HR DELIVERY / STEP-BY-STEP SERIES

Consultancy & Custom Builds

K1

SERVICE & WORKSPACE GUIDE

Explore the solution catalogue, frame your organisational challenge, prepare a clear brief, agree workflows and outputs, review a proposed build and organise practical handover with HR Delivery.

01 PREPARE

02 FOLLOW

03 CHECK

INTRODUCTION

OPEN SOURCE

From a broad challenge to a workable brief

This guide explains how to use HR Delivery's public service routes and prepare for a consultancy or custom-build assignment. There is no separate customer-facing Consultancy portal demonstrated here. The service connects public guidance with human scoping and existing staff and client document workspaces.

Use the opening tasks to explore and compare. Use the delivery tasks as practical client checklists for agreeing scope, reviewing prototypes and receiving outputs. On-screen controls are identified precisely; planning and review activities are clearly presented as recommended working procedures.

WHAT YOU CAN DO

01 Navigate the six custom-solution groups

02 Use Maya's service guide and public resources

03 Find frameworks and diagnostic manuals

04 Prepare requirements, workflow and evidence

05 Review a proposal, prototype and delivery plan

06 Request a conversation and organise handover

WHO THIS GUIDE IS FOR

HR and organisational development sponsors • Project and transformation leads • Subject specialists and process owners • Technology, procurement and implementation partners

CONTENTS

In this guide

Use the chapter pages to find a task. Follow each numbered sequence and check the result before continuing.

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FOREWORD

A note from Dr Phillip

A good brief connects the outcome you need with the people, evidence and decisions that will make it possible.

DR PHILLIP

HR Delivery

The most useful starting point for a consultancy assignment is a clear description of the work that needs to improve. A long list of features can wait. First establish the outcome, the people affected, the evidence available and the decisions that your organisation needs to make. Those foundations make the advice and any subsequent digital build more purposeful.

HR Delivery brings public frameworks, practical resources, specialist services and human expertise into that conversation. A custom solution may adapt an established approach, connect several workflows or create a focused tool around your organisation’s model. The appropriate route should be agreed with the people who will use, review and own the result.

This guide helps you prepare that discussion and remain involved through delivery. Use the catalogue to express possibilities, the checklists to make requirements concrete and the review stages to test whether the proposed experience works. Agree responsibilities, outputs and support explicitly. The aim is useful organisational capability that your team can understand, apply and maintain.

Proposed wording for Dr Phillip's review

YOUR FIRST POINT OF CONTACT

OPEN SOURCE

Meet Lama

Lama helps you start the right conversation with HR Delivery. Describe the business problem, the users and the outcome you want before asking for a particular build. She can route a consultancy enquiry, arrange a requested discussion with Dr Phillip, clarify document handover and help identify the appropriate department. Human staff confirm appointments and service arrangements; specialist communication channels depend on the access and connections enabled for your organisation.

ASK LAMA TO HELP WITH

- Initial scoping conversation
- Access and specialist-service questions
- Appointment request with Dr Phillip
- Agreed document and project handover

HAVE THESE DETAILS READY

- Organisation, country and project sponsor
- The work to improve and intended users
- Relevant models, documents and current systems
- Desired outputs, timing and practical constraints

OPEN LAMA'S RECEPTION

hr.delivery

ACCESSING THE SERVICE / STEPS 1–2 OF 4

OPEN SOURCE

Start with the public service route

01 Open the custom-solutions catalogue

Choose 'Custom AI and Portal Solutions' from the website navigation. This public route can be explored without a portal account.

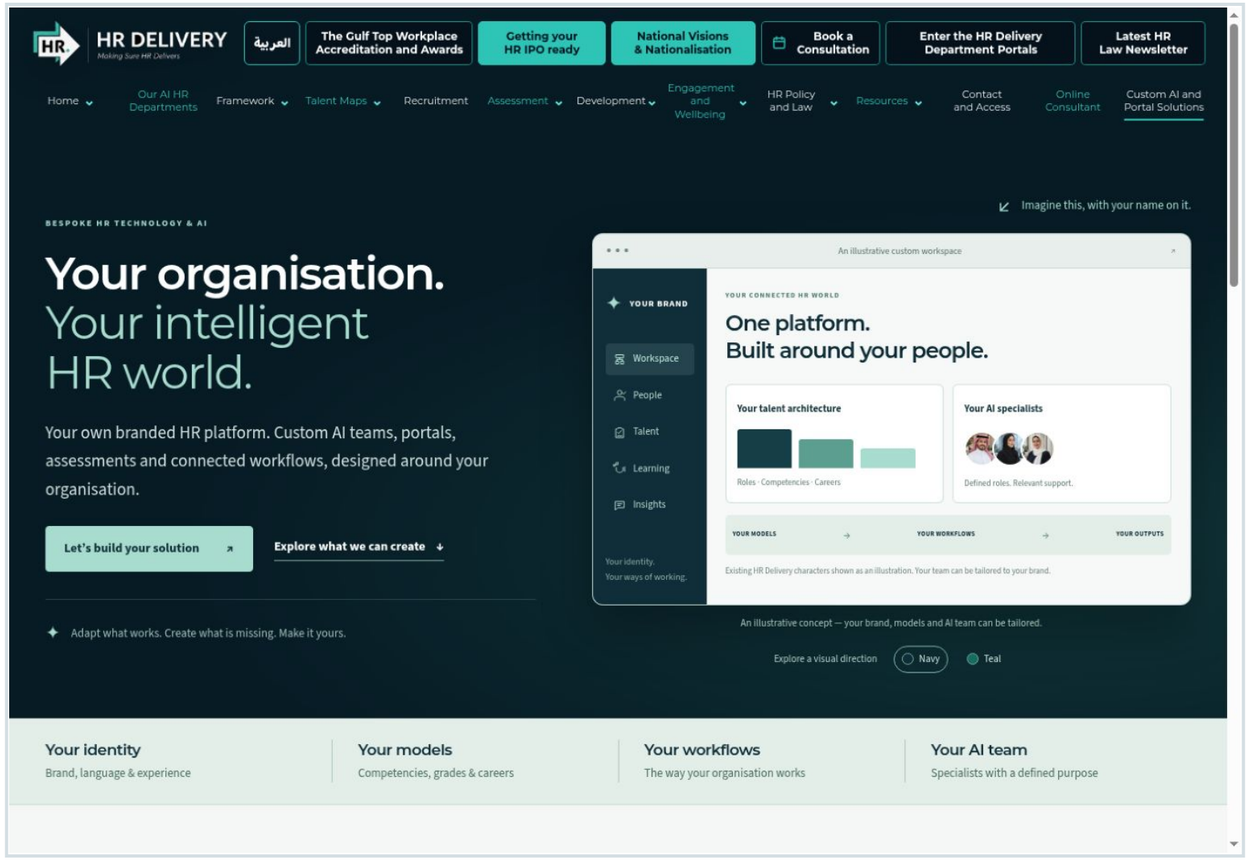
CHECK The catalogue introduces custom solutions and its solution explorer.

02 Enter the explorer

Select 'Explore what we can create', then choose one of the six subject tabs. Read the description before selecting a solution to discuss.

CHECK The selected group displays its scope and the related solution cards.

CURRENT LIVE SCREEN



Current custom-solutions catalogue. The pictured branded workspace is labelled an illustrative concept.

ACCESSING THE SERVICE / STEPS 3–4 OF 4

OPEN SOURCE

Start with the public service route

03 Use the complete scope list

Expand 'The full scope, at a glance'. The 25 named solutions help you check whether your idea overlaps more than one group.

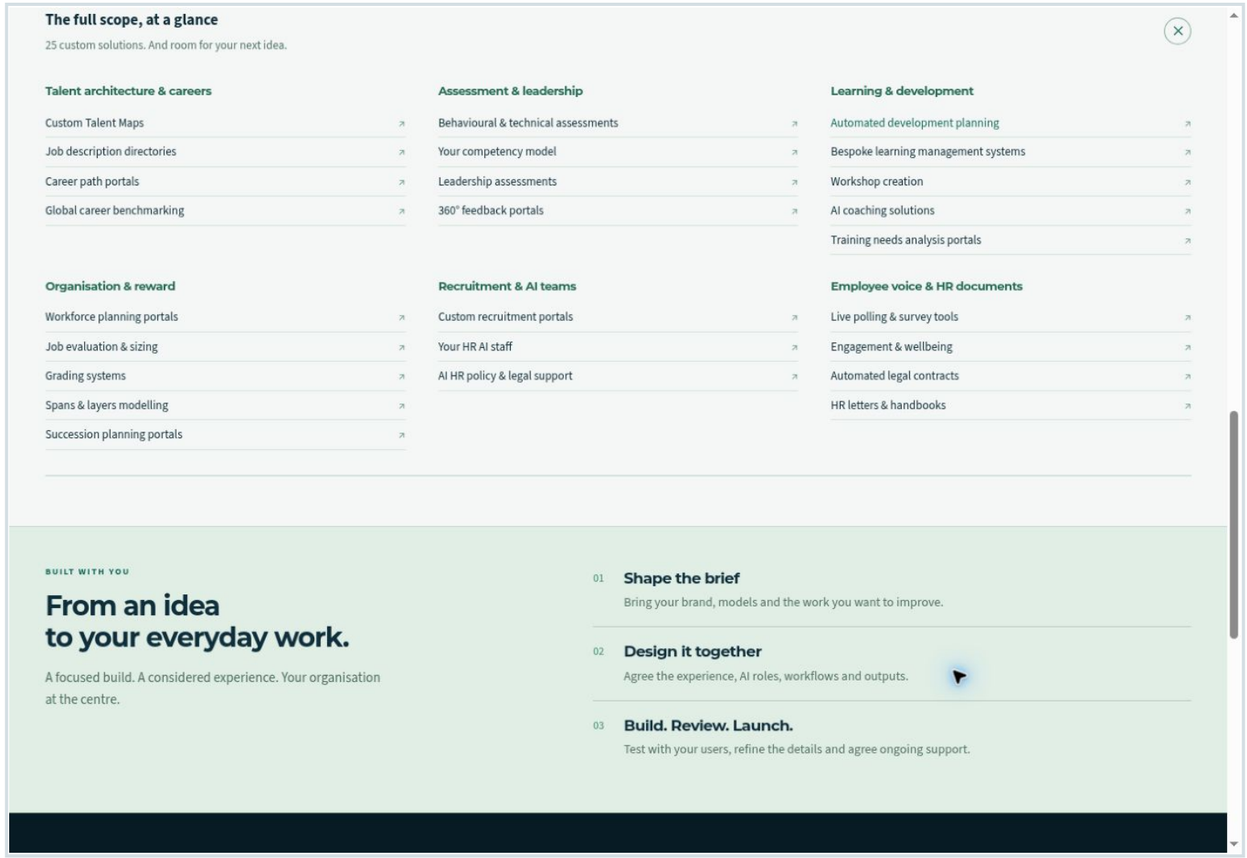
CHECK A grouped list provides direct routes to the relevant concepts.

04 Move to a human discussion

Use 'Discuss this solution' or 'Start with Lama'. Explain the outcome and shortlist; the page does not automatically commission or configure a build.

CHECK Lama's reception route provides enquiry and appointment options.

CURRENT LIVE SCREEN



Current expanded scope list with all 25 solutions and the three delivery stages.

BEFORE YOU START

OPEN SOURCE

Access and working context

01 The catalogue, frameworks and service navigator are public. They do not require a dedicated Consultancy portal login.

02 The human team agrees project scope, commercial arrangements, responsibilities and access. Browsing a solution is not an order.

03 Staff preparation and controlled customer handover use the separate document workspaces. Follow Guide L for client document access.

No separate Consultancy customer portal was observed. The public service routes were inspected; no proposal, project, appointment or client record was submitted or changed.

YOUR WORKFLOW MAP

How the tasks connect

Follow the sequence for a complete piece of work, or go straight to the chapter you need.

01

Find the right starting point

PAGE 010

02

Explore the six solution groups

PAGE 023

03

Shape, review and prepare delivery

PAGE 036

04

Contact the team and organise handover

PAGE 049

Each task: prepare the inputs, follow the numbered steps, then confirm the output and the checks.

01

Find the right starting point

Use the public navigator, frameworks and evidence resources before defining a solution.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

FIND THE RIGHT STARTING POINT / K-01-01

OPEN SOURCE

Use Maya’s service navigator and local preview

Find relevant public tools and prepare a clearer first question.

WHO USES THIS Prospective client or project sponsor

BEFORE YOU BEGIN

- A general HR question
- Country, audience and desired outcome

WHAT YOU WILL HAVE

- A relevant service route
- A concise question to bring to the team

CHECK BEFORE YOU FINISH

- The question describes an outcome and context.
- A local preview is not mistaken for a live AI response.

The preview does not answer the question. This is the expected current behaviour. Use the service links or contact the human team through Lama.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Maya’s live conversation is explicitly in preparation. The preview was exercised with a supplied non-sensitive example only.

FIND THE RIGHT STARTING POINT / STEPS 1–2 OF 5

OPEN SOURCE

Use Maya’s service navigator and local preview

01 Open the online consultant route

Choose 'Online Consultant' in the website navigation. Read the status beneath the introduction before using the conversation box.

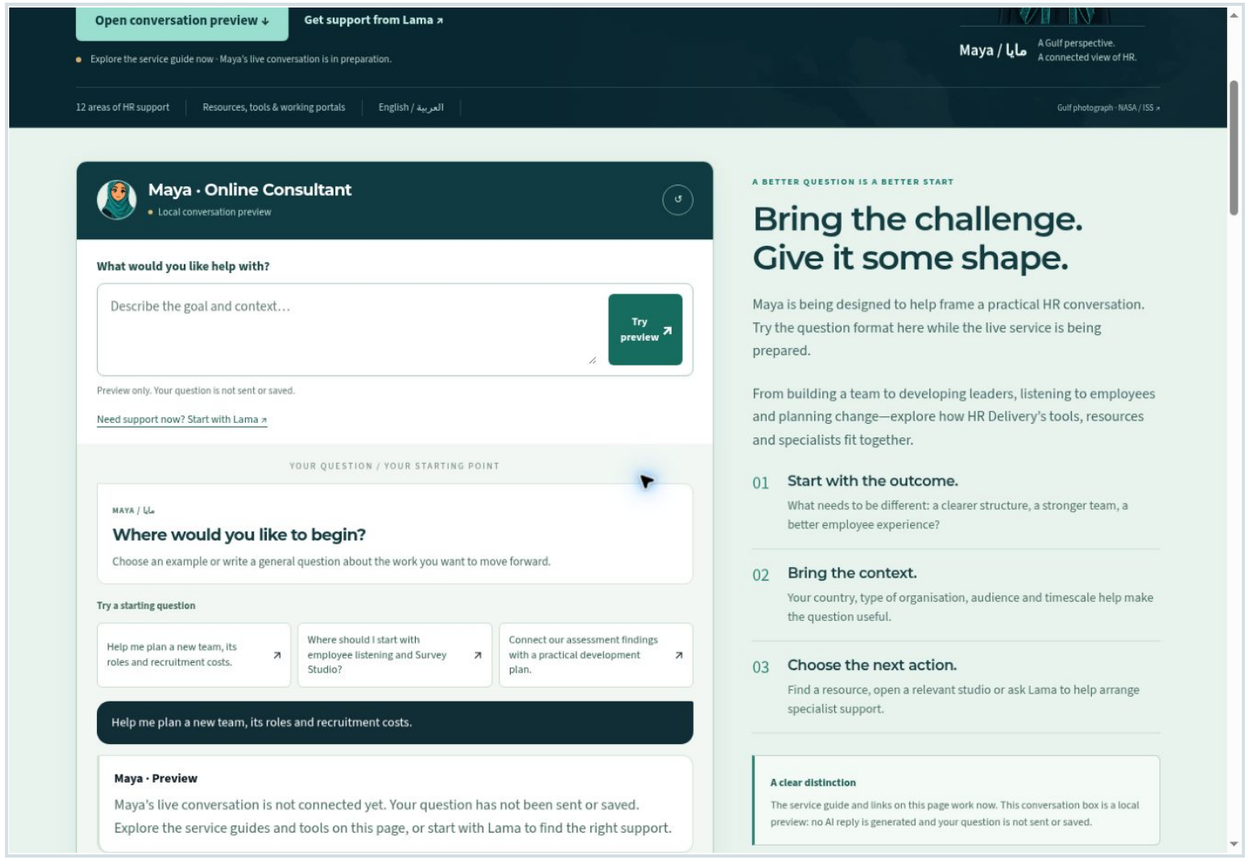
CHECK The page identifies Maya’s conversation as a local preview.

02 Try an example question

Select 'Help me plan a new team, its roles and recruitment costs.' Review the wording in 'What would you like help with?', then select 'Try preview'.

CHECK The page displays the example and explains that the preview is not a live response; nothing is sent or saved.

CURRENT LIVE SCREEN



The local preview after using a supplied example question. The page states that it is not sent or saved.

FIND THE RIGHT STARTING POINT / STEPS 3–4 OF 5

OPEN SOURCE

Use Maya’s service navigator and local preview

03 Choose the service area

In 'What are you working on?', select '12 Consulting & delivery'. Other tabs cover the eleven related service areas.

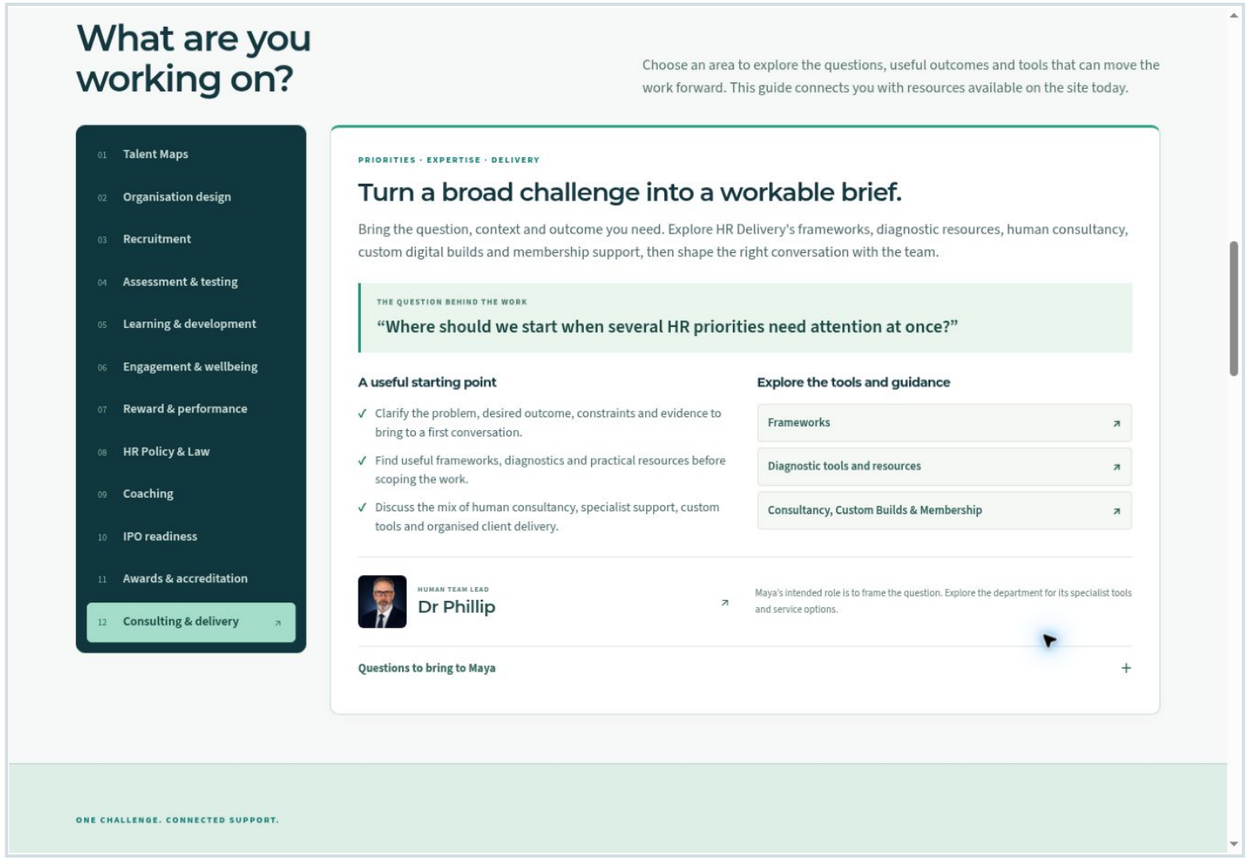
CHECK The panel shows a starting question, useful actions and guidance links.

04 Read the starting point

Read 'The question behind the work' and 'A useful starting point'. Use them to clarify the problem, outcome, constraints and evidence before describing a proposed build.

CHECK Your first question is connected to a practical organisational need.

CURRENT LIVE SCREEN



Maya’s public navigator with Consulting & delivery selected; twelve service routes remain visible.

