HR DELIVERY / STEP-BY-STEP SERIES

Organisation Design

C1

PORTAL USER GUIDE

Learn to define roles, use the TalentMaps architecture, model workforce demand, test layers and spans, create organisation charts and connect approved roles with people and development.

01 PREPARE

02 FOLLOW

03 CHECK

INTRODUCTION

OPEN SOURCE

A practical guide to organisation design

Start with the work the organisation needs to deliver. Use the architecture to describe contribution, the Job Description Bank to prepare roles, workforce modelling to understand capacity and the chart tools to test reporting relationships.

Organisation Design and TalentMaps[3] are connected but have separate entry screens. This guide covers their shared design process. Public calculators and supplied examples were inspected; private saved plans, employee records, imports and administration remain source-described. Salary and full job-evaluation operations are expanded in Guide F.

WHAT YOU CAN DO

01 Choose the correct map, career family and role reference

02 Prepare job descriptions and role requirements

03 Calculate workload, coverage, project, ratio, growth and establishment demand

04 Create and validate roles-only organisation charts

05 Test layers, spans, capacity and cost assumptions

06 Connect the agreed design with employee records and development

WHO THIS GUIDE IS FOR

Organisation design and workforce planning teams • HR business partners and reward specialists • Managers preparing role information • Authorised people-data administrators

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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 useful organisation design explains the work, the decisions and the support people need to deliver it well.

Organisation design starts with a practical question: what work must be done, and how should responsibility be arranged so that people can do it well? A useful structure makes decisions clearer, joins related work and gives managers a realistic opportunity to support their teams. The chart is one expression of those decisions.

This guide connects the architecture with the tools used to examine it. Choose the relevant role family, describe the accountabilities, test capacity assumptions and consider reporting alternatives. Keep the distinction between job grade, reporting layer and career progression clear. They are connected ideas, but they should not be treated as interchangeable measures.

Use the calculations as a transparent starting point for discussion. Record the assumptions, check the evidence and retain the reasons for local exceptions. The strongest design can be explained to the people who will work within it. Lama can help you locate the right resource or arrange support when the work calls for a wider organisation-design conversation.

DR PHILLIP

HR Delivery

Proposed wording for Dr Phillip's review

YOUR FIRST POINT OF CONTACT

OPEN SOURCE

Meet Lama

Lama can help you locate the Organisation Design or TalentMaps[3] entry, identify relevant role and planning resources, and arrange specialist support. Explain whether you are reviewing a single role, a team, a directorate or the whole organisation. Include the country, broad size, intended outcome and the tool you need. She can route your enquiry; keep employee-level data and confidential organisation charts out of an initial general message unless an approved sharing route is agreed.

ASK LAMA TO HELP WITH

- Portal and resource access
- Role architecture and job-design enquiry
- Workforce or structure modelling support
- People-data and development workflow guidance

HAVE THESE DETAILS READY

- Scope: role, team, directorate or organisation
- Country and broad workforce size
- Design question and intended output
- Tool, document or access issue

OPEN LAMA'S RECEPTION

hr.delivery

SIGNING IN / STEPS 1–2 OF 5

OPEN SOURCE

Sign in and choose the right workspace

01 Open the correct department entry

Use the portal link in this guide or select the department from All department portals. Check the heading before entering anything.

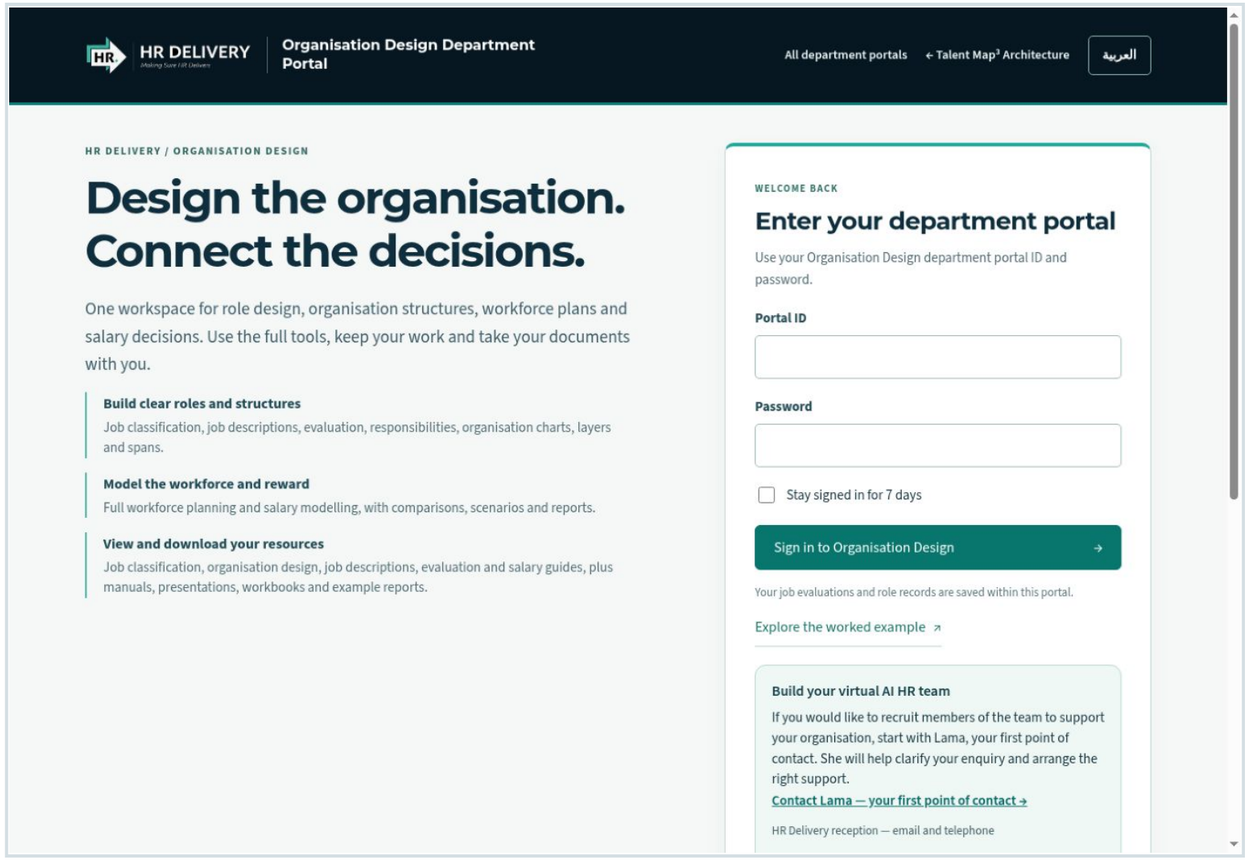
CHECK The sign-in heading identifies the intended department.

