Explain what brings you to HR Delivery in English or Arabic. Reception organises the enquiry and identifies the required information or meeting; the human team confirms arrangements and the material that will be shared.

HOW TO USE IT

1. **Describe.** Share your organisation, need and preferred timing.
2. **Arrange.** Request the information, introduction or meeting that will help.

YOUR OUTPUTS

- A routed service enquiry
- An information or document request
- A proposed appointment



RELATED SERVICE VIEW / Lama - first point of contact department profile.

WHY THIS HELPS

You have a clear starting point and a coordinated route for the next step, including work that involves several departments.

IN YOUR ORGANISATION / ILLUSTRATIVE

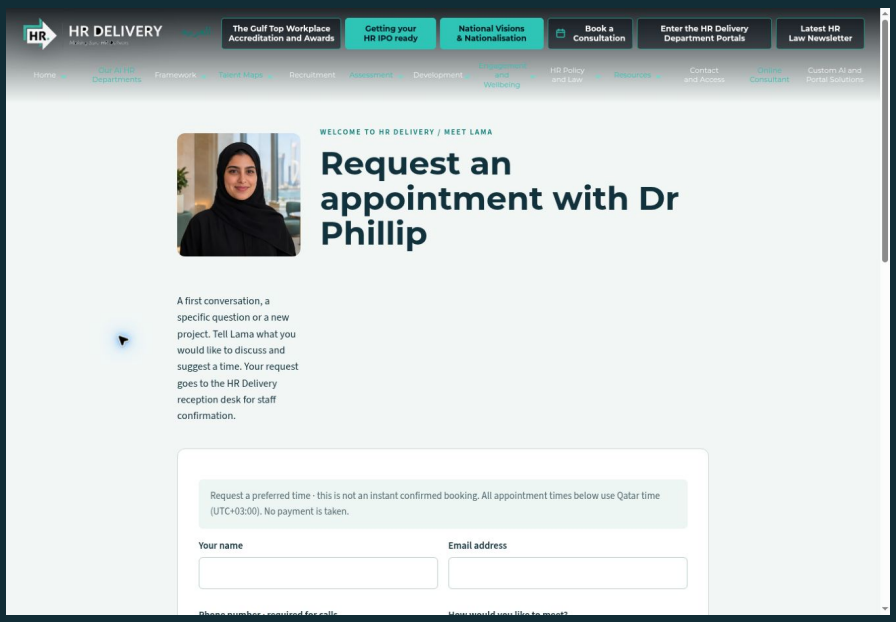
Illustrative example: a client needs both a proposal update and a discussion with Dr Phillip. The client provides one clear enquiry through Lama's reception route, describing the organisation, existing project and preferred next step so the human team can coordinate the response and meeting arrangements. Which linked information or meeting requests should reception understand together?

SOURCE: HR.DELIVERY / DEPARTMENT RECEPTION ADMINISTRATION

L · YOUR CLIENT EXPERIENCE

Request a conversation with Dr Phillip

Tell reception what you would like to discuss and propose a practical time and format for the conversation.



WEBSITE SCREEN / Live appointment-request page with staff-confirmation notice and first contact fields.

WHAT IT GIVES YOU

The public form collects contact details, purpose, preferred date, language and a 15-, 30- or 60-minute duration. Choose a call, online meeting or in-person appointment. Times are shown in Qatar time, UTC+03:00.

THE CLIENT VALUE

The team receives the information needed to prepare a relevant conversation and confirm the practical arrangements with you.

YOUR OUTPUTS

- Appointment request
- Meeting purpose and contact details
- Preferred timing and format

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client requests a consultation with Dr Phillip about a forthcoming project. The client gives the purpose, contact details and preferred meeting arrangements, then waits for staff confirmation. The request starts coordination; automatic confirmation emails and external calendar invitations remain separate connection dependencies. What purpose and preparation information should accompany your appointment request?

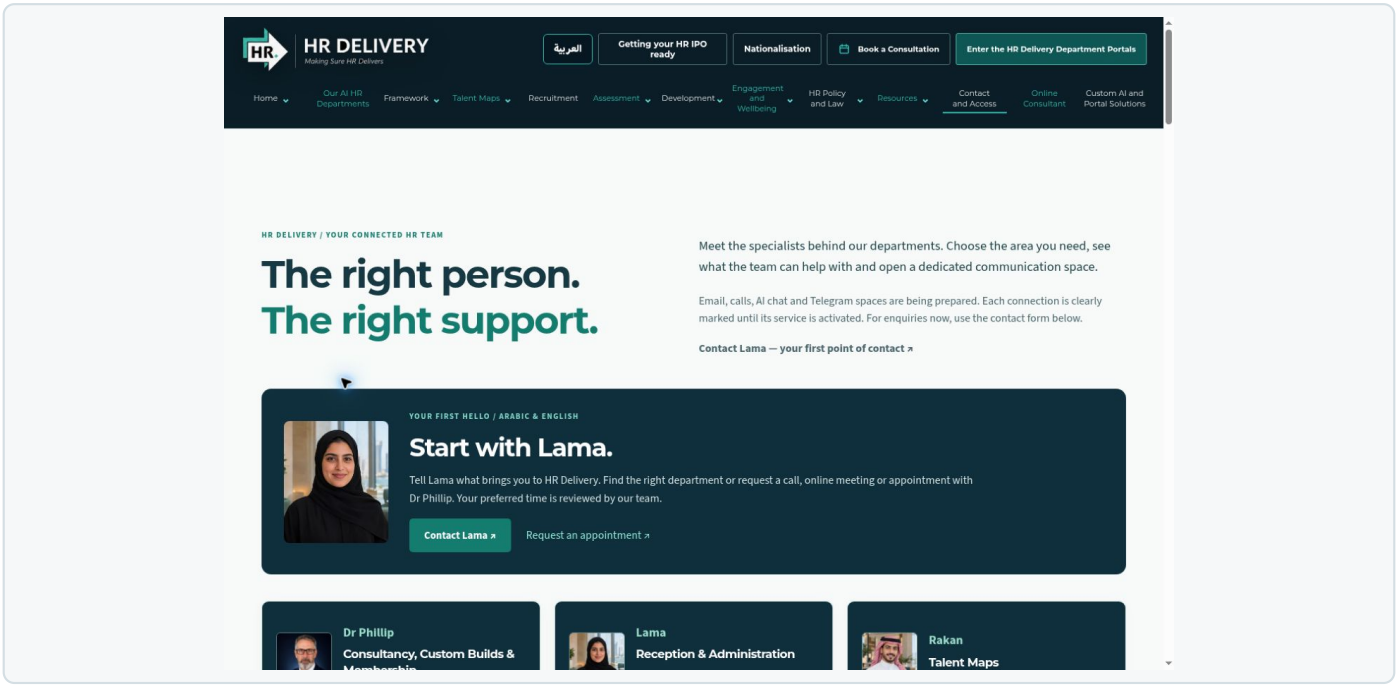
SERVICE CONTEXT / Requests require staff confirmation; automatic email and external-calendar delivery await connection.

SOURCE: HR.DELIVERY / BOOK DR PHILLIP

L · YOUR CLIENT EXPERIENCE

Your next step with HR Delivery

Bring your priority, intended outcome and timing to the team, then agree the service, documents and access that will support it.



RELATED SERVICE VIEW / Contact, consultation and portal-access routes

WHAT IT GIVES YOU

Use the contact pages to choose a department or begin with Lama. Reception can coordinate enquiries, proposals, documents and an appointment request with Dr Phillip. Once the scope is agreed, use the portal directory or your separate client collection handover.

THE CLIENT VALUE

Your organisation can move from exploring the guide to a practical assignment, with responsibilities and next steps understood.

YOUR OUTPUTS

- A focused conversation
- An agreed service and deliverables
- The correct access route

IN YOUR ORGANISATION / ILLUSTRATIVE

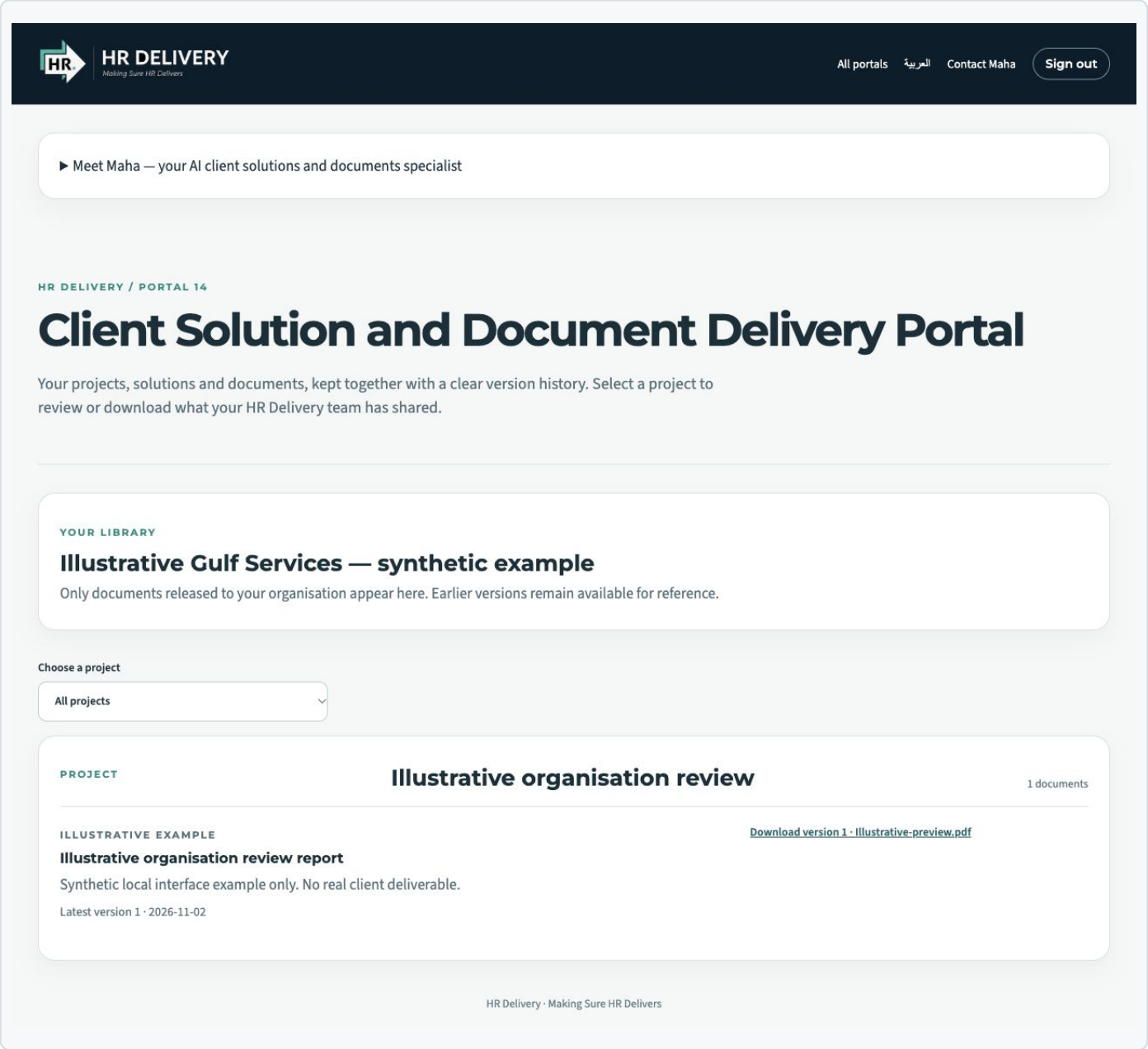
Illustrative example: a client has a clear HR priority but is unsure which department to approach. The client describes the intended outcome and timing through reception, then agrees a consultation or more detailed brief with the human team before receiving the relevant service and document access instructions. What priority, intended outcome and timing should guide your next conversation with HR Delivery?

SOURCE: HR.DELIVERY / CONTACT

THE SERVICE ON SCREEN

Meet Maha - Client Solutions and Document Collections / screen view

A complete captured view of the related resource, with its original proportions preserved.

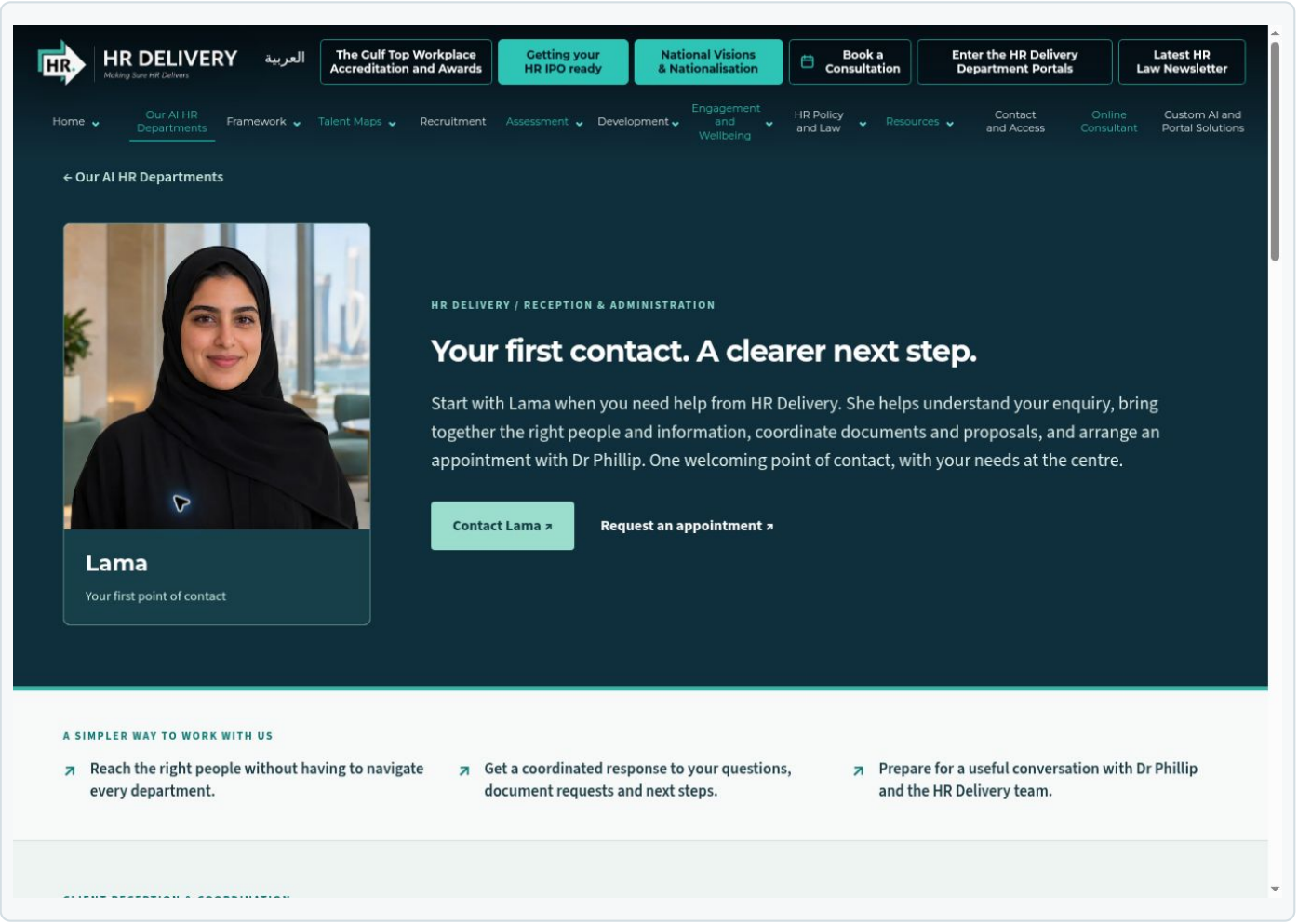


PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

THE SERVICE ON SCREEN

From enquiry to consultation and handover / screen view

A complete captured view of the related resource, with its original proportions preserved.



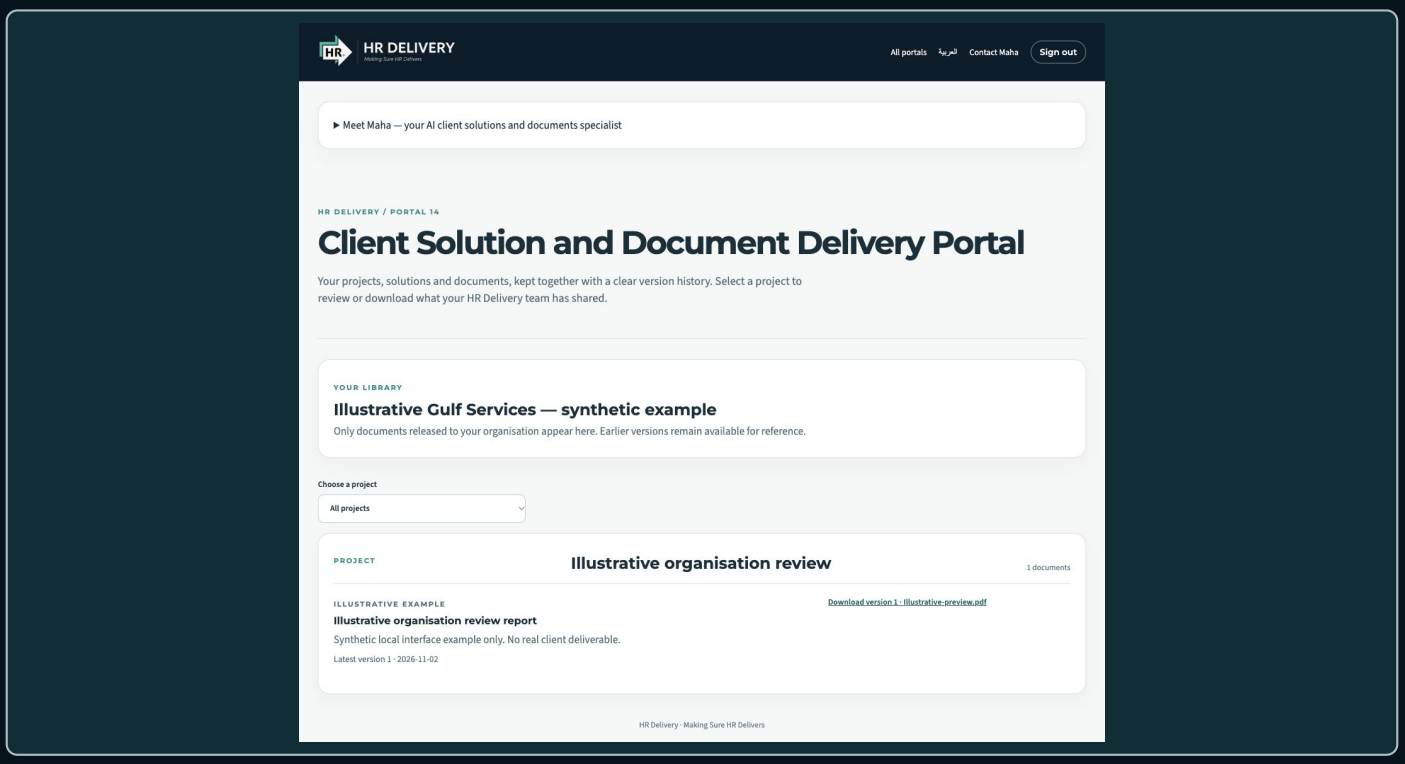
RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

L / CLIENT DOCUMENTS

02

Put the portal to work

Understand the tools, studios, records and handovers that support your agreed service.



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

PORTAL / THE WORKING SEQUENCE

Your collection contains the material released for your project

Enter the client collection using your client reference and separate access code after the welcome stage. Choose the relevant project and review document titles, notes and available versions. The latest shared deliverable and retained earlier releases support an informed handover. HR Delivery staff prepare working material, manage versions and decide which reviewed files appear in the collection through separate authorised administration. If something is missing or unclear, identify the project and document when asking the team for guidance.

01

Receive your handover

Confirm the collection reference, access details, intended recipients and project material being shared.

02

Locate the project

Select the relevant project and use document titles and notes to identify the deliverable.

03

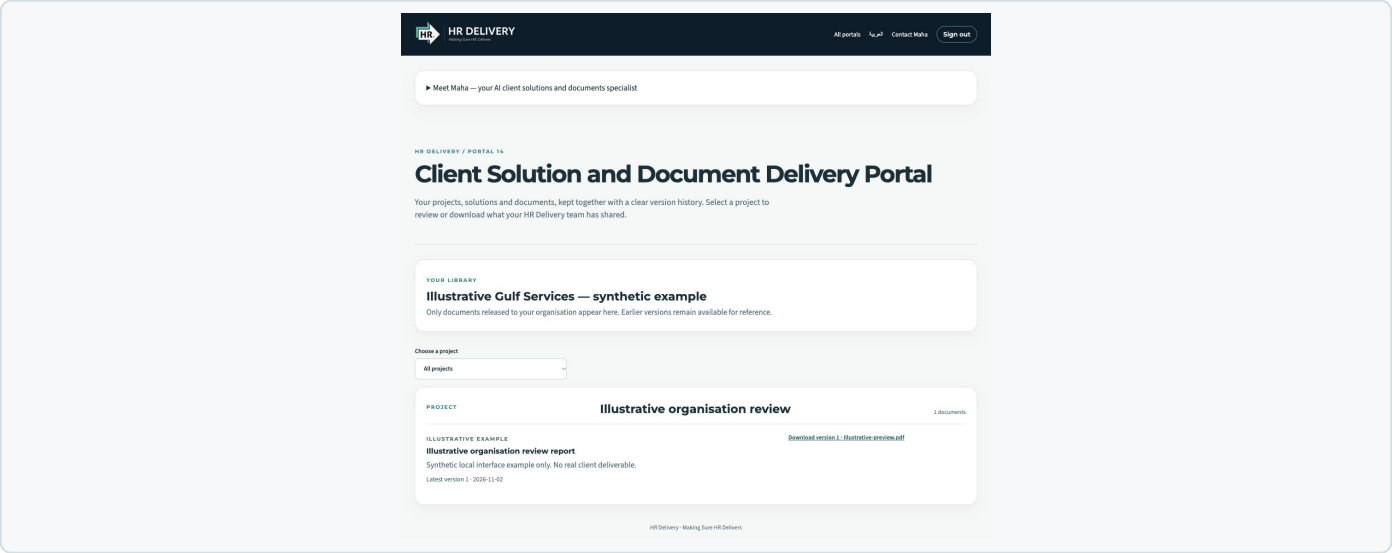
Check the version

Review the latest release and earlier shared editions where available before using the material.

04

Ask a focused question

Reference the project, document and edition when requesting clarification or a further handover.



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

BRING TO THE WORKSPACE

- Issued client reference and separate collection access code
- The project and document title you expect to receive
- The intended audience and practical use of the document
- Any question about a version, release or next action

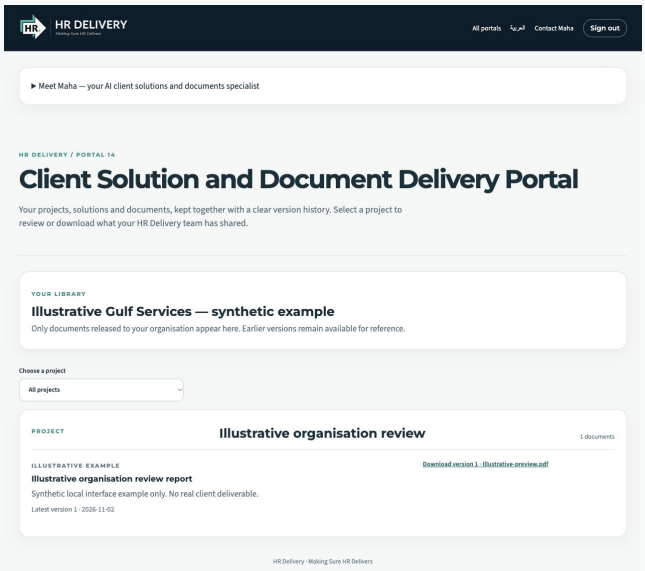
WORK TOWARDS THESE OUTPUTS

- Access to the released project document library
- A clearly identified shared edition
- Downloads of available client deliverables
- A focused follow-up request where clarification is needed

L · YOUR CLIENT EXPERIENCE

Your client portal keeps shared documents together

Find the projects and deliverables HR Delivery has released to your organisation through a dedicated client document collection.



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

WHAT IT GIVES YOU

Use your client reference and separate access code after the welcome stage. Choose the project, review document titles and notes, then open the latest version or an earlier shared edition where available. New material appears when the team releases it.

THE CLIENT VALUE

You have one place to return to the work, understand the current edition and maintain continuity after the original handover.

YOUR OUTPUTS

- A project document library
- Latest shared deliverables
- Access to retained earlier versions

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client sponsor opens the collection for a completed leadership project, selects the project and checks the report title and latest shared edition. The sponsor can then prepare a steering-group discussion using the released material and reference the exact document in any follow-up question. Which project and document edition does your team need for its next decision?

SERVICE CONTEXT / Access requires a client reference and separate client access code.

SOURCE: HR.DELIVERY / PORTALS

L · YOUR CLIENT EXPERIENCE

The staff workspace prepares your deliverables

HR Delivery's internal document portal gives the team a common place to prepare, organise and manage client work.