FIND THE RIGHT STARTING POINT / STEPS 5–5 OF 5

OPEN SOURCE

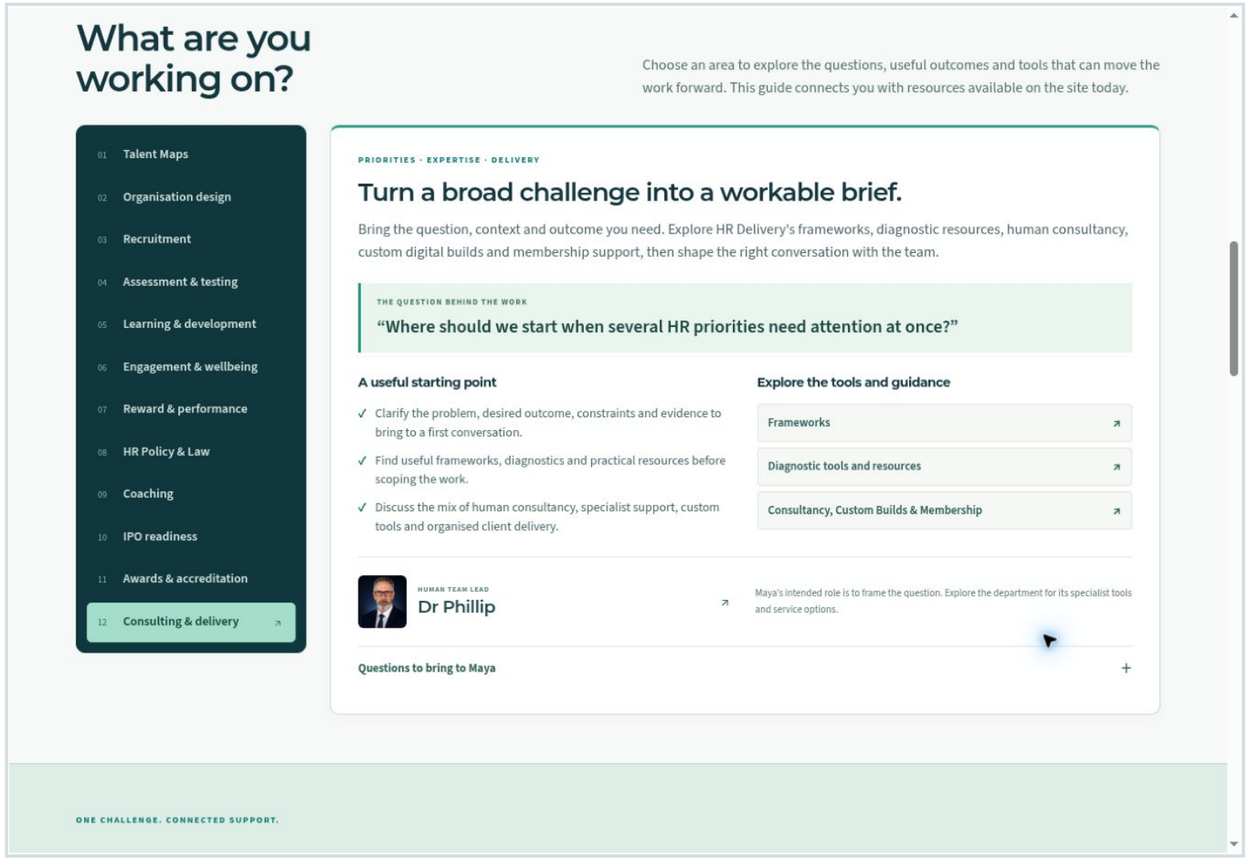
Use Maya’s service navigator and local preview

05 Follow a concrete next route

Use 'Frameworks', 'Diagnostic tools and resources' or 'Consultancy, Custom Builds & Membership'. Use Lama’s route when you need a human conversation.

CHECK You reach the relevant public guidance or reception page.

CURRENT LIVE SCREEN



Maya’s public navigator with Consulting & delivery selected; twelve service routes remain visible.

FIND THE RIGHT STARTING POINT / K-01-02

OPEN SOURCE

Find and apply a framework

Choose a relevant model and identify the decisions and outputs it supports.

WHO USES THIS Sponsor or HR/OD practitioner

BEFORE YOU BEGIN

- An organisational question
- A short note on current evidence and constraints

WHAT YOU WILL HAVE

- Selected framework
- Questions and evidence priorities
- Proposed deliverable

CHECK BEFORE YOU FINISH

- The model fits the organisational decision.
- An illustrative example is not treated as a client result.

A search gives no useful result. Use 'Clear search', then select the broader framework area and read its descriptions before trying a different term.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The current framework collection lists 29 frameworks; this supersedes the earlier inventory’s count of 22 topic pages. One framework and its manual were opened as the worked example.

FIND THE RIGHT STARTING POINT / STEPS 1–2 OF 6

OPEN SOURCE

Find and apply a framework

01 Open the connected model

Choose 'Framework' and then 'Explore the model'. The current collection displays seven areas and 29 frameworks.

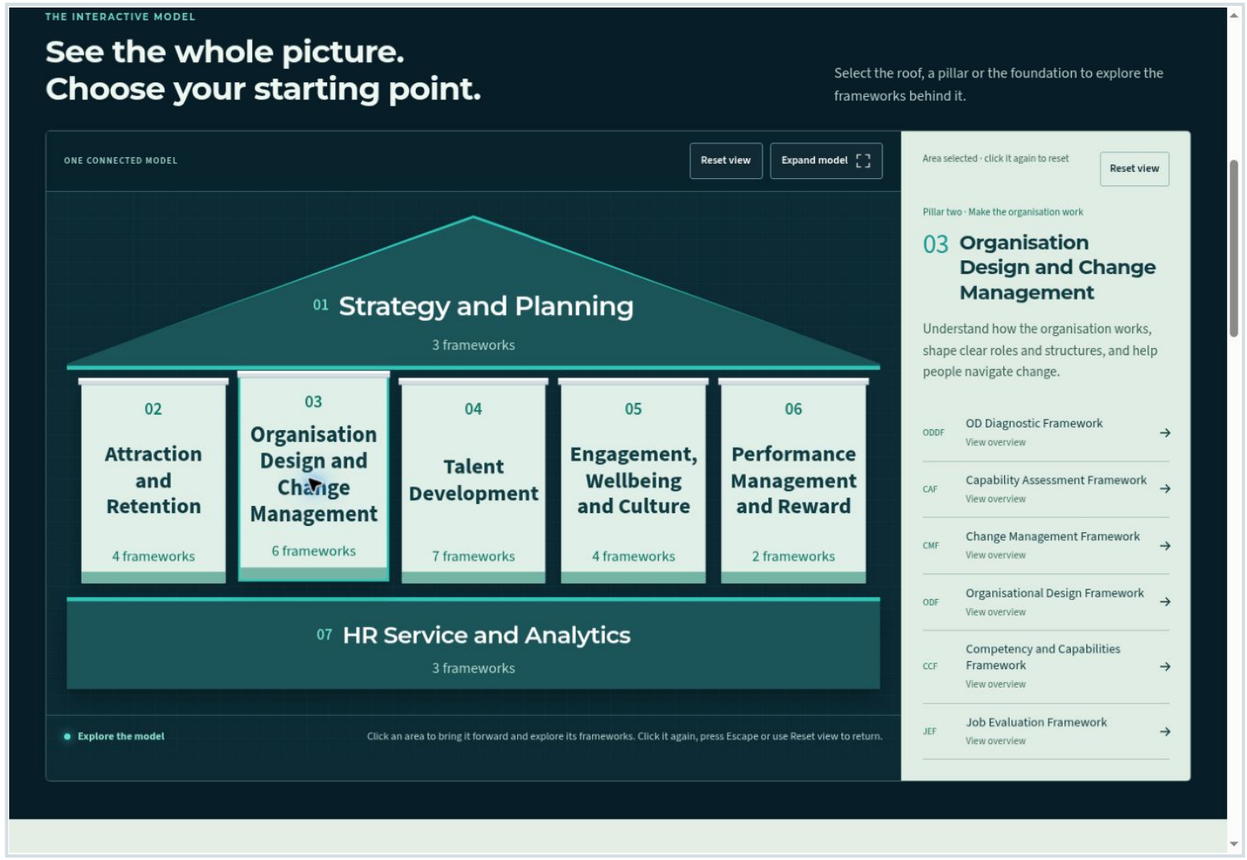
CHECK The interactive roof, five pillars and foundation are visible.

02 Select a relevant area

Select 'Organisation Design and Change Management' to see its six linked frameworks. Use 'Reset view' to return to the whole model.

CHECK The selected area and its framework links appear beside the model.

CURRENT LIVE SCREEN



Interactive framework model with Organisation Design and Change Management selected.

FIND THE RIGHT STARTING POINT / STEPS 3–4 OF 6

OPEN SOURCE

Find and apply a framework

03 Search by the work you need to do

Choose 'Browse all frameworks'. In 'Find a framework', enter workforce. The reviewed search returns one framework; 'Clear search' removes the term.

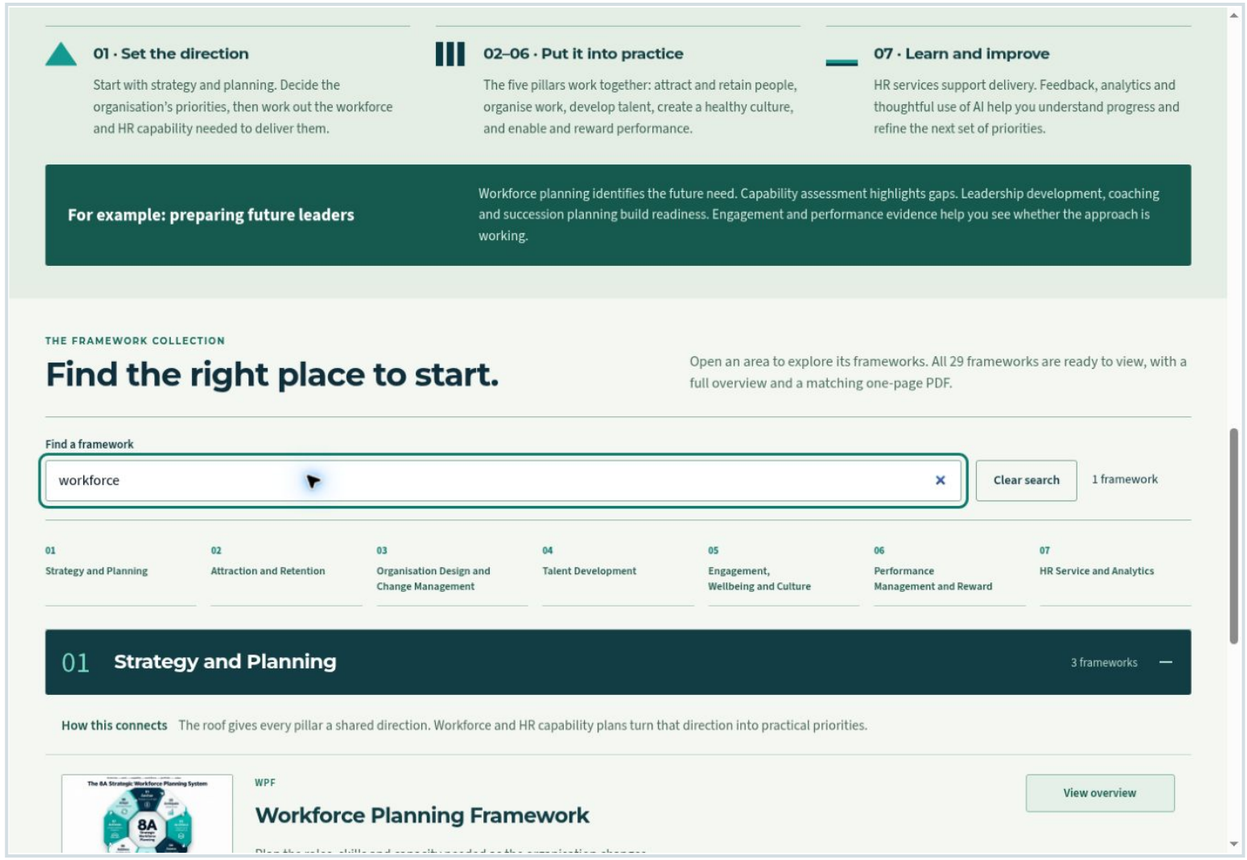
CHECK The result list is filtered to Workforce Planning Framework.

04 Open the detailed explanation

Scroll below the search box to the complete Workforce Planning Framework card and select its 'Explore framework' link. On the detailed page, use 'How it works', 'Practical example', 'Outputs & evidence' and 'Questions'.

CHECK The detailed page explains the model, decision gates and expected outputs.

CURRENT LIVE SCREEN



Framework search for workforce, showing one matching framework.

FIND THE RIGHT STARTING POINT / STEPS 5–6 OF 6

OPEN SOURCE

Find and apply a framework

05 Translate the model into a brief

Write the decision you need, the evidence missing and the output that would help. Use the framework as a structured starting point for discussion.

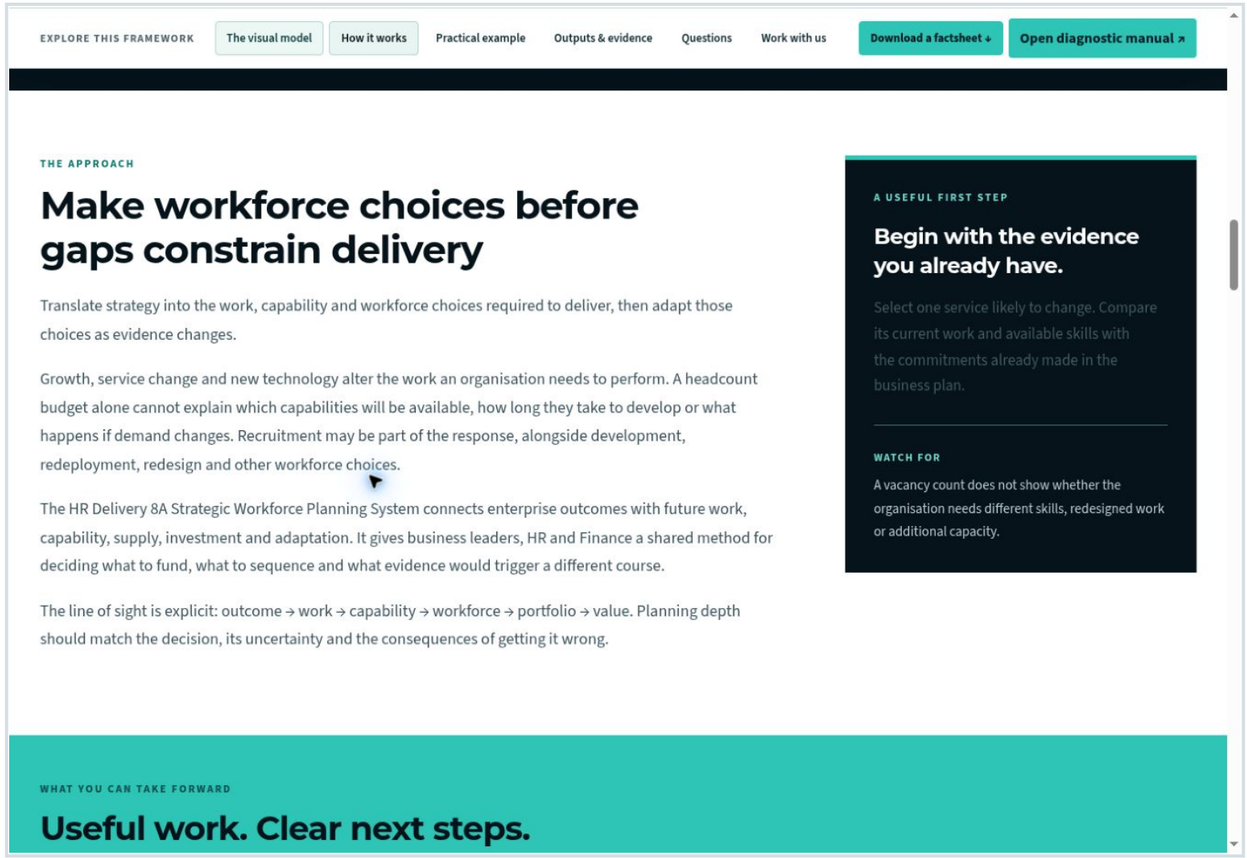
CHECK Your brief names a decision and deliverable rather than only a topic.

06 Use the available document route

Choose 'Download a factsheet' for the linked reader, or 'Open diagnostic manual' for the view-only manual. Confirm the permitted format before redistribution.

CHECK The selected document or manual opens through its displayed route.

CURRENT LIVE SCREEN



Workforce Planning Framework guidance with its section navigation and manual control.

FIND THE RIGHT STARTING POINT / K-01-03

OPEN SOURCE

Choose a diagnostic manual and evidence method

Prepare an evidence-gathering plan before designing the intervention.

WHO USES THIS HR/OD practitioner with the project sponsor

BEFORE YOU BEGIN

- A defined question
- An intended audience and evidence owner

WHAT YOU WILL HAVE

- Diagnostic scope
- Method and evidence plan
- Project reading list

CHECK BEFORE YOU FINISH

- The subject manual and chosen method answer the same question.
- Permissions and participant information are agreed before collection.
- View-only resources are used through their permitted reader.

A resource offers reading but no download.

Use the on-page reader. Ask HR Delivery about the required format or licence rather than assuming every resource can be downloaded or redistributed.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Search, viewer controls and the workforce manual were inspected. The four method cards were reviewed; their full manuals were not audited page by page.

FIND THE RIGHT STARTING POINT / STEPS 1–2 OF 6

OPEN SOURCE

Choose a diagnostic manual and evidence method

01 Open the diagnostic collection

From 'Resources', select 'Explore Diagnostic Tools'. The expanded section presents Discover, Diagnose, Design, Deliver and Review.

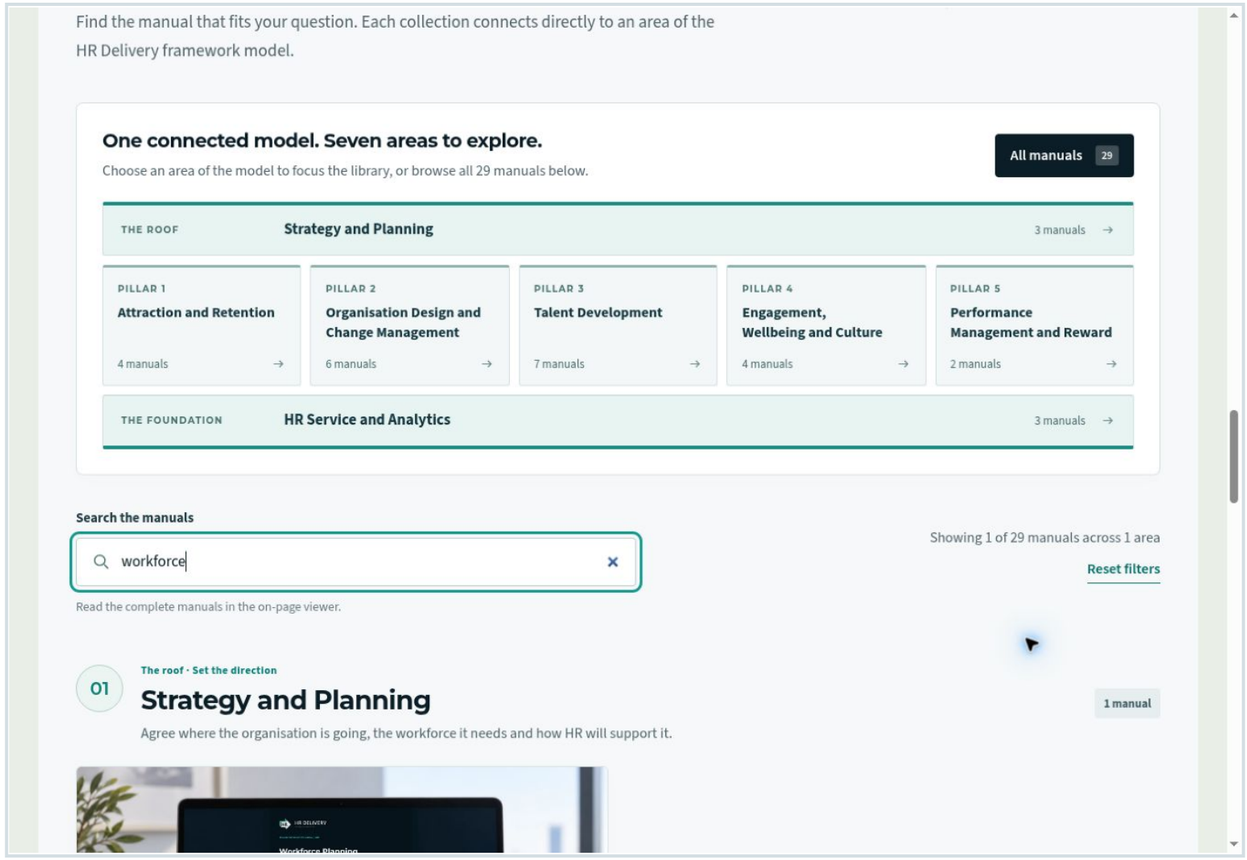
CHECK The subject library and diagnostic method collection become available.

02 Filter the subject library

Use the seven area filters or 'Search the manuals'. Enter workforce for the worked example; the current result is one of 29 manuals.

CHECK The displayed count tells you how many manuals match the filter.

CURRENT LIVE SCREEN



Diagnostic library filters and the result count for a workforce search.

FIND THE RIGHT STARTING POINT / STEPS 3–4 OF 6

OPEN SOURCE

Choose a diagnostic manual and evidence method

03 Read the subject manual

Select the relevant 'Open manual' control. The Workforce Planning example opens a 101-page viewer with 'View size' and 'Close manual'.