02 Enter your issued sign-in details

Enter your organisation’s account identifier in 'Portal ID' and your password in 'Password'. Do not copy credentials into project notes or screenshots.

CHECK Check both entries privately and retain the case supplied by HR Delivery.

CURRENT LIVE SCREEN



Current Organisation Design portal sign-in screen. No client records are visible.

SIGNING IN / STEPS 3–4 OF 5

OPEN SOURCE

Sign in and choose the right workspace

03 Choose the session option

'Stay signed in for 7 days' is optional. Use it only on a private device managed under your organisation’s access practices.

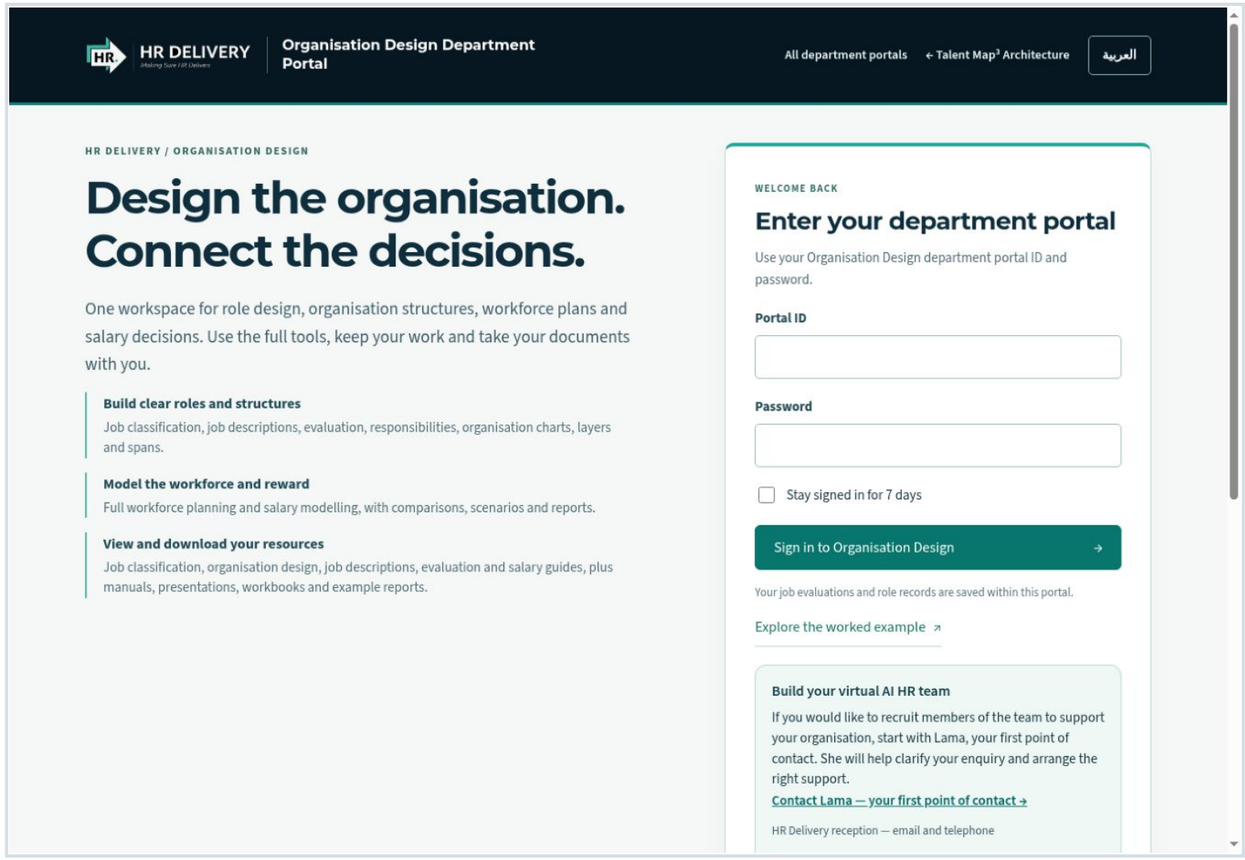
CHECK The checkbox reflects your intended session preference.