WHAT IT GIVES YOU

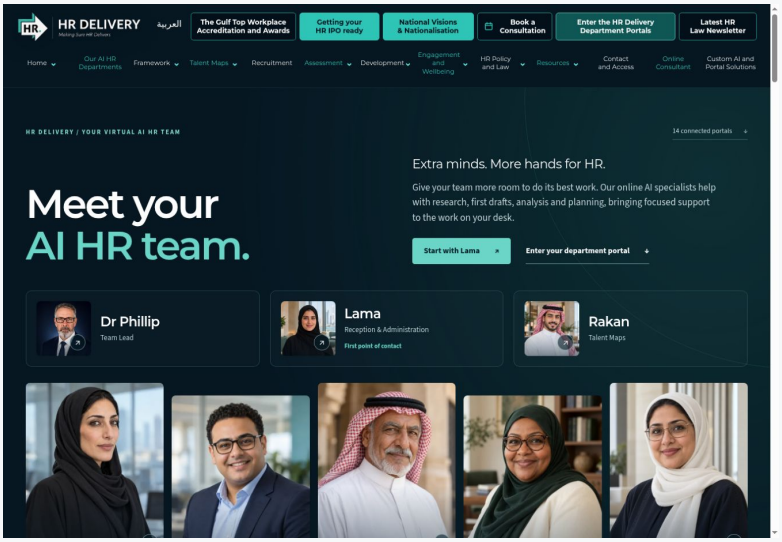
Approved templates, Document Studio, client and project records, private storage, versions and release controls support preparation behind the scenes. Authorised staff decide which reviewed deliverables become available in your separate client collection and retain the working history.

THE CLIENT VALUE

Your organisation receives an organised handover, while the team can manage working drafts and approved deliverables through a traceable process.

YOUR OUTPUTS

- Prepared client documents
- A maintained version history
- Controlled release into your collection



WEBSITE SCREEN / Live portal directory describing the Staff Document Portal.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: HR Delivery prepares a client report using internal project records and working documents. Staff review the material before deciding what to release. The client receives the agreed deliverable through the separate collection, while preparation and administration stay within the authorised staff environment. Who will review and release the document before it reaches your collection?

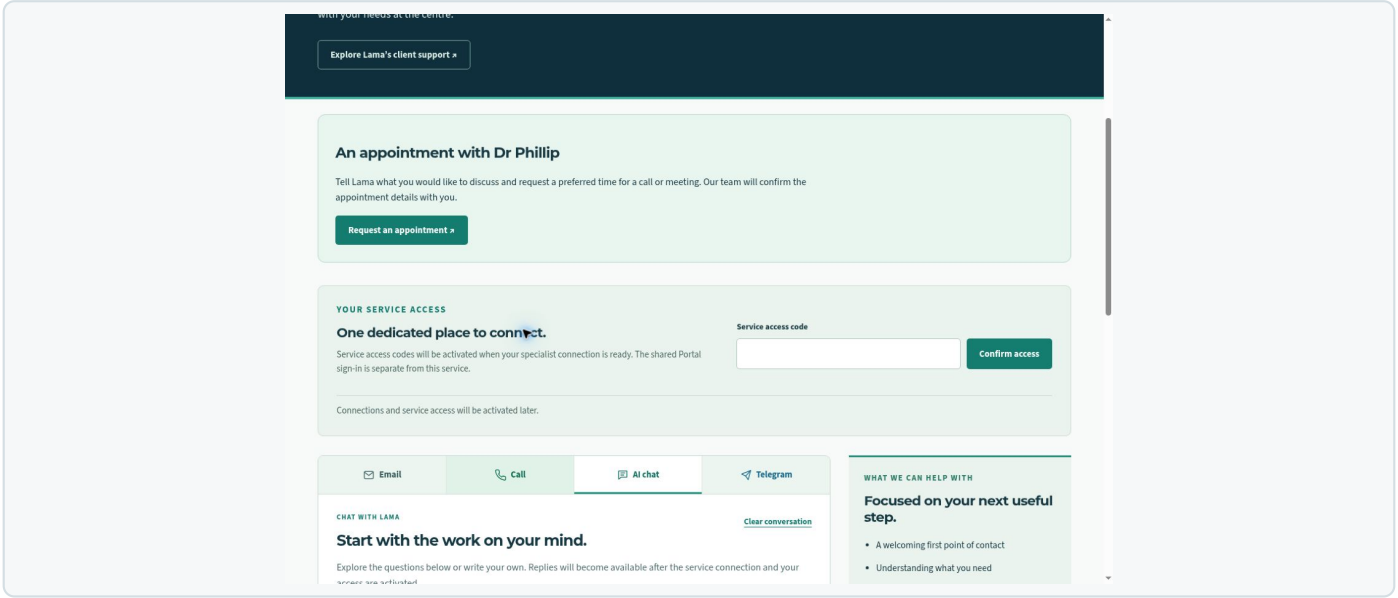
SERVICE CONTEXT / Internal administration requires an authorised staff account.

SOURCE: HR.DELIVERY / PORTALS

L · YOUR CLIENT EXPERIENCE

Use the access details for the service you have agreed

HR Delivery uses different access arrangements for department resources, specialist communication and private client document collections.



RELATED SERVICE VIEW / Service access code and communication channels awaiting activation

WHAT IT GIVES YOU

Use the credentials or code issued for the specific service. Specialist access-code screens are separate from department portal sign-in; client documents require their own client reference and access code after the welcome stage.

HOW TO USE IT

1. **Receive.** Keep the handover details supplied by HR Delivery.
2. **Enter.** Use the matching portal, specialist or client-document route.

YOUR OUTPUTS

- The correct service entry route
- Your assigned access details
- A clear support contact

WHY THIS HELPS

You can enter the intended workspace with a clear understanding of which information and services your access covers.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a project contact reaches the general portal welcome screen but needs a private client report. The contact uses the separate client reference and collection access code issued at handover. A specialist communication code would apply to its own activated service and is handled separately. Have you received the access details for the specific collection or service you need?

SERVICE CONTEXT / Specialist service codes and connections are activated separately.

SOURCE: HR.DELIVERY / CONTACT DEPARTMENT RECEPTION ADMINISTRATION

CONSISTENT FOUNDATIONS FOR CLIENT DELIVERABLES

Approved staff template library

Receive client materials prepared from approved HR Delivery starting structures, with the content adapted to the organisation, professional purpose and requirements of the assignment.

WHAT IT GIVES YOU

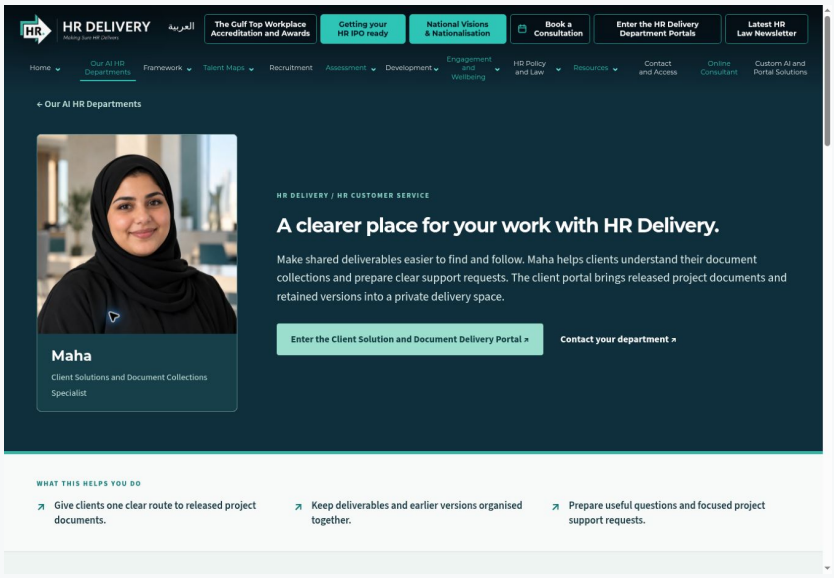
The Staff Document Portal describes a library for slides, Word documents, spreadsheets, letters and proposals. Authorised staff choose the relevant format and develop the content in the client's context, combining a common presentation structure with professional judgement for the deliverable.

THE CLIENT VALUE

A shared template foundation helps the team organise its work and gives clients documents with a more consistent structure across different stages of an engagement.

YOUR OUTPUTS

- Approved document starting formats
- Client-specific working material
- Consistent presentation across deliverables



WEBSITE SCREEN / Live public client-service department page, explaining the document workflow and sharing model.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client receives a proposal, report and implementation workbook as part of one assignment. Staff begin with the relevant approved formats, then adapt the content to the agreed work. The client sees consistent presentation while each document serves its own practical purpose. Which document formats will your team need to use the work effectively?

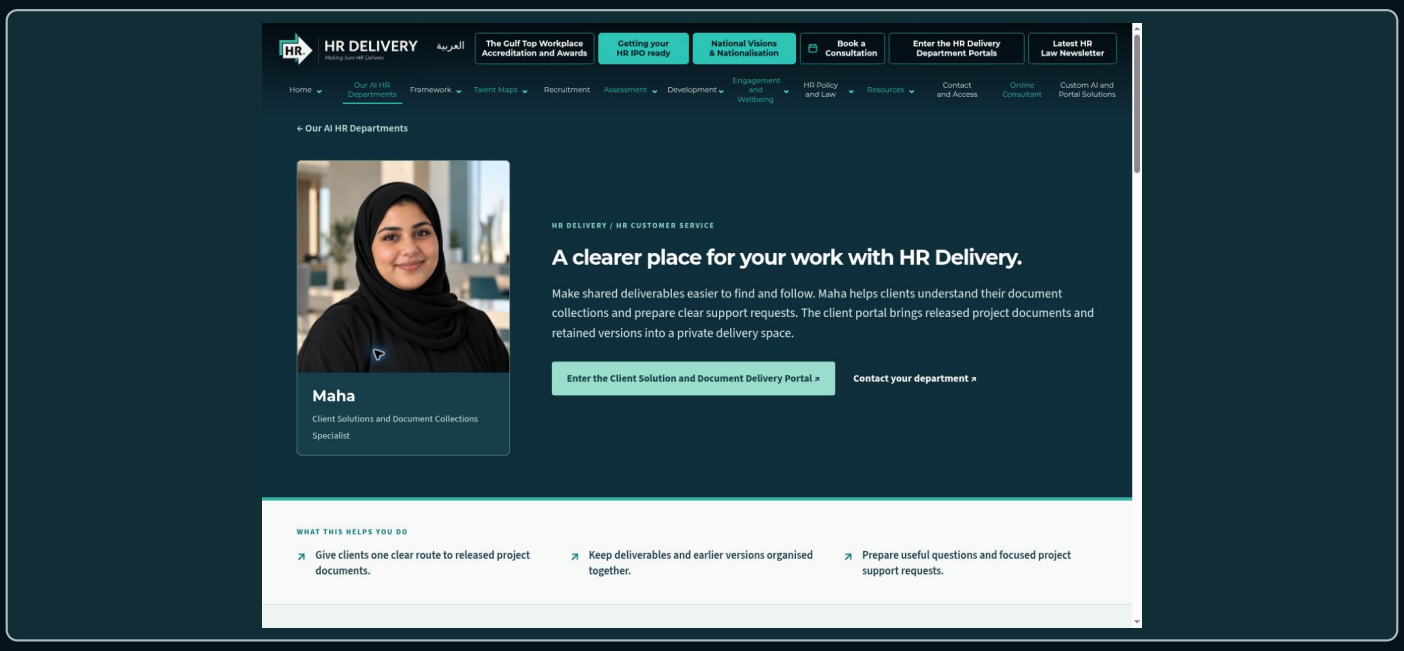
SERVICE CONTEXT / Approved staff library; authorised access required

SOURCE: HR.DELIVERY / PORTALS

PREPARE MATERIAL IN ITS PROJECT CONTEXT

Document Studio

Understand how HR Delivery staff create and organise a deliverable alongside the client and project information needed to give the document a clear purpose.



WEBSITE SCREEN / Live public client-service department page, explaining the document workflow and sharing model.

WHAT IT GIVES YOU

The Staff Document Portal connects Document Studio with client, contact and project records. The described workflow covers common office documents and proposals, retained versions and a later release step for material intended to appear in the client's document collection.

THE CLIENT VALUE

Project context helps staff organise the deliverable coherently and gives the eventual handover a clearer connection to the work the client has commissioned.

YOUR OUTPUTS

- Project-linked working document
- Retained versions
- Material prepared for a controlled client handover

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a consultant develops a client implementation plan within the staff document workflow and relates it to the project record. Revised drafts remain part of preparation until review and release are arranged, giving the final handover a clear connection to the assignment it supports. What project context must remain clear when the document is prepared and shared?

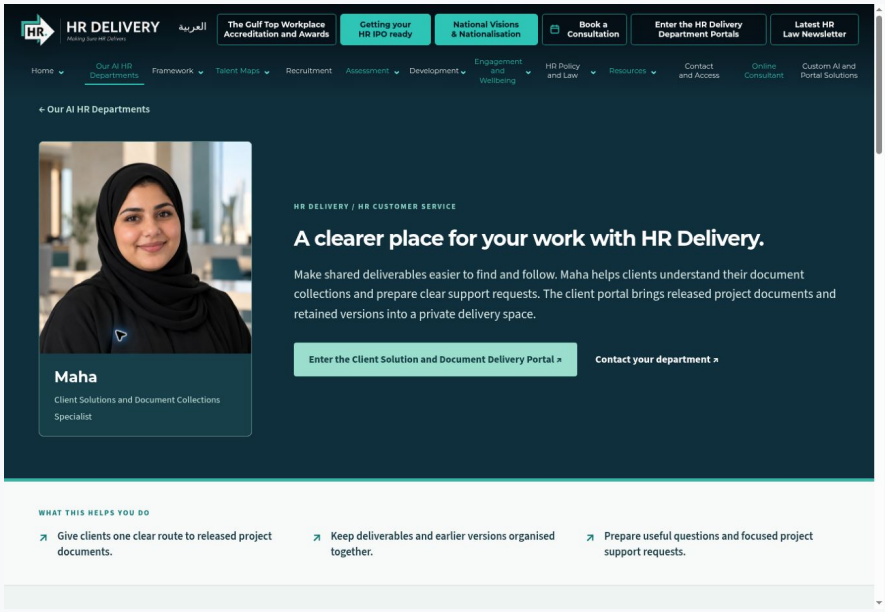
SERVICE CONTEXT / Private staff authoring workspace

SOURCE: HR.DELIVERY / PORTALS

GIVE EACH DOCUMENT A CLEAR HOME

Client, contact and project records

Connect the deliverable with the organisation, people and assignment it serves so preparation, review and handover remain focused on the correct piece of client work.



WEBSITE SCREEN / Live public client-service department page, explaining the document workflow and sharing model.

WHAT IT GIVES YOU

The staff portal describes client and project records with relevant contacts. These provide the context for storing documents and coordinating handovers, helping colleagues understand where a report belongs, who is involved and how the material relates to the agreed assignment.

THE CLIENT VALUE

Clear project relationships help staff coordinate delivery and give clients a more understandable collection of materials associated with the work undertaken for their organisation.

YOUR OUTPUTS

- Client and project context
- Relevant contact information
- Document relationship to the assignment

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: two assignments are running for the same organisation with different sponsors. Staff link each document to its own project and relevant contacts, helping the team prepare the correct handover and avoid confusing a recruitment deliverable with material for the organisation design assignment. Which project and client contacts should be associated with this deliverable?

SERVICE CONTEXT / Staff project records

SOURCE: HR.DELIVERY / PORTALS

PREPARE BEFORE SHARING

Private uploads and working-file storage

Keep internal working material organised within the staff preparation process so the documents released to the client reflect a deliberate review and handover decision.

WHAT IT GIVES YOU

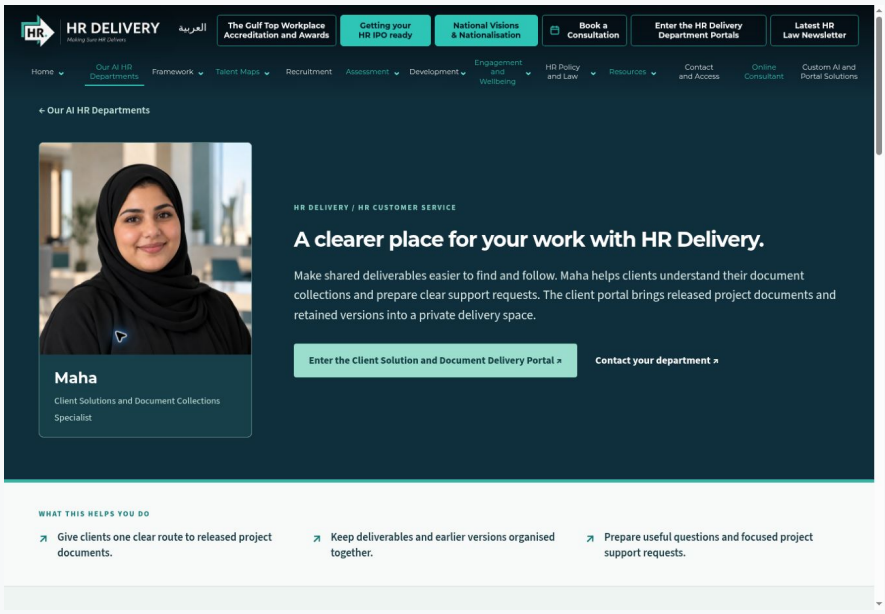
The supplied staff workspace supports private uploads and storage associated with client or project work. The public service description distinguishes internal material from released client documents, giving the team a stage for organising and reviewing files before arranging their availability.

THE CLIENT VALUE

A separate preparation stage helps staff organise revisions and review the work before selected documents are presented in the collection the client will use.

YOUR OUTPUTS

- Staff working-file collection
- Project-linked uploads
- Material ready for review and release



WEBSITE SCREEN / Live public client-service department page, explaining the document workflow and sharing model.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: the client provides an existing framework to inform a report. Staff retain it within the private preparation environment alongside working material. Release into the client collection is a separate decision, so the shared deliverable can be clearly distinguished from supporting files used during preparation. Which supporting files are needed for preparation, and which should form part of the client handover?

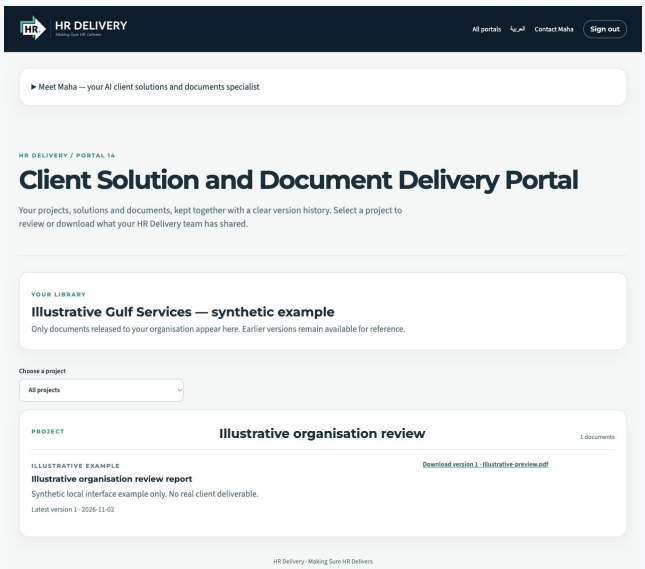
SERVICE CONTEXT / Private staff storage; release is a separate step

SOURCE: HR.DELIVERY / PORTALS

UNDERSTAND HOW THE DELIVERABLE HAS DEVELOPED

Document version history

Locate the relevant edition of a document and retain the context of earlier releases when reviewing changes, following up a question or continuing the assignment.



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

WHAT IT GIVES YOU

The staff portal describes version history, and the client-service page explains that earlier versions remain available alongside the latest shared document. The published synthetic demonstration shows a version-specific project document, illustrating how a released edition can remain identifiable.

THE CLIENT VALUE

A visible history helps clients and staff discuss the same edition and understand what changed as the deliverable moved through review and subsequent revision.

YOUR OUTPUTS

- Latest shared document context
- Earlier released versions
- Version-specific project references

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a report is revised after a client review meeting. Staff retain its working history and identify the edition intended for release. The sponsor can then refer to the shared version when discussing agreed changes, instead of relying on an unlabelled file from an earlier exchange. How will your team identify the edition that reflects the agreed review changes?

SERVICE CONTEXT / Versioned delivery described; published demonstration available

SOURCE: HR.DELIVERY / PORTALS

SHARE THE MATERIAL INTENDED FOR THE CLIENT

Controlled release and hiding of deliverables

Use a client collection that contains documents deliberately released by HR Delivery staff, with internal working material remaining part of the preparation process until handover.

WHAT IT GIVES YOU

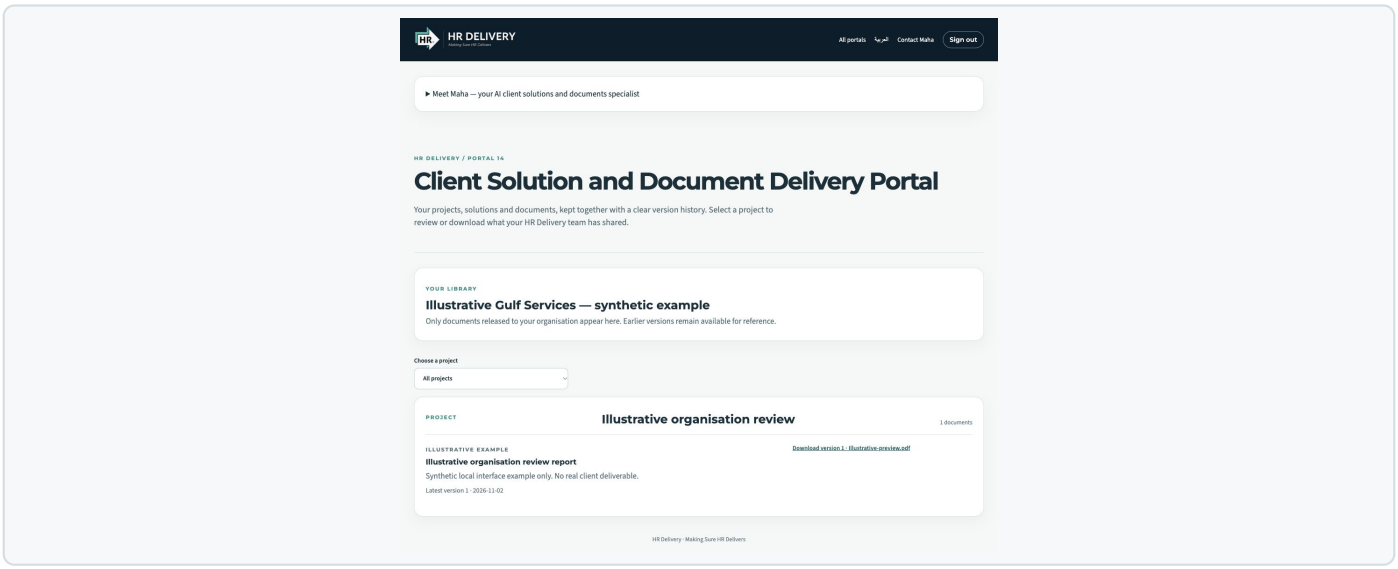
The supplied workflow includes release and hiding controls. Staff prepare and review material in their working area, then arrange its visibility in the appropriate client project collection so availability can be aligned with the agreed delivery and handover context.

THE CLIENT VALUE

A deliberate release step helps clients focus on the material intended for their use and keeps the handover connected to the project and review process.

YOUR OUTPUTS

- Selected client-visible documents
- Project-specific release context
- Staff control of subsequent visibility



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a project contains a reviewed report and several unfinished supporting drafts. Staff release the agreed report to the client collection and manage visibility of other material separately. The client understands which documents are ready to use and can ask about the remaining delivery schedule. Which reviewed documents should be visible to your client team at this stage?

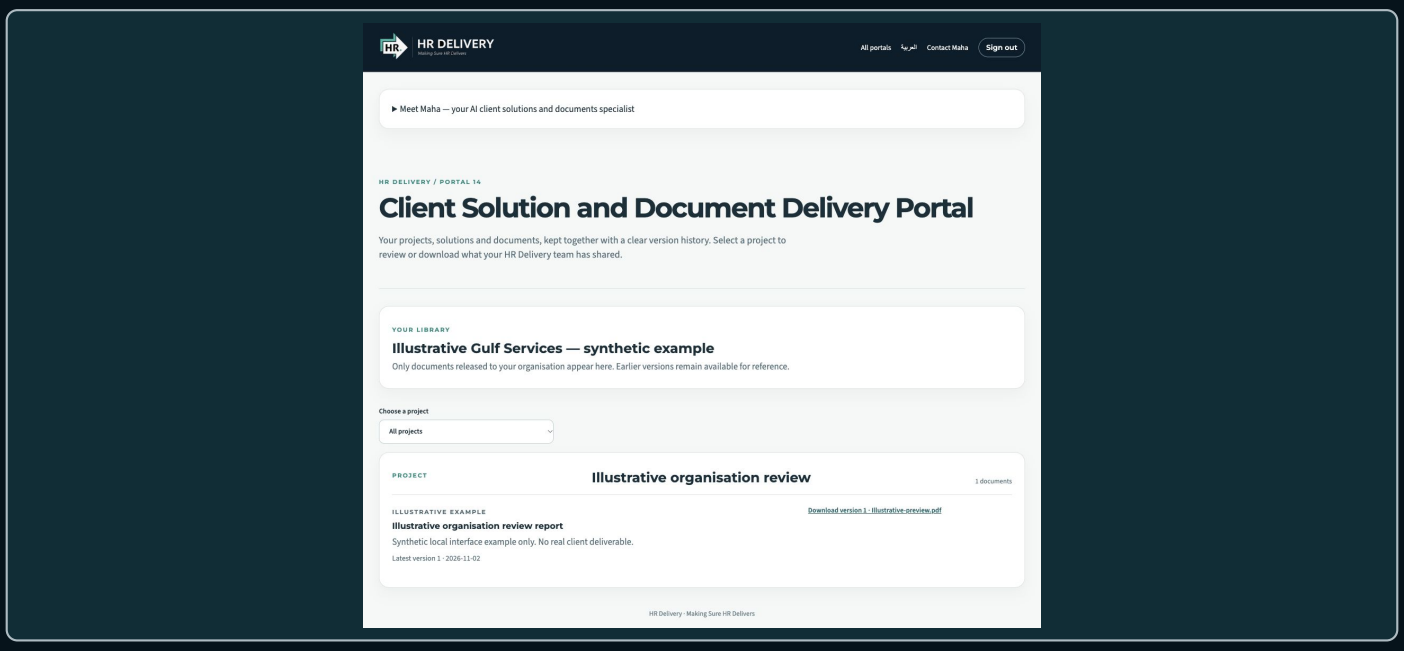
SERVICE CONTEXT / Staff-controlled release; client access follows the handover

SOURCE: HR.DELIVERY / PORTALS

OPEN THE CORRECT DOCUMENT COLLECTION

Unique client references

Use the client reference provided in the handover together with the separate collection access code to reach the documents prepared for the organisation.