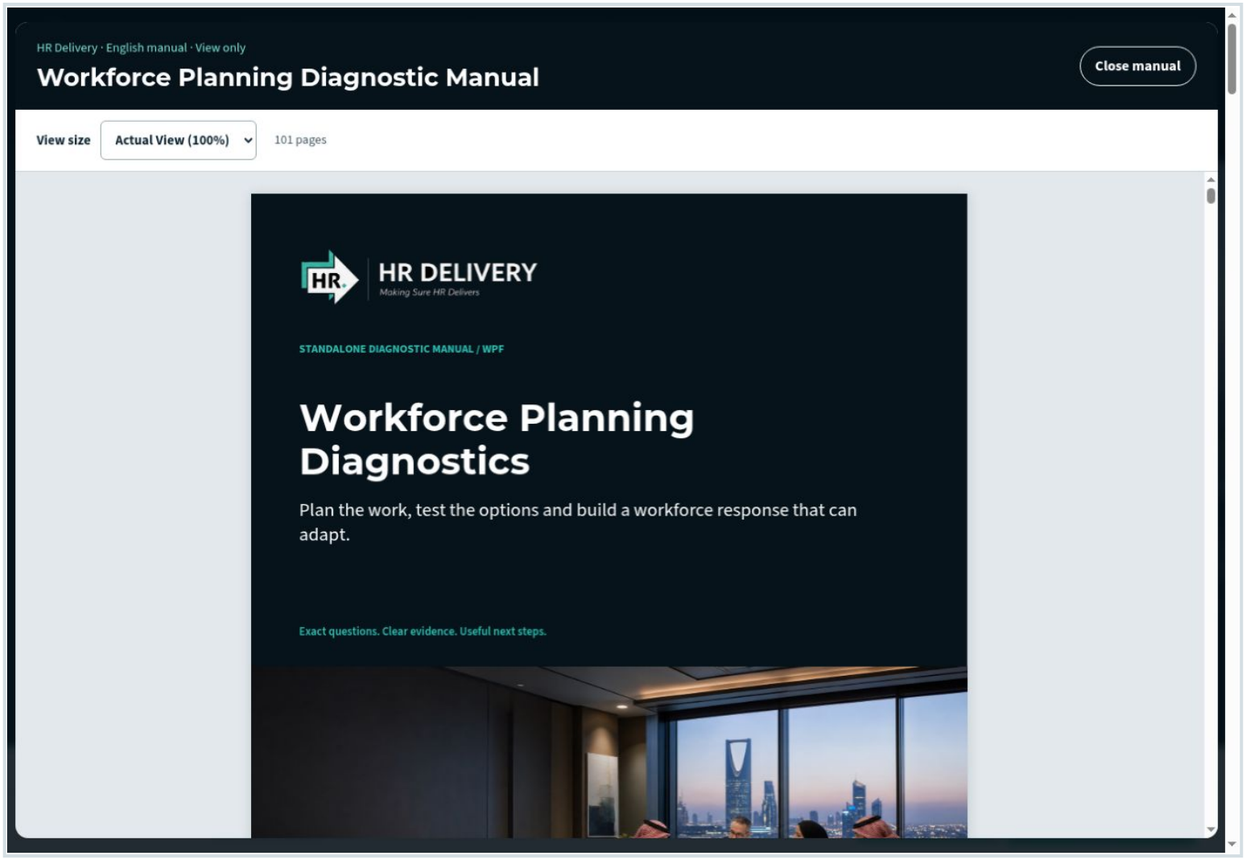
CHECK The viewer identifies the manual, page count and view-only status.

04 Adjust the reader and return

Use 'View size' to select a readable scale and scroll through the manual. Select 'Close manual' to return to the collection and continue to the diagnostic method cards.

CHECK The manual closes and the public collection is available again.

CURRENT LIVE SCREEN



The 101-page Workforce Planning Diagnostic Manual in the view-only reader.

FIND THE RIGHT STARTING POINT / STEPS 5–6 OF 6

OPEN SOURCE

Choose a diagnostic manual and evidence method

05 Choose the evidence method

Compare Diagnostic Interview Manual, Diagnostic Survey Manual, Diagnostic Focus Group Manual and Large Group Intervention Manual. Agree participants, evidence handling, analysis and feedback before collection.

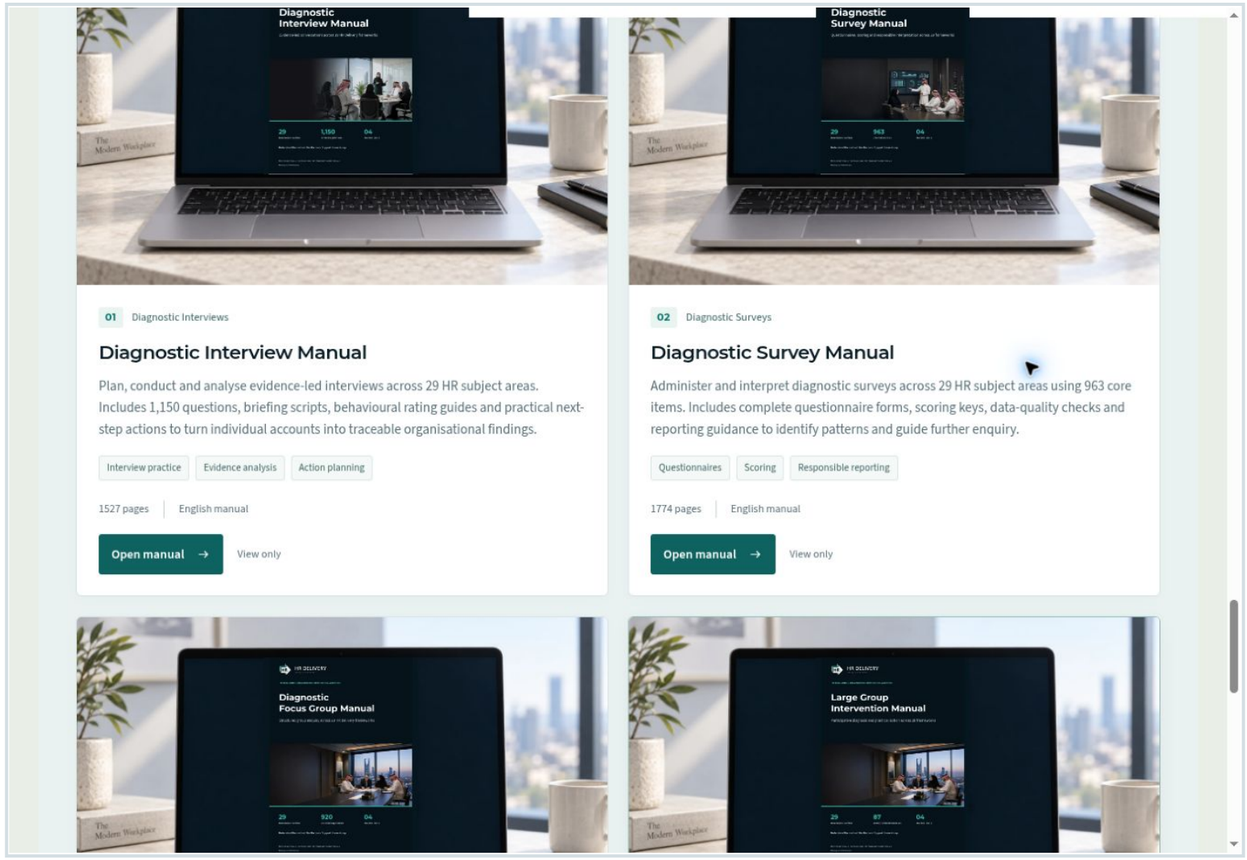
CHECK The chosen method and review plan support the question, audience and decision.

06 Add useful background reading

Use the Resources routes for country guides, insights, longer articles, research, eBooks and toolkits. Retain the source and edition in the project reading list.

CHECK Supporting material adds context without replacing organisation-specific evidence.

CURRENT LIVE SCREEN



Interview and survey method cards, with view-only manual controls; the next method row is below.

02

Explore the six solution groups

Use the catalogue to form a precise shortlist and identify what must be agreed.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

EXPLORE THE SIX SOLUTION GROUPS / K-02-01

OPEN SOURCE

Scope talent architecture and assessment needs

Connect role expectations, career routes and assessment requirements in a shortlist.

WHO USES THIS HR architecture or assessment lead

BEFORE YOU BEGIN

- Current role and competency models
- The population and intended use

WHAT YOU WILL HAVE

- Talent and assessment shortlist
- Model and reporting requirements

CHECK BEFORE YOU FINISH

- Career levels and assessment criteria use consistent definitions.
- Assessment outputs have an appropriate human interpretation route.

The requirement spans two solution groups.

Keep one business outcome and list the connected components. Ask the team to identify shared data and avoid duplicate definitions.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The catalogue tabs are observed. The scoping checklist is recommended client preparation; no organisation-specific assessment was built.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 1–2 OF 6

OPEN SOURCE

Scope talent architecture and assessment needs

01 Choose the talent group

In the solution explorer, select 'Talent architecture & careers'. Read the four solution areas before choosing the required combination.

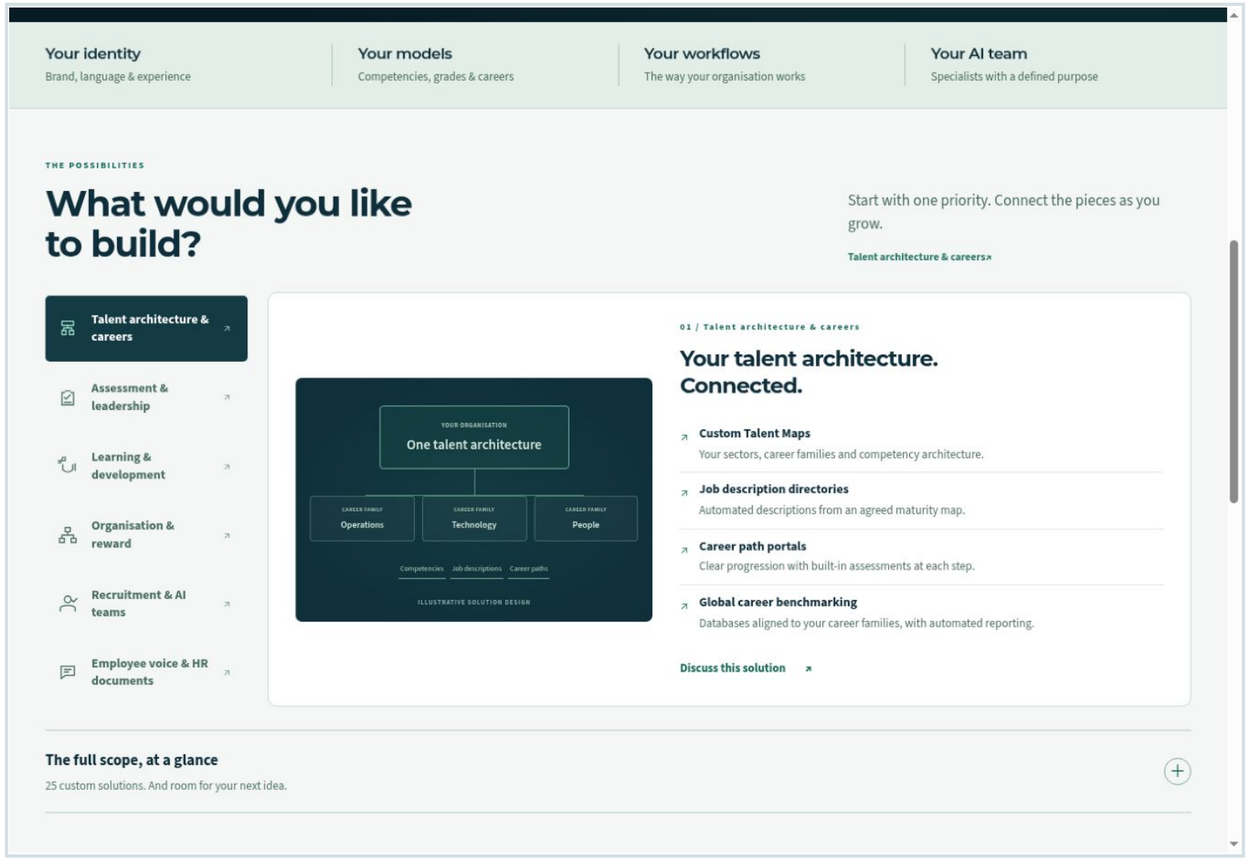
CHECK Talent Maps, job directories, career paths and benchmarking are shown.

02 Define the role architecture

List sectors, career families, grades and maturity expectations. Identify whether you are adapting HR Delivery's architecture or supplying an organisation-specific model.

CHECK The proposed role structure and source model are explicit.

CURRENT LIVE SCREEN



Talent architecture and careers: current catalogue tab and its four solution areas.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 3–4 OF 6

OPEN SOURCE

Scope talent architecture and assessment needs

03 Define career outputs

For a job directory or career-path portal, specify role descriptions, progression requirements and the information employees and managers need to see.

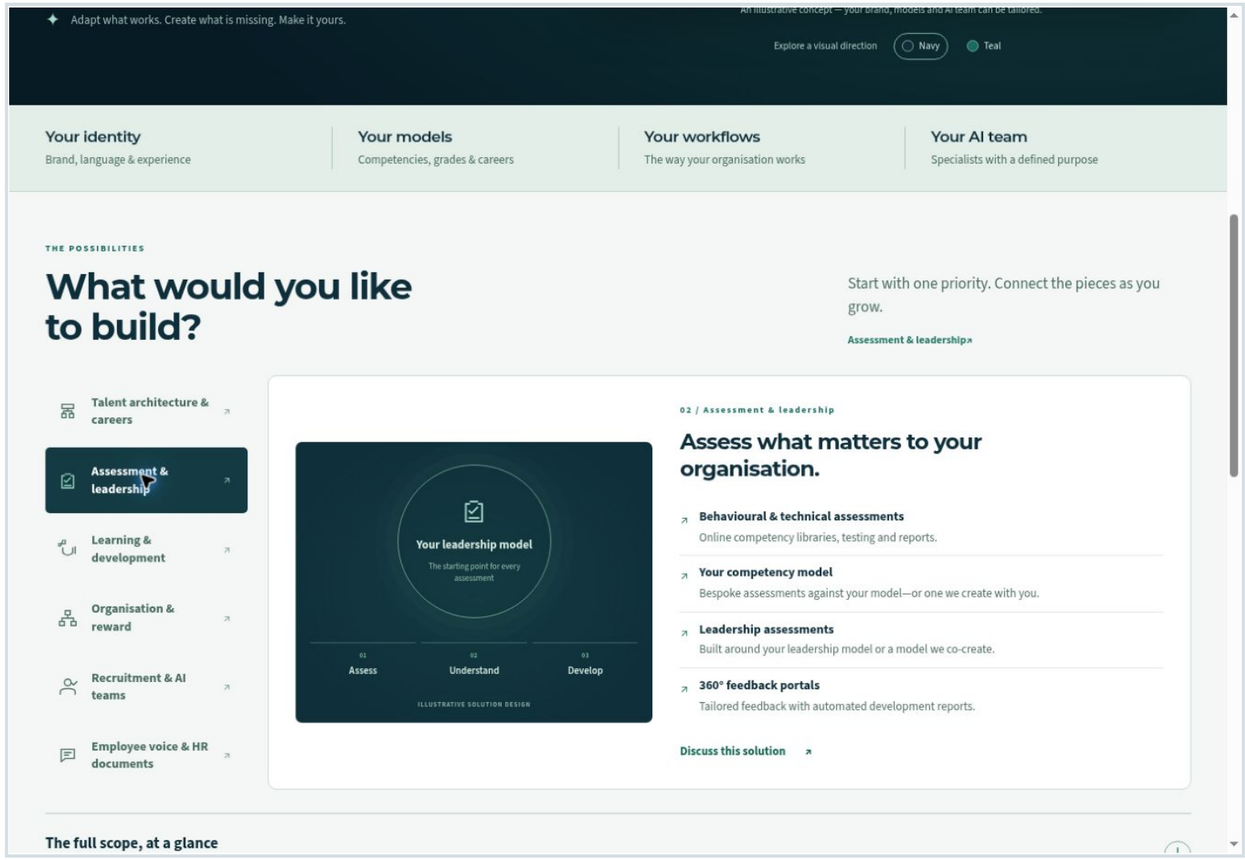
CHECK The brief distinguishes role requirements from individual development evidence.

04 Choose the assessment group

Select 'Assessment & leadership'. Review behavioural and technical assessments, your competency model, leadership assessments and 360° feedback portals.

CHECK The assessment options can be compared against the intended decision.

CURRENT LIVE SCREEN



Assessment and leadership: current catalogue tab.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 5–6 OF 6

OPEN SOURCE

Scope talent architecture and assessment needs

05 Specify administration and interpretation

Identify participant groups, rating sources, languages, reporting audiences and feedback arrangements. Agree scoring and evidence requirements with the assessment specialist.

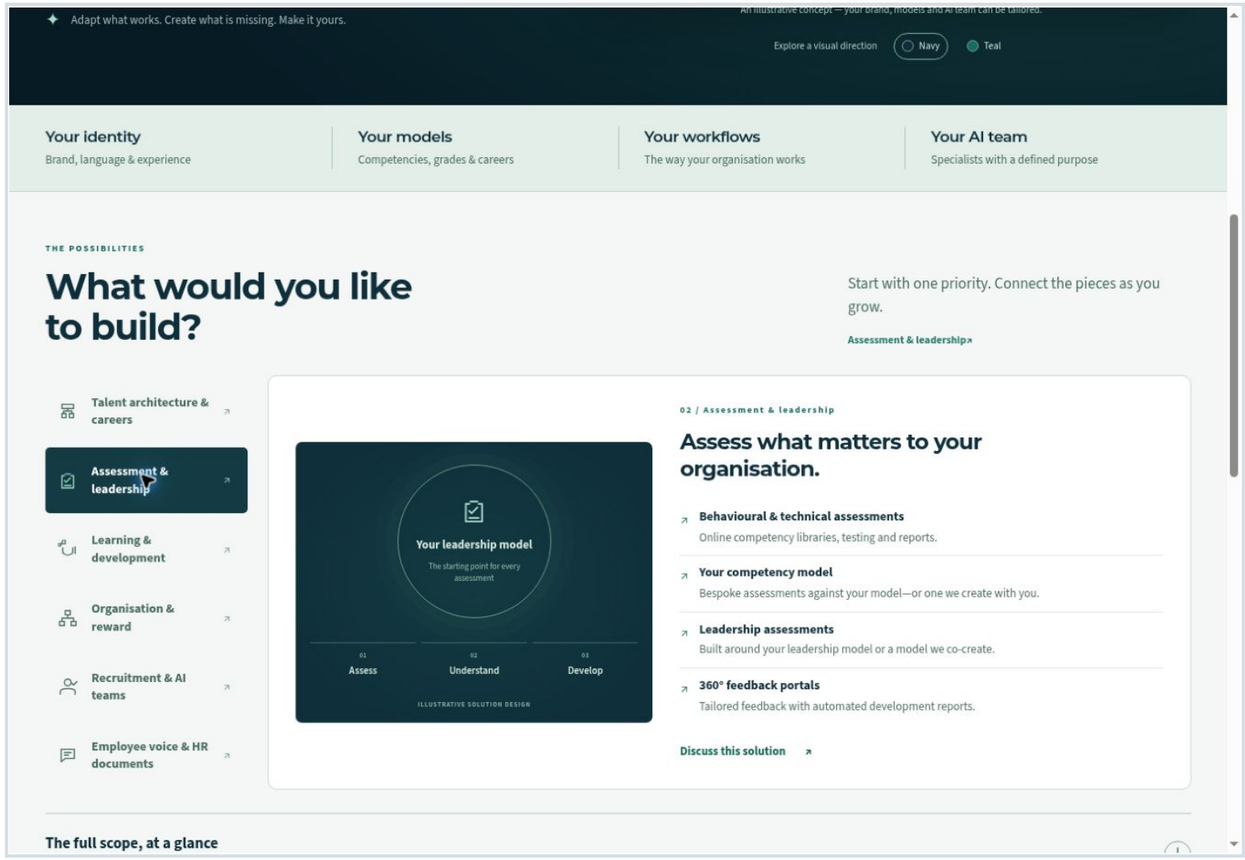
CHECK The shortlist has an administration and interpretation brief.

06 Bring both parts to a discussion

Use 'Discuss this solution' with your selected concepts. Ask which existing tools can meet the requirement and which elements require adaptation or a build.

CHECK The team can scope a connected, bounded requirement.

CURRENT LIVE SCREEN



Assessment and leadership: current catalogue tab.

EXPLORE THE SIX SOLUTION GROUPS / K-02-02

OPEN SOURCE

Scope learning, workforce and reward needs

Specify the learning or modelling workflow and the outputs users need.

WHO USES THIS Learning, workforce or reward lead

BEFORE YOU BEGIN

- Current course or workforce information
- Target users and review owners

WHAT YOU WILL HAVE

- Learning or model workflow brief
- Input and output specification

CHECK BEFORE YOU FINISH

- Completion or modelling rules are written before automation.
- Assumptions and dates remain visible in outputs.

An existing spreadsheet contains undocumented calculations.