04 Select the sign-in control

Select 'Sign in to Organisation Design'. If access is refused, check the department, account and entitlement with Lama.

CHECK After access is accepted, confirm your client/workspace name before opening records.

CURRENT LIVE SCREEN



Current Organisation Design portal sign-in screen. No client records are visible.

SIGNING IN / STEPS 5–5 OF 5

OPEN SOURCE

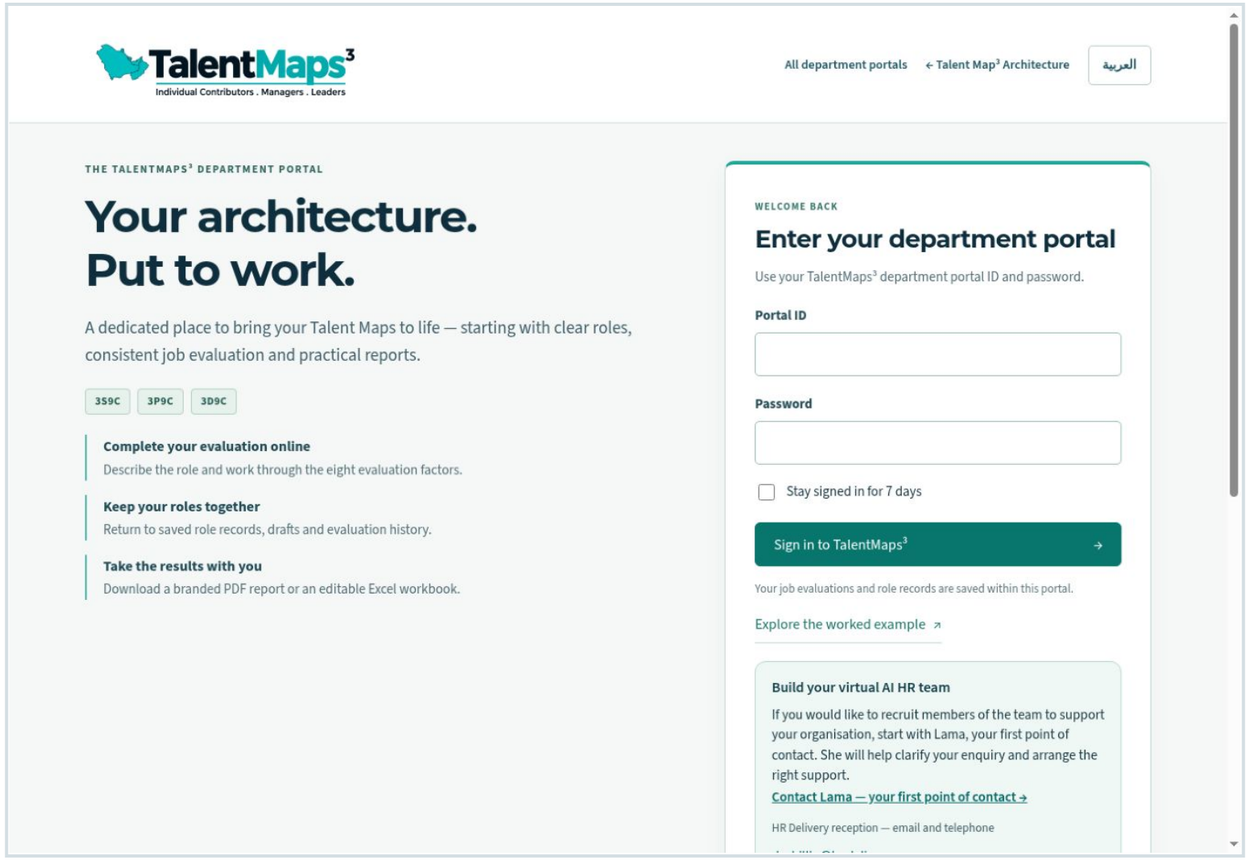
Sign in and choose the right workspace

05 Use the separate TalentMaps³ entry when needed

For the saved-role and job-evaluation workspace, open the TalentMaps³ Department Portal and use its 'Sign in to TalentMaps³' control with the access issued for that workspace.

CHECK The TalentMaps³ heading identifies this separate entry; confirm its entitlement before continuing.

CURRENT LIVE SCREEN



TalentMaps³ has a separate entry and names the saved evaluation/role workflow.

BEFORE YOU START

OPEN SOURCE

Access and working context

01 Use the account issued for your organisation and authorised responsibilities.

02 Department access and access to a private client workspace are separate checks; do not assume another portal's session carries across.

03 Public examples use illustrative records. Replace them only in your authorised workspace.

04 Employee ERP explicitly offers named-account access; department welcome access does not establish a right to employee records.

The current access screen was inspected. The authenticated private workspace was not entered in this review. Public tools and official demonstration screens support the steps identified below; private transactions remain source-described.

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

Set the architecture

PAGE 011

02

Define roles and job value

PAGE 024

03

Model workforce demand

PAGE 037

04

Build and check the organisation chart

PAGE 058

05

Test layers and spans

PAGE 072

06

Connect people and development

PAGE 081

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

01 Set the architecture

Choose a consistent reference before designing roles or reporting lines.