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

WHAT IT GIVES YOU

The public service description explains that a unique client reference identifies the collection. This is an additional entry step beyond the shared welcome sign-in, keeping the project and document routes connected to the specific client delivery context described in the handover.

THE CLIENT VALUE

A clear reference helps clients identify the correct collection and gives support enquiries a precise starting point when a document or project needs to be located.

YOUR OUTPUTS

- Unique client reference
- Collection entry route
- Project-based document context

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client sponsor receives a collection reference and separate access code during the handover. These identify the correct private collection after the welcome stage. The sponsor records the access instructions appropriately and uses the project name when requesting help with a document. Who needs the issued collection reference and access instructions for the agreed work?

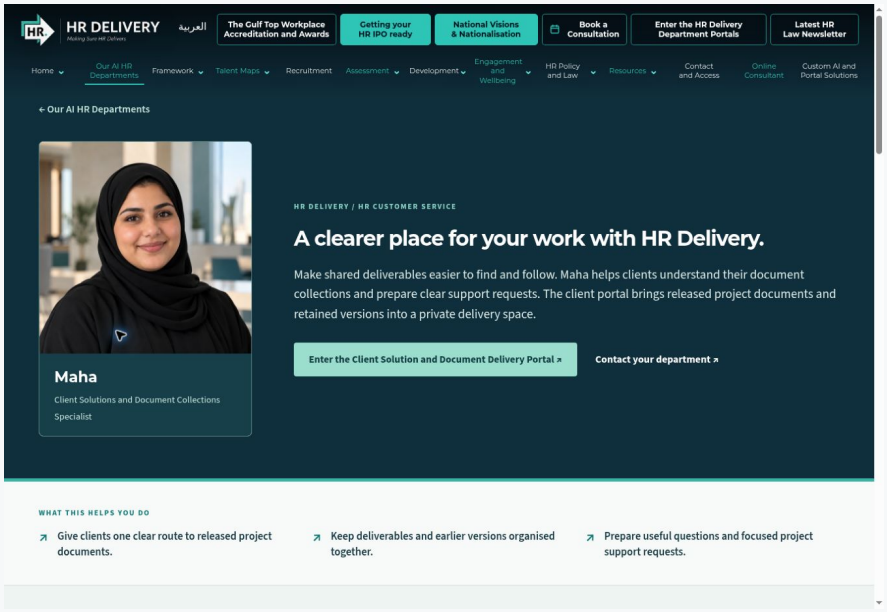
SERVICE CONTEXT / Client reference and separate collection access code required

SOURCE: HR.DELIVERY / DEPARTMENT HR CUSTOMER SERVICE

KEEP THE HANDOVER CURRENT WHEN ACCESS CHANGES

Client collection access-code changes

Receive updated access information when HR Delivery staff change the code associated with the client's document collection, with the project and reference context kept clear.



WEBSITE SCREEN / Live public client-service department page, explaining the document workflow and sharing model.

WHAT IT GIVES YOU

The supplied scope includes access-code rotation alongside unique client references and controlled document delivery. Staff coordinate the revised code through the agreed handover route, explaining how the client should continue reaching the relevant collection after the arrangement is updated.

THE CLIENT VALUE

A coordinated update helps clients continue using the agreed document collection and know which support route to follow if the changed access arrangement needs clarification.

YOUR OUTPUTS

- Updated collection access code
- Retained client reference context
- Revised handover information

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client changes its project contact and asks the team to review the collection access arrangements. Authorised staff manage any access-code change and coordinate the handover to the correct contact, so the client knows which instructions now apply to the document collection. Has a contact or access requirement changed since the collection was first handed over?

SERVICE CONTEXT / Staff-administered collection access changes

SOURCE: HR.DELIVERY / PORTALS

FIND THE DELIVERED MATERIAL IN ONE PLACE

Client project and document library

Browse the projects and documents shared by HR Delivery, using the project context and version information to identify the report or resource needed for the work.

WHAT IT GIVES YOU

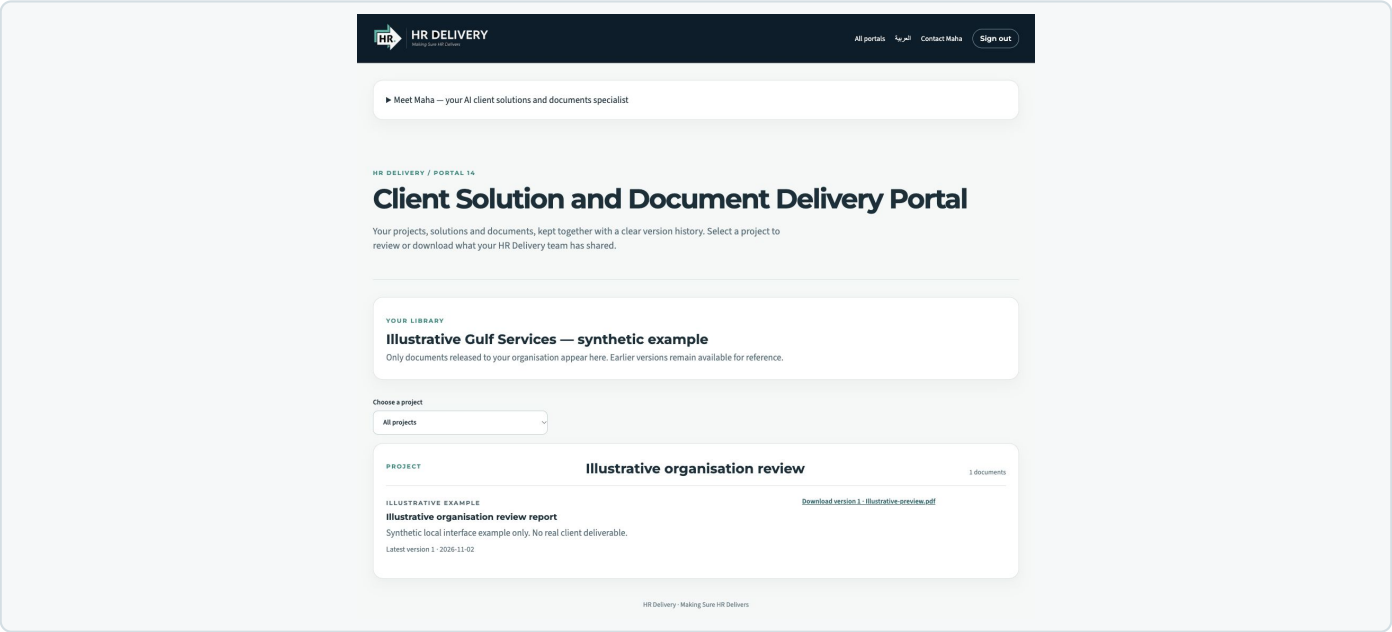
The public department page and published demonstration show project selection, document titles, categories or notes, latest-version context and updates. Clients can focus on one project or review the shared collection, while staff retain internal preparation material in their separate workspace.

THE CLIENT VALUE

An organised collection makes it easier for clients to return to agreed deliverables and understand which material relates to the project currently being discussed or used.

YOUR OUTPUTS

- Project-based document collection
- Document title and category context
- Latest released version and update information



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client has separate projects for reward and leadership development. The collection organises released documents by project, allowing the sponsor to locate the relevant report, review its notes and select the edition needed for a particular management discussion or implementation activity. Which project should your colleagues open to find the material relevant to their work?

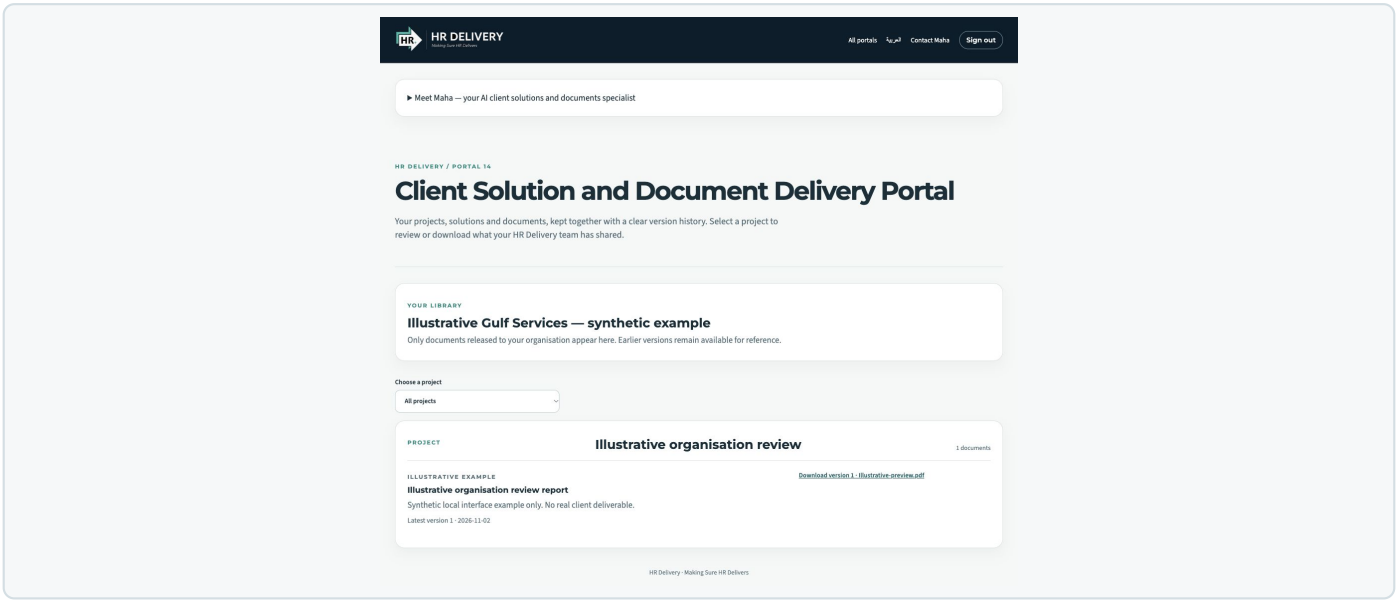
SERVICE CONTEXT / Client delivery workspace; published demonstration available

SOURCE: HR.DELIVERY / DEPARTMENT HR CUSTOMER SERVICE

RETRIEVE THE EDITION YOU NEED

Client downloads and earlier releases

Download the documents shared with the client and refer back to earlier releases when reviewing an original decision, a later revision or continuing project work.



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

WHAT IT GIVES YOU

The public service description states that shared documents can be downloaded and earlier versions remain available. Its published synthetic demonstration includes a version-specific download link, showing how the handover can remain a continuing reference after the initial delivery conversation.

THE CLIENT VALUE

Clients can retrieve the relevant edition when they need it and maintain continuity as further documents or revisions are shared during the relationship.

YOUR OUTPUTS

- Download of the shared document
- Access to earlier released versions
- Continuing project reference

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a sponsor wants to understand how a shared framework changed after a workshop. Where earlier releases are retained in the collection, the sponsor can open the relevant editions and refer to their titles when asking the team to explain the change and its practical implications. Do you need the latest shared edition, or an earlier release for a specific comparison?

SERVICE CONTEXT / Client downloads described; use the issued collection access

SOURCE: HR.DELIVERY / DEPARTMENT HR CUSTOMER SERVICE

FROM COMPANY CONTEXT TO AN ACCESS HANDOVER

Start the client relationship clearly

Provide the client context needed to connect agreed services with practical access instructions before the organisation starts using the relevant workspaces.

WHAT IT GIVES YOU

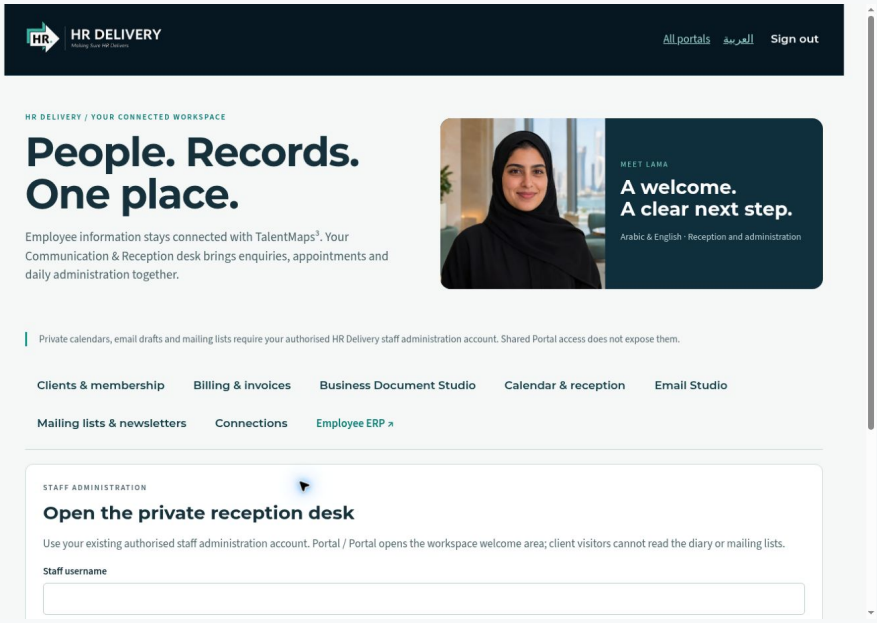
Staff prepare the customer context and portal entitlements, then explain service routes and support contacts in the welcome handover. The client supplies and checks the information needed to begin.

YOUR OUTPUTS

- Confirmed client and contact context
- Agreed service-access summary
- Welcome and access handover

HOW TO USE IT

1. **Confirm the client context.** Provide the organisation details, relevant contacts and agreed service requirements.
2. **Prepare the access arrangement.** Staff relate the customer record to the relevant portal entitlements.
3. **Complete the handover.** Check the first steps, document routes and contact points with the client.



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

WHY THIS HELPS

A coordinated start helps the client understand where to begin and gives staff a consistent reference for subsequent access questions.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a new client agrees the organisation name, principal contact, service scope and required access with HR Delivery. Staff prepare the supporting records and welcome material, while the sponsor confirms the intended users and understands how the first project documents will be handed over. What organisation, contact and access information should be agreed before work begins?

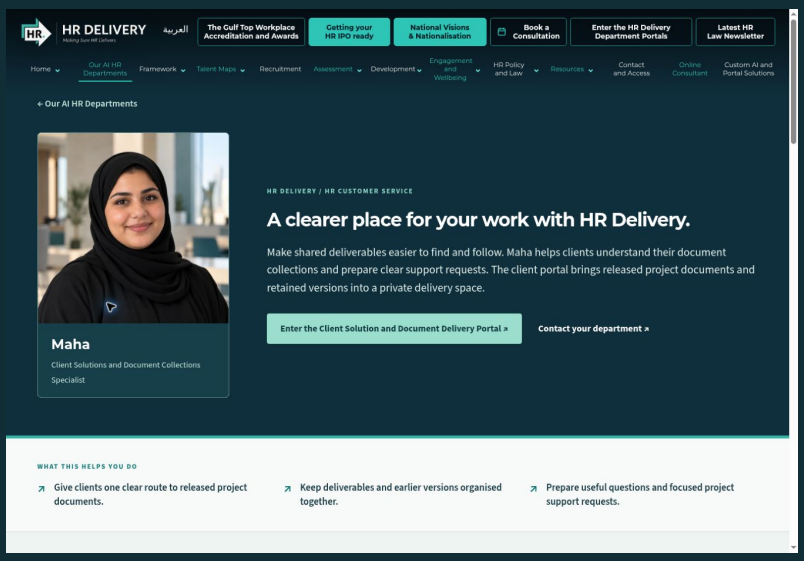
SERVICE CONTEXT / Staff administration supports the client onboarding experience

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

PREPARE, REVIEW, RELEASE AND RETRIEVE

Move a deliverable from draft to client collection

Prepare the document in its project context, then release the reviewed edition with a handover that helps the client use it.



RELATED SERVICE VIEW / Live public client-service department page, explaining the document workflow and sharing model.

WHAT IT GIVES YOU

Staff prepare the project document and retain its version context. After review, release the selected edition to the client collection and explain its purpose, reference and access route in the handover.

YOUR OUTPUTS

- Reviewed project deliverable
- Identifiable released version
- Client collection and download handover

HOW TO USE IT

1. **Prepare in project context.** Use the relevant template and keep working files with the assignment.
2. **Review the edition.** Resolve feedback and identify the document version intended for release.
3. **Hand over the collection.** Explain the client reference, access route and documents being shared.

WHY THIS HELPS

A deliberate delivery sequence helps clients find the intended material and understand its version, purpose and relationship to the assignment.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a draft report passes through staff preparation and review before the agreed edition is released into the client collection. The handover identifies the project, documents and next steps, helping the sponsor explain to colleagues what is available and which questions remain for discussion. What review and handover steps should take place before your team uses the deliverable?

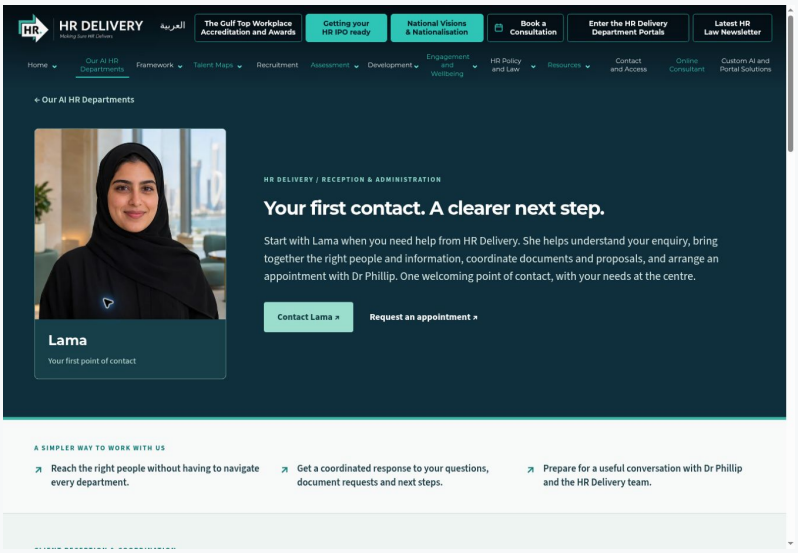
SERVICE CONTEXT / Staff-controlled release; separate client collection access

SOURCE: HR.DELIVERY / PORTALS

A CONSISTENT ACCOUNT OF THE ENGAGEMENT

Keep delivery and commercial records aligned

Connect the agreed work with progress communication and billing documents so the client can discuss the engagement using a consistent set of records.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

Use the agreed scope and commercial documents as a shared reference. Connect progress updates with delivery and retain invoices, external-payment information and renewal context alongside the customer arrangement.

YOUR OUTPUTS

- Scope and commercial reference
- Progress and action record
- Invoice and renewal context

HOW TO USE IT

1. **Confirm the arrangement.** Agree the scope, deliverables and commercial basis before delivery begins.
2. **Record the progress.** Use meeting actions and progress updates to explain work and decisions.
3. **Maintain the commercial context.** Relate invoices, external receipts and renewal discussions to the agreed services.

WHY THIS HELPS

A connected account helps clients understand the agreement, progress and remaining questions about delivery or the associated commercial arrangement.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a completed project phase has a progress report, released document set and invoice. Staff align these records with the agreed service, while the client checks the scope and separate payment instructions. This makes the delivery and commercial conversation easier to follow at the next review. Do the delivered documents, progress record and invoice describe the same agreed phase?

SERVICE CONTEXT / Staff records; online and recurring collection not connected

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

The Connected Workspace behind your client service

HR Delivery's connected administration links people records, reception, client relationships and commercial documents around the services being delivered.

WHAT IT GIVES YOU

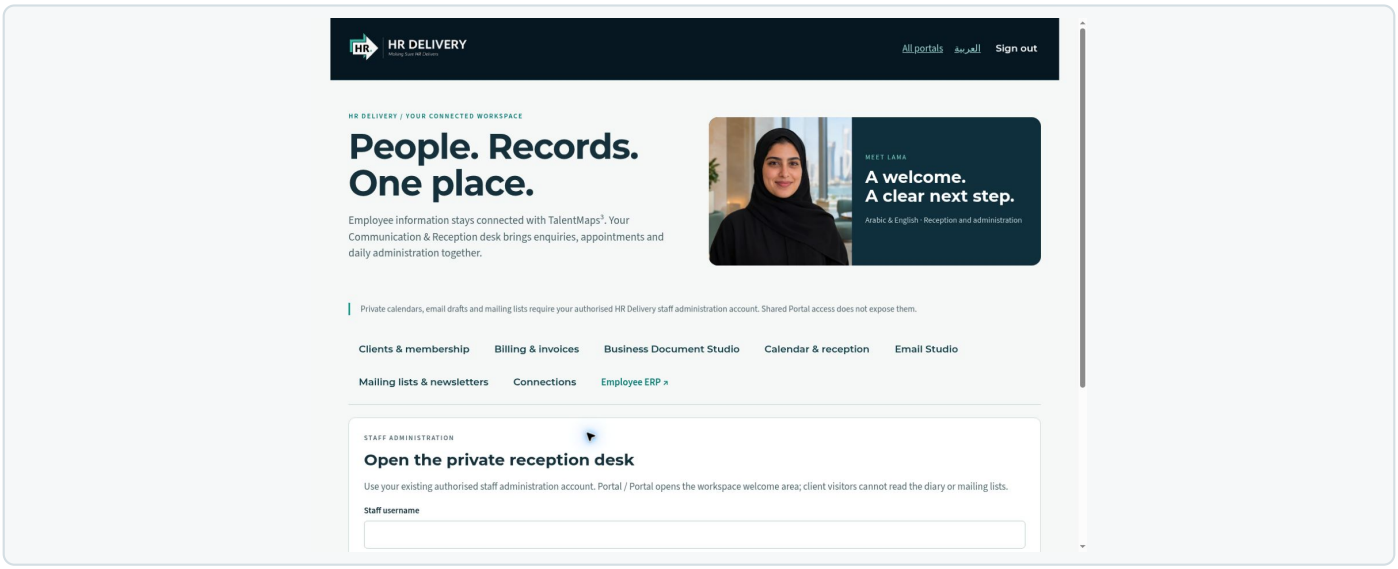
The welcome screen connects Employee ERP, Clients & Membership, Billing & Invoices, Business Document Studio, Calendar & Reception, Email Studio, Mailing Lists & Newsletters and Connections. Authorised staff use the relevant private workspace to coordinate administration.

THE CLIENT VALUE

Your relationship, access arrangements and deliverables can be administered coherently, with client-facing outputs shared through the agreed handover route.

YOUR OUTPUTS

- A connected service record
- Commercial and business documents
- Reception and communication preparation



WEBSITE SCREEN / Live Connected Workspace welcome screen.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client request touches reception, documents and billing. Authorised staff use the Connected Workspace administration context to coordinate the relevant records. The client continues through the agreed contact and collection routes; the shared welcome screen does not provide access to private staff tools. Which administrative questions should the human team coordinate for your project?

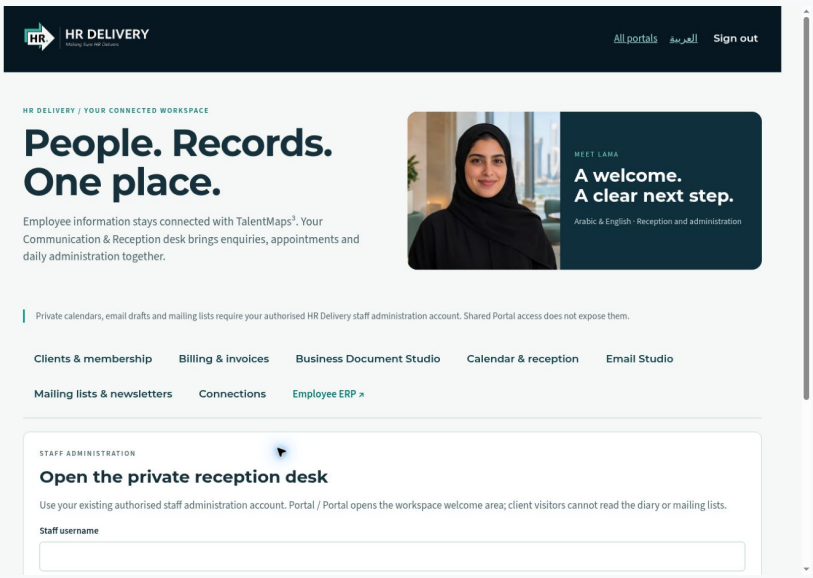
SERVICE CONTEXT / The shared welcome area leads to separate private staff sign-in for administration.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

THE ADMINISTRATIVE FOUNDATION OF THE RELATIONSHIP

Client organisation registration

Give HR Delivery the organisation details needed to establish a consistent client record before contacts, service arrangements and delivery activity are brought together.



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

WHAT IT GIVES YOU

The staff Clients & Membership area is described as holding the company registration that anchors contacts, agreements, access arrangements and commercial information. The record gives HR Delivery a common reference when preparing proposals, coordinating services or responding to a client enquiry.

THE CLIENT VALUE

A consistent organisation record helps the team coordinate the relationship and reduces the need to reconstruct basic client context each time work moves forward.

YOUR OUTPUTS

- Staff-maintained organisation record
- Common customer reference
- Context for membership and delivery administration

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a new client provides its organisation name and agreed service context. HR Delivery staff create the relevant customer record and use it to support the relationship. The client confirms the details through the agreed contact route rather than administering the internal record directly. What organisation details should the team confirm when establishing your client record?