Supply a controlled copy and explain each decision rule. Agree expected results for example inputs before requesting automation.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Catalogue routes are observed. Build-specific screens, rules and integrations must be agreed for the assignment.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 1–2 OF 6

OPEN SOURCE

Scope learning, workforce and reward needs

01 Open learning and development

Select 'Learning & development'. Review development planning, bespoke learning management systems, workshops, AI coaching and training-needs analysis.

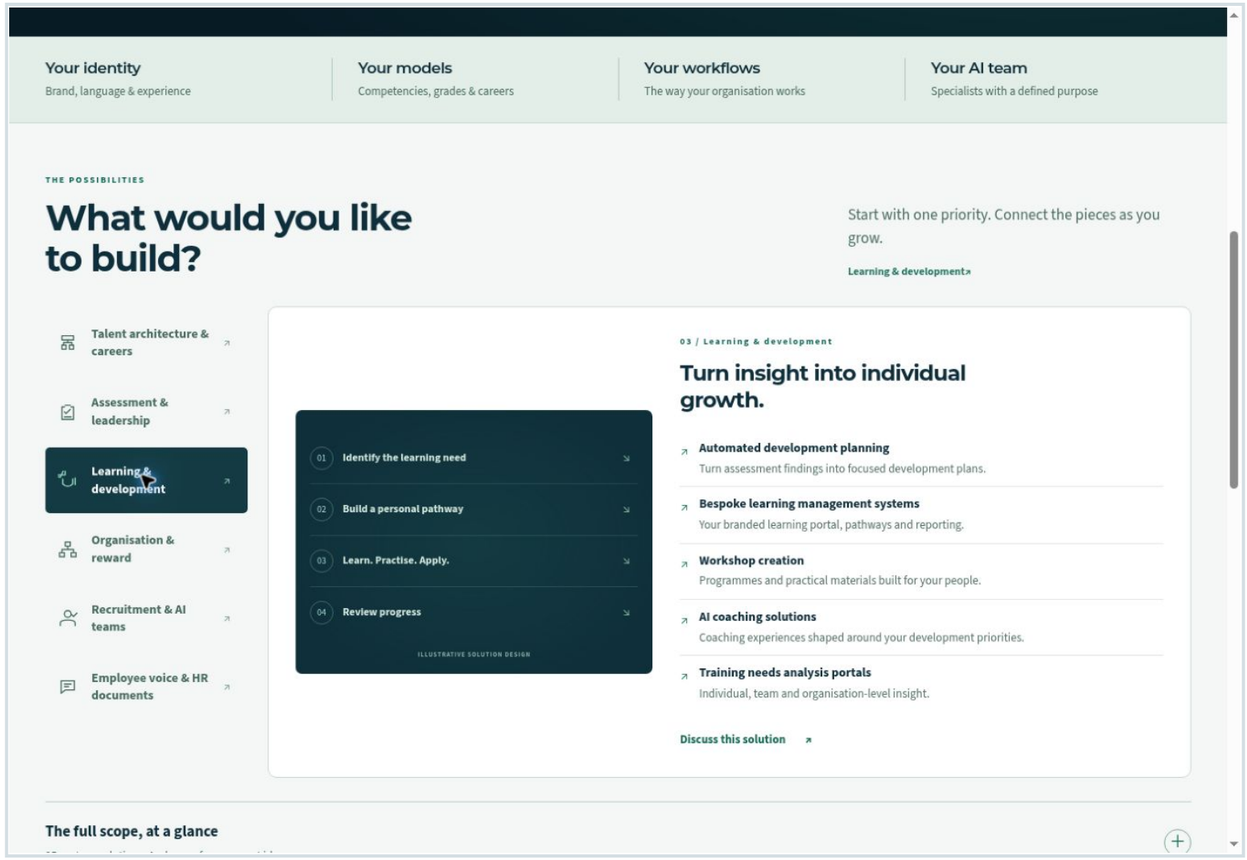
CHECK The five learning-related custom-solution routes are visible.

02 Describe the learner journey

Identify who is assigned learning, how activities are completed, who reviews practical evidence and what counts as completion. List documents, media and required languages.

CHECK The brief covers author, learner, manager and reviewer responsibilities.

CURRENT LIVE SCREEN



Learning and development: current catalogue tab.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 3–4 OF 6

OPEN SOURCE

Scope learning, workforce and reward needs

03 Specify development connections

If assessment findings should lead to an IDP, TNA or coaching pathway, define the source findings, agreed selection rules and review points.

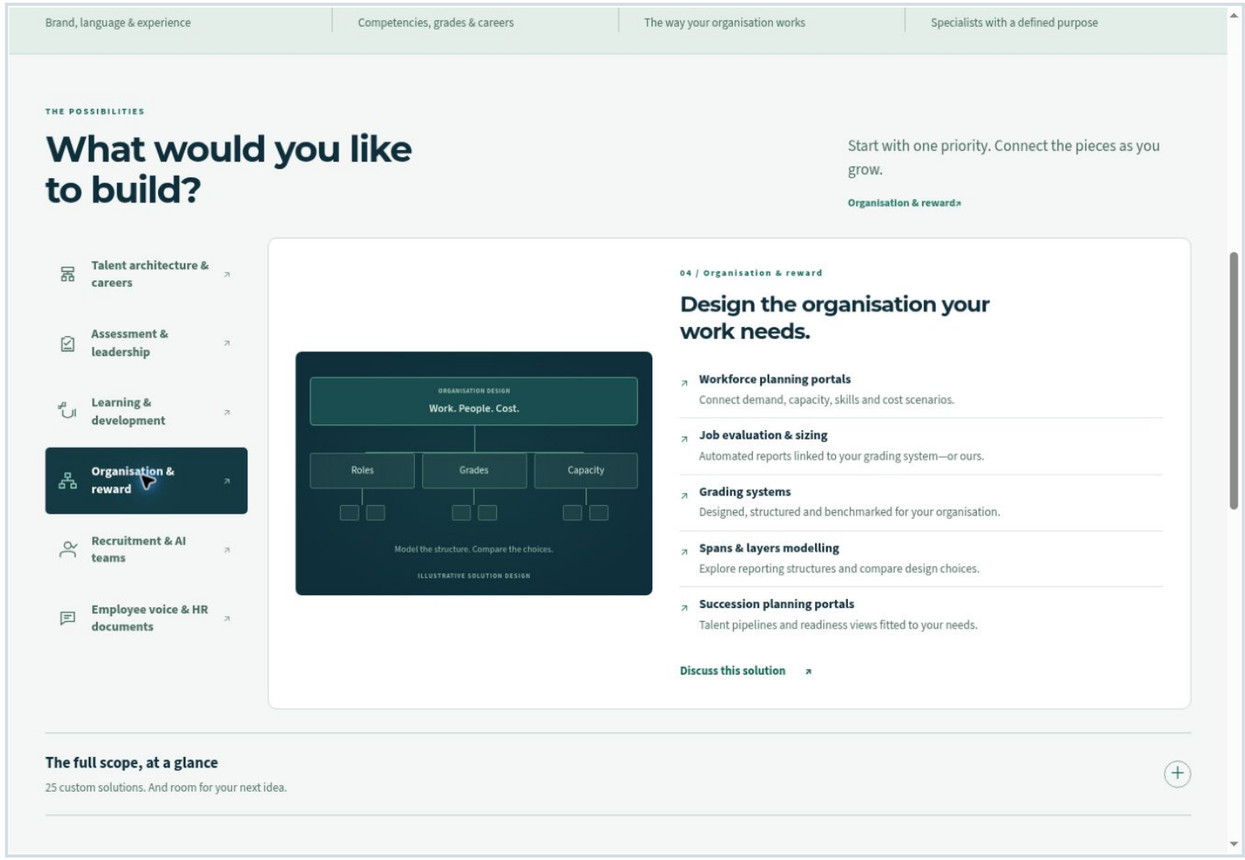
CHECK The transition from evidence to development is explainable.

04 Open organisation and reward

Select 'Organisation & reward'. Review workforce planning, job evaluation and sizing, grading, spans and layers, and succession planning.

CHECK The five organisation and reward routes are visible.

CURRENT LIVE SCREEN



Organisation and reward: current catalogue tab.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 5–6 OF 6

OPEN SOURCE

Scope learning, workforce and reward needs

05 Prepare modelling requirements

Document the baseline fields, assumptions, scenarios, calculation rules and output tables. Identify data owners, review frequency and who authorises the final organisational decision.

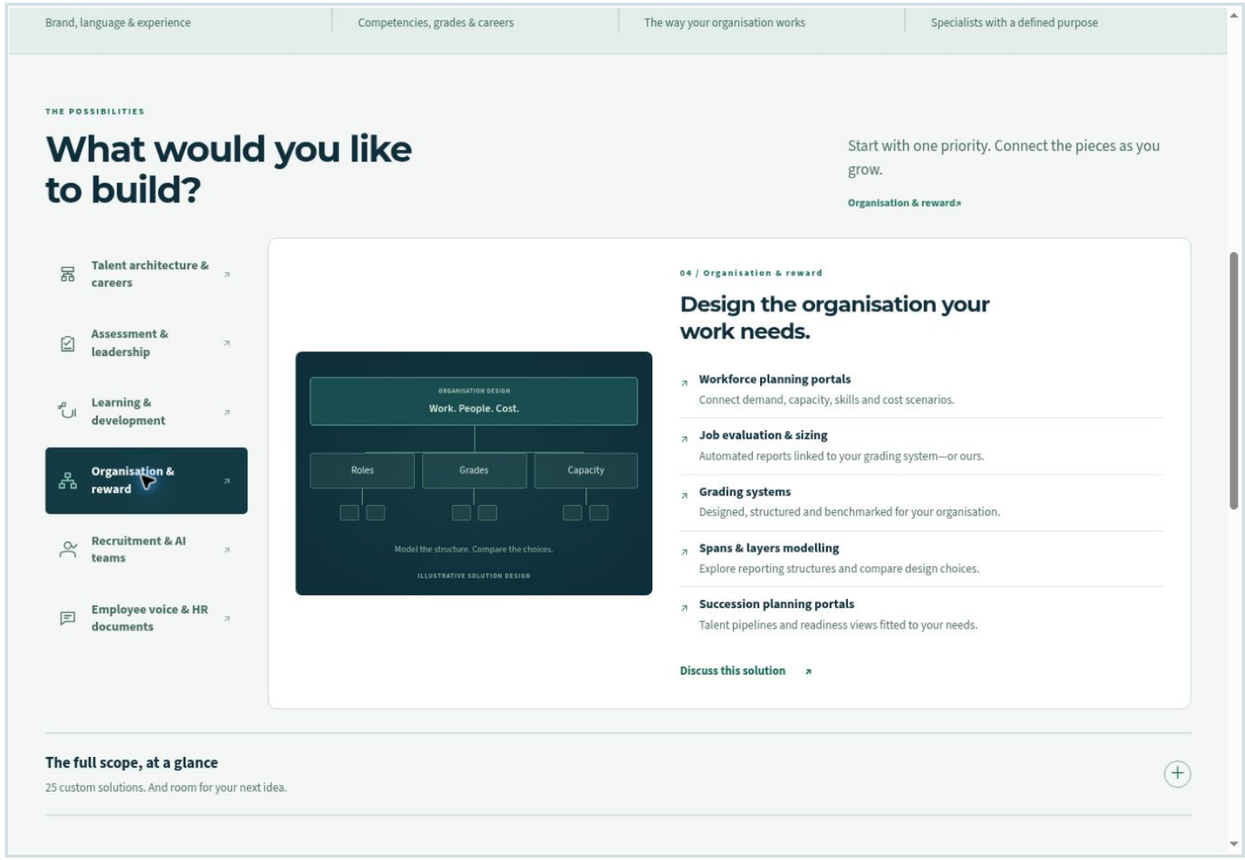
CHECK A reviewer can understand the inputs and trace the intended outputs.

06 Agree the comparison and export needs

Specify which scenarios users compare, which report formats they need and what must remain visible in exported assumptions and notes.

CHECK The proposed output is useful outside the working model.

CURRENT LIVE SCREEN



Organisation and reward: current catalogue tab.

EXPLORE THE SIX SOLUTION GROUPS / K-02-03

OPEN SOURCE

Scope recruitment, AI, listening and HR documents

Define the users, content, channels and approvals behind a proposed workflow.

WHO USES THIS Process owner with HR and technology representatives

BEFORE YOU BEGIN

- A current workflow or template set
- Named owners for content and external services

WHAT YOU WILL HAVE

- Workflow and channel shortlist
- Approved-content requirements
- Connection inventory

CHECK BEFORE YOU FINISH

- A responsible person approves consequential outputs.
- Country and language requirements are explicit.
- A visible contact channel is not assumed to be connected.

A requested communication channel is not active.	Agree the provider connection and acceptance test with the team. Use the confirmed human contact route for current support.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

These are custom-build service options. The catalogue’s illustrated workspace is a concept, not proof that a client’s proposed integration is live.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 1–2 OF 6

OPEN SOURCE

Scope recruitment, AI, listening and HR documents

01 Open recruitment and AI teams

Select 'Recruitment & AI teams'. Review custom recruitment portals, your HR AI staff and AI HR policy and legal support.

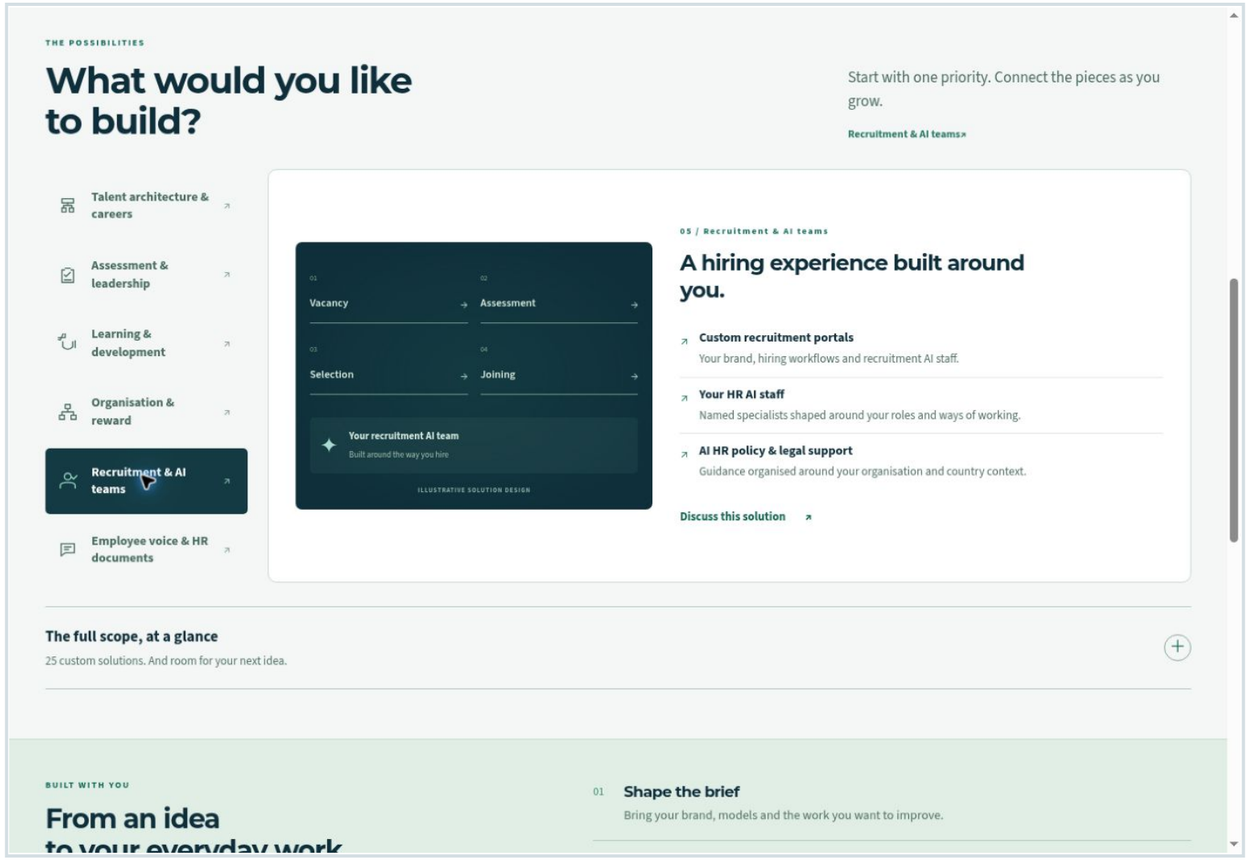
CHECK The three concepts describe hiring and specialist-support possibilities.

02 Define the hiring or AI responsibility

For recruitment, map requisition through appointment and handover. For AI support, identify the permitted tasks, reference content, user roles and human escalation route.

CHECK The brief distinguishes preparation, advice and approval responsibilities.

CURRENT LIVE SCREEN



Recruitment and AI teams: current catalogue tab.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 3–4 OF 6

OPEN SOURCE

Scope recruitment, AI, listening and HR documents

03 Open employee voice and documents

Select 'Employee voice & HR documents'. Review live polling and surveys, engagement and wellbeing, automated legal contracts, and HR letters and handbooks.

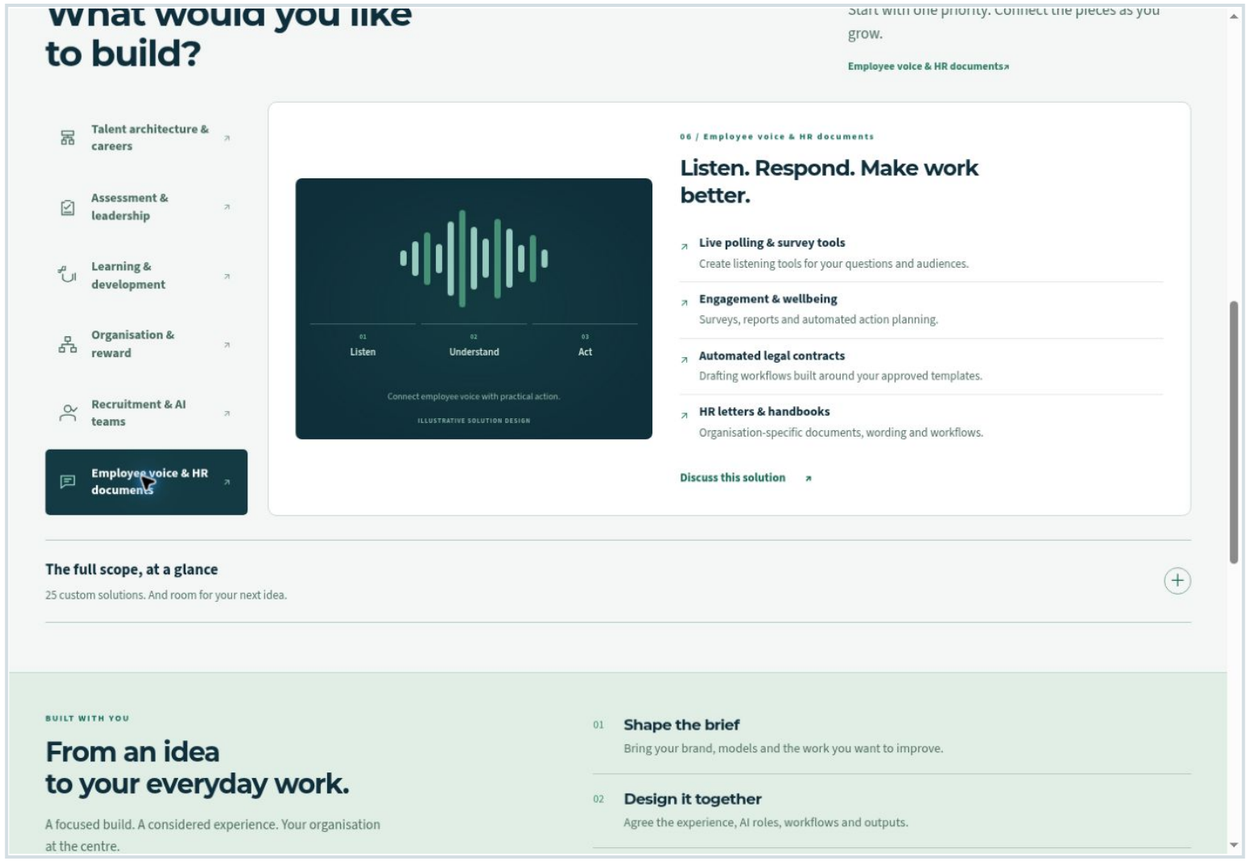
CHECK The four employee-voice and document concepts are visible.

04 Prepare content and audience rules

For listening, define participants, question content, confidentiality and reporting groups. For documents, define country, language, approved clauses, variable fields and reviewer.

CHECK The required content and decisions are owned by named people.

CURRENT LIVE SCREEN



Employee voice and HR documents: current catalogue tab.

EXPLORE THE SIX SOLUTION GROUPS / STEPS 5–6 OF 6

OPEN SOURCE

Scope recruitment, AI, listening and HR documents

05 List every external connection

Record any email, calendar, AI, voice, Telegram or payment service required. Agree the provider, authorised access, expected behaviour and support owner for each.