03 PRACTICAL TASKS

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

SET THE ARCHITECTURE / C-01-01

OPEN SOURCE

Choose the appropriate Talent Map

Use the contribution pathway that describes the work.

WHO USES THIS HR designer or manager

BEFORE YOU BEGIN

- Role purpose and contribution
- Current or proposed job context

WHAT YOU WILL HAVE

- Selected map and reference set

CHECK BEFORE YOU FINISH

- Pathway reflects contribution
- Document edition is recorded
- Grade is not inferred from title alone

The role spans several contribution types Describe its main accountability and discuss the appropriate pathway with the organisation-design lead.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Architecture controls and selected resources were inspected in the prior review; private adoption records are not shown.

SET THE ARCHITECTURE / STEPS 1–2 OF 5

OPEN SOURCE

Choose the appropriate Talent Map

01 Open the architecture explorer

Use the TalentMaps³ architecture page. Choose Overall Talent Map³ for shared resources or a specific contribution pathway for its supporting documents.

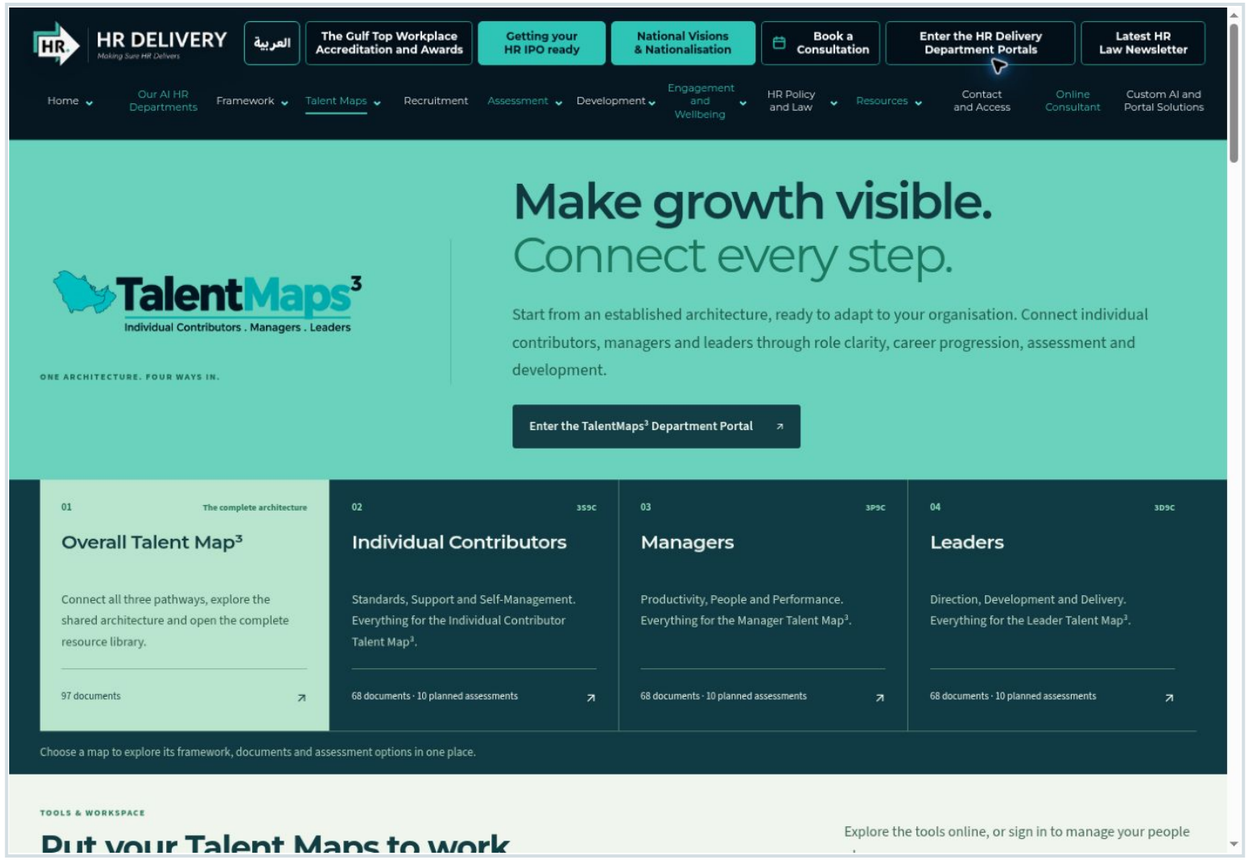
CHECK The selected map and its resource sections are visible.

02 Select the contribution pathway

Choose 3S9C Individual Contributors, 3P9C Managers or 3D9C Leaders according to the work. A title alone is not enough to determine the pathway.

CHECK The pathway fits the actual contribution required.

PRIOR REVIEWED SCREEN



The public architecture explorer offers the overall map and three contribution pathways.

SET THE ARCHITECTURE / STEPS 3–4 OF 5

OPEN SOURCE

Choose the appropriate Talent Map

03 Open 'Architecture'

Review the maturity, career-family and competency resources. Use Organisation Design, Compensation and Reward, Development and other section links for related work.