SERVICE CONTEXT / Staff administration; not client self-service

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

KEEP THE CLIENT CONTEXT USEFUL

Contacts, staff counts, notes and agreements

Provide the relevant contact people, organisational scale and agreement context so HR Delivery can prepare more informed handovers, proposals and service discussions with the client.

WHAT IT GIVES YOU

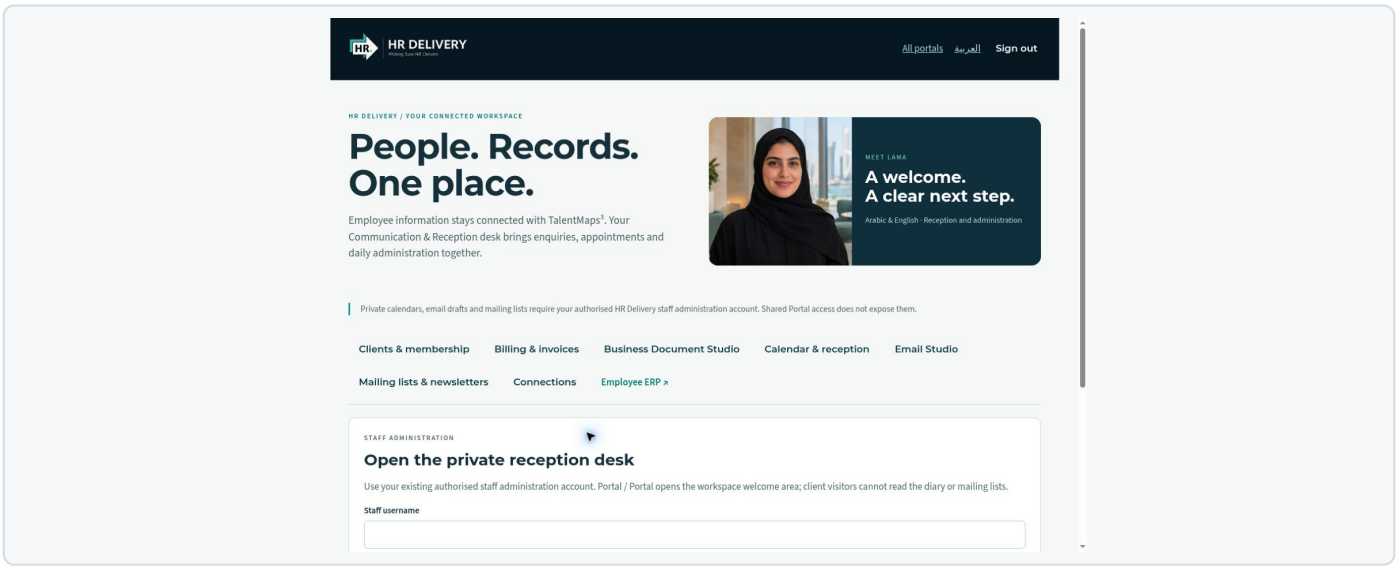
The described staff workspace records contacts, staff counts, working notes and agreements alongside the company record. These details support continuity when the team prepares access information, coordinates delivery, discusses renewal or responds to a later question about the arrangement.

THE CLIENT VALUE

A fuller client record helps staff understand who to involve, what has been discussed and which arrangements matter when coordinating the next stage of work.

YOUR OUTPUTS

- Contact and organisation context
- Working notes and agreement references
- Information supporting proposals and handovers



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client appoints a new sponsor and updates the workforce context for an assignment. Staff maintain the relevant contacts, notes and agreement information, so the next conversation reflects the current organisation and the people responsible for decisions, review and practical implementation. Which contact or organisation details have changed since the assignment was agreed?

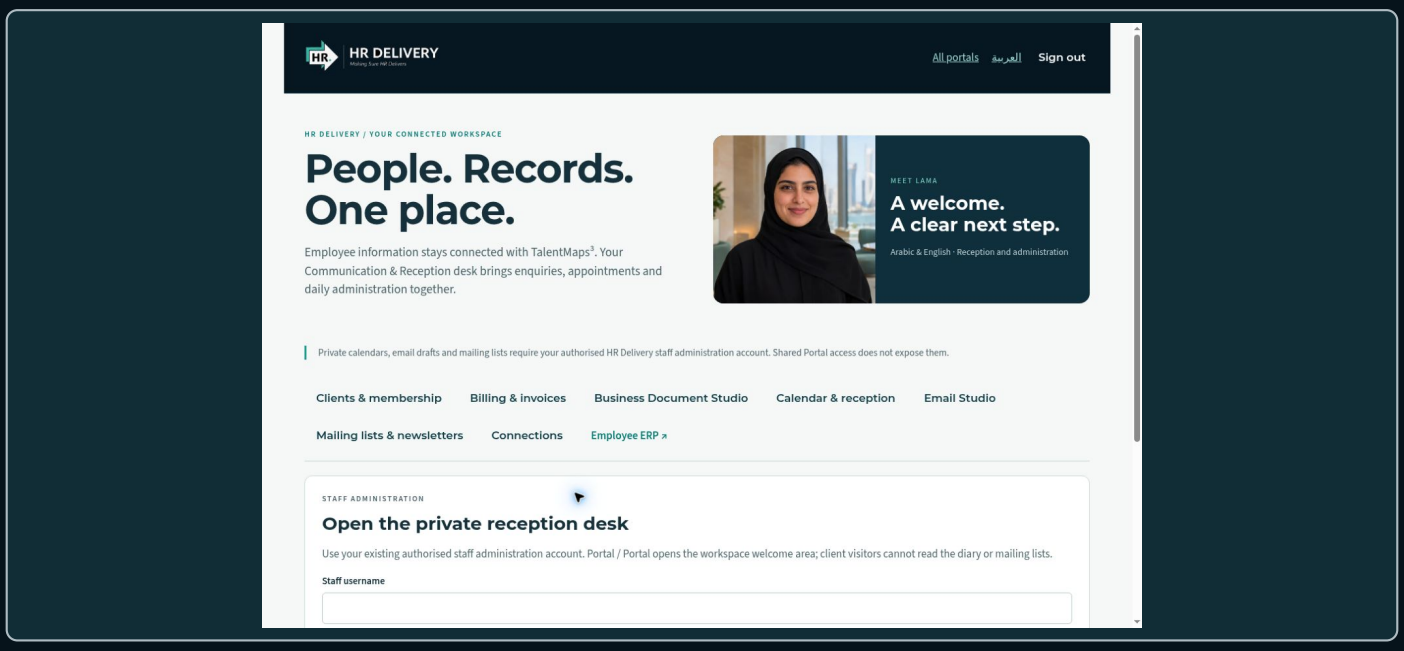
SERVICE CONTEXT / Staff-maintained client information

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

PREPARE THE AGREED ACCESS HANDOVER

Customer access administration

Receive access information that relates to the agreed service arrangement, with HR Delivery staff maintaining the customer codes and administrative context behind the handover.



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

WHAT IT GIVES YOU

The supplied workspace includes staff administration of customer codes and passwords alongside company records and portal entitlements. This supports onboarding or changes to the arrangement, while a client document collection separately uses its own reference and access code.

THE CLIENT VALUE

An organised access handover helps clients understand which services they have agreed to use and where to raise questions if access arrangements need attention.

YOUR OUTPUTS

- Staff-managed customer access details
- Access information for the agreed service
- Handover context for subsequent changes

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a service is agreed for named client users. Staff arrange the relevant customer access details and explain the route in the welcome handover. Private document collections retain their separate reference and code, helping the client distinguish service access from access to released deliverables. Which named users need access, and what service or collection will each use?

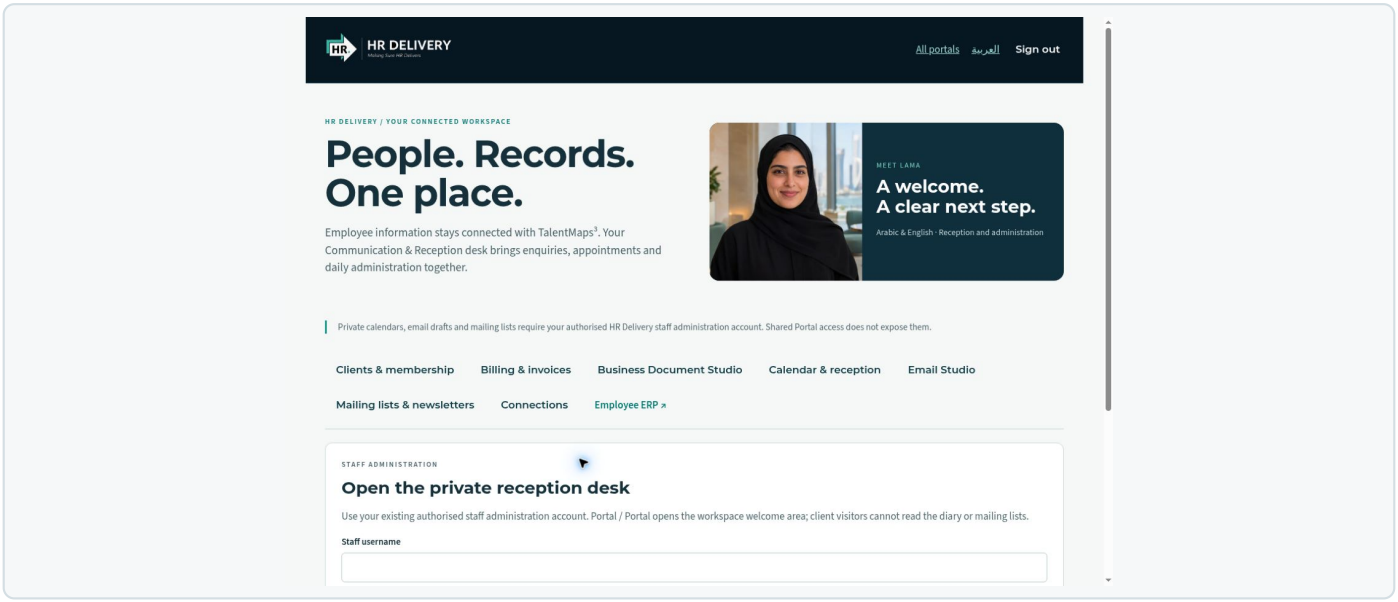
SERVICE CONTEXT / Staff access administration; separate collection access applies

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

CONNECT THE SERVICE ARRANGEMENT TO THE WORKSPACES

Agreed portal entitlements

Understand which portals are included in the client's agreed arrangement and use the handover to identify the relevant starting point for each service.



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

WHAT IT GIVES YOU

Portal entitlements are described within staff customer administration, linking the client relationship to intended workspace access. The welcome process can then explain the included portals, their purpose and the support route when the organisation's needs or membership arrangement changes.

THE CLIENT VALUE

A clear service-access record helps clients focus on the workspaces relevant to their needs and gives staff a consistent basis for explaining the arrangement.

YOUR OUTPUTS

- Record of agreed portal access
- Relevant workspace routes
- Context for onboarding and renewal discussions

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: an organisation agrees access to learning and assessment services for a defined assignment. Staff record the relevant portal entitlements and explain them to the client. The sponsor can check that each user has the access needed for the agreed work without assuming every department is included. Which department portals form part of your agreed service scope?

SERVICE CONTEXT / Staff administration of agreed service access

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

SUPPORT ACCESS AND ADOPTION CONVERSATIONS

Customer-code usage review

Use the administrative context available to HR Delivery staff when discussing access questions, service adoption or a review of the client's ongoing arrangement.

WHAT IT GIVES YOU

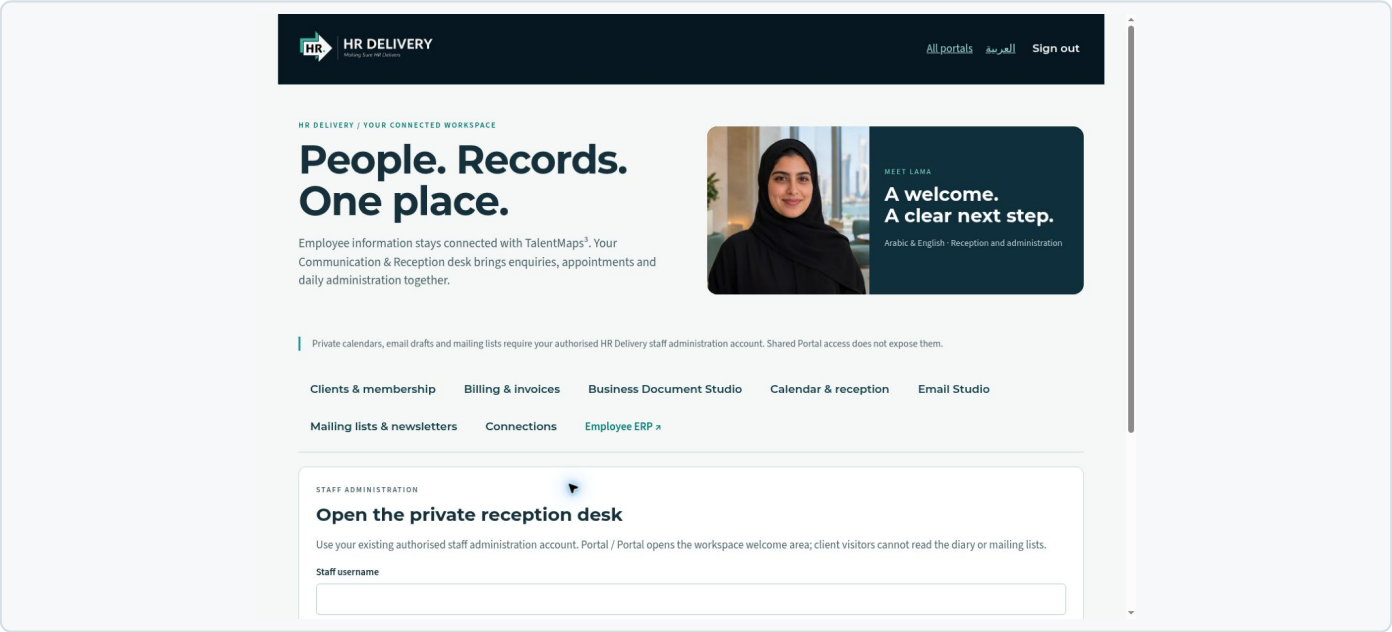
The supplied workspace includes usage tracking alongside customer access codes and portal entitlements. Staff can review the information retained for the customer arrangement, with the meaning of individual measures depending on what the private workspace records and reports.

THE CLIENT VALUE

Usage context can help the team ask more focused questions about access and service use, without treating a code-use measure as evidence of business impact.

YOUR OUTPUTS

- Staff view of customer-code usage
- Context for access enquiries
- Information for an adoption or renewal discussion



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client asks which service access arrangement applies to an ongoing programme. Staff can review customer-code administration in its proper context and clarify the relevant record. Any discussion of usage should explain what the recorded measure represents before drawing conclusions about participation or value. What does the recorded usage measure mean for the service your organisation has agreed?

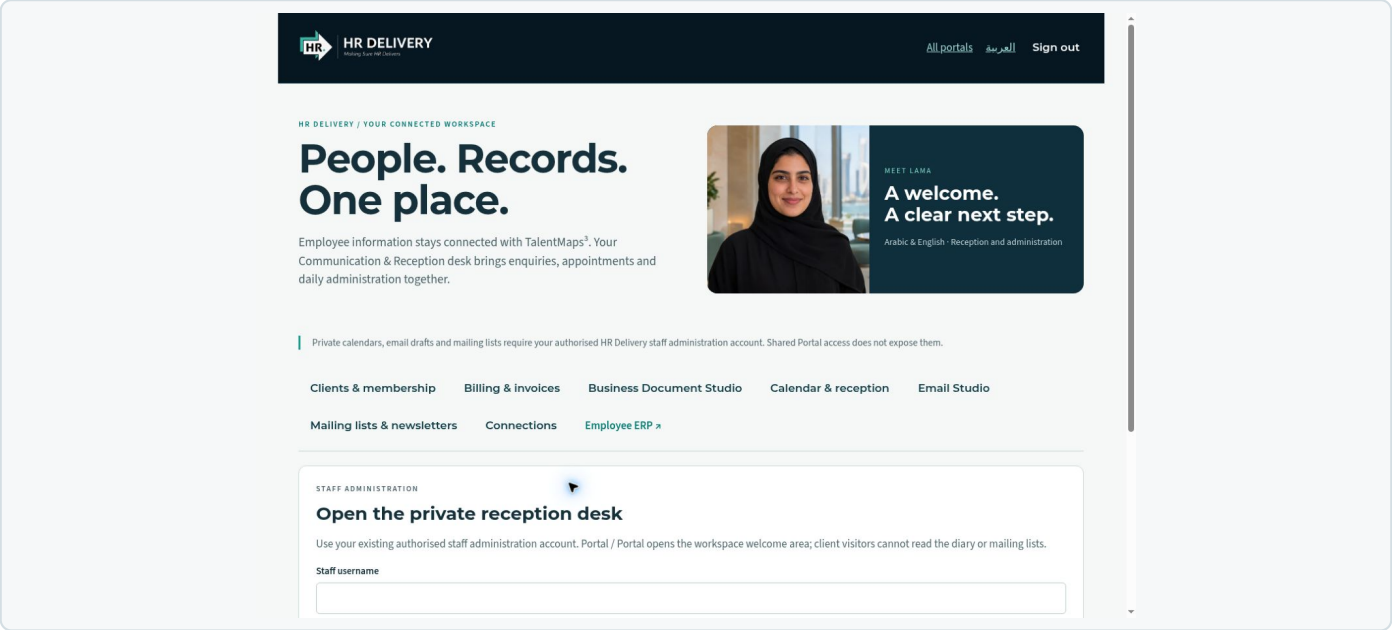
SERVICE CONTEXT / Staff administrative record; measure definitions require context

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

KEEP THE COMMERCIAL TIMETABLE CLEAR

Fees, service periods and renewals

Discuss the agreed service period and renewal timing with a clear administrative reference to the monthly or annual fee arrangement held by HR Delivery.



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

WHAT IT GIVES YOU

The supplied staff records include monthly or annual fees and renewal dates. These details support review of the current agreement, preparation of a renewal conversation and coordination of the associated quotation or invoice for the relevant customer and service period.

THE CLIENT VALUE

A clear commercial timetable helps clients and staff prepare renewal decisions in context and connect the proposed next period with the services being discussed.

YOUR OUTPUTS

- Fee and service-period record
- Renewal timing
- Context for quotation and invoice preparation

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client is approaching the end of an annual service period. Staff review the fee and renewal record with the sponsor, confirming the next scope and dates. A recorded recurring service period does not itself activate recurring payment collection, which requires separate arrangements. What service period, scope and renewal decision should be confirmed before the current arrangement ends?

SERVICE CONTEXT / Staff commercial records; recurring payment collection not connected

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

PREPARE A CONSISTENT CLIENT INVOICE

Billing preparation settings

Provide the billing details needed for staff to prepare an invoice that reflects the agreed customer, service and commercial basis of the work.

WHAT IT GIVES YOU

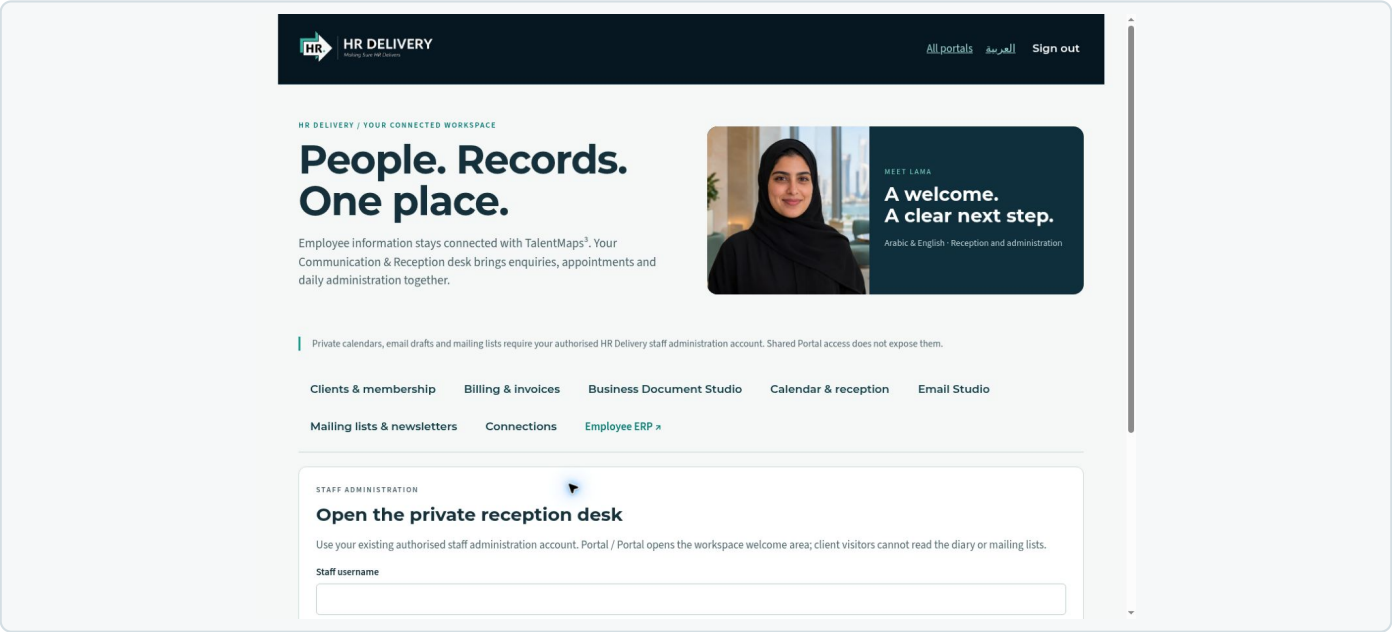
The Connected Workspace includes Billing & Invoices, with billing settings described as the administrative starting point for invoice preparation. Staff use the customer and agreement context to organise the information and review the document before it is finalised.

THE CLIENT VALUE

Consistent preparation helps the client receive a clearer billing document and gives the administration team a useful basis for checking the charge against the agreement.

YOUR OUTPUTS

- Billing preparation context
- Agreed customer and service information
- Invoice details ready for staff review



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: before an invoice is prepared, the client confirms the billing organisation and agreed commercial details with the team. Authorised staff maintain the relevant settings, helping the billing document reflect the assignment and the information required by the client's own payment administration process. Which billing details must be correct before the invoice is issued?

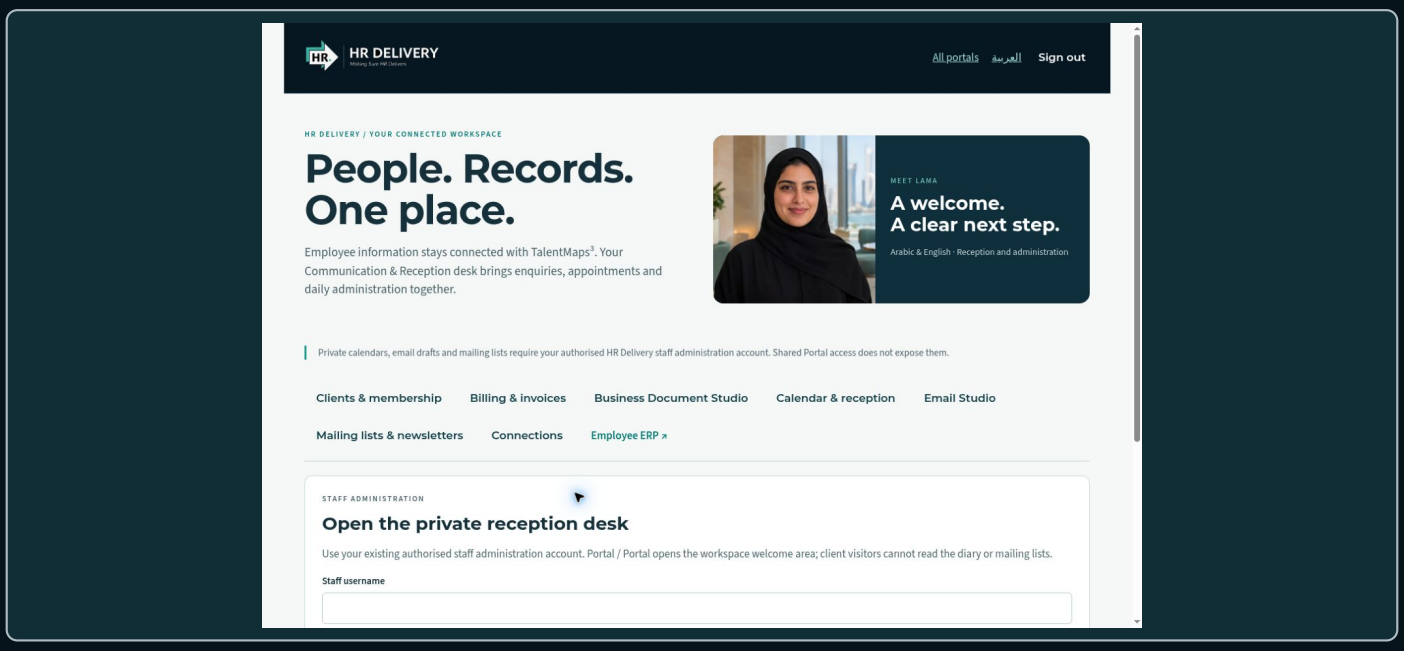
SERVICE CONTEXT / Staff billing administration

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

RECEIVE A CLEAR RECORD OF THE CHARGE

Branded invoices and PDF downloads

Receive an HR Delivery invoice that presents the customer, agreed service and amount due in a consistent document prepared for review and sharing.



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

WHAT IT GIVES YOU

The supplied scope includes branded invoice generation and PDF download within Billing & Invoices. Staff prepare the invoice against the commercial arrangement and retain it with the billing record, then use the agreed route to deliver the document to the client.

THE CLIENT VALUE

A clear invoice helps the client understand the basis of the charge and provides a shared reference for billing questions or separately arranged payment.