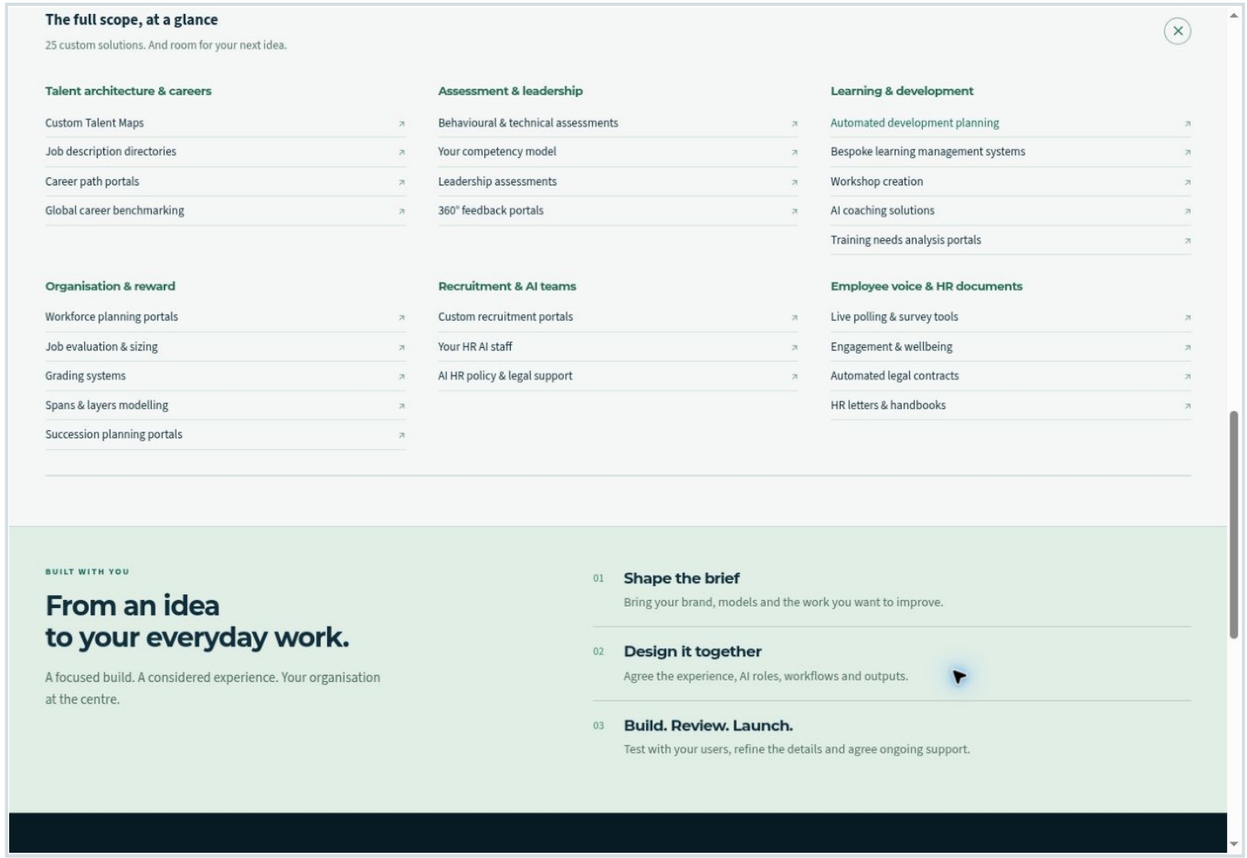
CHECK A connection list distinguishes interface design from operational delivery.

06 Check the complete scope

Expand 'The full scope, at a glance' to review all 25 solutions. Carry the selected names into the brief and omit features that do not serve the outcome.

CHECK The shortlist is concrete and bounded.

CURRENT LIVE SCREEN



Expanded catalogue of 25 solutions and the published brief, design and build-review-launch sequence.

03

Shape, review and prepare delivery

Use concrete client checklists to make the proposed assignment reviewable.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

SHAPE, REVIEW AND PREPARE DELIVERY / K-03-01

OPEN SOURCE

Prepare a focused consultancy or build brief

Give the human team enough information to propose an appropriate scope.

WHO USES THIS Client sponsor and project lead

BEFORE YOU BEGIN

- An accountable sponsor
- A short solution shortlist or diagnostic question

WHAT YOU WILL HAVE

- Dated project brief
- Agreed scope and responsibilities

CHECK BEFORE YOU FINISH

- Every deliverable supports the stated outcome.
- Dependencies and unresolved decisions have owners.
- The approved scope is distinguishable from ideas for later.

The brief is a long list of features with no priority.

Choose the most important user outcome and define the smallest complete workflow that achieves it. Keep later options in a separate list.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Recommended client working procedure based on the published service process. This is not an automated project-management screen.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 1–2 OF 6

OPEN SOURCE

Prepare a focused consultancy or build brief

01 State the outcome in one sentence

Describe what needs to work better, for whom and why. Add the decision or improvement you expect the assignment to support.

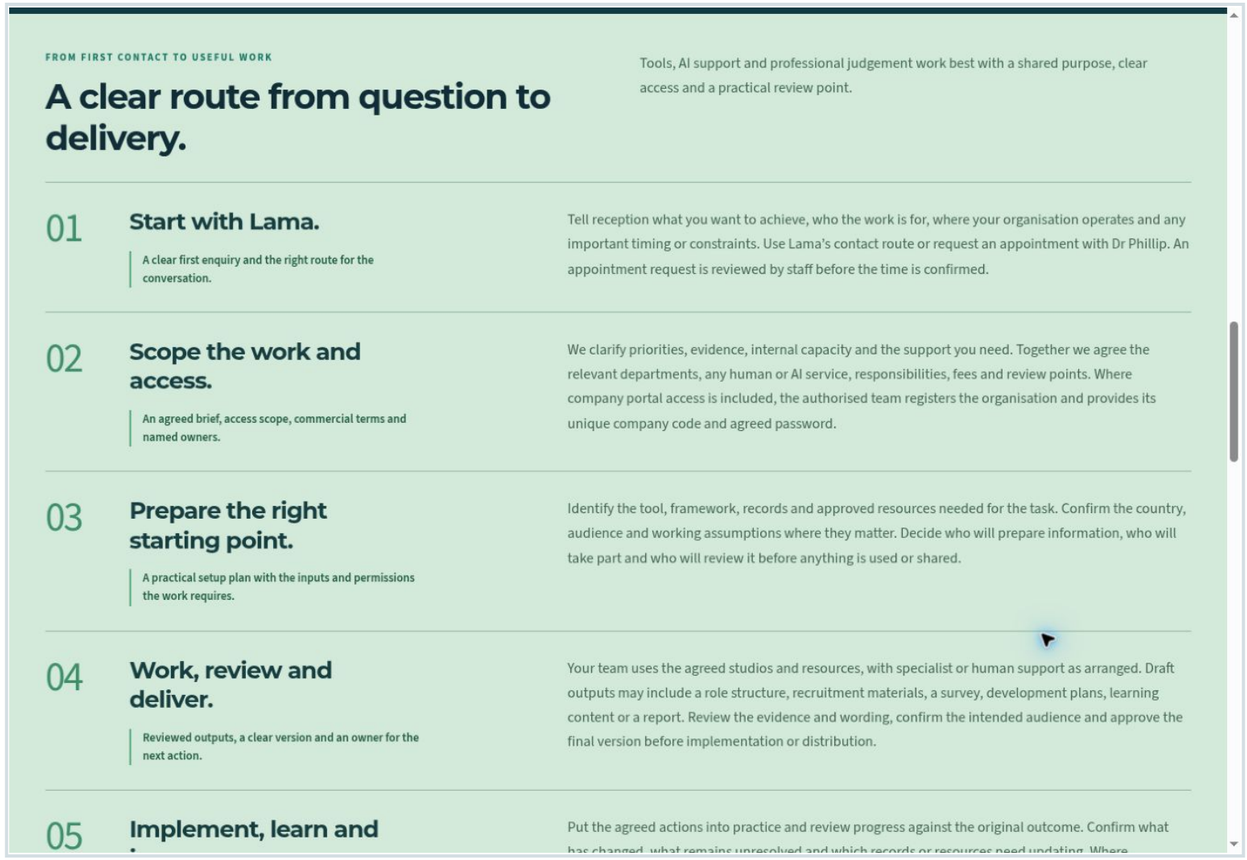
CHECK The team can understand the intended result without a feature list.

02 Record the current situation

Summarise organisation, country, users, current process and constraints. Identify known evidence, gaps and the systems already in use.

CHECK The starting point and material unknowns are explicit.

CURRENT LIVE SCREEN



Published service process: first contact, scope, preparation and review.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 3–4 OF 6

OPEN SOURCE

Prepare a focused consultancy or build brief

03 Define outputs and boundaries

List the required reports, tools, documents or services. Separate essential launch requirements from later possibilities and record exclusions that prevent scope ambiguity.

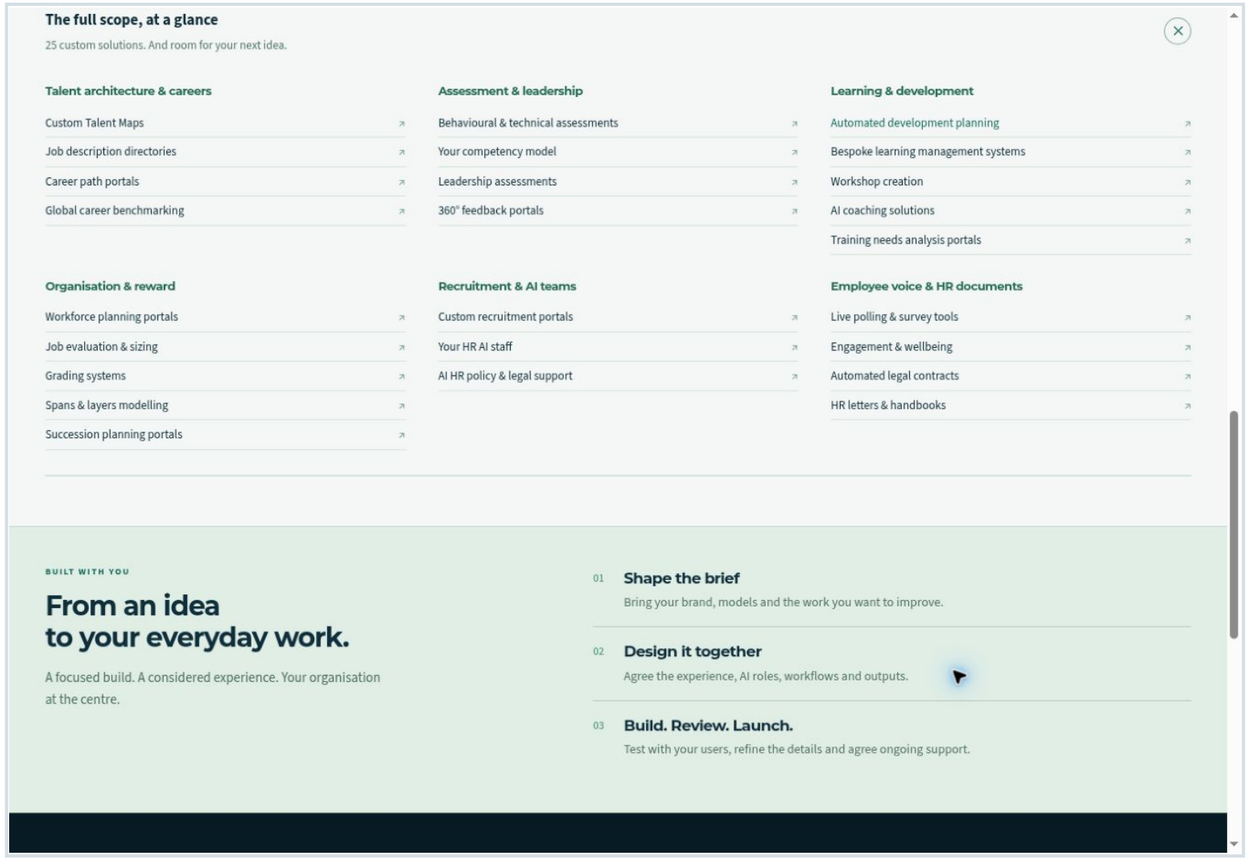
CHECK A proposed scope can be checked against a small set of deliverables.

04 Identify contributors and owners

Name the sponsor, process owner, content reviewer, technical contact and representative users. State who can approve scope and final use.

CHECK The assignment has clear decision and contribution responsibilities.

CURRENT LIVE SCREEN



Expanded catalogue of 25 solutions and the published brief, design and build-review-launch sequence.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 5–6 OF 6

OPEN SOURCE

Prepare a focused consultancy or build brief

05 Agree the working arrangement

Discuss the appropriate project, retainer, deliverable-based, associate, day-rate, interim, coaching or assessment arrangement with the team. Record timetable, fees and review points.

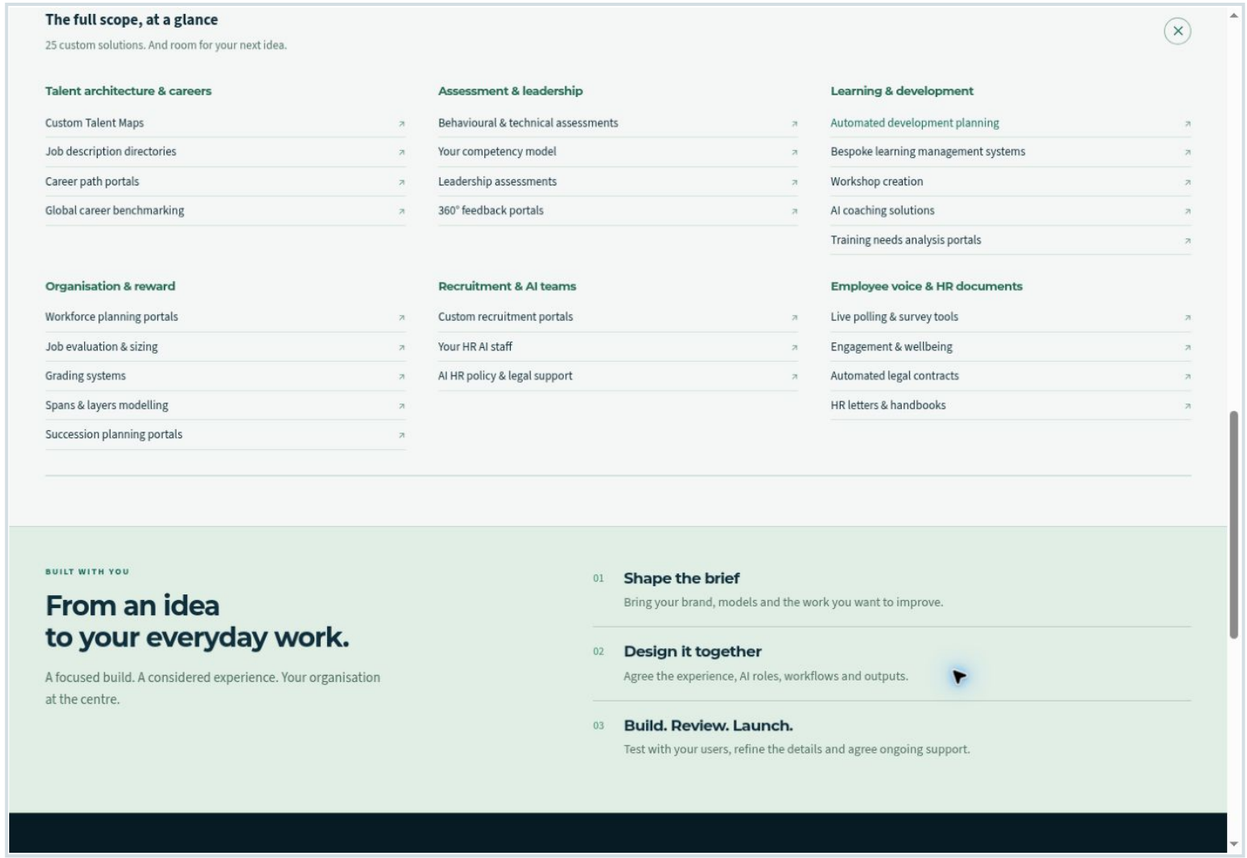
CHECK The commercial and delivery basis is agreed before work starts.

06 Keep a controlled brief

Retain the dated brief and agreed changes with the project documents. Use the current version in review meetings and distinguish proposals from accepted scope.

CHECK Participants work from the same agreed reference.

CURRENT LIVE SCREEN



Expanded catalogue of 25 solutions and the published brief, design and build-review-launch sequence.

SHAPE, REVIEW AND PREPARE DELIVERY / K-03-02

OPEN SOURCE

Agree workflows, content and acceptance criteria

Make the proposed experience specific enough to review and test.

WHO USES THIS Process owner, subject expert and delivery team

BEFORE YOU BEGIN

- An agreed brief
- Representative source documents and example inputs

WHAT YOU WILL HAVE

- Workflow specification
- Content register
- Acceptance criteria

CHECK BEFORE YOU FINISH

- Inputs, outputs and exception paths are described.
- Approvers and support owners are named.
- Expected results can be reproduced from the example inputs.

Users interpret the same field or status differently.	Agree a shared definition and example. Update both the screen wording and the underlying rule before continuing the review.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Recommended client working procedure based on the published service process. This is not an automated project-management screen.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 1–2 OF 6

OPEN SOURCE

Agree workflows, content and acceptance criteria

01 Describe each user journey

For each role, record its starting point, required inputs, actions, review step and final output. Include what happens when information is missing or rejected.

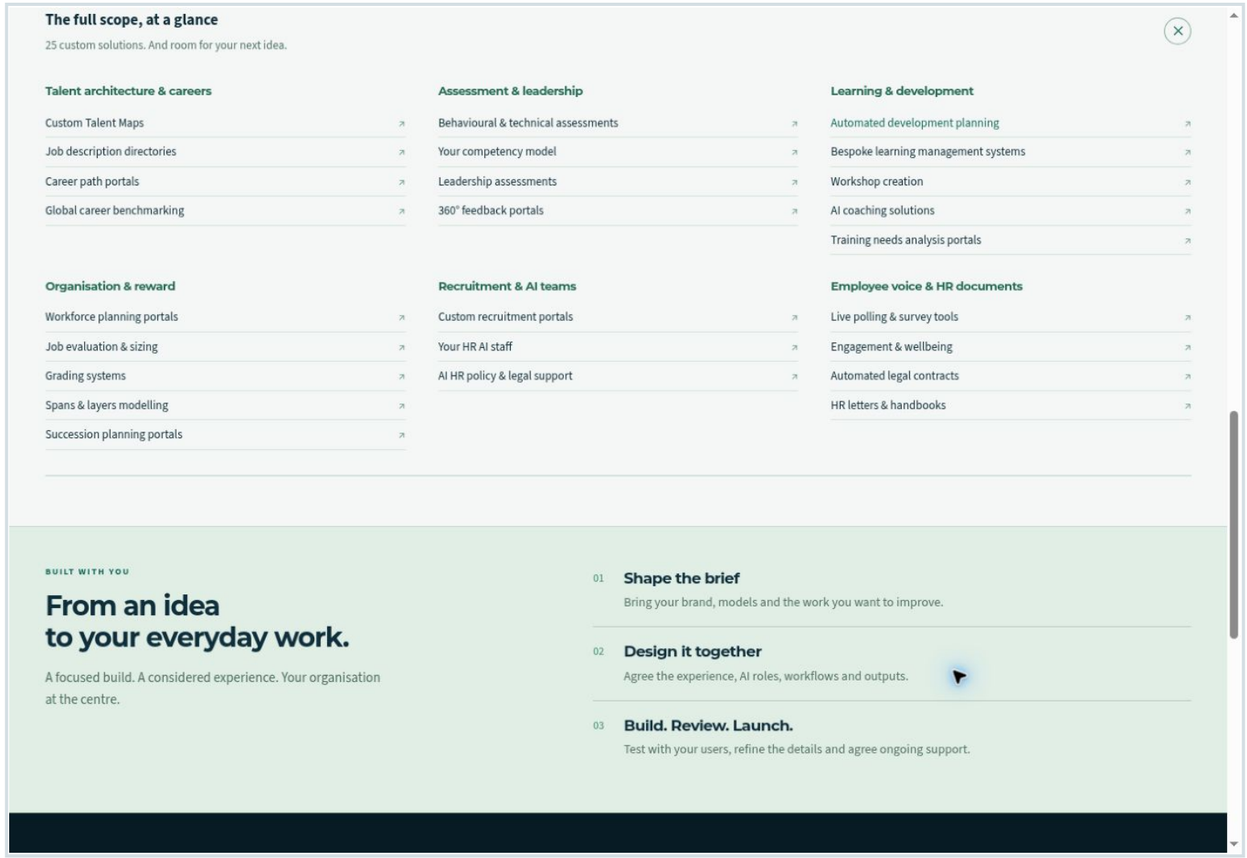
CHECK The workflow can be followed from entry to completion.

02 Prepare approved content

Supply controlled brand assets, terminology, competency models, questions, templates and reference material. Identify ownership, revision date and any usage restrictions.

CHECK The design team knows which source content is approved.

CURRENT LIVE SCREEN



Expanded catalogue of 25 solutions and the published brief, design and build-review-launch sequence.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 3–4 OF 6

OPEN SOURCE

Agree workflows, content and acceptance criteria

03 Agree access and record ownership

List which roles may view, create, edit, review and release each record type. Specify organisation boundaries and how access requests will be administered.