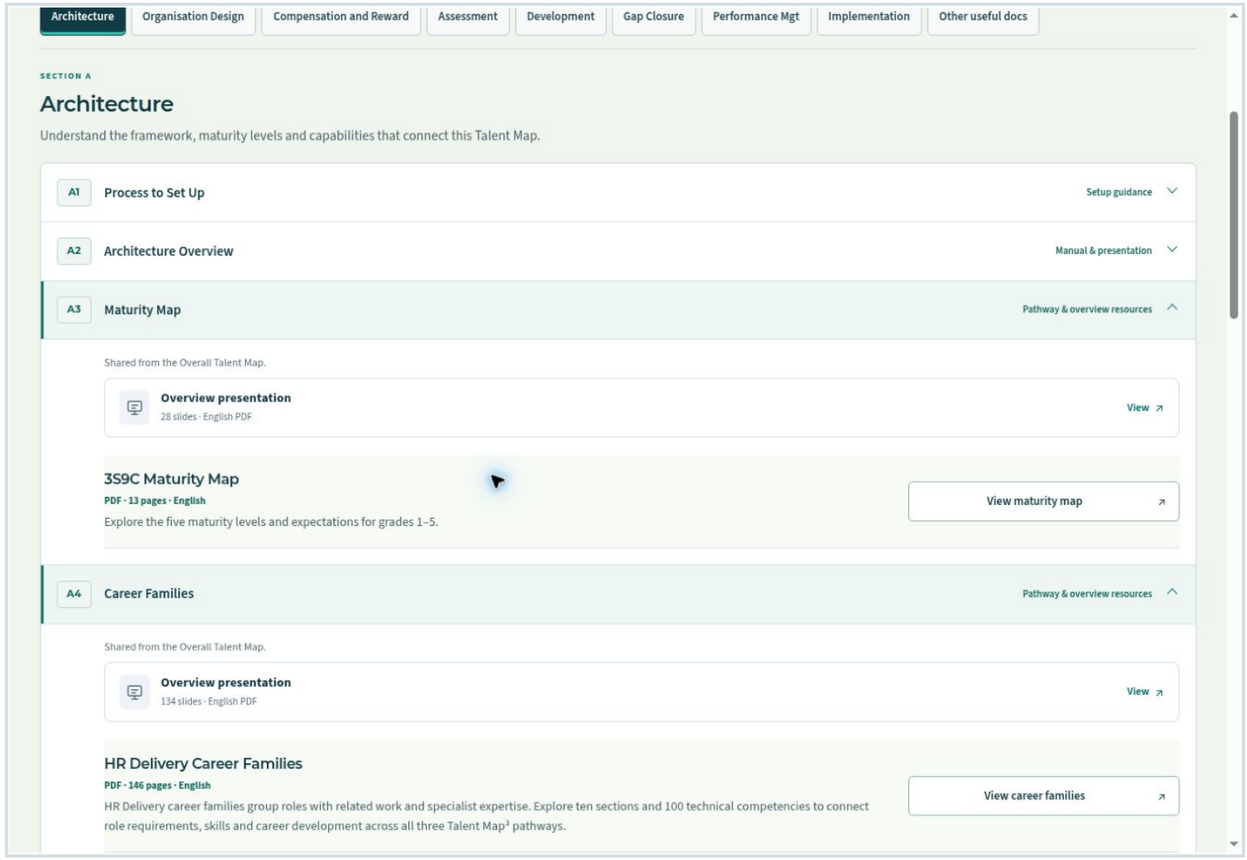
CHECK The resource area matches the design question.

04 Record the chosen reference

Note the pathway, career family, grade context and document edition used for the discussion. Keep the same references across role and development documents.

CHECK Later design decisions can be traced to the selected architecture.

PRIOR REVIEWED SCREEN



Maturity and career-family resources in the Individual Contributor architecture.