YOUR OUTPUTS

- Branded invoice PDF
- Customer and service description
- Amount due and commercial context

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: an agreed project milestone leads to a branded invoice PDF for client review. The sponsor checks the service description and billing details, then follows the separate payment instructions confirmed with HR Delivery. Creating the invoice does not imply that online or recurring collection is connected. Does the invoice accurately describe the agreed service and the payment instructions you received?

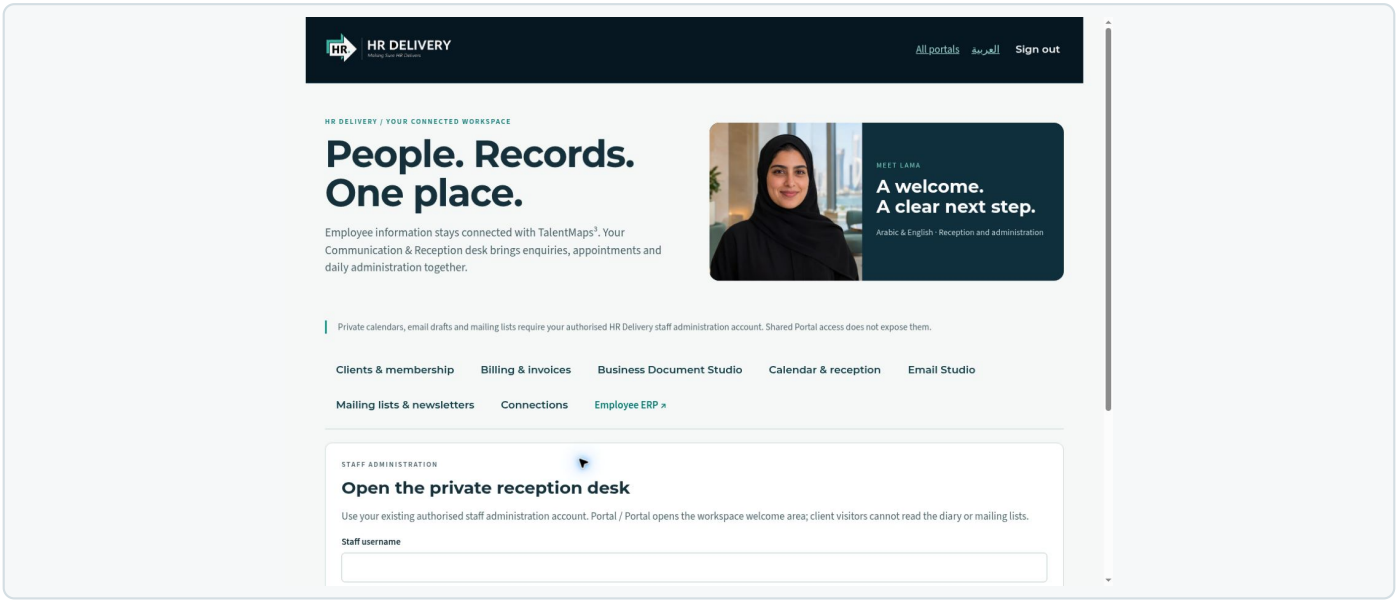
SERVICE CONTEXT / Invoice documents available; online and recurring payments not connected

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

RETURN TO THE RELEVANT BILLING DOCUMENT

Invoice history

Refer back to an earlier invoice when discussing a service period, renewal or billing question with the HR Delivery administration team supporting the client relationship.



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

WHAT IT GIVES YOU

The described invoice history sits alongside invoice generation and customer records. Staff can use retained documents to examine the relationship between the invoice, underlying agreement and any payment recorded through an external route, keeping the commercial context available for follow-up.

THE CLIENT VALUE

A retained history supports a more informed billing conversation and helps the team explain how previous documents relate to the client's continuing service arrangement.

YOUR OUTPUTS

- Earlier billing documents
- Service-period reference
- Context for payment and renewal enquiries

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client asks which invoice relates to a completed phase of work. Staff use the invoice history to identify the relevant record and discuss it alongside the agreed service period and deliverables, giving the sponsor a clear reference for internal commercial follow-up. Which project phase or service period should the team use to locate the invoice?

SERVICE CONTEXT / Staff invoice record

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

CONNECT PAYMENT INFORMATION WITH THE INVOICE

Recording externally received payments

Keep the client's commercial record current when a payment is received through a separately arranged route, with staff recording the relevant receipt or payment information.

WHAT IT GIVES YOU

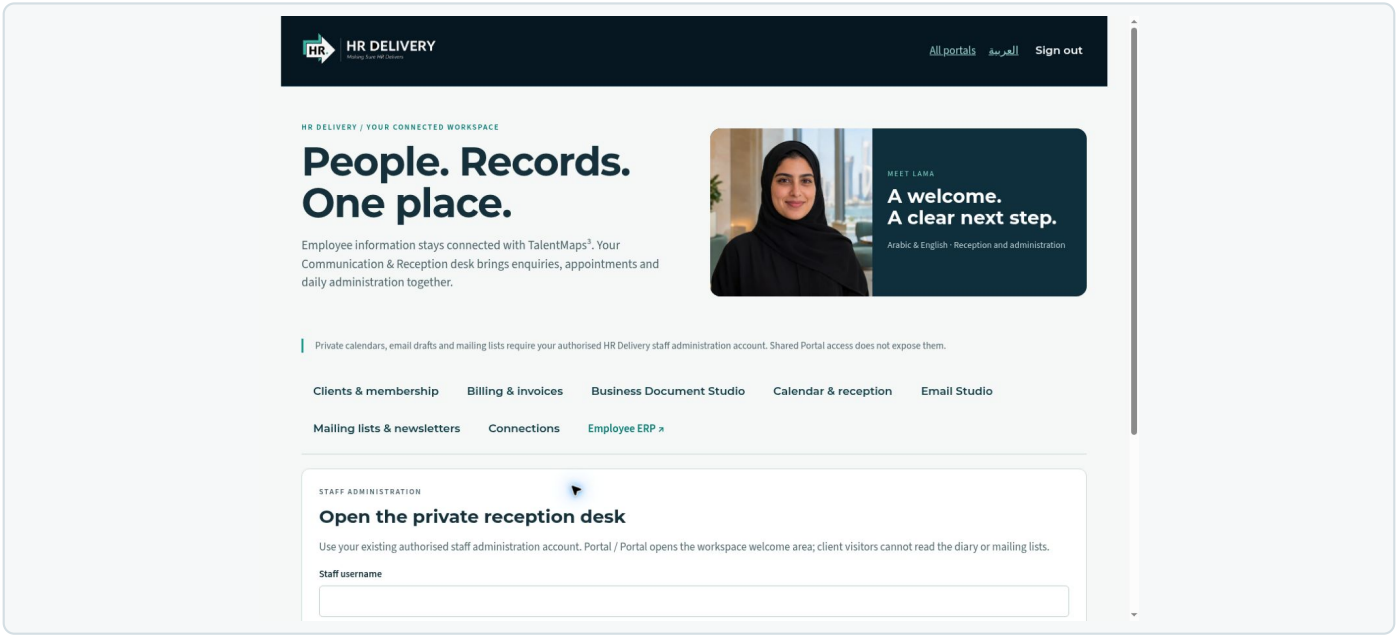
The supplied workspace includes receipt recording for external payments, such as an agreed bank-transfer route. Staff can connect the payment information with the customer and invoice history, providing an administrative reference for follow-up and questions about the current billing position.

THE CLIENT VALUE

A recorded receipt helps the team discuss the billing position with the client using the relevant payment context and the associated commercial documents.

YOUR OUTPUTS

- External-payment receipt or note
- Connection to the customer and invoice
- Updated context for billing follow-up



RELATED SERVICE VIEW / Connected Workspace entry and module navigation; supporting context for staff administration.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client pays through an agreed external route and provides the relevant payment reference. Staff record the receipt against the appropriate commercial record after checking the details. The receipt record documents an externally received payment; it does not perform the payment collection itself. What payment reference and invoice details will help the team match the external receipt?

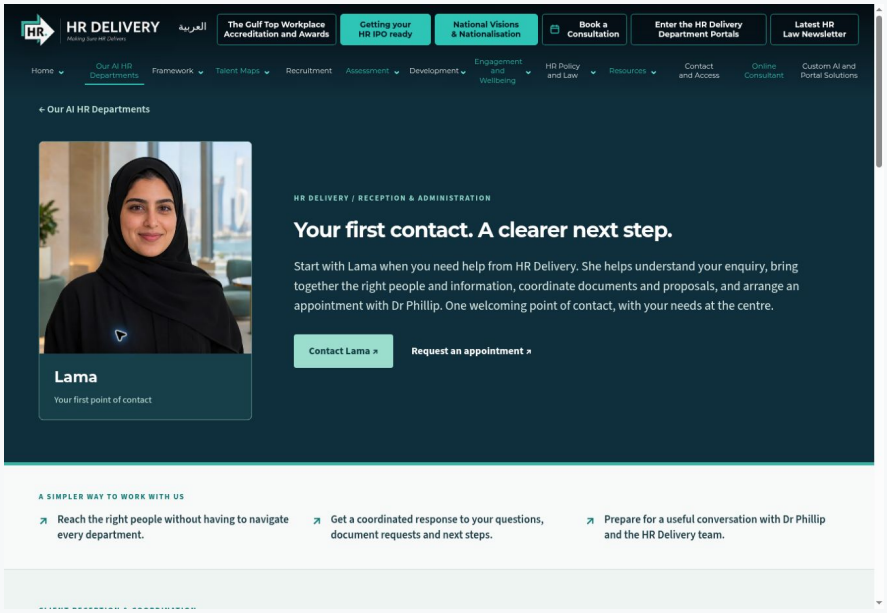
SERVICE CONTEXT / External receipt recording; no online collection implied

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

A CONSISTENT STRUCTURE FOR CLIENT COMMUNICATION

Stationery and Business Document Studio

Receive staff-prepared business documents built from a common HR Delivery structure, with content adapted to the organisation, assignment and purpose of the communication.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

The supplied studio includes presentation, proposal, quotation, letter, welcome, statement-of-work, meeting and progress-report templates. Staff select the document type, tailor the content and retain a working version for review before sharing through the agreed client communication route.

THE CLIENT VALUE

A consistent starting structure helps the delivery team communicate clearly across the relationship, while keeping each document focused on the client's actual requirement and next decision.

YOUR OUTPUTS

- Branded business-document draft
- Client-specific content and context
- Working version for review

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client assignment needs a proposal, meeting agenda and progress update. Staff use the business document preparation environment to develop the appropriate materials in HR Delivery's format, adapting each to its purpose and reviewing the client-specific details before the agreed issue or handover. Which business documents would help both teams coordinate the next stage of the assignment?

SERVICE CONTEXT / Staff document preparation

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

TAILOR THE STORY TO THE CLIENT MEETING

Editable presentation starter

Use a staff-prepared HR Delivery presentation to explain the relevant service, project or workshop purpose in a form suited to the audience and discussion.

WHAT IT GIVES YOU

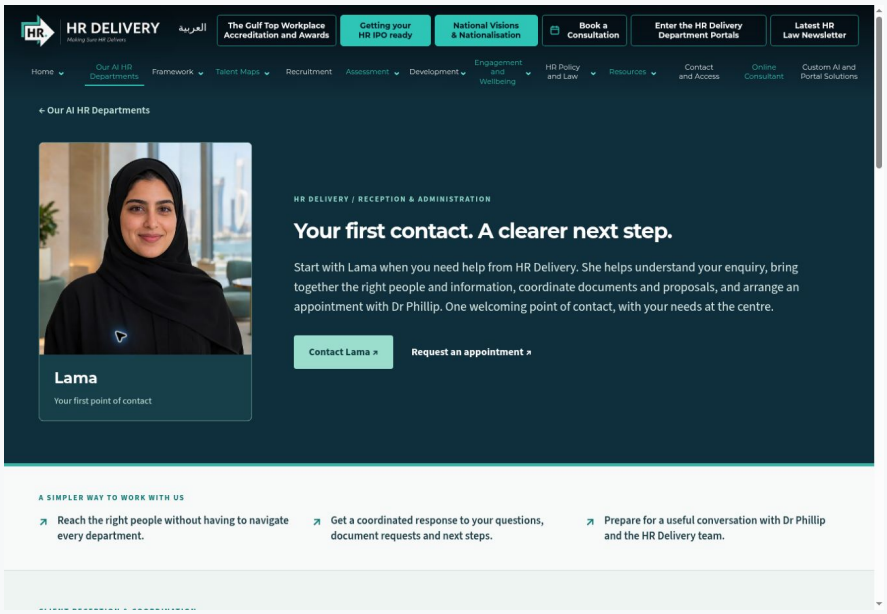
The editable starter is described within Business Document Studio as a branded foundation for presentations. Staff develop the narrative, select relevant service explanations, figures and screenshots, then review the flow before using the deck in a meeting or formal handover.

THE CLIENT VALUE

A tailored presentation gives participants a clearer shared account of the subject and helps the meeting concentrate on the decisions or understanding required from the discussion.

YOUR OUTPUTS

- Branded presentation draft
- Audience-specific service or project narrative
- Relevant figures and screenshots



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a consultant prepares a client steering-group presentation using the editable starter. The content is adapted to the agreed findings, decisions and next actions, then reviewed before issue. The starter provides a presentation foundation; the value of the final deck depends on the assignment-specific content. What decisions should the client presentation help your audience make?

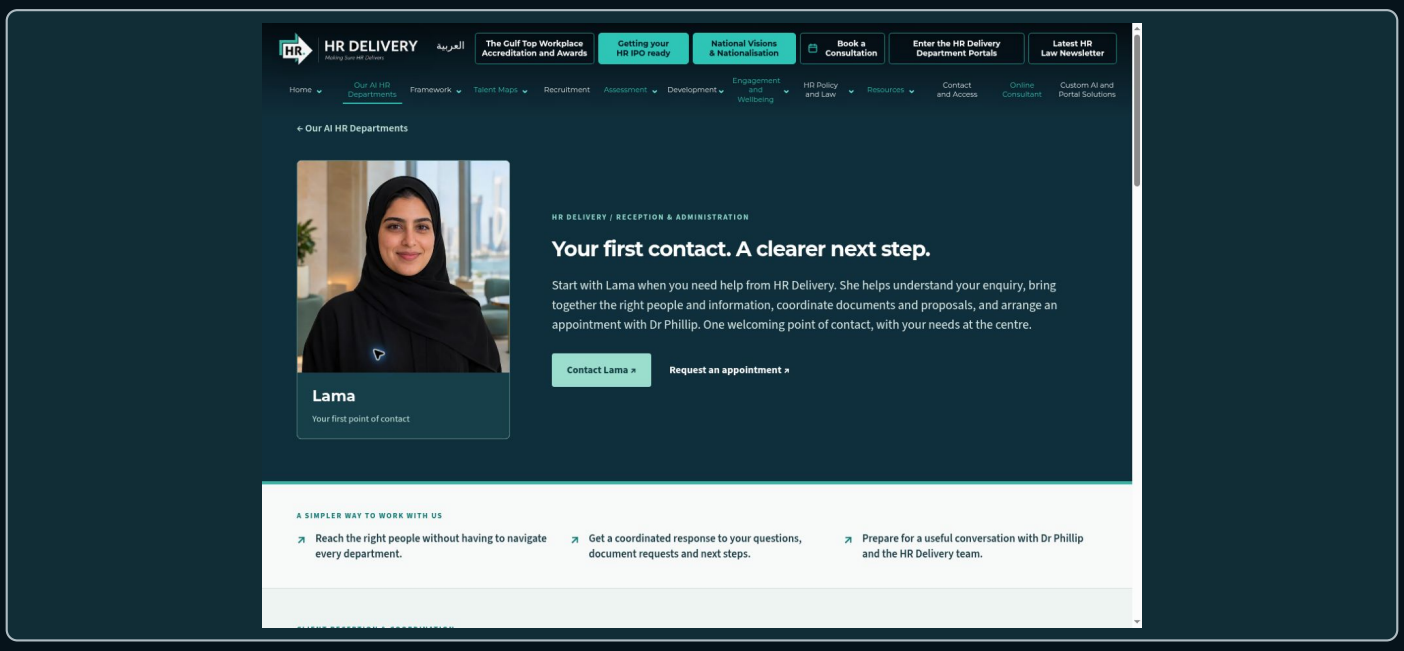
SERVICE CONTEXT / Staff presentation template

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

TURN THE ENQUIRY INTO A REVIEWABLE OFFER

Client proposal template

Review a proposal that explains the client need, proposed support and next decisions, using the initial conversation as the foundation for a scoped engagement.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

The staff proposal template provides a structure for describing the requirement, planned work and way forward. It can be developed from the organisation record and reception brief, then reviewed with relevant specialists before being shared with the client.

THE CLIENT VALUE

A concrete proposal helps the client assess whether the intended work addresses the requirement and gives both parties a clearer basis for refining the engagement.

YOUR OUTPUTS

- Client need and proposed approach
- Defined scope for discussion
- Decisions and next steps to proceed

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client describes an organisation design priority and asks for a proposal. Staff develop the proposed scope, deliverables and approach for discussion. The sponsor reviews these against the organisational need, helping both sides agree what the assignment should produce before the work proceeds. Which outcomes and deliverables must the proposal address for your organisation?

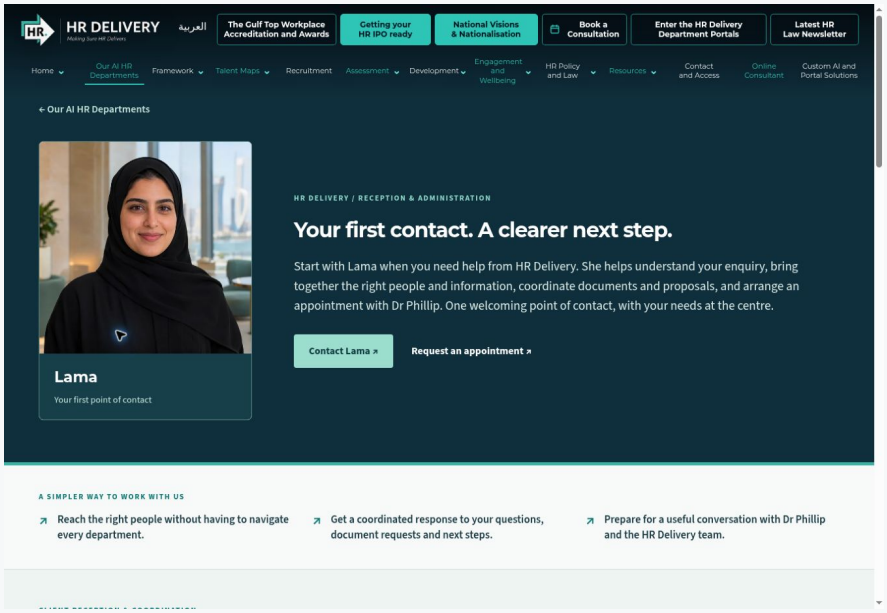
SERVICE CONTEXT / Staff-prepared proposal; scope agreed with the client

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

MAKE THE COMMERCIAL OFFER CONCRETE

Quotation template

Review the commercial offer for the requested services or deliverables in a document that connects the description of the work with the proposed terms.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

The described quotation template lets staff present the relevant service description, commercial terms and service period alongside the proposal and customer context. Review ensures that the quotation reflects the current understanding of the work before the client considers the offer.

THE CLIENT VALUE

A clear quotation gives the client a practical basis for discussing the commercial arrangement and checking that it corresponds to the work they intend to commission.

YOUR OUTPUTS

- Branded quotation
- Service or deliverable description
- Commercial terms and service-period context

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client requests pricing for an agreed set of services. Staff prepare a quotation that can be reviewed alongside the described scope and relevant terms. The sponsor clarifies any assumptions before agreement so that the commercial discussion refers to the same work and expected deliverables. What assumptions or service inclusions should be clarified before you accept the quotation?

SERVICE CONTEXT / Staff-prepared quotation; client agreement required

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

CREATE A CLEAR WRITTEN RECORD

Business letter template

Receive formal correspondence in a consistent HR Delivery format, with the recipient, subject and message prepared around the particular client matter being addressed.

WHAT IT GIVES YOU

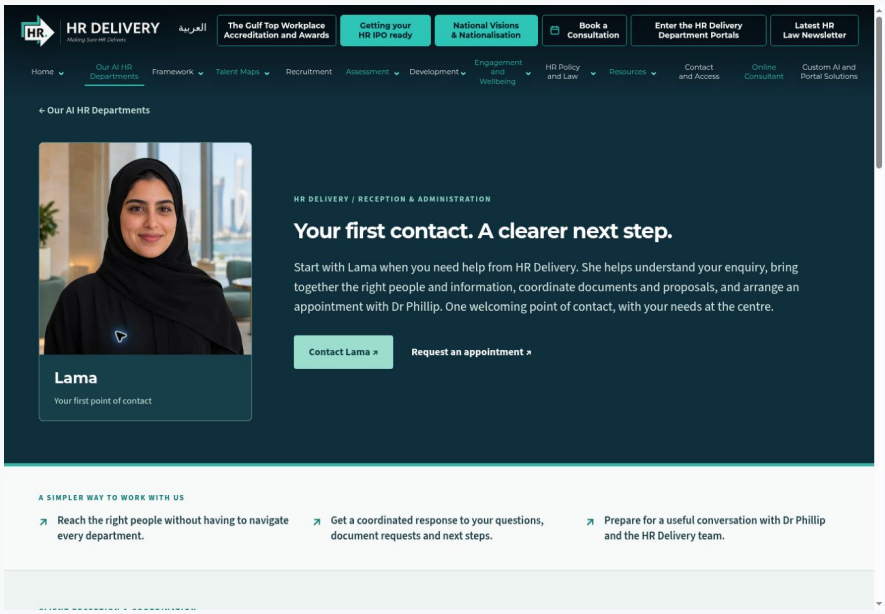
The supplied letter template supports structured business communication with clients and partners. Staff adapt the details and wording to the organisation, agreement or issue, review the content and retain the document with the appropriate customer or project material.

THE CLIENT VALUE

A clear letter helps both parties refer back to the same communication and understand its purpose within the ongoing client or project relationship.

YOUR OUTPUTS

- Branded business letter
- Specific recipient and subject
- Written record linked to the relevant matter



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a project needs a formal letter confirming an agreed handover arrangement. Staff adapt the business letter template to the recipient, purpose and relevant details, then review the wording before issue. The client receives a document grounded in the specific communication it is intended to support. What should the letter confirm, and who is the appropriate recipient?

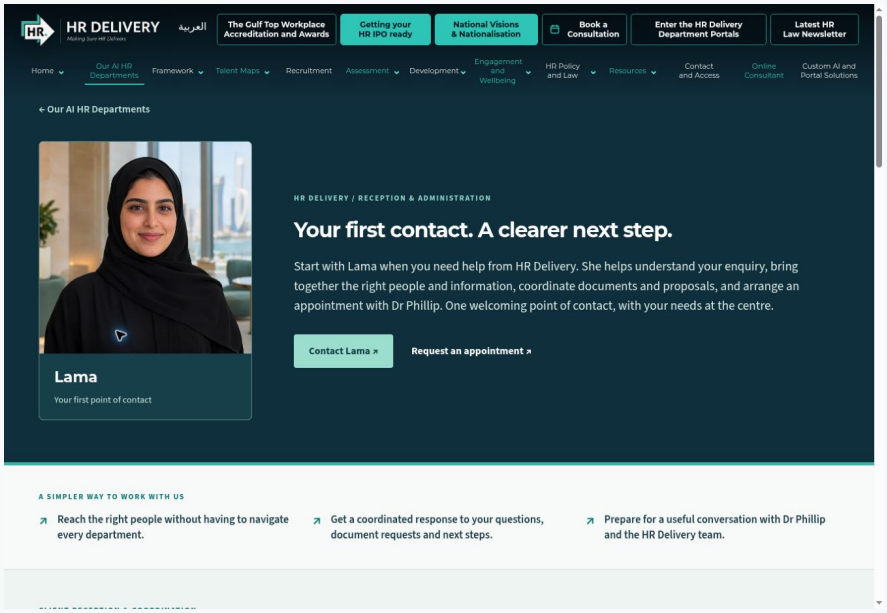
SERVICE CONTEXT / Staff correspondence template; review before release

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

KNOW WHERE TO BEGIN

Customer welcome and access handover

Receive the practical information needed to begin the agreed service, including relevant portal routes, access arrangements and contact points for support during the relationship.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

The welcome template brings the customer's services and portal entitlements into a structured handover. Staff can explain the first useful steps, identify any prepared document collection and provide the route for raising access questions or clarifying the service arrangement.

THE CLIENT VALUE

A focused welcome handover connects the commercial arrangement with the practical actions the client needs to take and makes the initial service experience easier to navigate.

YOUR OUTPUTS

- Agreed service and portal summary
- Access and document-collection routes
- First steps and support contacts

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a new client receives a welcome handover explaining the agreed service, principal contacts and access routes. The sponsor checks who will use the portals and document collection, then resolves any missing instructions before inviting colleagues to begin work with the shared material. Does the welcome handover explain the correct contact and access route for each part of your service?

SERVICE CONTEXT / Staff-prepared onboarding handover

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

AGREE WHAT DELIVERY WILL INVOLVE

Statement of work template

Review the scope, deliverables, responsibilities and timetable of an assignment before delivery begins, using a shared document to support coordination and decisions about changes.