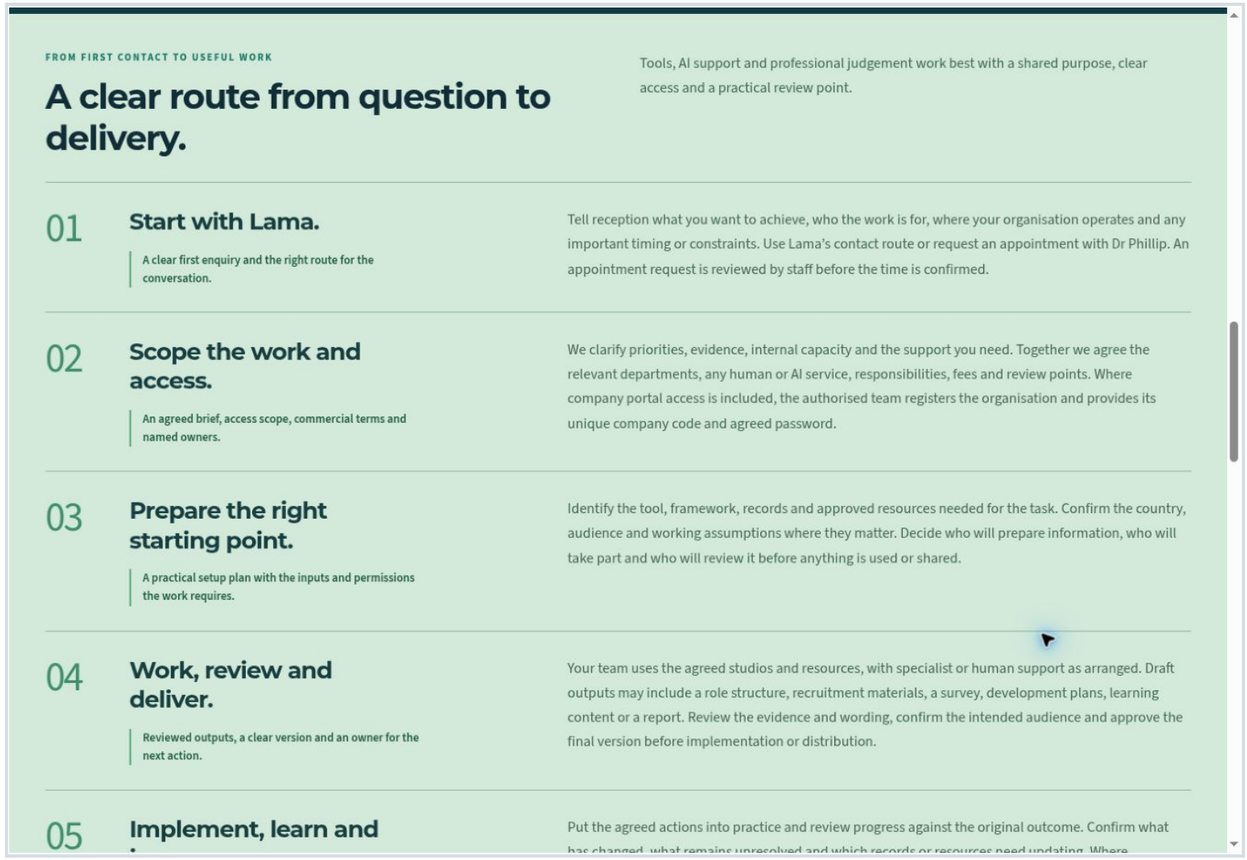
CHECK The proposed access model is reviewable by the responsible client owner.

04 Define expected results

For each important process, provide a representative input and expected output. Include calculation examples, bilingual content, error cases and document layouts where relevant.

CHECK The acceptance criteria can be checked with observable evidence.

CURRENT LIVE SCREEN



Published service process: first contact, scope, preparation and review.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 5–6 OF 6

OPEN SOURCE

Agree workflows, content and acceptance criteria

05 Map dependencies and support

Identify provider connections, migration or imports, administrator training and ongoing maintenance. Assign owners for both the build and the service after handover.

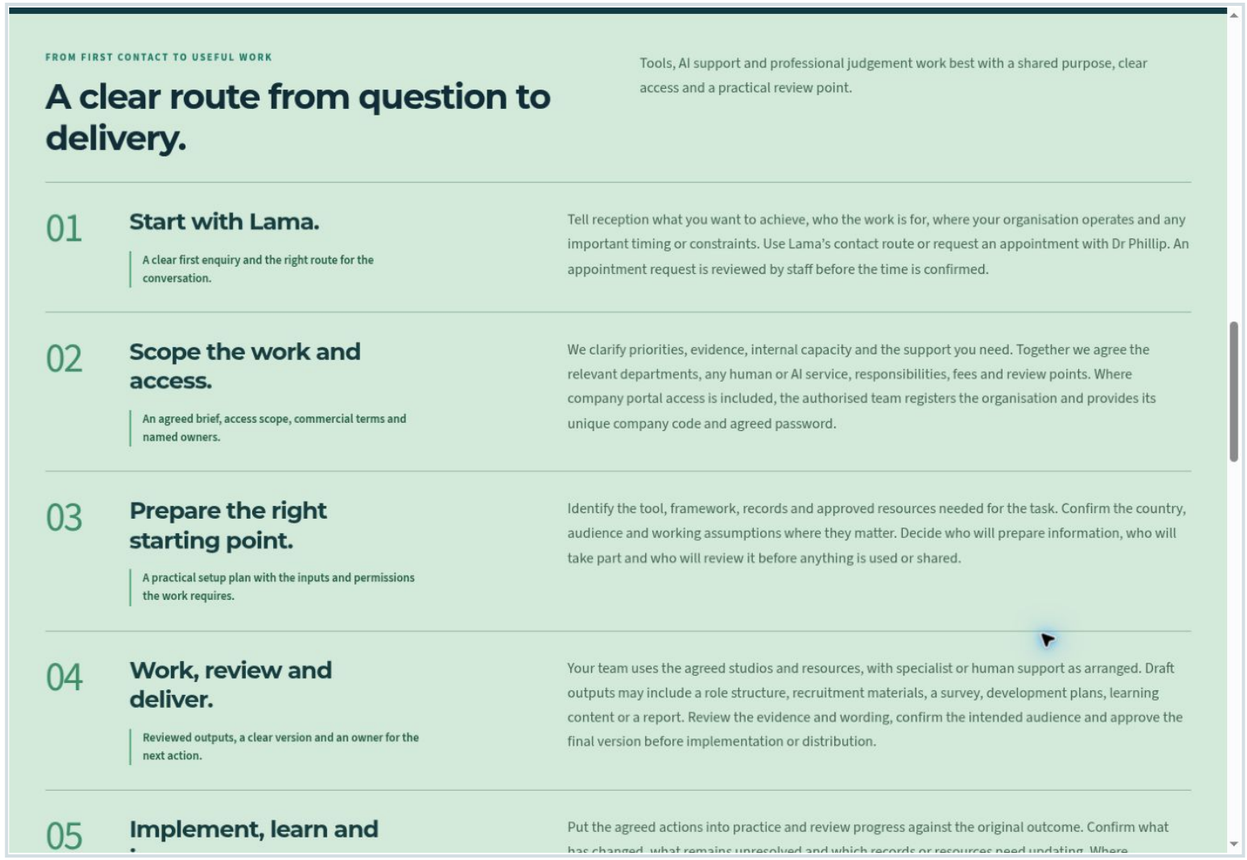
CHECK Dependencies are included in the delivery plan.

06 Review the design together

Walk through the proposed screens and outputs with representative users. Resolve ambiguous terminology or decisions before treating the design as approved.

CHECK Feedback refers to a defined task and expected result.

CURRENT LIVE SCREEN



Published service process: first contact, scope, preparation and review.

SHAPE, REVIEW AND PREPARE DELIVERY / K-03-03

OPEN SOURCE

Review a prototype and organise release readiness

Use task-based evidence to decide whether the proposed build is ready for its agreed use.

WHO USES THIS Client project lead and representative users

BEFORE YOU BEGIN

- A reviewable prototype or draft
- Agreed acceptance criteria and an issue owner

WHAT YOU WILL HAVE

- Review log
- Accepted version and readiness record
- Implementation and support plan

CHECK BEFORE YOU FINISH

- Representative users complete their priority tasks.
- Provider tests are recorded independently of interface previews.
- A named owner accepts the intended use and any remaining limitations.

The prototype looks complete but an end-to-end process fails.

Record the exact task, input and failure point. Resolve the missing rule or connection before approving that process for live use.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Recommended client working procedure based on the published service process. This is not an automated project-management screen.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 1–2 OF 6

OPEN SOURCE

Review a prototype and organise release readiness

01 Use realistic, non-sensitive examples

Prepare sample cases that cover typical work and important exceptions. Use synthetic or appropriately approved data for the review environment.

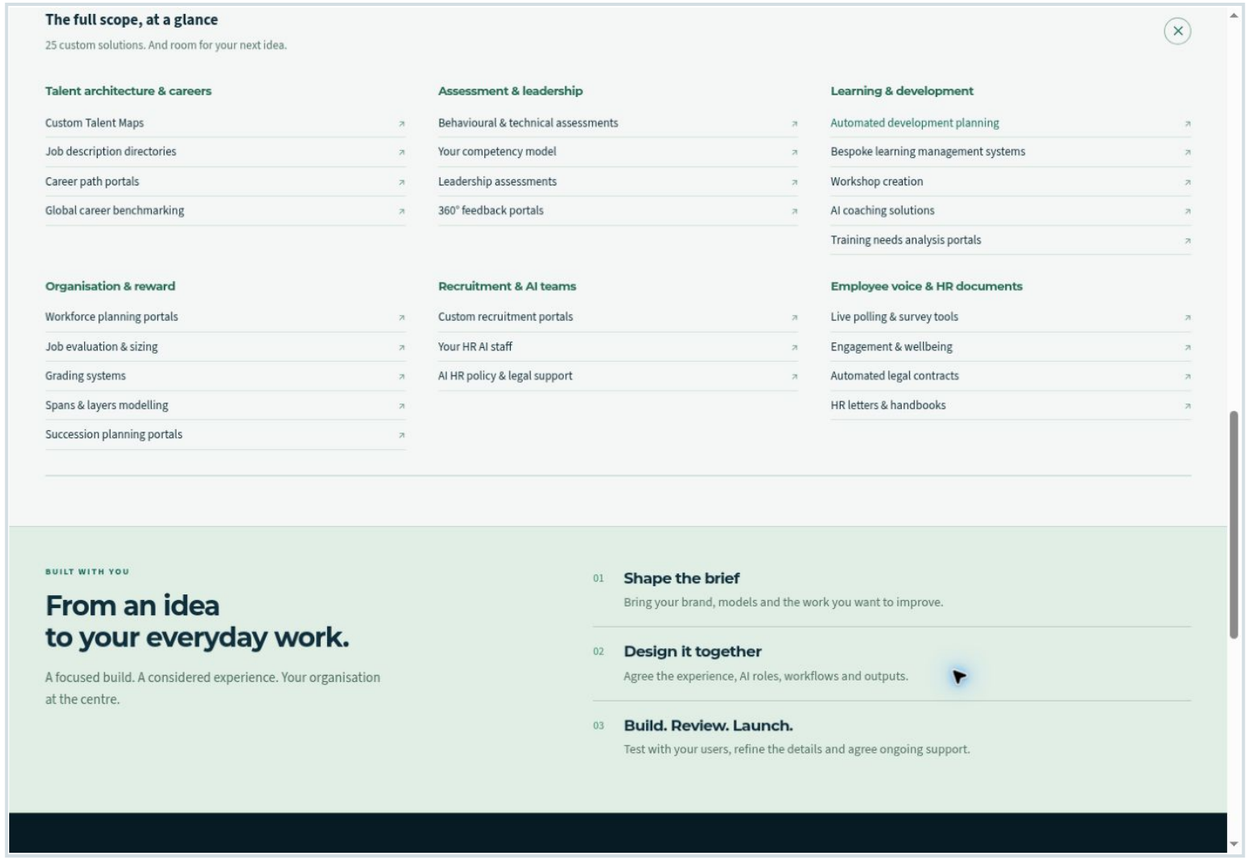
CHECK Tests represent the users' work without exposing unnecessary records.

02 Follow each complete task

Start at the intended entry point and work through input, review, output and export. Record where users hesitate or cannot complete the expected process.

CHECK Feedback is tied to a repeatable task and visible result.

CURRENT LIVE SCREEN



Expanded catalogue of 25 solutions and the published brief, design and build-review-launch sequence.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 3–4 OF 6

OPEN SOURCE

Review a prototype and organise release readiness

03 Check documents and calculations

Compare generated results with the agreed examples. Review dates, language, units, grading or scoring rules, page layout and retained assumptions.

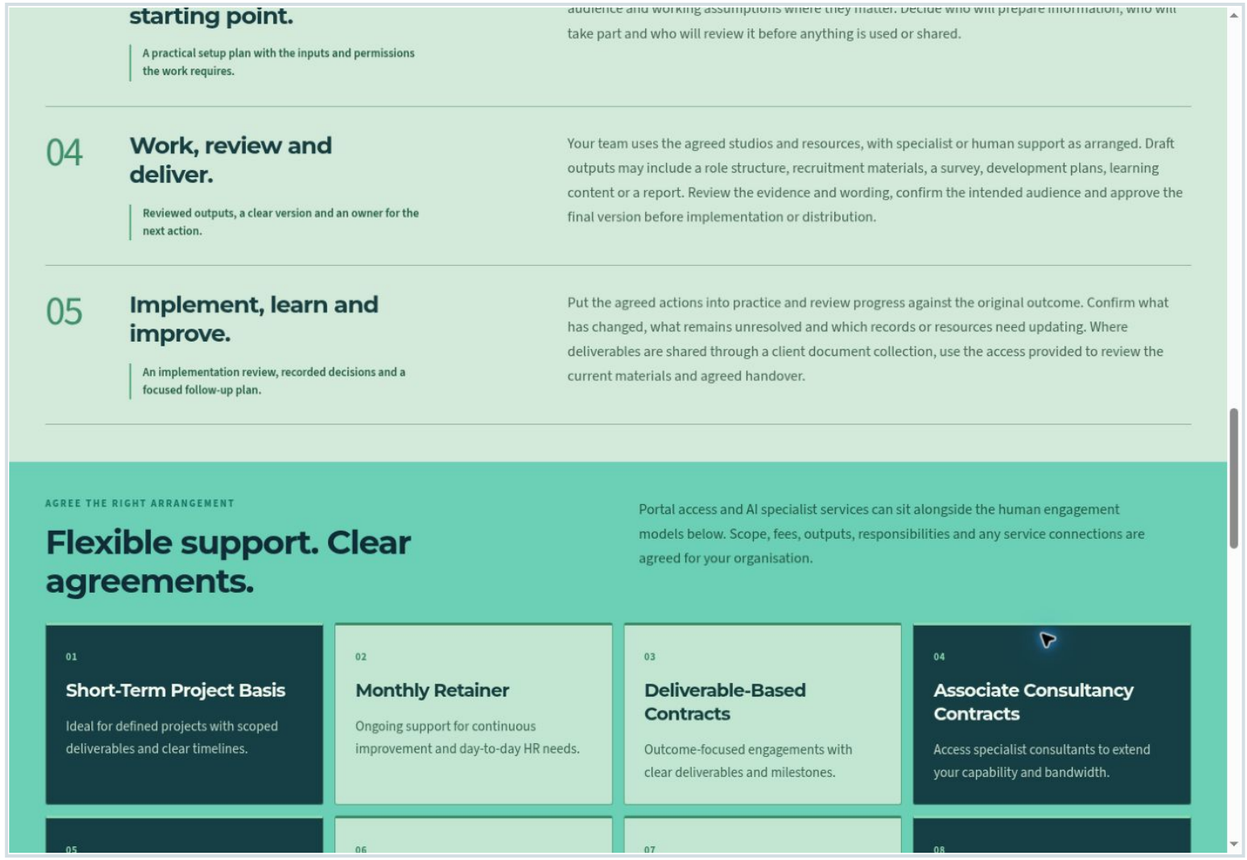
CHECK Outputs match the specification and are understandable to their audience.

04 Test active connections explicitly

Check each agreed provider in the intended environment and record the result. A preview, draft or interface alone is not evidence of successful delivery or synchronisation.

CHECK The readiness record separates functioning connections from outstanding work.

CURRENT LIVE SCREEN



Published delivery and implementation review stages with engagement arrangements below.

SHAPE, REVIEW AND PREPARE DELIVERY / STEPS 5–6 OF 6

OPEN SOURCE

Review a prototype and organise release readiness

05 Resolve and retest material issues

Give each issue a reproduction step, expected result, owner and priority. Retest the affected workflow after a fix and record the accepted version.

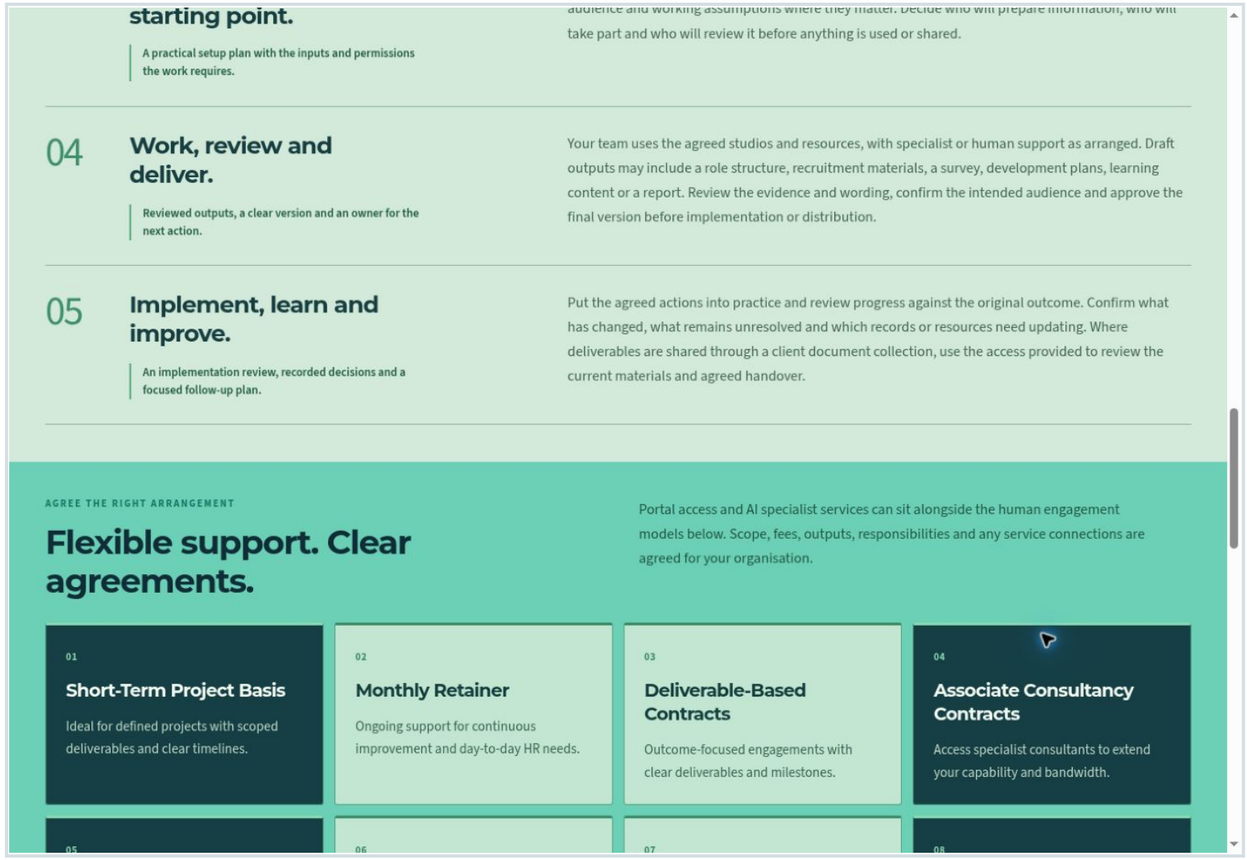
CHECK The team has evidence for the release decision.

06 Plan the first operating review

Agree the launch audience, support contact, training, review date and measures of useful adoption. Record open limitations and the response if a material fault appears.

CHECK The handover includes a practical support and improvement plan.

CURRENT LIVE SCREEN



Published delivery and implementation review stages with engagement arrangements below.

04 Contact the team and organise handover

Request the right conversation and keep the agreed deliverables accessible.

03 PRACTICAL TASKS

Prepare the inputs / Follow the screen sequence / Check the result

CONTACT THE TEAM AND ORGANISE HANDOVER / K-04-01

OPEN SOURCE

Use Lama’s first-contact route

Route an enquiry to the relevant human or specialist support.

WHO USES THIS Client sponsor or authorised contact

BEFORE YOU BEGIN

- A concise non-sensitive summary
- The department or outcome, if known

WHAT YOU WILL HAVE

- A concise enquiry brief
- The correct support route

CHECK BEFORE YOU FINISH

- No password or confidential employee record is included.
- An interface or saved draft is not mistaken for a delivered message.

A channel does not produce a response. Check its displayed connection status. Use the confirmed human email or appointment route and include the topic and page URL.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Contact controls and their status text were inspected. No message, call or access-code transaction was sent.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 1–2 OF 5

OPEN SOURCE

Use Lama’s first-contact route

01 Open Lama’s reception page

Use 'Start with Lama', 'Contact Lama' or 'Get support from Lama'. Confirm that the page identifies Lama as the first point of contact.