SET THE ARCHITECTURE / STEPS 5–5 OF 5

OPEN SOURCE

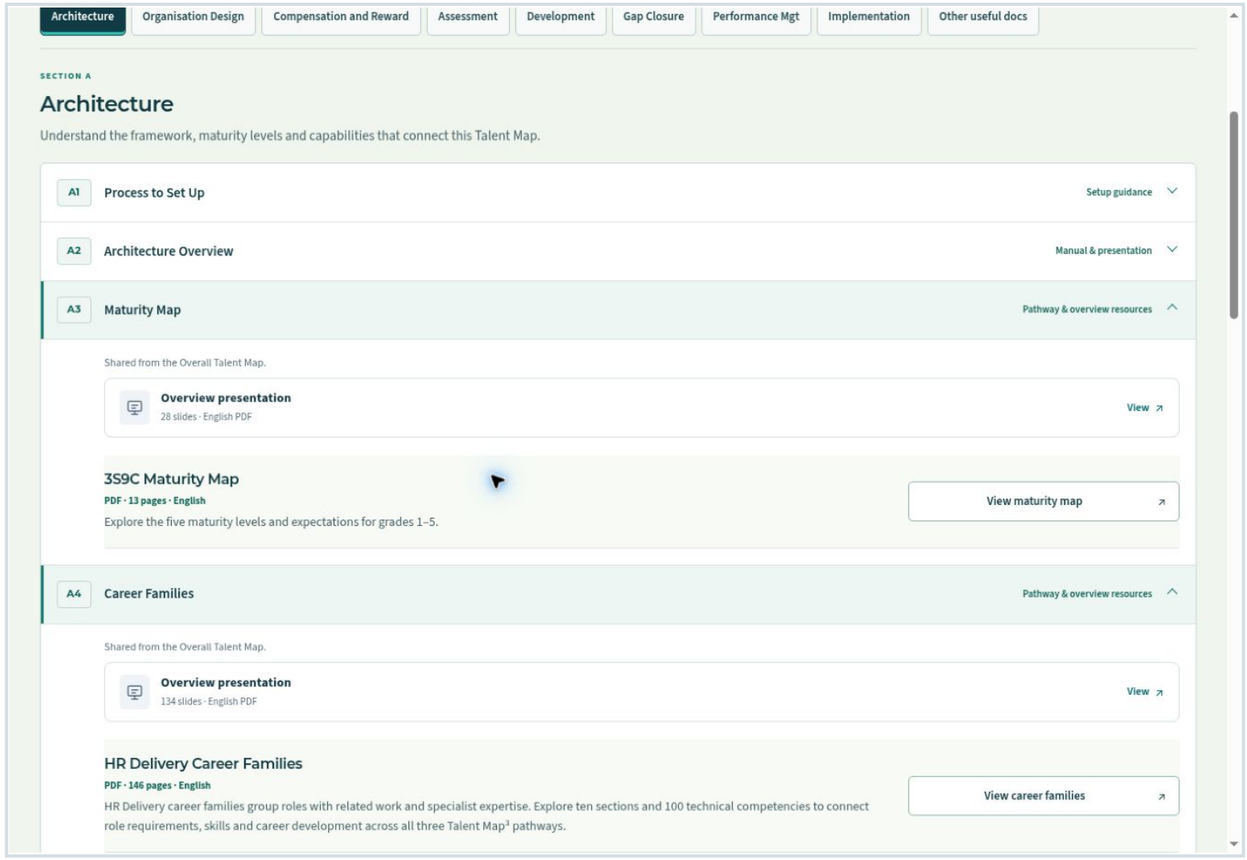
Choose the appropriate Talent Map

05 Review local adoption

Check the framework against your organisation’s actual accountabilities and adopted grades before treating a reference as an approved local requirement.

CHECK The reference is used with explicit organisational judgement.

PRIOR REVIEWED SCREEN



Maturity and career-family resources in the Individual Contributor architecture.

SET THE ARCHITECTURE / C-01-02

OPEN SOURCE

Use the behavioural and technical directories

Define observable requirements for the selected role.

WHO USES THIS Role designer with manager and technical expert

BEFORE YOU BEGIN

- Chosen pathway and career family
- Approved role purpose
- Relevant maturity/proficiency level

WHAT YOU WILL HAVE

- Behavioural and technical requirement set

CHECK BEFORE YOU FINISH

- Definitions are from the intended map
- Technical family fits the role
- Role requirements are separate from personal performance

A technical skill does not apply locally — Record the reason and ask the relevant expert to confirm an appropriate requirement; do not silently substitute a different jurisdiction's skill.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public directory controls were inspected; not every source page was audited.

SET THE ARCHITECTURE / STEPS 1–2 OF 5

OPEN SOURCE

Use the behavioural and technical directories

01 Open the behavioural guide

In Architecture, use 'View behavioural guide' for the selected map. Read the competency definition and the indicators at the relevant level.

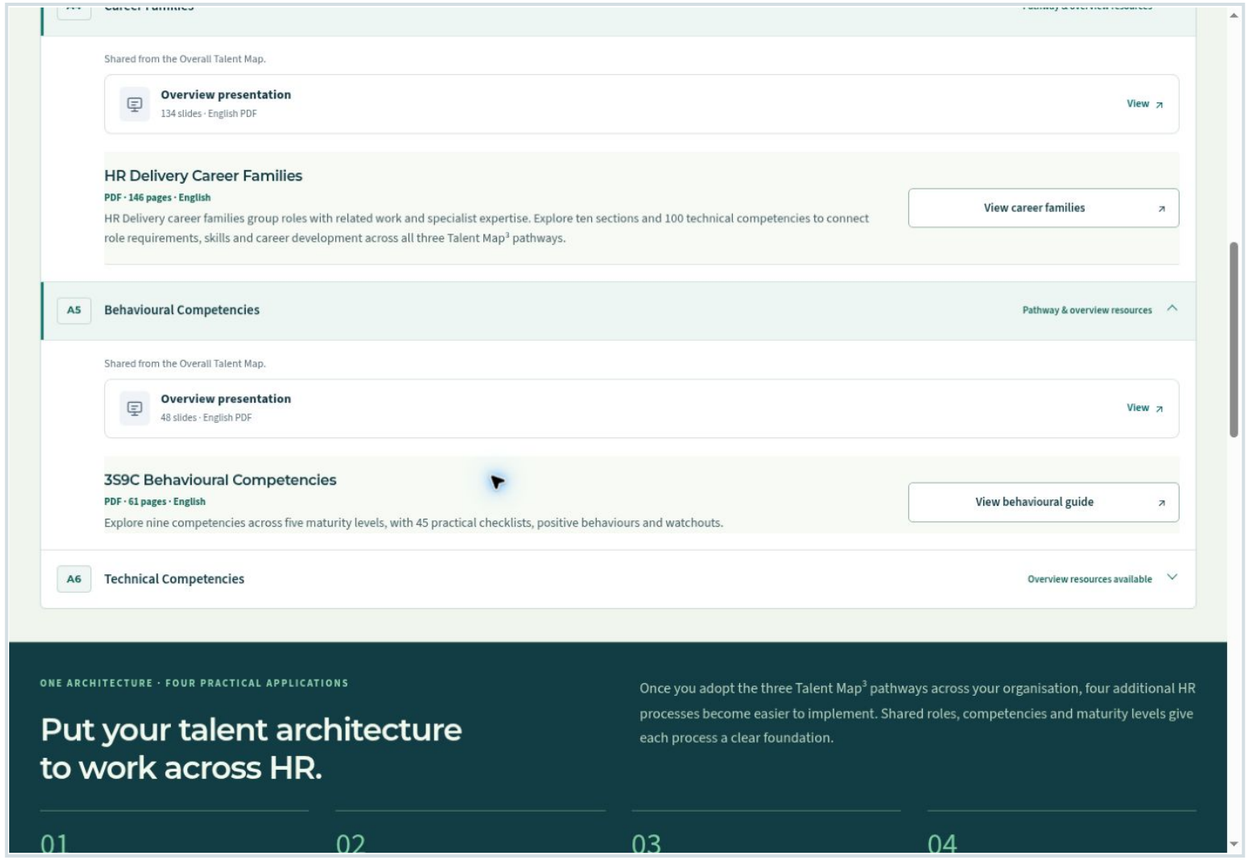
CHECK Behavioural requirements can be described in observable terms.