WHAT IT GIVES YOU

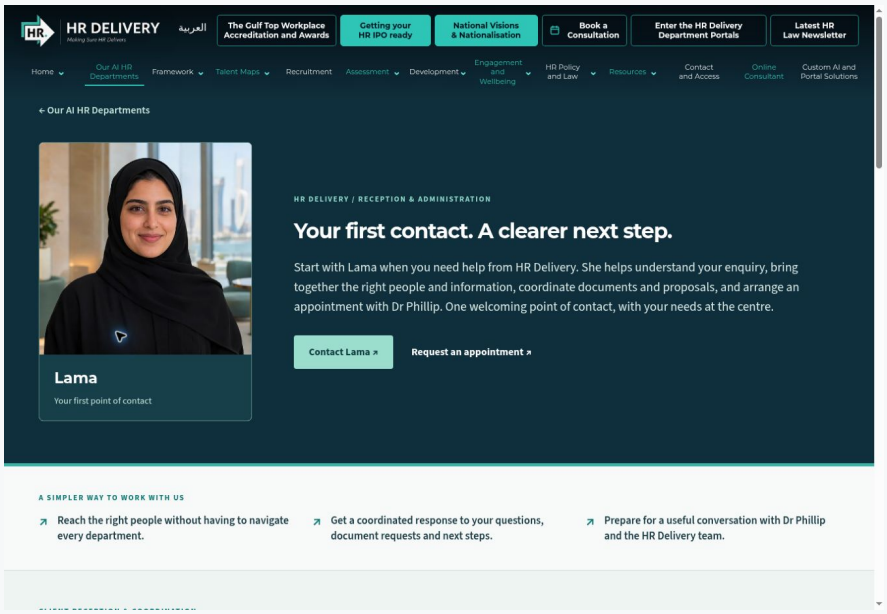
The staff template develops the proposal and client discussions into a structured statement of work. It provides a reference for the planned activities and outputs, with specific obligations determined by the completed document and the agreement reached between the parties.

THE CLIENT VALUE

A clear statement of work helps clients and delivery colleagues understand the assignment boundaries and coordinate the contributions needed to produce the agreed outputs.

YOUR OUTPUTS

- Scope and deliverables
- Responsibilities and timetable
- Shared reference for delivery discussions



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client and HR Delivery agree a focused workforce planning assignment. The statement of work records the intended deliverables, responsibilities and timing for review. The completed agreement defines the assignment, helping both sides distinguish the agreed work from possible later additions or related enquiries. Are the deliverables, responsibilities and timing clear enough to guide the assignment?

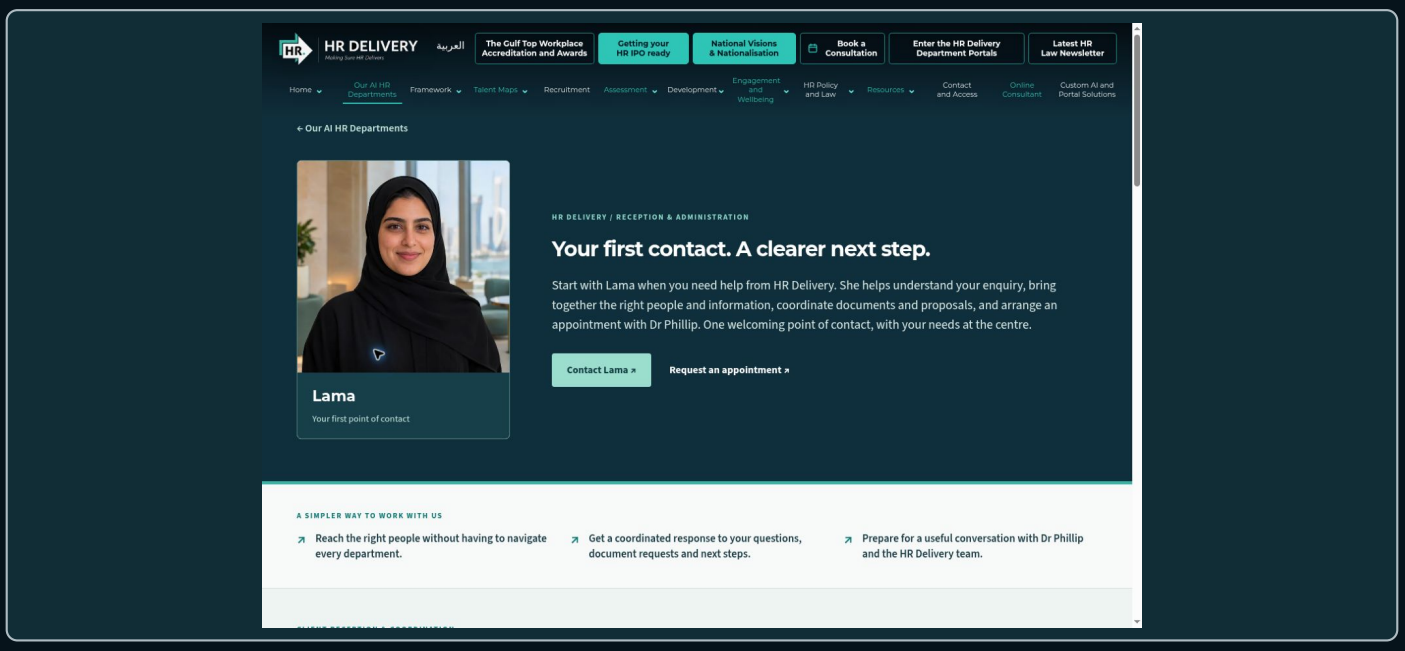
SERVICE CONTEXT / Draft for agreement; completed terms define the assignment

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

PREPARE THE CONVERSATION AROUND ITS PURPOSE

Meeting agenda template

Know what the meeting is intended to achieve and what information to bring, so the time can focus on the questions and decisions that matter.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

The agenda template gives staff a common structure for connecting meeting objectives with topics, participants and preparation. It can draw on the appointment brief or project record, helping the discussion follow a useful sequence and arrive at practical next steps.

THE CLIENT VALUE

A focused agenda helps participants prepare and makes it easier to use the meeting for the substantive discussion required by the project or client enquiry.

YOUR OUTPUTS

- Meeting purpose and discussion topics
- Participants and preparation requirements
- Questions or decisions for the session

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a project review meeting needs decisions on two documents and a delivery date. Staff prepare an agenda identifying the discussion topics and expected decisions, allowing the client sponsor to bring the right colleagues, review the material and prepare the information needed for a useful conversation. What decisions and preparation should be included in the next meeting agenda?

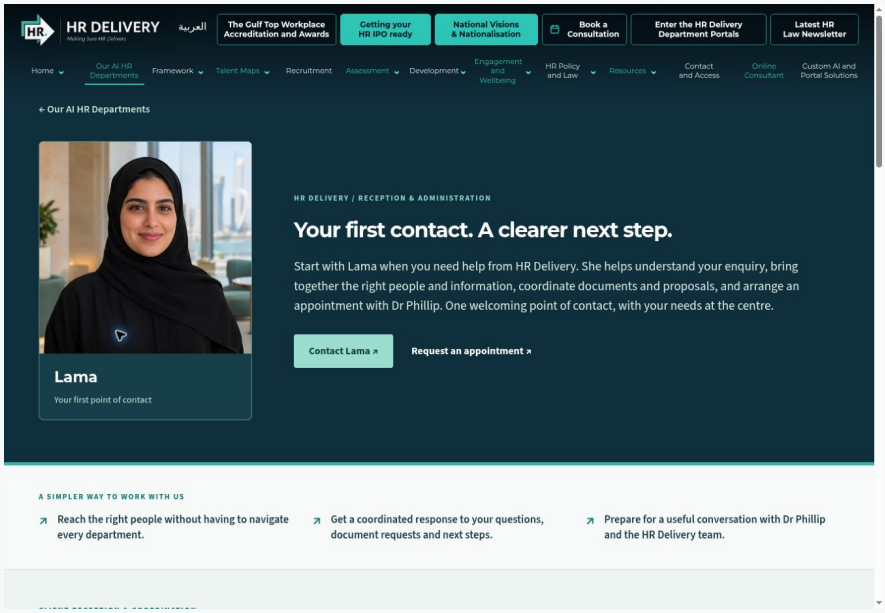
SERVICE CONTEXT / Staff-prepared meeting document

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

CARRY DECISIONS INTO FOLLOW-UP

Meeting record and action log

Receive an organised record of the discussion, decisions and agreed actions so the next stage of work has a clear starting point for everyone involved.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

The supplied template records meeting conclusions and follow-up work, with responsibilities, intended dates and subsequent updates considered alongside the agenda and project context. It gives staff and clients a continuing reference for preparing the next progress discussion or delivery activity.

THE CLIENT VALUE

A shared record helps the team maintain continuity between meetings and check whether the follow-up work still reflects what the participants actually agreed to do.

YOUR OUTPUTS

- Meeting conclusions and decisions
- Actions with responsibilities and intended dates
- Reference for subsequent progress review

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a review meeting agrees changes to a report and allocates follow-up tasks. The meeting record captures the decisions and action owners for participants to check, helping the client and delivery team understand who will do what before the next review and document release. Which decisions and action owners should everyone confirm after the meeting?

SERVICE CONTEXT / Staff-prepared record; actions agreed with participants

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

SEE WHAT HAS MOVED FORWARD

Client progress report template

Review completed work, current priorities and decisions needing client input in a structured update that relates progress to the assignment and its next practical steps.

WHAT IT GIVES YOU

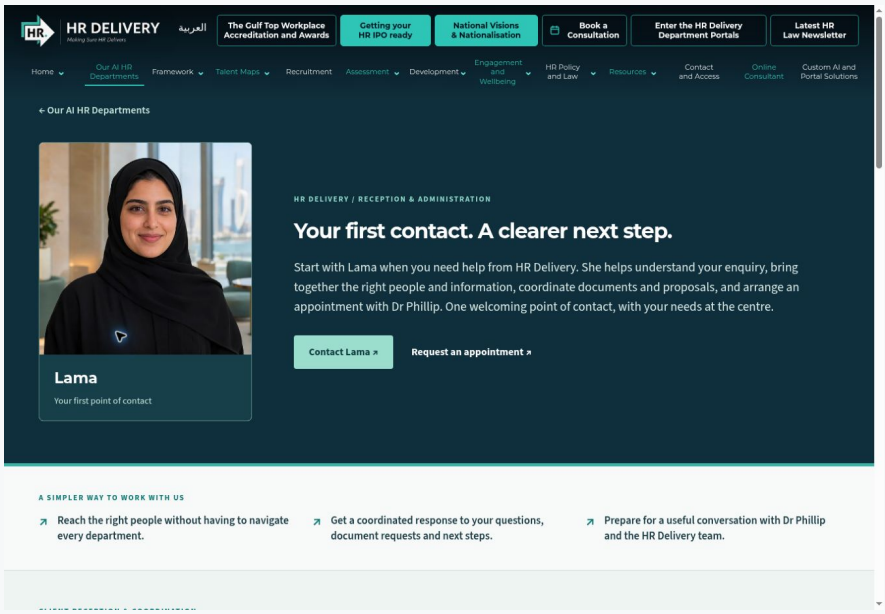
The staff template draws together project context and action-log information to explain delivery. It can summarise what has been completed, what is underway and what comes next, with detail adapted to the client's needs and the stage of the engagement.

THE CLIENT VALUE

A clear progress update helps the client understand the state of the assignment and contribute the decisions or information needed to keep the work moving.

YOUR OUTPUTS

- Completed work and current priorities
- Upcoming activity
- Decisions or information needed from the client



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: an assignment is approaching a milestone with one document ready and another awaiting client input. A progress report explains the current position, outstanding information and next decisions. The sponsor can use it to coordinate colleagues and keep the agreed delivery conversation focused. What completed work, open inputs and next decisions should the progress update make clear?

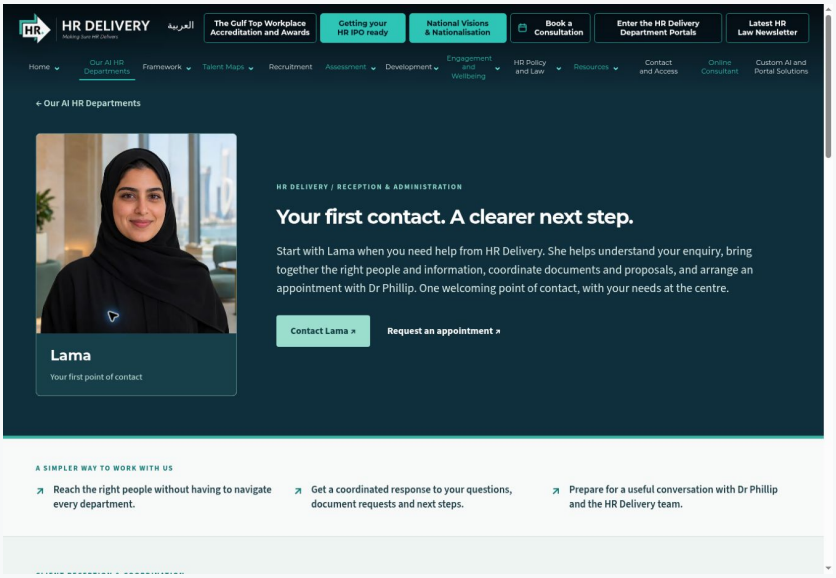
SERVICE CONTEXT / Staff-prepared project update

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

DISCUSS THE NEXT SERVICE PERIOD

Membership renewal template

Consider the proposed next period of support with the current services, fee arrangement and renewal timing brought into one clear communication for review.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

Staff prepare the renewal document from the customer record and current arrangement, then confirm the client's requirements and the proposed scope for the next period. It supports an informed conversation before the subsequent commercial administration and access handover are completed.

THE CLIENT VALUE

A structured renewal conversation helps clients assess their continuing needs and gives the team a clear basis for preparing the next agreed service arrangement.

YOUR OUTPUTS

- Proposed renewal period and scope
- Relevant fee and service context
- Information needed to complete the renewal discussion

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client considers renewing a membership or service arrangement. Staff prepare a renewal document reflecting the proposed period and scope for discussion. The sponsor reviews the continuing need and any changes, while payment arrangements are agreed separately from the preparation of the renewal record. What should continue or change in the next service period?

SERVICE CONTEXT / Staff renewal document; payment collection remains separate

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

UNDERSTAND WHAT HAS BEEN DELIVERED

Document-delivery handover template

Receive a clear explanation of the reports, solutions or project documents being handed over, including where to find them and how the material supports the assignment.

WHAT IT GIVES YOU

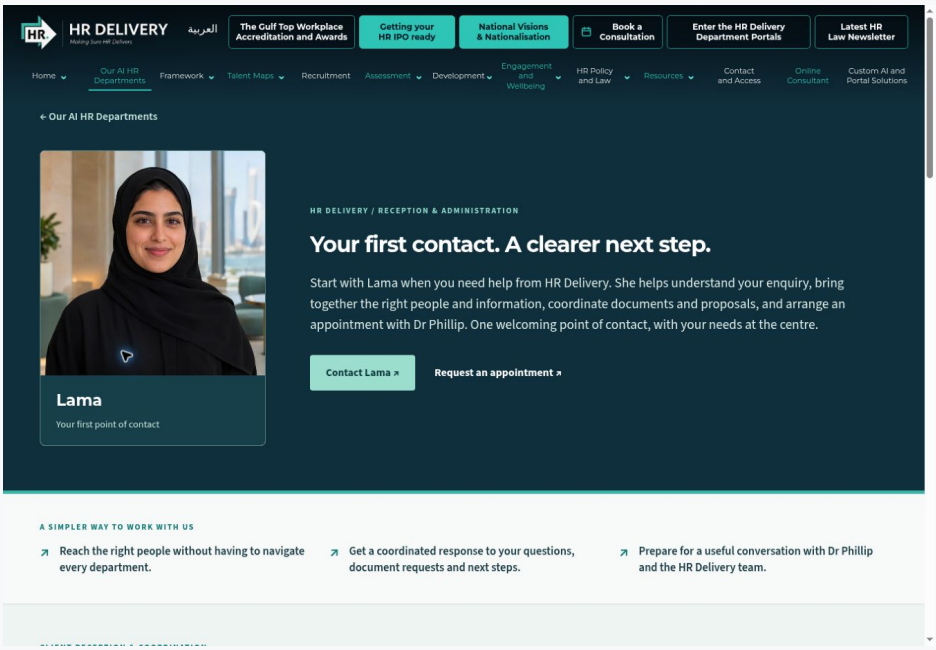
The handover template identifies the delivered material, relevant version and next steps for the client. Staff can relate it to the project collection, explain the purpose of the documents and provide the contact route for questions or further work.

THE CLIENT VALUE

A clear handover helps clients navigate the material and begin using it with a better understanding of its purpose, context and place in the assignment.

YOUR OUTPUTS

- Delivered-document list and purpose
- Project and version references
- Next steps and support contact



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: staff prepare a handover record for a completed client report and supporting workbook. It identifies the material shared, the project context and relevant next actions, allowing the sponsor to explain the delivery to colleagues and raise a precise question if something needs clarification. What should the handover record say about the documents, versions and next steps?

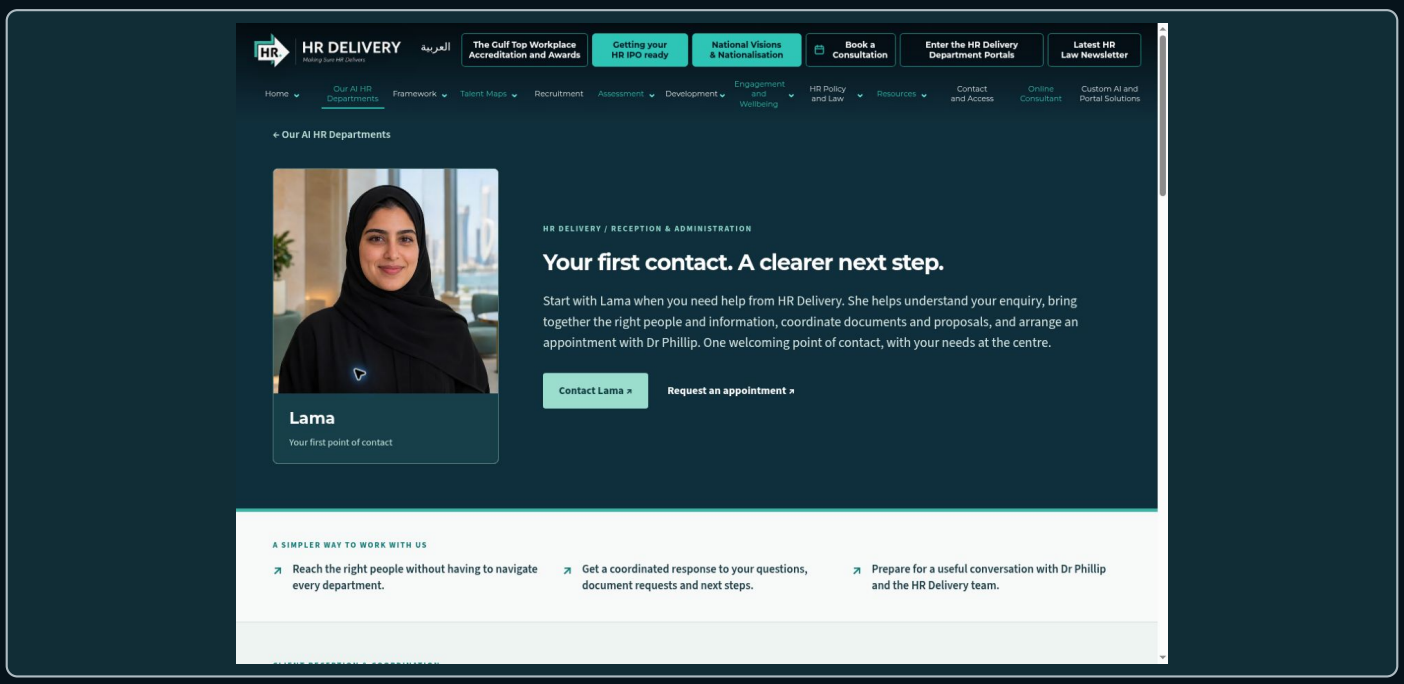
SERVICE CONTEXT / Staff-prepared delivery record

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

MATCH THE EDITION AND FORMAT TO THE NEXT STEP

Business-document versions and exports

Receive the appropriate version and file format for the intended review, editing or delivery activity, with staff retaining the context of how the document has developed.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

WHAT IT GIVES YOU

Business Document Studio is described as handling versions alongside PDF and Word exports. Staff can distinguish a working draft from a later revision and select the format that supports the next review or handover, keeping the relevant edition identifiable.

THE CLIENT VALUE

Clear edition and format choices help clients review the right material and maintain continuity as a business document develops through discussion, revision and delivery.

YOUR OUTPUTS

- Document version context
- PDF export
- Editable Word export

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a proposal is revised after client feedback, then prepared in the agreed export format. Staff retain the relevant version history and review the issued edition, helping the sponsor recognise which document represents the current discussion and which earlier material has been superseded for that purpose. Which edition and format should be treated as the current document for review?

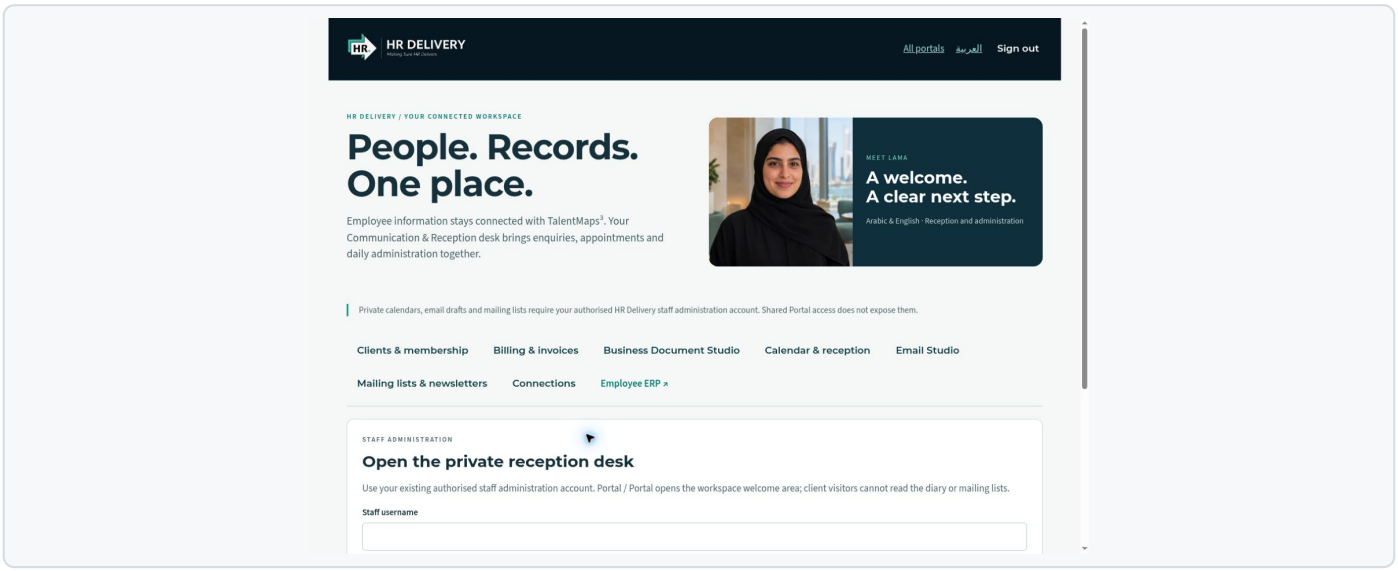
SERVICE CONTEXT / Staff version handling and export workflow

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

Your request enters a reception review queue

Reception brings incoming appointment requests together so the team can review the purpose, timing and required follow-up.



WEBSITE SCREEN / Live Connected Workspace welcome screen.

WHAT IT GIVES YOU

The private inbox is intended for authorised reception staff. Your request supplies contact information, a discussion purpose and preferred timing; staff use that context to arrange the next step and coordinate an appropriate response.

THE CLIENT VALUE

Your enquiry has an organised route from initial submission to a human response and an agreed next step.

YOUR OUTPUTS

- A request ready for review
- A staff follow-up task
- A coordinated appointment decision

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: several client requests arrive with different purposes and preferred times. The private reception queue supports staff review and coordination of the next response. A client submits through the public request route and uses the confirmed contact method to clarify any missing context or timing requirement. What information would help reception review and route your request without another clarification round?

SERVICE CONTEXT / Private staff workspace; the client uses the public request route.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

A diary that supports a prepared conversation

Dr Phillip's diary gives the reception team a common place to coordinate calls, meetings and other commitments.

WHAT IT GIVES YOU

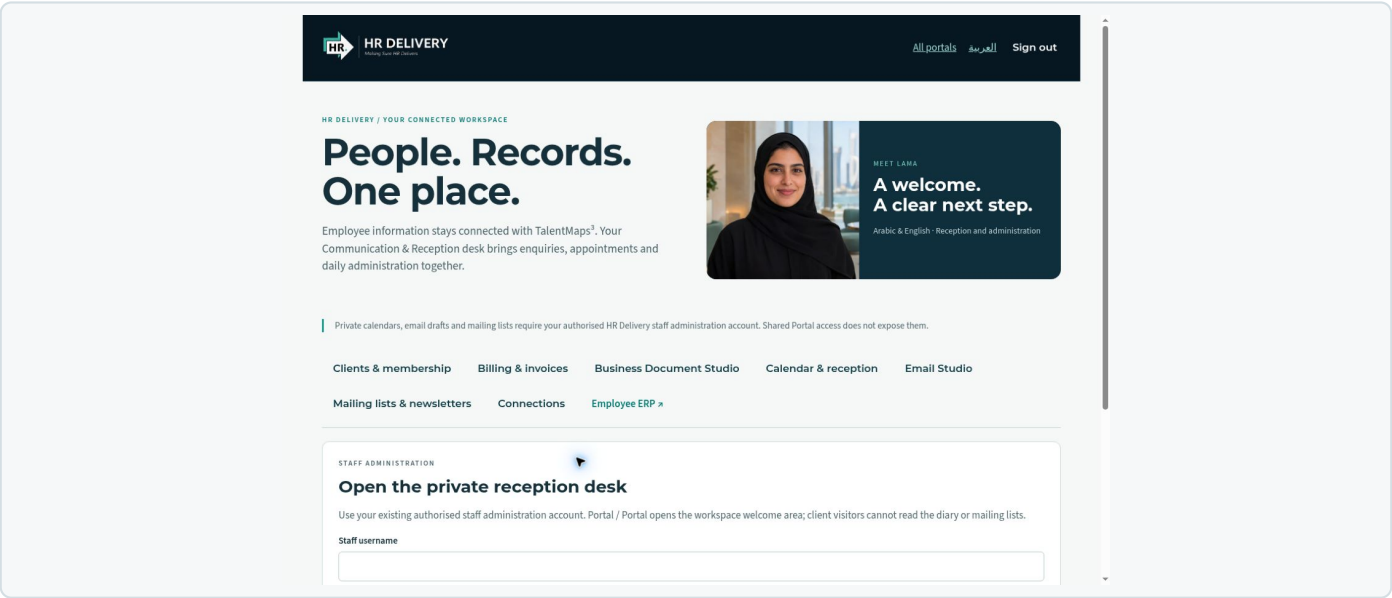
Staff relate your requested appointment to existing commitments and planned availability. Meeting purpose, participant details and timing provide the preparation context, while changes can be coordinated through the same reception process.