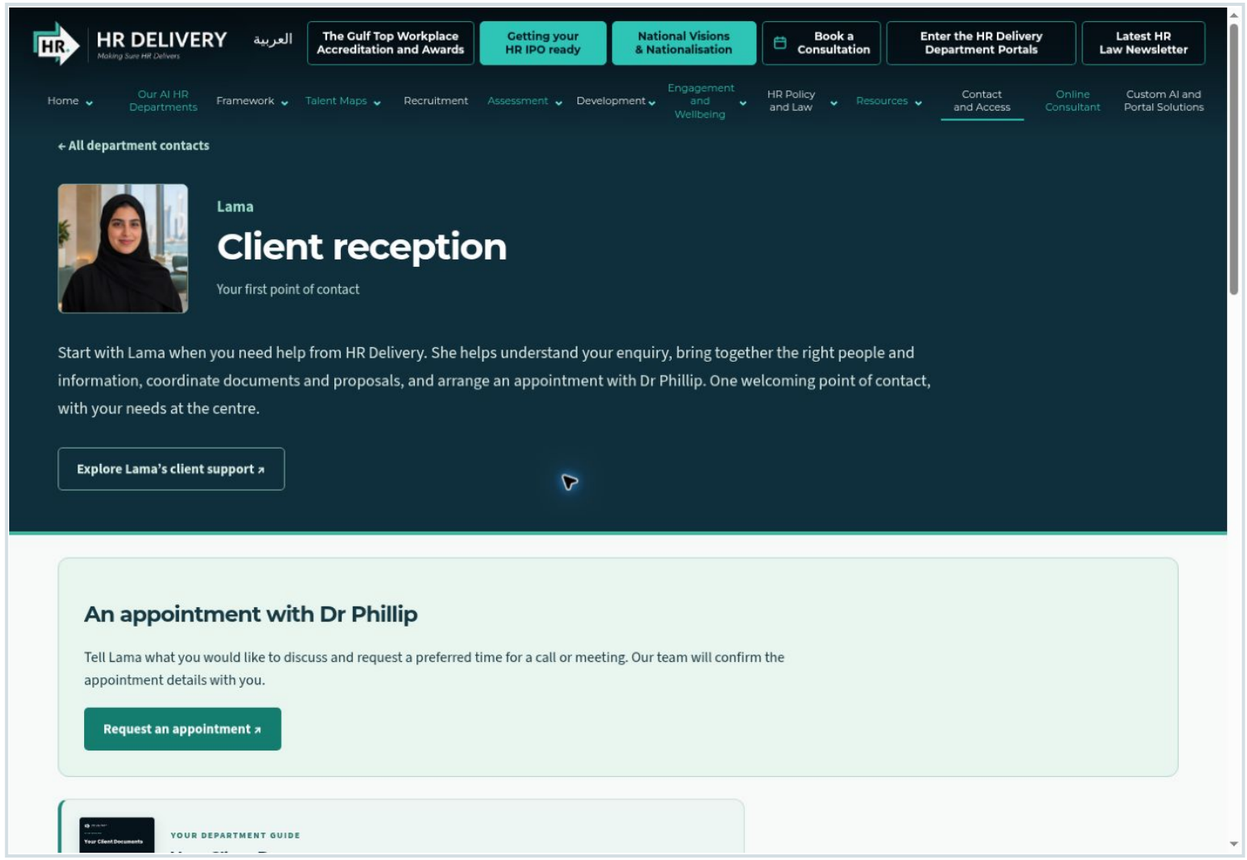
CHECK The reception page explains enquiry and appointment support.

02 Choose the purpose of contact

Prepare the organisation, country, challenge and required outcome. Say whether you need scoping, a document, access clarification or an appointment.

CHECK The enquiry can be routed without a long discovery exchange.

CURRENT LIVE SCREEN



Lama’s public reception route and appointment entry point.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 3–4 OF 5

OPEN SOURCE

Use Lama’s first-contact route

03 Distinguish service access from portal access

Scroll to 'Your service access'. A specialist service access code is separate from the shared department sign-in. Use only the code issued for your organisation and service when activation has been confirmed.

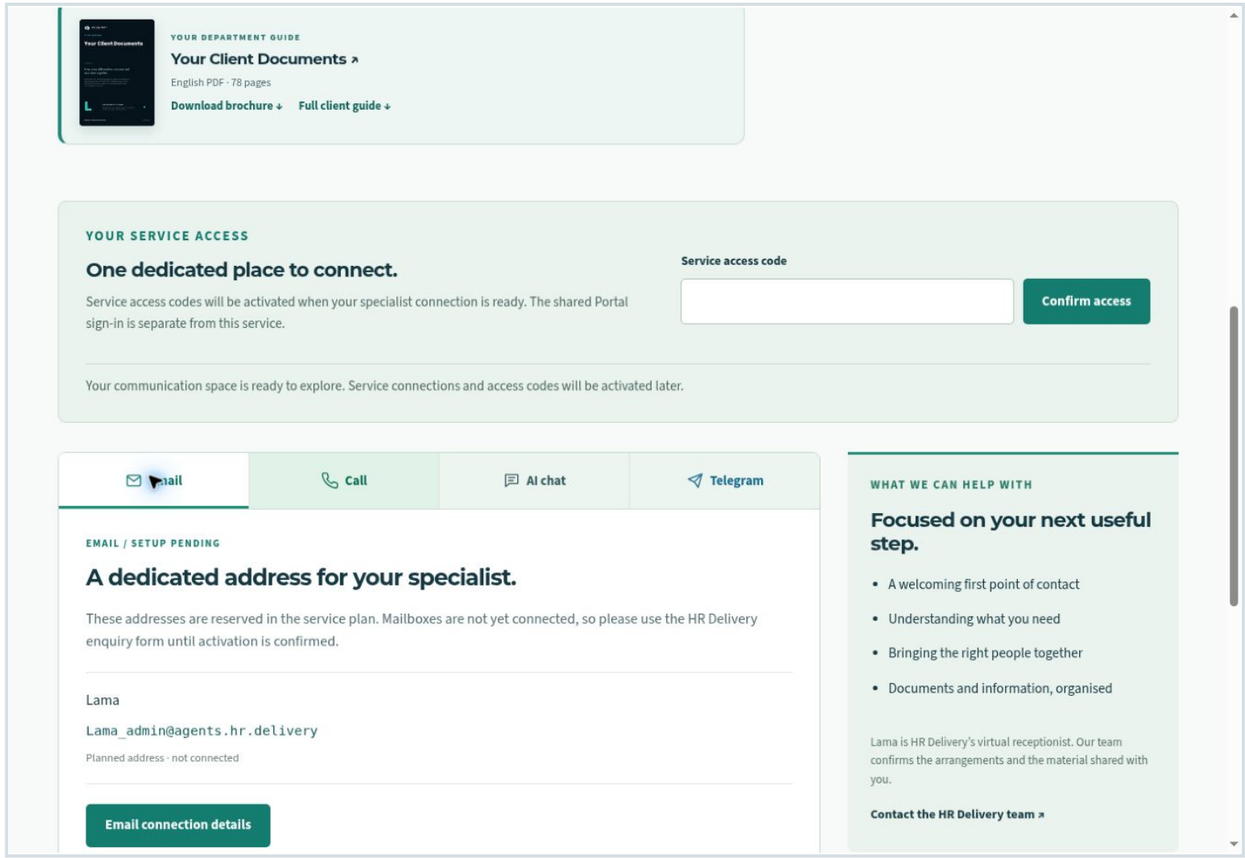
CHECK You use the relevant access route for the requested support.

04 Check the channel status

The page offers Email, Call, AI chat and Telegram interfaces. Check whether the connection and your service access are active before expecting a response.

CHECK The chosen channel is understood to be operational or awaiting connection.

CURRENT LIVE SCREEN



Current service access code field and all four communication tabs; Email is selected and marked as awaiting connection.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 5–5 OF 5

OPEN SOURCE

Use Lama’s first-contact route

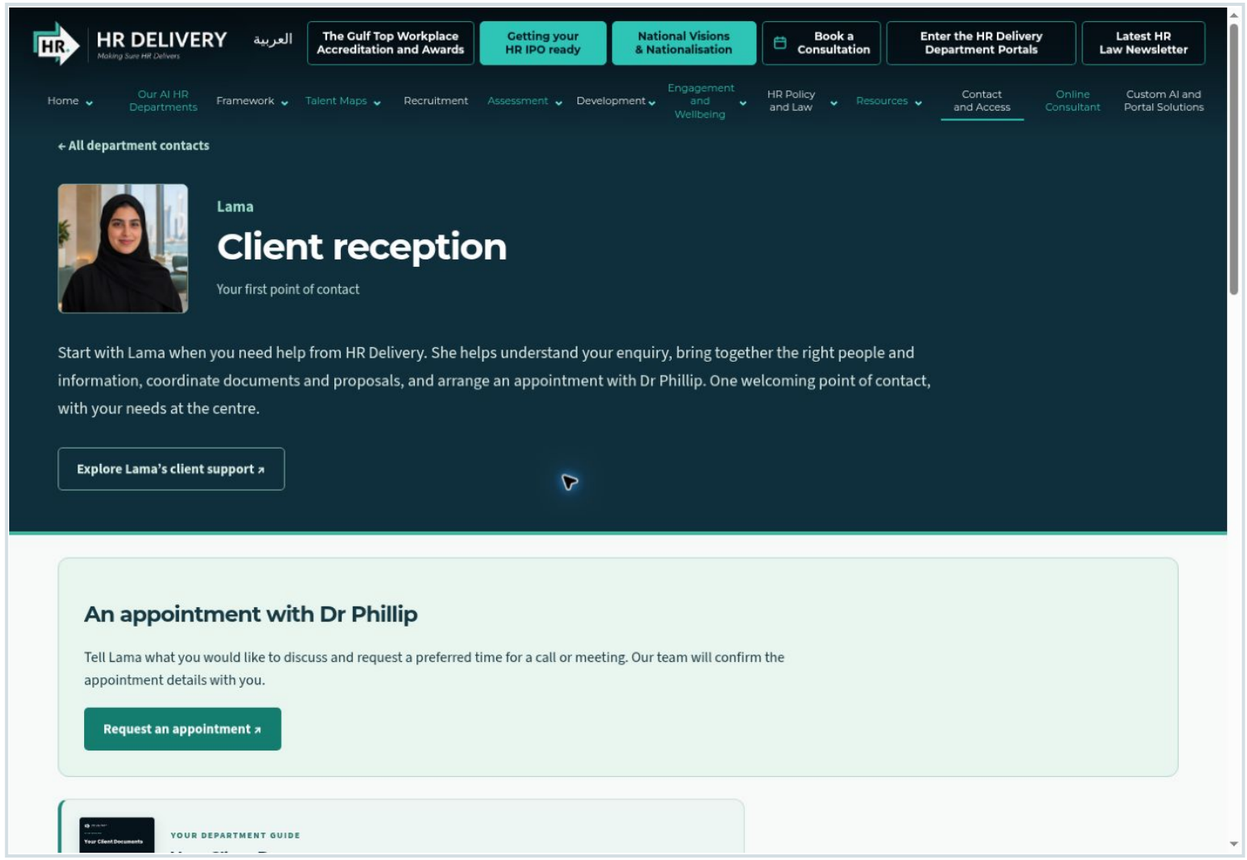
05

Use the human support route when needed

For an appointment choose 'Request an appointment'. For direct human support use the displayed contact route or drphillip@hr.delivery.

CHECK The enquiry reaches the route appropriate for current support.

CURRENT LIVE SCREEN



Lama’s public reception route and appointment entry point.

CONTACT THE TEAM AND ORGANISE HANDOVER / K-04-02

OPEN SOURCE

Request an appointment with Dr Phillip

Prepare and submit an accurate preferred-time request for staff confirmation.

WHO USES THIS Client contact

BEFORE YOU BEGIN

- Contact details you are authorised to share
- A proposed time converted to Qatar time

WHAT YOU WILL HAVE

- Preferred-time appointment request
- Staff-confirmed arrangement when issued

CHECK BEFORE YOU FINISH

- Date and time use Qatar time.
- The contact address is correct.
- A request is not entered in your diary as confirmed prematurely.

No automatic email or calendar invitation arrives.

The reviewed form says these connections are pending. Keep the page acknowledgement if supplied and contact drphillip@hr.delivery for follow-up.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The blank form and controls were inspected only. Automatic email confirmations and external calendar invitations are stated to await service connections.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 1–2 OF 6

OPEN SOURCE

Request an appointment with Dr Phillip

01 Open the request form

Select 'Request an appointment'. Read the notice: this is a preferred-time request, not an instantly confirmed booking; no payment is taken.

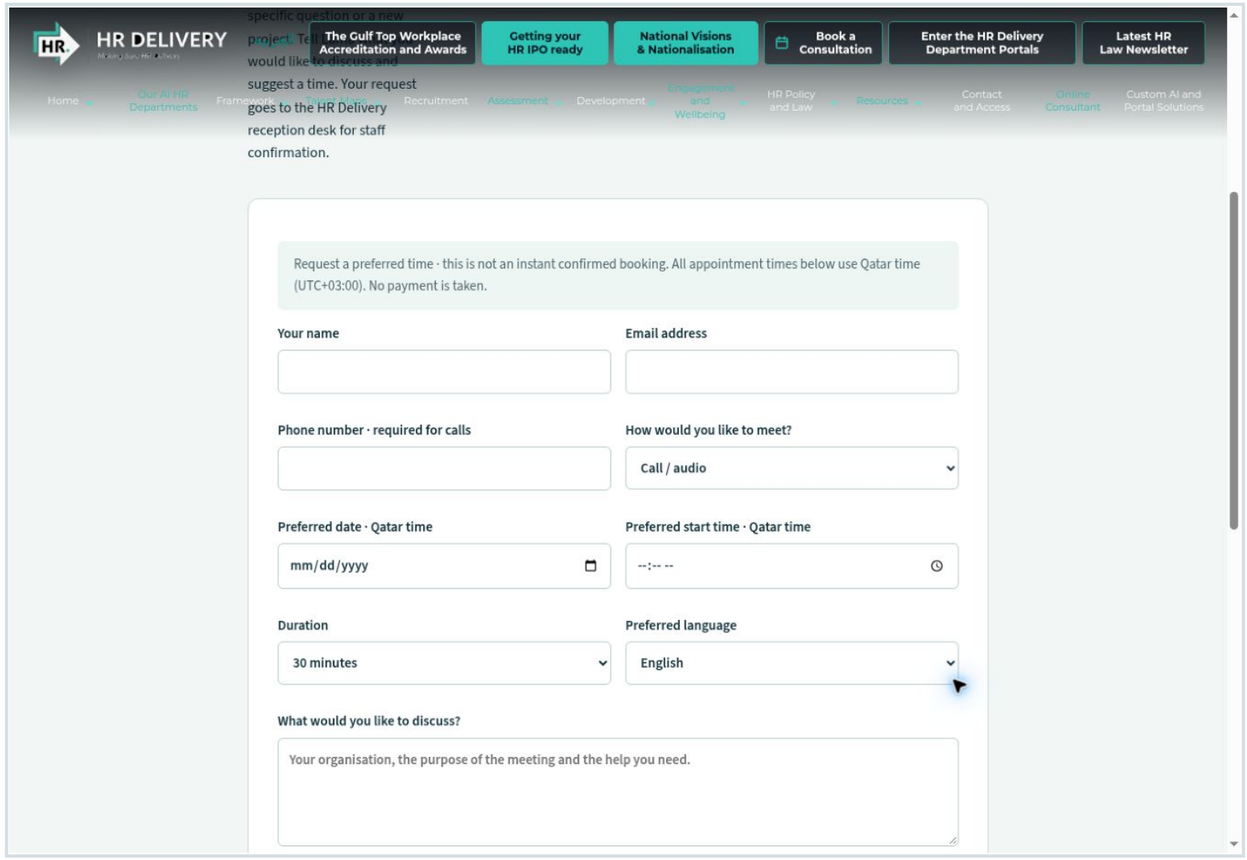
CHECK The form shows contact, meeting and timing fields.

02 Enter your contact details

Complete 'Your name' and 'Email address'. Enter 'Phone number · required for calls' when choosing a call or audio appointment.

CHECK Staff have the details needed to follow up the request.

CURRENT LIVE SCREEN



Blank appointment form: contact details, meeting format and proposed date and time.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 3–4 OF 6

OPEN SOURCE

Request an appointment with Dr Phillip

03 Choose meeting format and proposed time

Use 'How would you like to meet?' for Call / audio, Online meeting or In person. Enter the preferred date and start time in Qatar time, UTC+03:00.

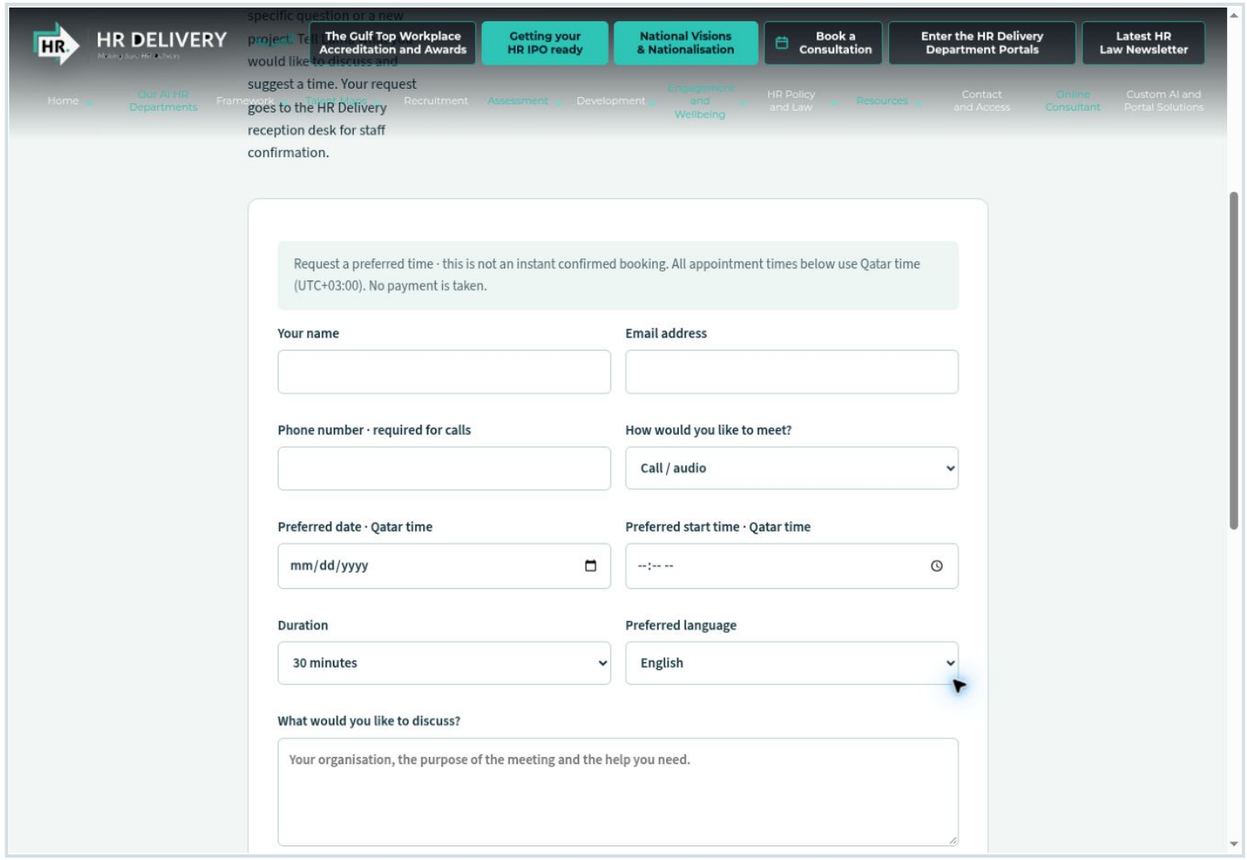
CHECK The intended format and proposed time are unambiguous.

04 Set duration and language

Choose 15, 30 or 60 minutes in 'Duration', then choose English or Arabic in 'Preferred language'. Check that the length suits the intended discussion.

CHECK The request includes the selected duration and language.

CURRENT LIVE SCREEN



Blank appointment form: contact details, meeting format and proposed date and time.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 5–6 OF 6

OPEN SOURCE

Request an appointment with Dr Phillip

05 Describe the discussion and review consent

In 'What would you like to discuss?', summarise purpose and required help. Read the privacy statement and consent checkbox; do not include confidential employee or client records.