02 Distinguish expected levels

Review the surrounding levels to understand what changes with maturity. Do not rate the current person while defining the role requirement.

CHECK The requirement is based on work demands.

PRIOR REVIEWED SCREEN



Behavioural competency directory with the map-specific guide route.

SET THE ARCHITECTURE / STEPS 3–4 OF 5

OPEN SOURCE

Use the behavioural and technical directories

03 Choose the technical section

In the technical-skills area, use 'Document' to select the A–J section, then 'View selected document'. Section B covers People and Organisation.

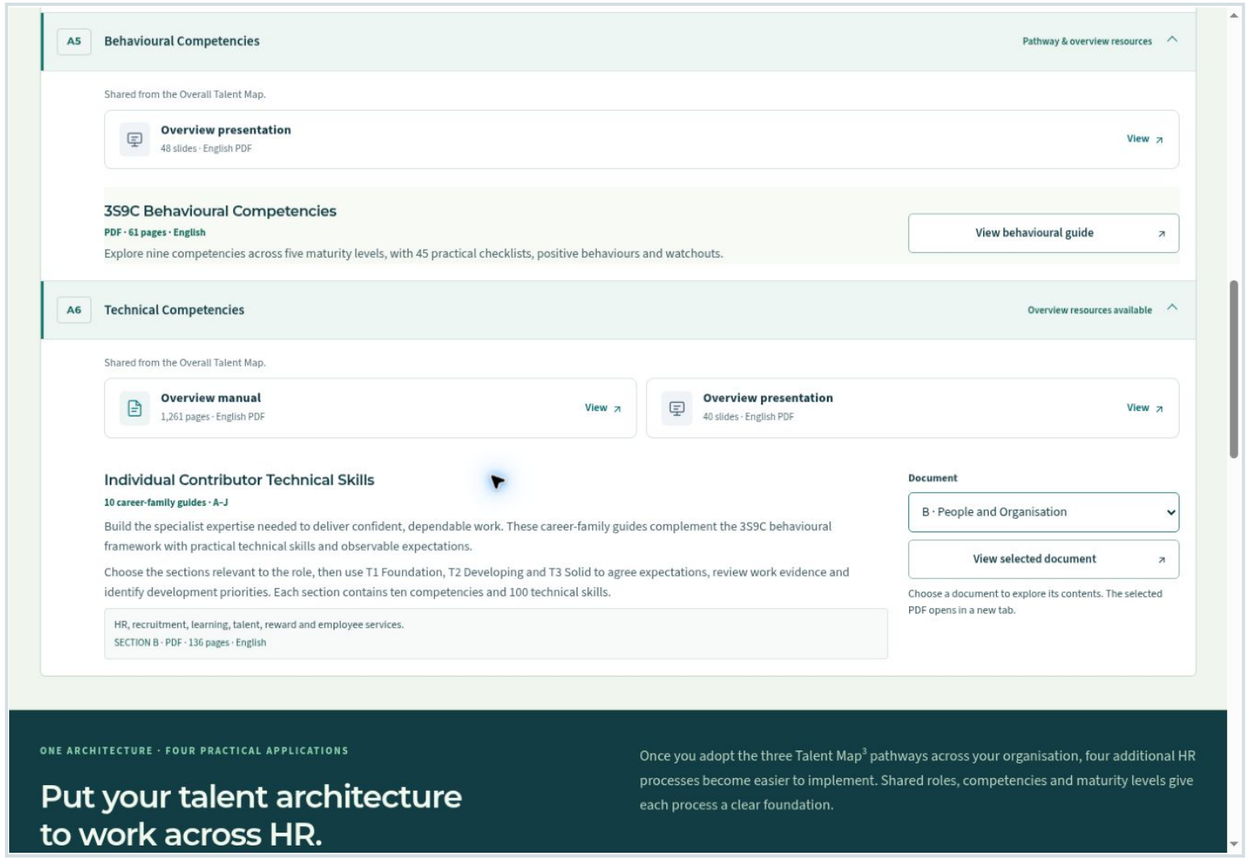
CHECK The selected technical resource corresponds to the work domain.