THE CLIENT VALUE

Your conversation can be arranged with a clearer purpose and practical preparation, while the team manages competing commitments.

YOUR OUTPUTS

- A coordinated schedule
- Meeting preparation details
- A confirmed timing when agreed



WEBSITE SCREEN / Live Connected Workspace welcome screen.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a confirmed client meeting requires review of a report beforehand. Staff use the private diary context to prepare the appointment with its purpose and relevant information. The client helps by identifying the document and the decisions the conversation should address when arranging the meeting. Which document or decision should be linked to the purpose of your meeting?

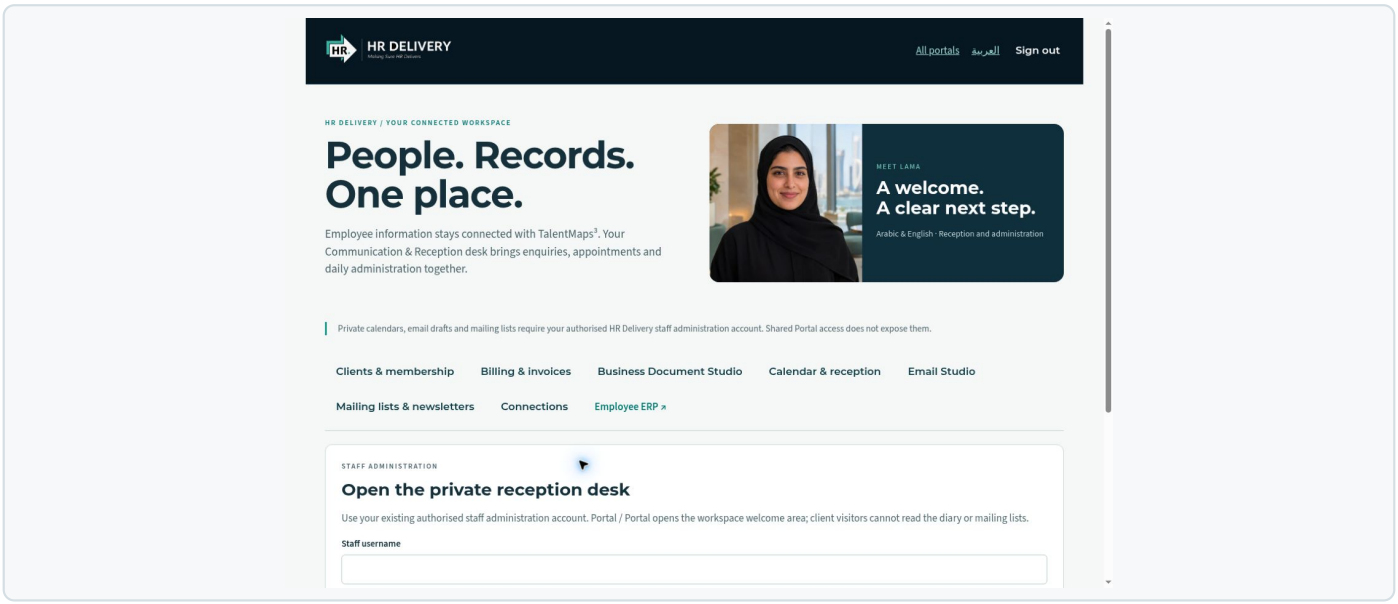
SERVICE CONTEXT / Diary administration is a private staff function.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

Know whether an appointment is requested or confirmed

The reception process distinguishes a proposed meeting from an agreed appointment and records later changes when needed.



WEBSITE SCREEN / Live Connected Workspace welcome screen.

WHAT IT GIVES YOU

Staff review the request and record confirmation, decline or cancellation. If circumstances change, the appointment record and communication requirement should be updated so the next action is clear to the team and the client.

THE CLIENT VALUE

You can plan around an agreed arrangement and understand when another time or a different next step needs to be discussed.

YOUR OUTPUTS

- An appointment decision
- An updated meeting record
- A communication or follow-up requirement

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client proposes a meeting time that needs adjustment. Staff review the request and coordinate confirmation, an alternative or cancellation as appropriate. The client checks the agreed time and format through the confirmed communication route instead of treating the original request as a completed booking. Has the team confirmed the meeting time and format, or is the request still under review?

SERVICE CONTEXT / Automatic appointment messages require an external email connection.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

Availability blocks help the team offer realistic times

Reception can reserve unavailable periods before agreeing an appointment, taking existing commitments and practical constraints into account.

WHAT IT GIVES YOU

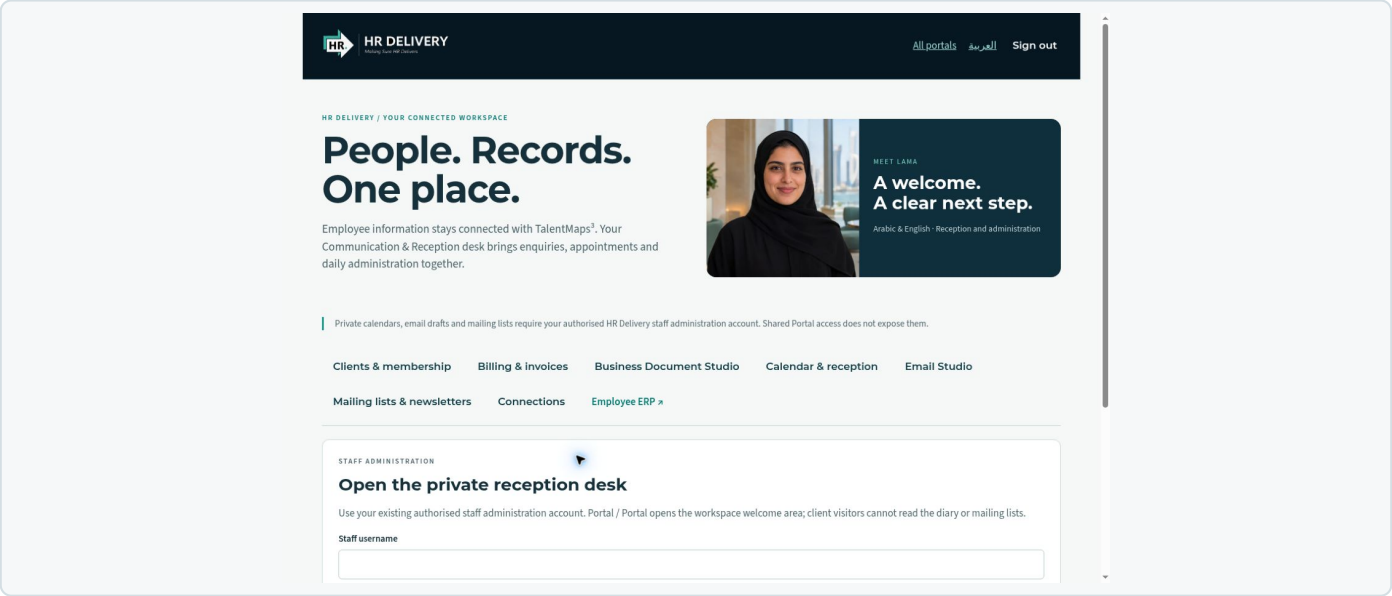
The described calendar tools allow staff to mark travel, other commitments or time reserved by Dr Phillip. When your preferred slot overlaps an unavailable period, the team can use that information to consider a suitable alternative.

THE CLIENT VALUE

The scheduling conversation is grounded in the diary, helping avoid arrangements that cannot be honoured.

YOUR OUTPUTS

- A staff availability picture
- Protected unavailable periods
- A more practical alternative slot



WEBSITE SCREEN / Live Connected Workspace welcome screen.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: Dr Phillip has an existing commitment during a requested meeting period. Staff maintain unavailable time in their diary process and coordinate a suitable alternative with the client. A clear preferred window and preparation context help reception preserve the purpose of the appointment when arranging another time. Which alternative time windows would work if your preferred appointment cannot be confirmed?

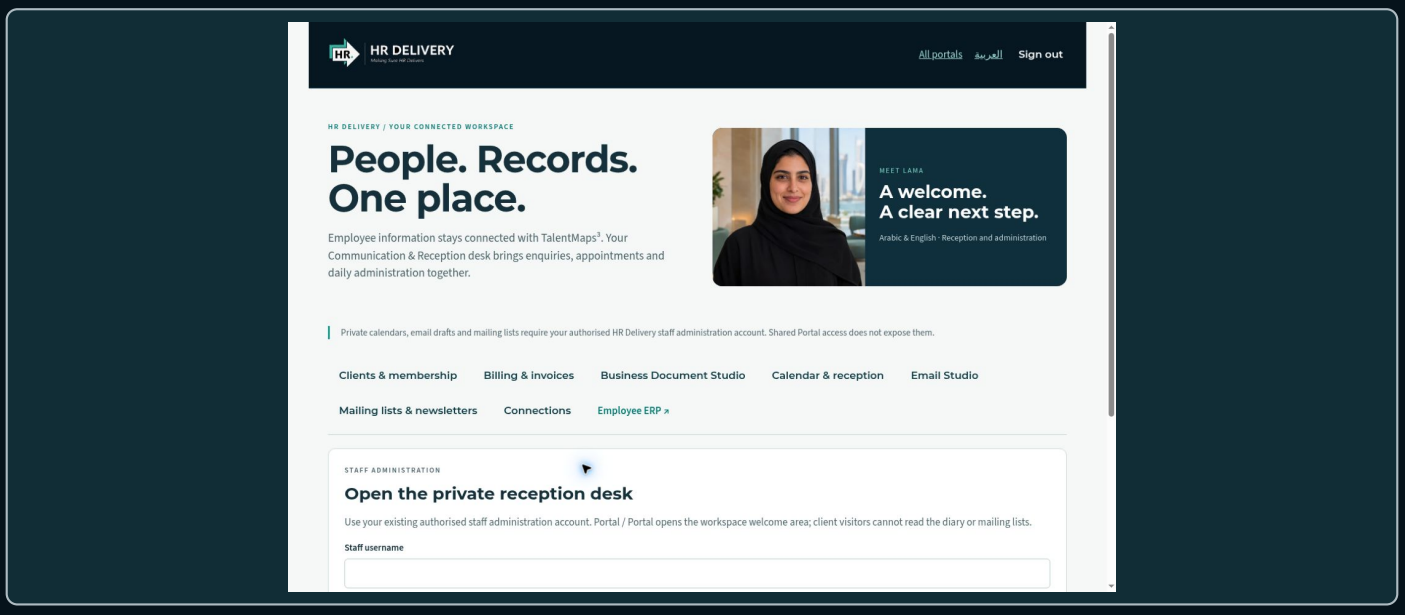
SERVICE CONTEXT / Unavailable-time management sits within the private staff calendar.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

Timing checks support a dependable schedule

Appointment overlap checks help reception identify a potential clash before confirming a meeting or changing an existing booking.



WEBSITE SCREEN / Live Connected Workspace welcome screen.

WHAT IT GIVES YOU

Staff consider the requested start time and duration against the diary. A conflict can be addressed while retaining the original purpose and preparation details, allowing the team to coordinate another time with the client.

THE CLIENT VALUE

Problems can be identified early enough to discuss a workable appointment, with fewer last-minute uncertainties for the people involved.

YOUR OUTPUTS

- A potential conflict highlighted
- A scheduling decision
- An alternative arrangement where needed

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a proposed consultation could overlap with an existing diary commitment. Staff consider its start time and duration during scheduling and discuss an alternative with the client where needed. The client confirms the final arrangement, keeping the required participants and preparation needs visible through the change. What duration and participant availability should reception consider when confirming the appointment?

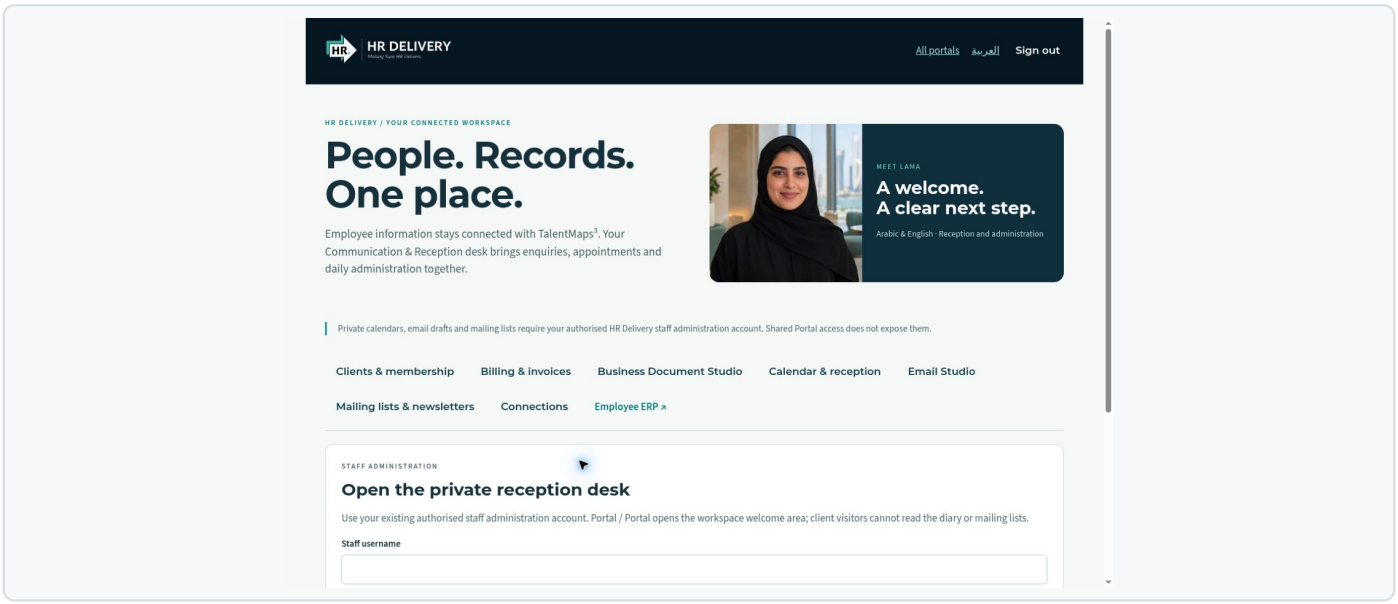
SERVICE CONTEXT / Overlap checks support staff scheduling decisions.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

A morning briefing prepares the day's conversations

The diary briefing preview brings the day's commitments into a concise preparation view for Dr Phillip and reception.



WEBSITE SCREEN / Live Connected Workspace welcome screen.

WHAT IT GIVES YOU

Staff can review meeting purposes, contact information and preparation needs against the diary. The usefulness of the briefing depends on the information recorded for each appointment, so a clear purpose in your original request helps.

THE CLIENT VALUE

The team can approach scheduled conversations with a clearer view of the day and the material each meeting needs.

YOUR OUTPUTS

- A daily diary overview
- Meeting context to review
- Preparation priorities

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client consultation appears in the day's diary with a clear purpose and relevant contact information. Staff can use the morning briefing preview to prepare the discussion. Automatic delivery of that briefing by email remains dependent on connection, while useful preparation begins with the recorded meeting context. What would help the team prepare for your conversation before the appointment begins?

SERVICE CONTEXT / The briefing preview exists; automatic morning email delivery awaits connection.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

Prepared email drafts support consistent follow-up

Email Studio gives authorised staff a place to prepare and retain wording for client administration and follow-up.

WHAT IT GIVES YOU

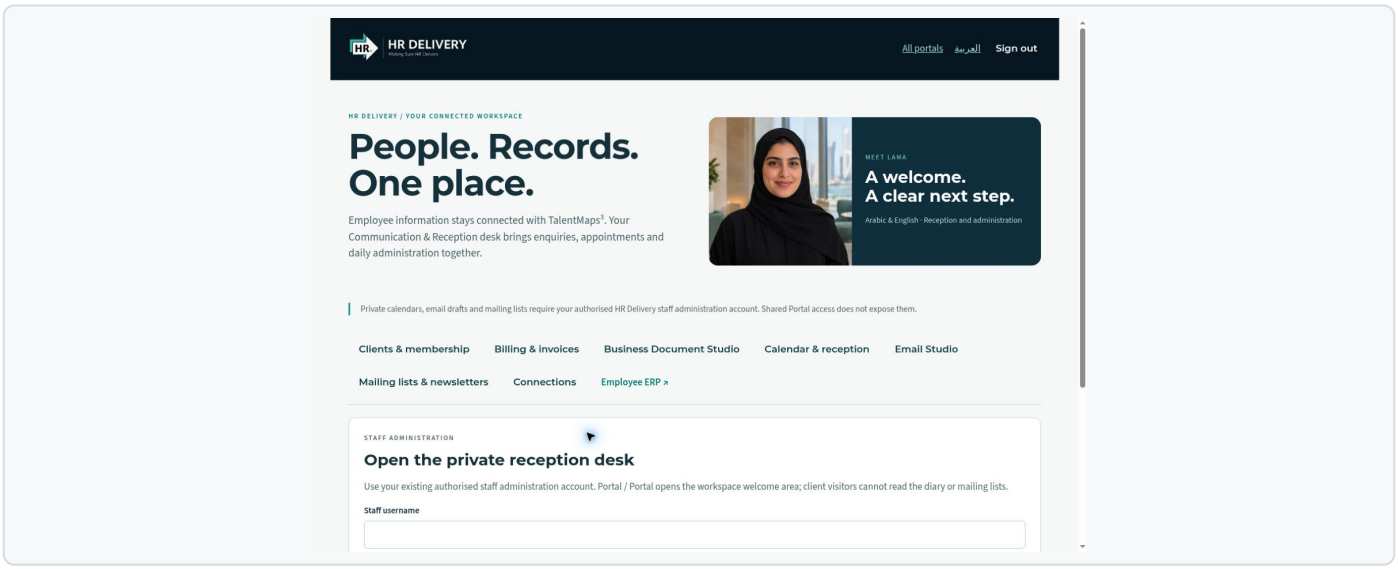
Drafts may support an appointment message, a document handover or another agreed communication. Staff can prepare the content, review the details and arrange delivery through an available channel; saving a draft does not itself send it.

THE CLIENT VALUE

The team can maintain continuity between preparing a response, checking it and completing the intended client follow-up.

YOUR OUTPUTS

- A saved email draft
- Reviewed follow-up wording
- A message ready for an agreed delivery route



WEBSITE SCREEN / Live Connected Workspace welcome screen.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: staff prepare an email explaining a forthcoming document handover and retain the draft for review. They check the recipient, project and edition before arranging delivery through an available channel. Saving the draft supports preparation but does not establish that the message has been sent. Which recipient, document and next action must be correct in the follow-up message?

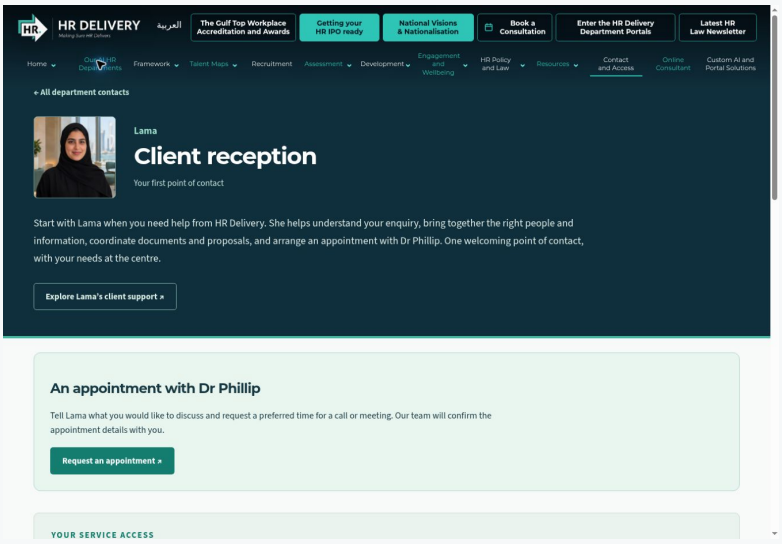
SERVICE CONTEXT / Saved drafts are available; external sending depends on the configured provider.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

Communication preparation sits alongside client support

The Communication Suite is described as an administrative home for coordinating planned channels, enquiries, drafts and follow-up.



WEBSITE SCREEN / Live Lama communication screen, explicitly awaiting service connections.

WHAT IT GIVES YOU

Public specialist screens show email, call, chat and Telegram interfaces with service access and connection messages. Staff administration provides context for managing those routes and understanding what needs to be activated before live use.

THE CLIENT VALUE

Client support can be planned around an available channel and a clear follow-up, with service status understood before a conversation starts.

YOUR OUTPUTS

- An organised contact route
- Prepared communication
- A view of channel readiness

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client sees email, call, chat and Telegram options on a specialist screen. The team confirms the enabled route for the agreed service before relying on it. Staff communication preparation helps coordinate the enquiry and follow-up while provider-dependent channels await the relevant activation. Which communication channel has been confirmed for your service enquiry and follow-up?

SERVICE CONTEXT / Live specialist replies and calls require the relevant external providers.

SOURCE: HR.DELIVERY / CONTACT DEPARTMENT RECEPTION ADMINISTRATION

L · YOUR CLIENT EXPERIENCE

Connection status makes service readiness explicit

The Connections area helps staff understand which integrations are configured before relying on them in a client process.

WHAT IT GIVES YOU

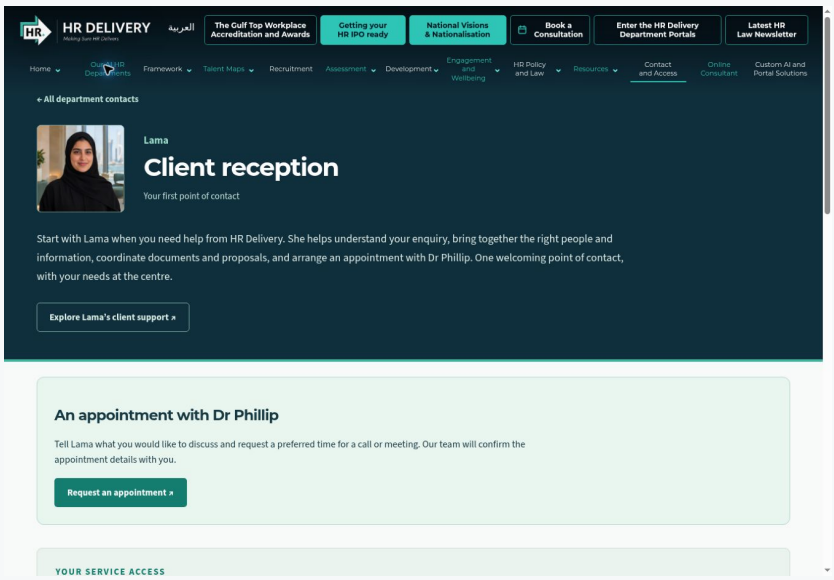
Email, chat, calling, calendar and other connected services can have different readiness states. The administration route provides a place to coordinate those dependencies and distinguish the visible interface from the live external service.

THE CLIENT VALUE

Your organisation can agree what is active and what still needs to be connected before adopting a new workflow.

YOUR OUTPUTS

- A connection-status view
- A configuration requirement
- A clearer service handover



WEBSITE SCREEN / Live Lama communication screen, explicitly awaiting service connections.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client wants appointment updates by email and a discussion through a specialist channel. Staff check the relevant service readiness and explain the available route. The client can then agree a workable communication arrangement without assuming every visible interface is already connected to its external provider. Which external services need to be confirmed before you rely on the proposed workflow?

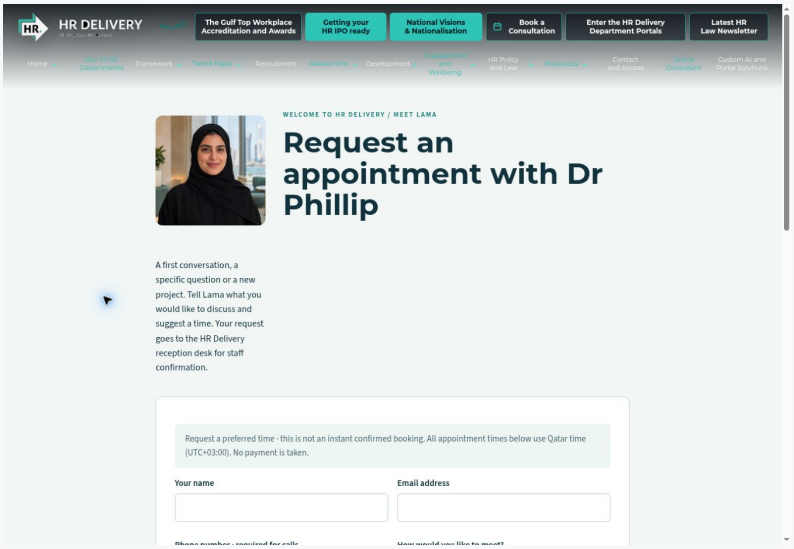
SERVICE CONTEXT / Provider-dependent functions must be activated and checked for the agreed service.