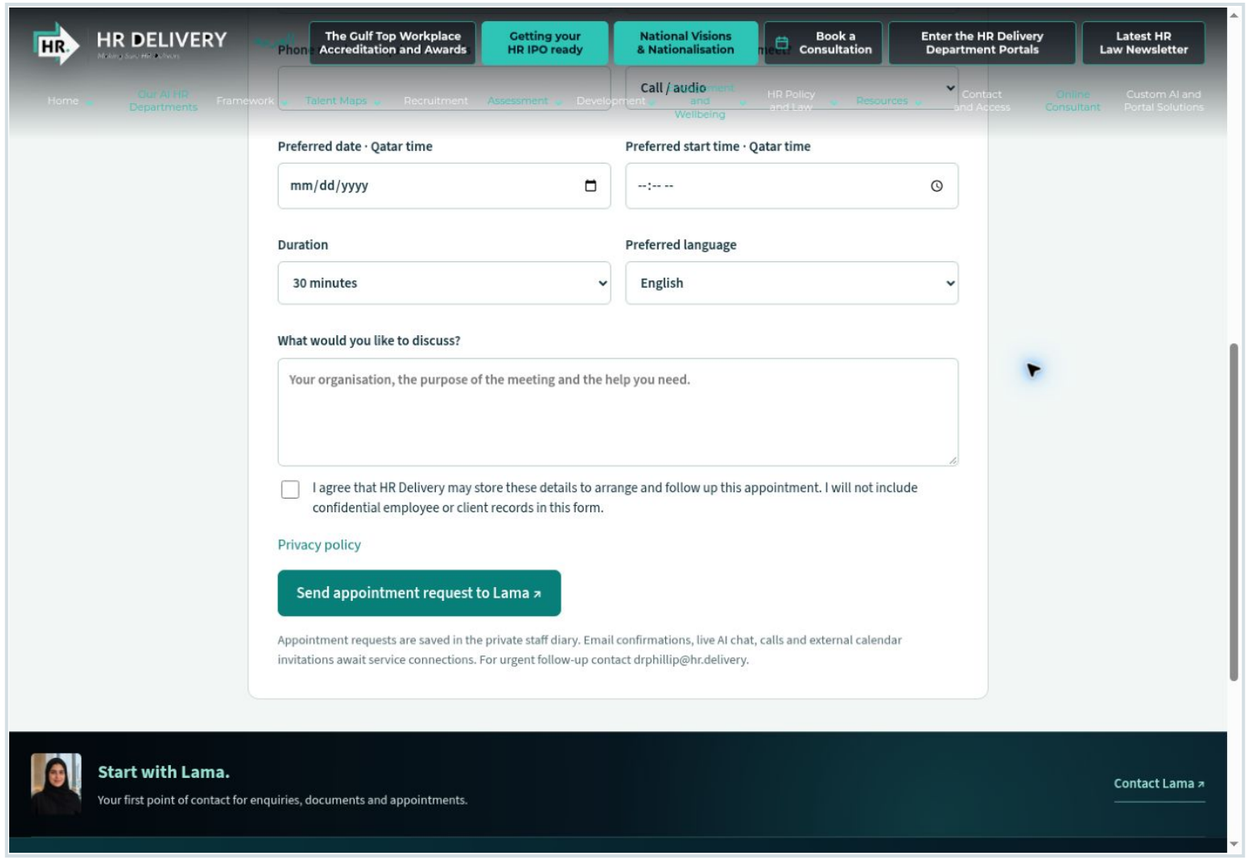
CHECK The request contains only the information needed to arrange the meeting.

06 Send once and await staff confirmation

When ready, select 'Send appointment request to Lama ↗'. Retain any on-screen acknowledgement and await the team's confirmation before treating the time as booked.

CHECK An acknowledgement should be checked; successful submission was not exercised in this review.

CURRENT LIVE SCREEN



Blank appointment form: timing, language, discussion, consent and submission controls.

CONTACT THE TEAM AND ORGANISE HANDOVER / K-04-03

OPEN SOURCE

Receive, review and retain project deliverables

Keep the current documents, decisions and follow-up actions together.

WHO USES THIS Authorised client contact and project owner

BEFORE YOU BEGIN

- Agreed deliverables and reviewer
- Client collection access supplied by the team

WHAT YOU WILL HAVE

- Reviewed deliverables
- Version and approval record
- Implementation action list

CHECK BEFORE YOU FINISH

- Every agreed output has an owner and status.
- Client release follows the agreed review process.
- Earlier versions remain distinguishable from current approved materials.

The expected document is absent from the client collection.	Ask the project contact whether it has been released and whether your client reference is correct. Do not assume staff drafts are automatically visible to clients.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The relationship between staff preparation and client delivery is described on the consultancy page. Private project records were not opened; Guide L covers the document-workspace interface.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 1–2 OF 6

OPEN SOURCE

Receive, review and retain project deliverables

01 Agree the handover list

List each required document, tool, output and training item in the accepted scope. Identify file formats, intended audience and the person responsible for review.

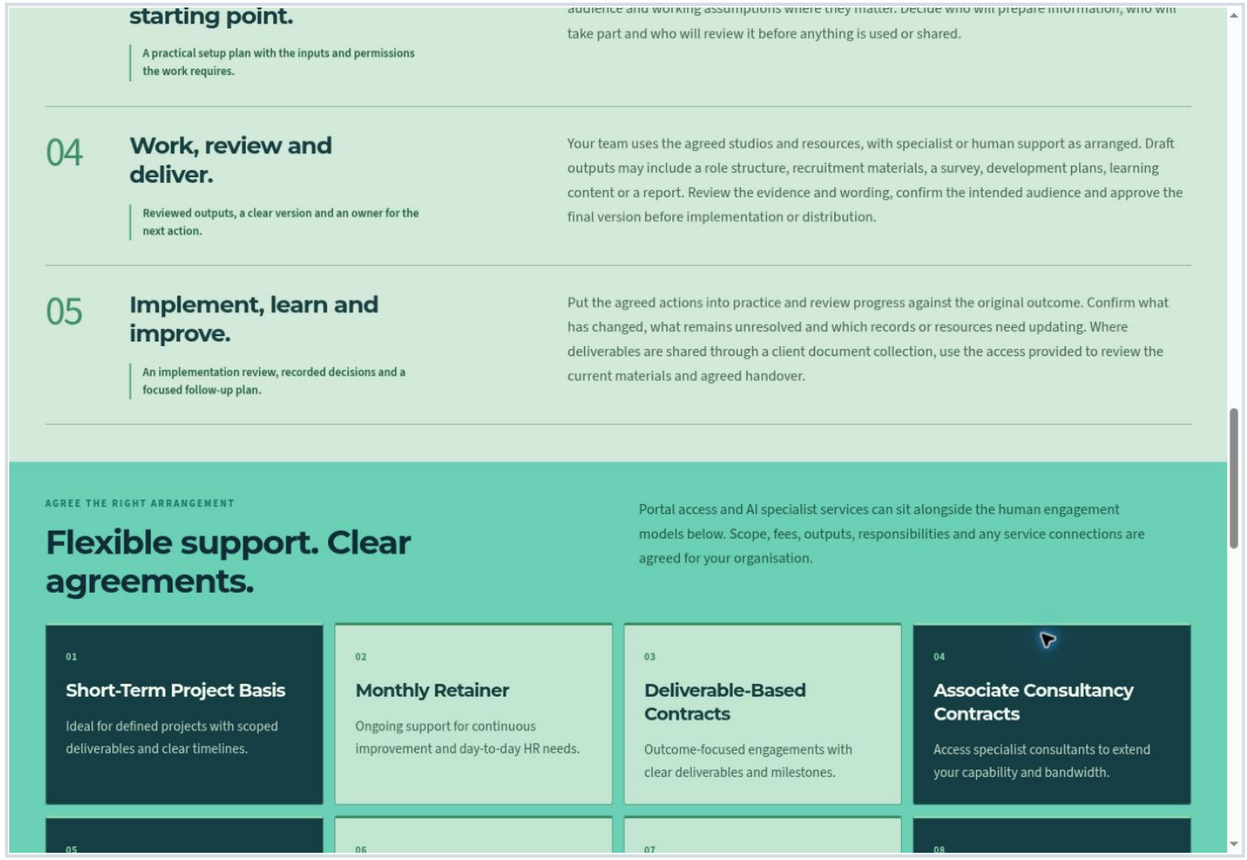
CHECK The handover can be checked against the original brief.

02 Use the issued client route

The consultancy service uses the existing staff document and client-delivery workspaces. Staff organise preparation; clients use the collection and access supplied to them.

CHECK Client access is distinct from staff authoring and administration.

CURRENT LIVE SCREEN



Published delivery and implementation review stages with engagement arrangements below.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 3–4 OF 6

OPEN SOURCE

Receive, review and retain project deliverables

03 Check the shared version

In the authorised collection, confirm project, title, date and version before review or download. Follow Guide L for the observed client-portal procedure.

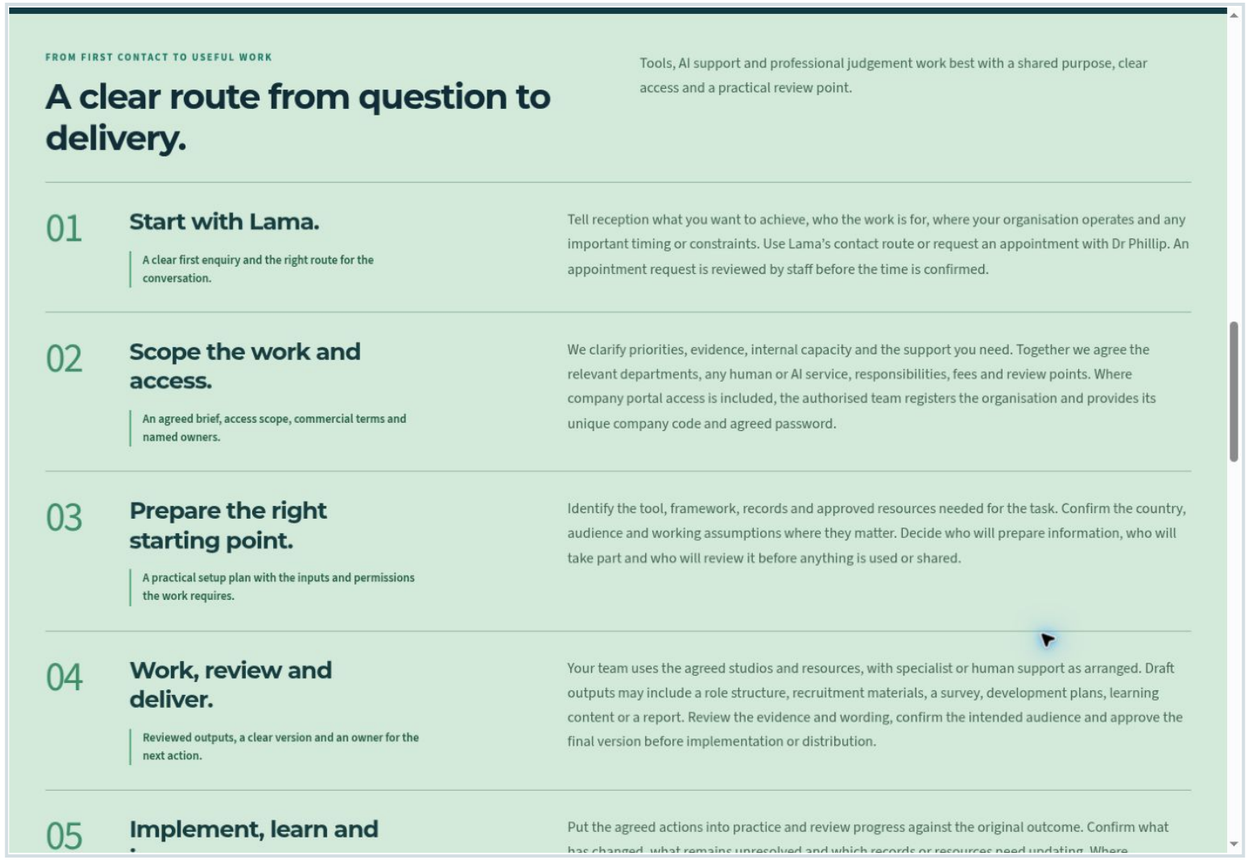
CHECK You are reviewing the intended deliverable rather than an earlier draft.

04 Return specific review comments

Reference the document version, section, expected result and proposed correction. Keep approval decisions separate from suggestions for future development.

CHECK The delivery team can resolve feedback against a stable reference.

CURRENT LIVE SCREEN



Published service process: first contact, scope, preparation and review.

CONTACT THE TEAM AND ORGANISE HANDOVER / STEPS 5–6 OF 6

OPEN SOURCE

Receive, review and retain project deliverables

05 Record implementation ownership

For each accepted output, agree who will use it, any training or configuration required and the first review date. Keep the decision and action log with the project.

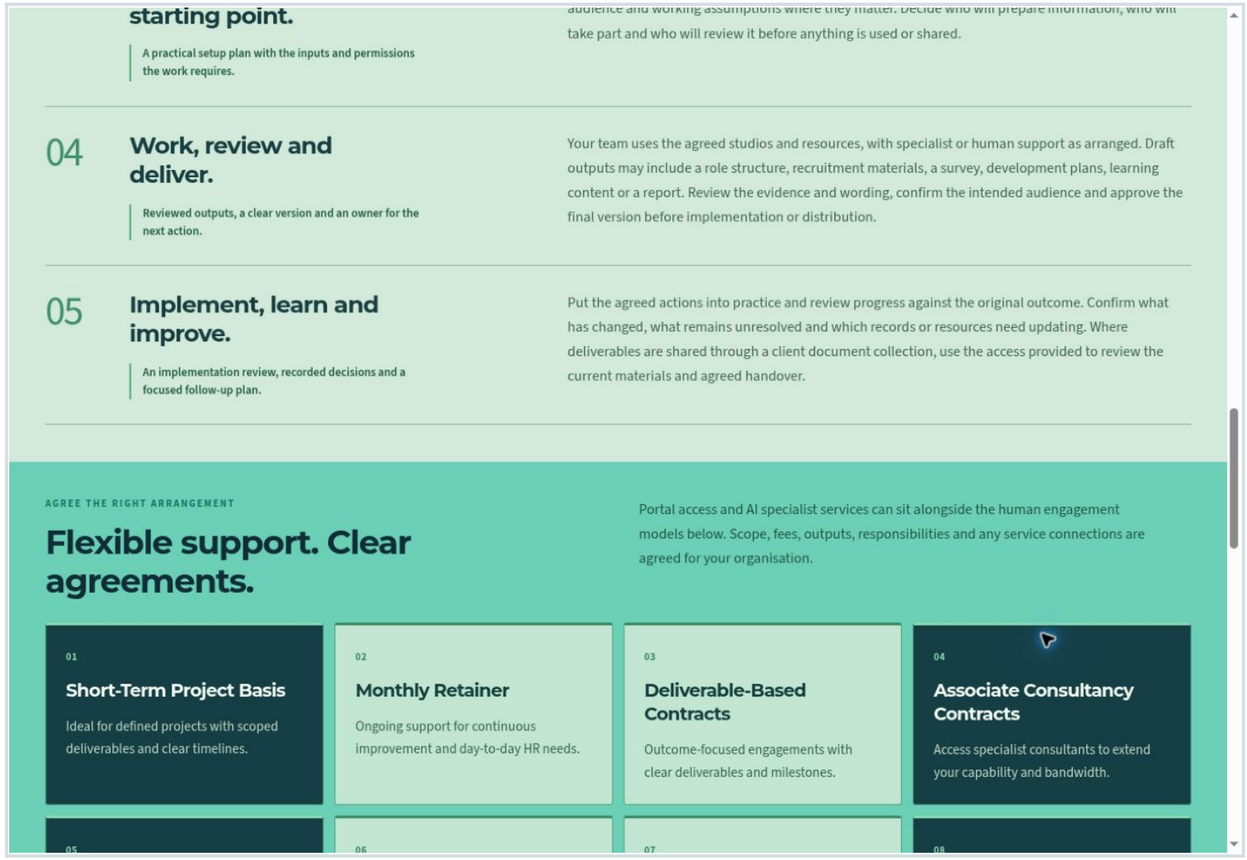
CHECK Handover leads to a named next action.

06 Review the outcome after use

Compare the result with the original goal. Record lessons, changes to assumptions and any new support or revision required through the agreed channel.

CHECK The assignment closes with a clear continuation or completion decision.

CURRENT LIVE SCREEN



Published delivery and implementation review stages with engagement arrangements below.

REFERENCE / 1 OF 4

OPEN SOURCE

The 25 custom-solution options

Catalogue group	Solution	What to prepare
Talent architecture & careers	Custom Talent Maps	Define sectors, career families and competency architecture.
Talent architecture & careers	Job description directories	Specify controlled role descriptions and maturity requirements.
Talent architecture & careers	Career path portals	Connect progression options with requirements and development.
Talent architecture & careers	Global career benchmarking	Agree comparable role and career reference information.
Assessment & leadership	Behavioural & technical assessments	Specify content, administration, scoring and feedback requirements.
Assessment & leadership	Your competency model	Translate an approved organisation model into the intended experience.
Assessment & leadership	Leadership assessments	Agree the leadership model, audience and reporting purpose.

REFERENCE / 2 OF 4

OPEN SOURCE

The 25 custom-solution options

Catalogue group	Solution	What to prepare
Assessment & leadership	360° feedback portals	Define raters, confidentiality, reports and feedback arrangements.
Learning & development	Automated development planning	Agree the rules connecting evidence with development actions.
Learning & development	Bespoke learning management systems	Specify authoring, assignment, completion and reporting workflows.
Learning & development	Workshop creation	Prepare objectives, activities, facilitator materials and outputs.
Learning & development	AI coaching solutions	Define the coaching purpose, boundaries and required connections.
Learning & development	Training needs analysis portals	Connect role requirements, current evidence and learning priorities.
Organisation & reward	Workforce planning portals	Define baseline, assumptions, scenarios, gaps and action outputs.

REFERENCE / 3 OF 4

OPEN SOURCE

The 25 custom-solution options

Catalogue group	Solution	What to prepare
Organisation & reward	Job evaluation & sizing	Agree factor definitions, evidence, review and recommendation rules.
Organisation & reward	Grading systems	Specify the grade structure and the rules supporting placement.
Organisation & reward	Spans & layers modelling	Define reporting relationships and structural comparisons.
Organisation & reward	Succession planning portals	Agree critical roles, readiness evidence and development review.
Recruitment & AI teams	Custom recruitment portals	Map requisition, candidate, interview, offer and handover stages.
Recruitment & AI teams	Your HR AI staff	Agree specialist roles, source content, permissions and escalation.
Recruitment & AI teams	AI HR policy & legal support	Define country sources, permitted use and professional review.

REFERENCE / 4 OF 4

OPEN SOURCE

The 25 custom-solution options

Catalogue group	Solution	What to prepare
Employee voice & HR documents	Live polling & survey tools	Specify activity, participation, analysis and follow-up workflows.
Employee voice & HR documents	Engagement & wellbeing	Agree questions, privacy profile, reporting and action ownership.
Employee voice & HR documents	Automated legal contracts	Define approved clauses, fields, country and review responsibilities.
Employee voice & HR documents	HR letters & handbooks	Prepare controlled bilingual templates and export requirements.

REFERENCE / 1 OF 1

OPEN SOURCE

Choose the diagnostic method

Method	Useful for	Plan before use
Interviews	Detailed individual accounts and examples	Consistent prompts, evidence recording and analysis
Surveys	Comparable patterns across an audience	Question content, scoring, data quality and reporting
Focus groups	Exploring different experiences through discussion	Group composition, facilitation and thematic analysis
Large-scale interventions	Participative diagnosis and action workshops	Running order, capture sheets and accountable follow-up

REFERENCE / 1 OF 1

OPEN SOURCE

A complete handover pack

Item	What the client checks
Scope and decisions	Current accepted brief, exclusions, changes and decision owner
Outputs	Required tools, reports and documents; correct versions and formats
Operating guidance	Roles, access routes, input definitions and practical user instructions
Connections	Provider, service owner, tested behaviour and current status
Support and review	Contact route, maintenance responsibility and first review date

REFERENCE / 1 OF 1

OPEN SOURCE

Public resources for the project reading list

Route	How to use it
Frameworks	Start with the model, then read the relevant explanation and factsheet.
Diagnostic manuals	Choose the subject and evidence method before collection.
Country guides and publications	Record country, edition and applicability to the project.
Short insights and longer articles	Use the argument and references to prepare better questions.
Research and eBooks	Read substantial context and distinguish evidence from interpretation.
Toolkits and directories	Choose the relevant template or resource and check format permissions.

QUICK REFERENCE

Your final check

- [ ] **01** The outcome, audience and sponsor are explicit.
- [ ] **02** The selected solution names are linked to a bounded scope.
- [ ] **03** Content, workflow, roles and expected outputs have reviewers.
- [ ] **04** External connections are verified independently of previews.
- [ ] **05** The current versions, handover owners and review dates are recorded.

HELP AND SUPPORT

OPEN SOURCE

Continue with HR Delivery

Contact Lama when you need access, a missing resource or help applying the consultancy & custom builds workflow. Describe the task and the point where you stopped. Include an error message or a screenshot with personal records hidden so the team can route the request accurately.

OPEN LAMA'S RECEPTION

drphillip@hr.delivery

INCLUDE IN YOUR REQUEST

- Your organisation and authorised role
- Portal and task name
- Page URL and exact error message
- A screenshot without passwords or personal records

REFERENCE NOTES

OPEN SOURCE

Guide scope and screen references

- K is a consultancy and custom-build service route. No dedicated customer Consultancy portal was observed.
- Public catalogue pages and local navigation were inspected; no live client project, proposal or build transaction was created.
- The illustrated custom workspace is labelled a concept. Organisation-specific scope, functionality and connections are agreed with the human team.
- Maya’s conversation is a local preview. The reviewed page states that no AI reply is generated and the question is not sent or saved.
- Appointment requests require staff confirmation. The page states that automatic email confirmations and external calendar invitations await connections.
- The current framework page lists 29 frameworks. Earlier brochure counts may reflect a previous edition.

Screen key: Current live screen | Published demonstration | Prior reviewed screen