SOURCE: HR.DELIVERY / CONTACT DEPARTMENT RECEPTION ADMINISTRATION

L · YOUR CLIENT EXPERIENCE

Agree how appointment confirmations will reach you

The request and diary workflow is distinct from delivery into an external mailbox or calendar.



WEBSITE SCREEN / Live appointment form and its notice distinguishing requests from confirmed bookings.

WHAT IT GIVES YOU

Appointment requests require staff confirmation. Automatic confirmation emails, external-calendar invitations and morning-diary email delivery await connection, so agree the current communication route with reception and check the confirmed time and meeting format.

THE CLIENT VALUE

The meeting can be coordinated clearly while the automated notification and calendar services are being completed.

YOUR OUTPUTS

- A confirmed appointment route
- A clear time and format
- An agreed notification method

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client submits an appointment request and expects a calendar invitation. Reception explains the current confirmation route because automatic emails and external-calendar delivery await connection. The client checks the confirmed time and meeting format directly, keeping the scheduling record separate from any automatic notification expectation. How will reception confirm your appointment while automatic delivery connections remain pending?

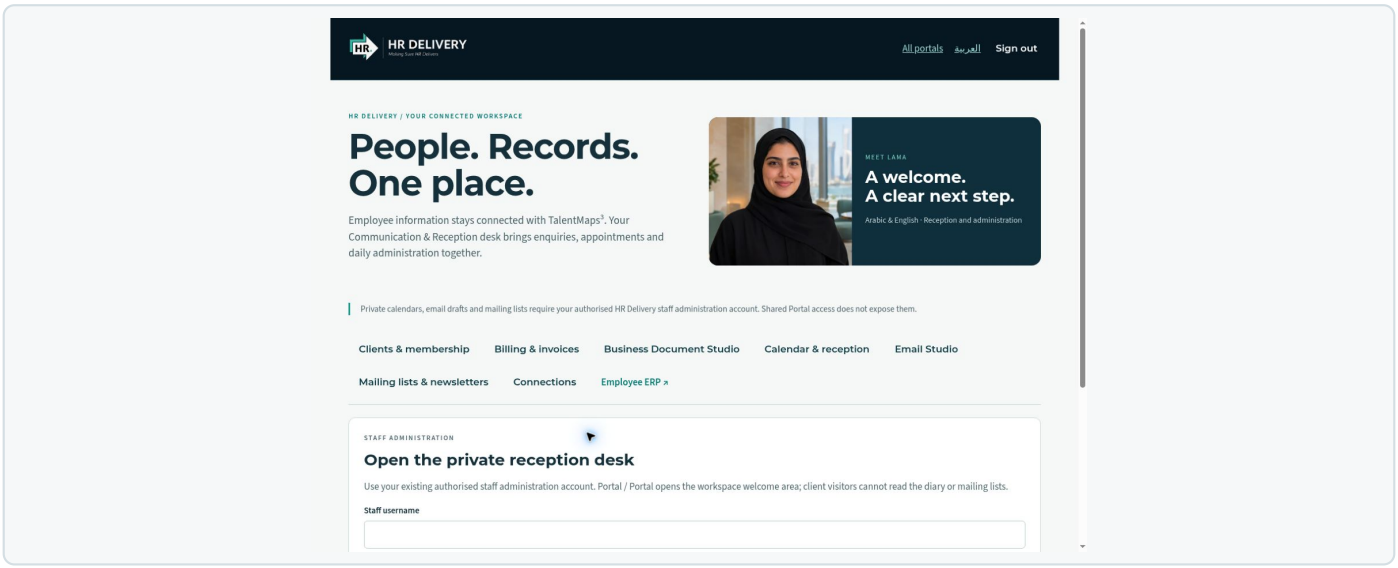
SERVICE CONTEXT / Readiness and scope to confirm for the client engagement.

SOURCE: HR.DELIVERY / BOOK DR PHILLIP

L · YOUR CLIENT EXPERIENCE

Separate your invoice from the payment arrangement

Invoice creation and commercial records are available as described; online and recurring collection still need an external payment service.



WEBSITE SCREEN / Live Connected Workspace welcome screen.

WHAT IT GIVES YOU

Review the invoice, agreed service period and payment instructions with HR Delivery. Payments made through an external route can be recorded as receipts, while any future online or recurring collection needs its own configured and reviewed process.

THE CLIENT VALUE

You have a clear billing document and payment route without assuming that an invoice automatically initiates a charge.

YOUR OUTPUTS

- A branded invoice
- Agreed payment instructions
- A receipt record for an external payment

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a client receives a branded invoice and asks how to pay. The team confirms the agreed external payment route and relevant reference, then records the received payment appropriately. Online or recurring collection is a separate service dependency and should not be assumed from the invoice document. What payment route and reference have been agreed for this invoice?

SERVICE CONTEXT / Readiness and scope to confirm for the client engagement.

SOURCE: HR.DELIVERY / CONNECTED WORKSPACE

L · YOUR CLIENT EXPERIENCE

A clear access handover helps your team start well

Match each user to the relevant portal, client collection and connected service before beginning the agreed work.

WHAT IT GIVES YOU

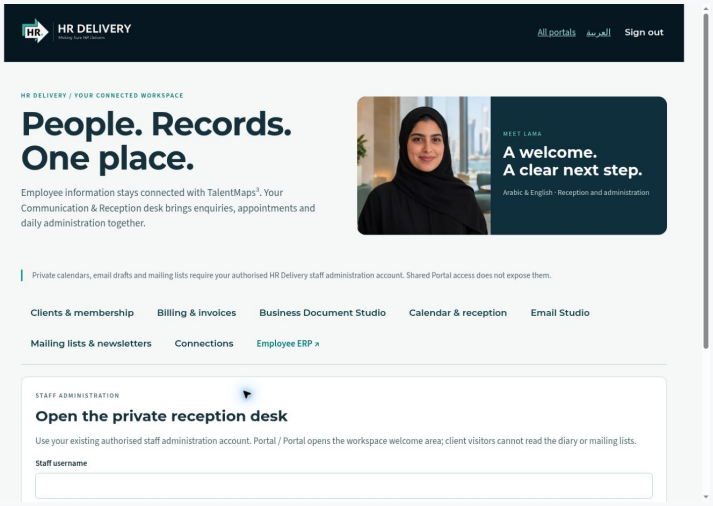
The shared welcome route is separate from staff administration, private client documents and specialist access. Confirm the named users, permitted portals, client reference, access code and active services as part of the handover; demonstrations do not establish every production transaction.

THE CLIENT VALUE

Your team can start in the correct workspace, find its documents and know who to contact when another service or permission is needed.

YOUR OUTPUTS

- Named users and portal entitlements
- Client reference and access details
- Confirmed active service routes



RELATED SERVICE VIEW / Connected Workspace access screen.

IN YOUR ORGANISATION / ILLUSTRATIVE

Illustrative example: a new project involves a sponsor, a learning coordinator and colleagues receiving a report. The handover confirms each person's required portal or collection route, relevant access details and active services. This prevents the general welcome screen being mistaken for permission to use every private workspace. Does each intended user know which portal or collection they may access and how?

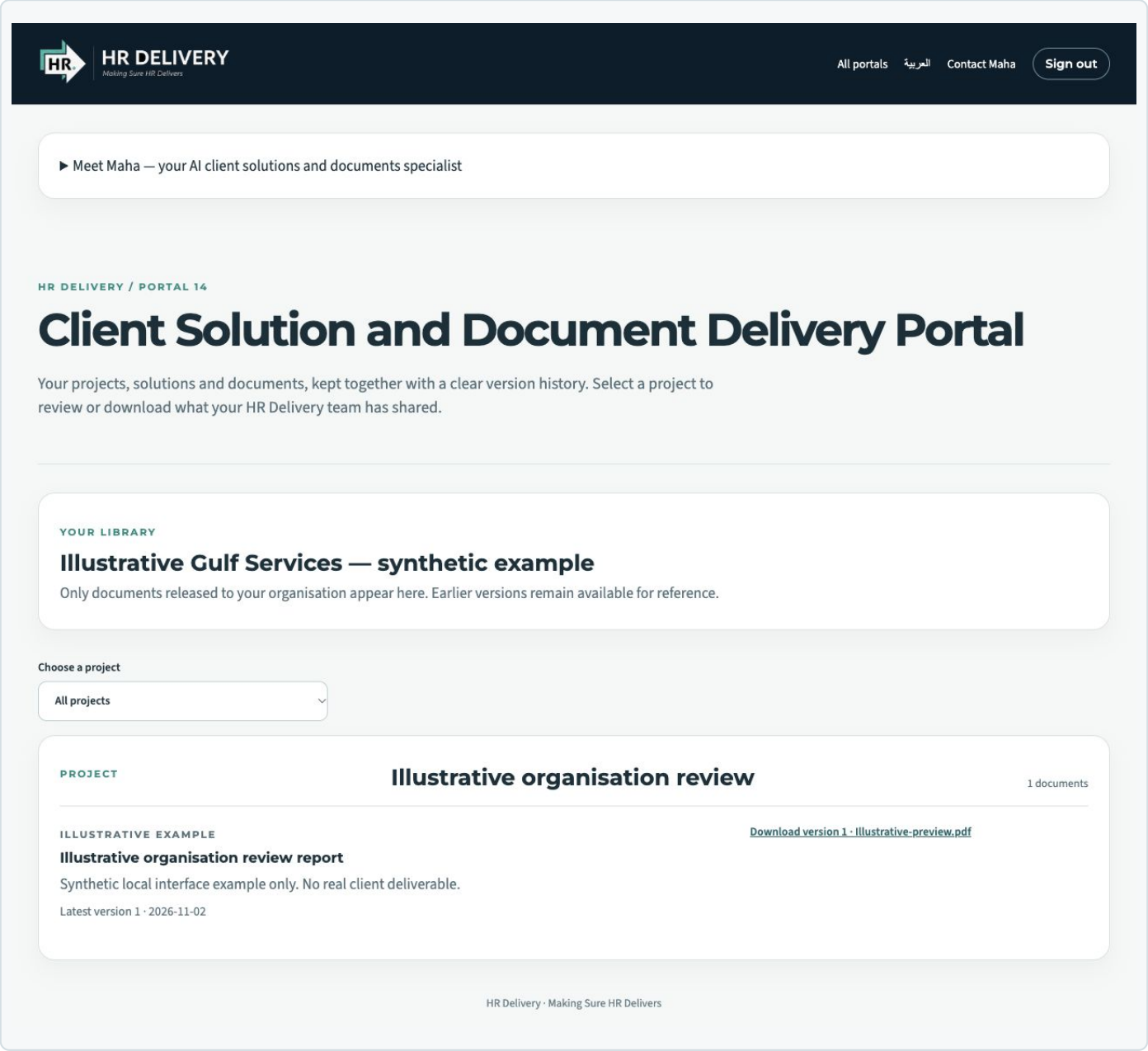
SERVICE CONTEXT / Readiness and scope to confirm for the client engagement.

SOURCE: HR.DELIVERY / HTTPS://WWW.HR.DELIVERY/WORKSPACES

THE SERVICE ON SCREEN

A closer look at the workspace

The complete published demonstration is shown at a larger scale. Use the feature pages to connect this view with your own service requirements.



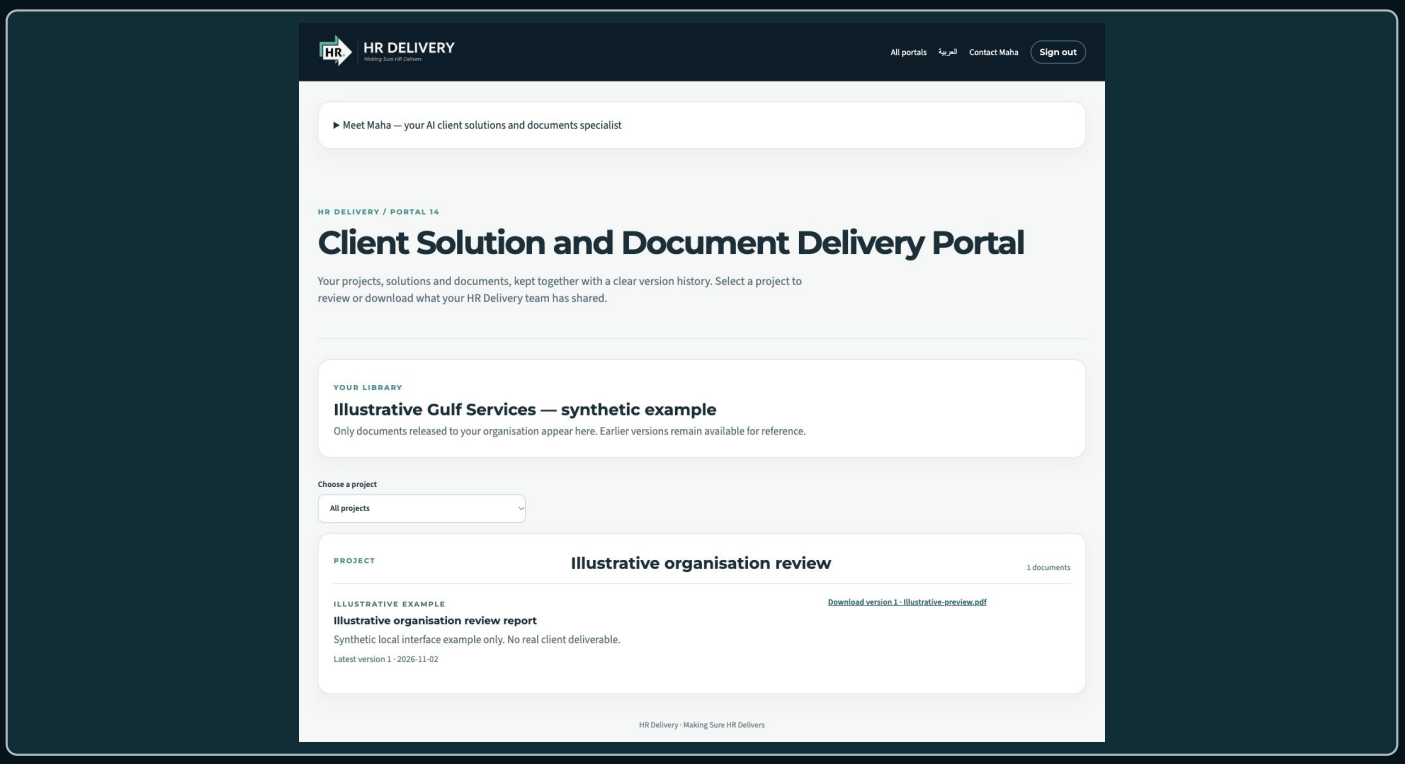
PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

L / CLIENT DOCUMENTS

03

See the service in practice

Two illustrative client journeys connect the tools with a business need, a working sequence and useful outputs.



PUBLISHED WORKSPACE DEMONSTRATION / HR Delivery's published demonstration of a client project library.

CLIENT JOURNEY / 01

Receive and use your first project handover

Illustrative example: an HR director has agreed an organisation design assignment and needs to share the final report with a steering group. The director wants a clear handover identifying the reviewed edition, its supporting documents and the colleagues who should receive collection access.

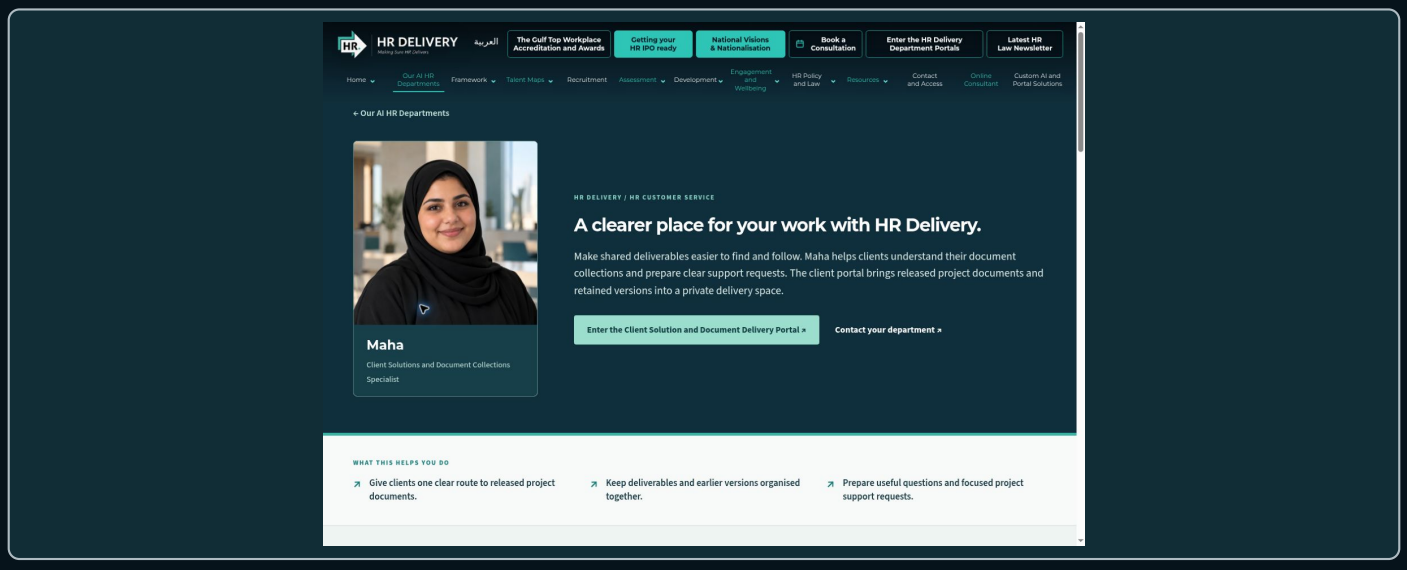
1. **Agree the delivery.** Confirm the project scope, document list, intended recipients and review responsibilities with the team.
2. **Prepare and review.** HR Delivery staff develop the material and retain working versions in their authorised environment.
3. **Release and hand over.** Staff release the agreed documents and provide the client reference, access route and handover context.
4. **Use and clarify.** The client checks the edition, shares it appropriately and references it in any follow-up question.

WHAT THE WORK PRODUCES

- An agreed list of shared deliverables
- A client collection access handover
- A named document edition for the steering group

THE VALUE FOR YOUR TEAM

The sponsor can explain what was delivered and where it belongs, while staff working drafts remain separate from the material released for client use.



RELATED SERVICE VIEW / Live public client-service department page, explaining the document workflow and sharing model.

EXPLORE NEXT / Move a deliverable from draft to client collection (p035) · Document version history (p028) · Controlled release and hiding of deliverables (p029)

CLIENT JOURNEY / 02

Keep a continuing assignment aligned

Illustrative example: a client project continues into a second phase with revised deliverables and another review meeting. The sponsor needs the proposal, statement of work, progress record and invoice to describe the same agreed service, while the document collection reflects the material released.

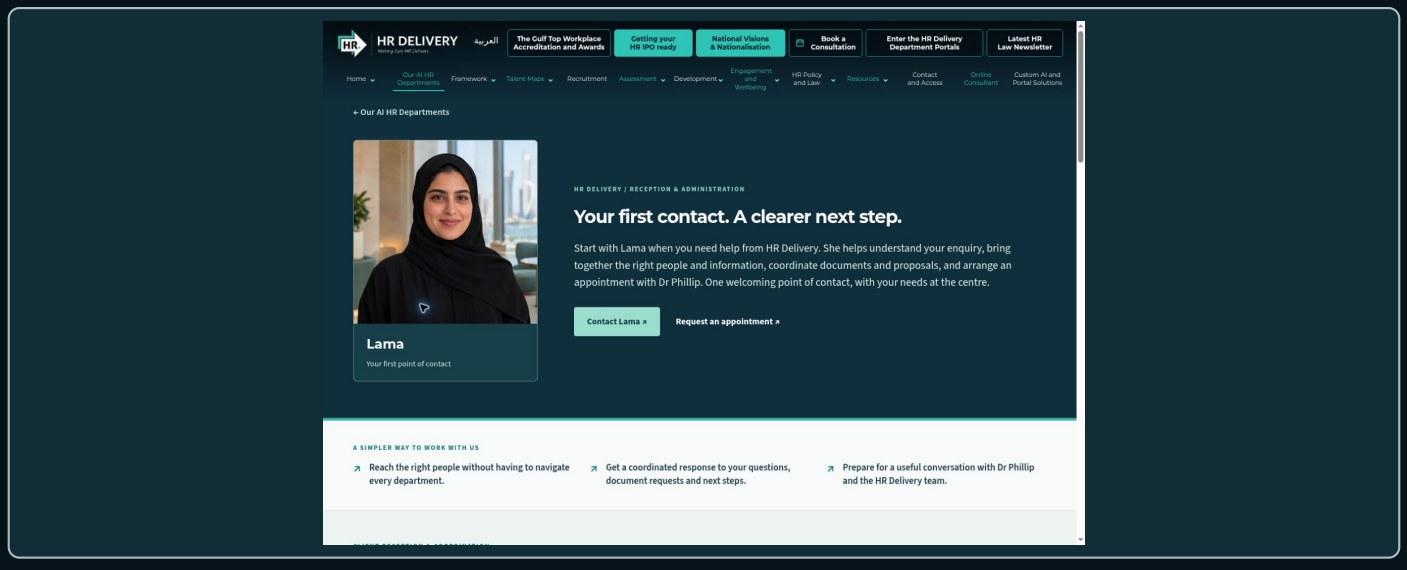
1. **Clarify the change.** Discuss the next phase, its deliverables, timing and decision responsibilities with the human team.
2. **Record the agreement.** Staff prepare the relevant proposal, quotation or statement of work for client review and agreement.
3. **Track the work.** Use meeting actions and progress reports to explain completed material, open questions and next decisions.
4. **Coordinate the handover.** Confirm the released documents, invoice and separate payment instructions through the agreed contact route.

WHAT THE WORK PRODUCES

- An agreed record of the next phase
- A shared view of progress and actions
- A coordinated document and commercial handover

THE VALUE FOR YOUR TEAM

Both sides can follow the assignment through its agreed scope, practical actions and released material, with commercial administration connected to the correct service period.



RELATED SERVICE VIEW / Public reception and administration overview; supporting context for staff-prepared business documents.

EXPLORE NEXT / Keep delivery and commercial records aligned (p036) · Statement of work template (p054) · Meeting record and action log (p056)

SERVICE ARRANGEMENTS

A clear handover helps your team start well

Agree the people, workspaces, outputs and service connections required for your assignment.

SCOPE AND RESPONSIBILITY

Confirm the business question, participating colleagues, outputs and the decisions that remain with your authorised team.

ACCESS AND COMMUNICATION

Lama can coordinate the relevant portal route and service setup. Specialist AI profiles are virtual characters; enabled chat, call, email and Telegram channels depend on the agreed provider connections.

SCREENS AND EXAMPLES

Screens show the public website, published workspace demonstrations or related service views, as labelled. Examples in this brochure are illustrative; they do not report client results or completed private transactions.

REVIEW AND RELEASE

Adapt models and documents to the assignment. Agree professional review, approval, release and record-handling arrangements before organisational use.

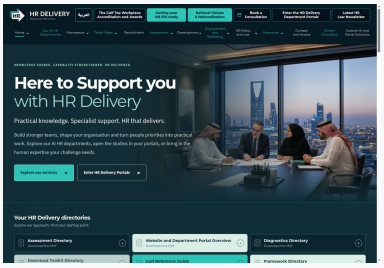
USEFUL DIRECT ROUTES

Speak with Lama

Explore the portal directory

Request a conversation with Dr Phillip

Contact HR Delivery



Source basis: the approved HR Delivery Client Guide and its linked site review, expanded with client applications. Mission, vision and pledges were checked against HR Delivery's public site in November 2026. Catalogue counts refer to the stated inventory, not a promise of future totals.

YOUR NEXT STEP

Bring the project, document and next question

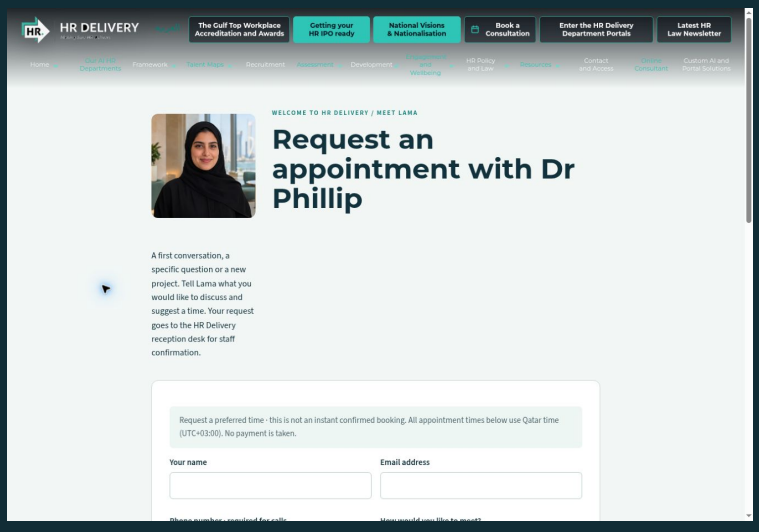
Your next step may be receiving a first collection, checking an edition or arranging a conversation about how to use the delivered work. Begin with the organisation and project name, describe the material you need and explain the action it supports. Reception and the human team can clarify the relevant handover, contact and access arrangements. Confirm active communication channels and appointment details separately, using the instructions provided for your service.

A PRACTICAL START

- Identify the project, document and practical question.
- Confirm the intended recipients and collection access arrangements.
- Agree the next handover or conversation with the human team.

A STARTING BRIEF YOU CAN ADAPT

Our organisation is working on [project]. We need [document or support] for [people and purpose]. We are using [edition, if known] and need clarification about [question]. Our preferred timing is [date], and the responsible project contact is [name and role].



WEBSITE SCREEN / Public appointment-request route: requests are reviewed by the team.

Start with Lama

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