04 Identify the family and skills

Locate the relevant career family and distinguish core from supporting technical requirements. Read the exact proficiency descriptions before choosing a level.

CHECK The role's technical expectations are specific and explainable.

PRIOR REVIEWED SCREEN



Technical directory with A–J document selection.

SET THE ARCHITECTURE / STEPS 5–5 OF 5

OPEN SOURCE

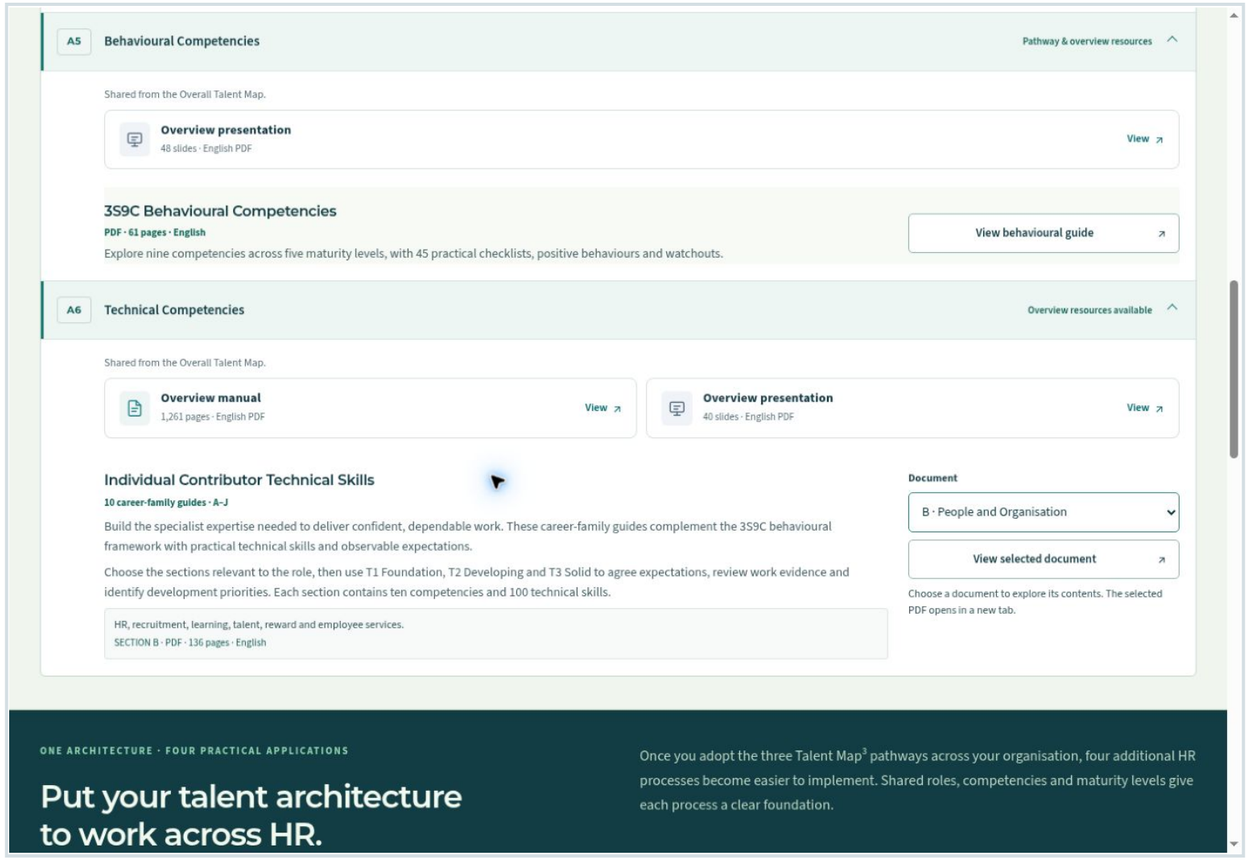
Use the behavioural and technical directories

05 Retain the references

Keep competency names, levels and source pages with the role profile. Use them consistently in evaluation, recruitment, development and review.

CHECK Other users can locate the same requirement.

PRIOR REVIEWED SCREEN



Technical directory with A–J document selection.

SET THE ARCHITECTURE / C-01-03

OPEN SOURCE

Build a sensible career progression discussion

Keep career stages, grades and reporting layers distinct.

WHO USES THIS HR career-framework lead

BEFORE YOU BEGIN

- Career-family references
- Evaluated role requirements
- Local progression approach

WHAT YOU WILL HAVE

- Locally reviewed career-path outline

CHECK BEFORE YOU FINISH

- Progression is distinct from reporting depth
- Stages reflect changes in contribution
- Availability is confirmed before promising a tool

A career stage appears to require a new reporting tier	Review whether it is a development/pay progression within an evaluated role rather than a separate managerial layer.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Interactive career-path availability was not confirmed; this task uses the available public reference materials.

SET THE ARCHITECTURE / STEPS 1–2 OF 5

OPEN SOURCE

Build a sensible career progression discussion

01 Start with the career family

Use View career families and the maturity materials to identify the work domain and contribution stages relevant to the profession.

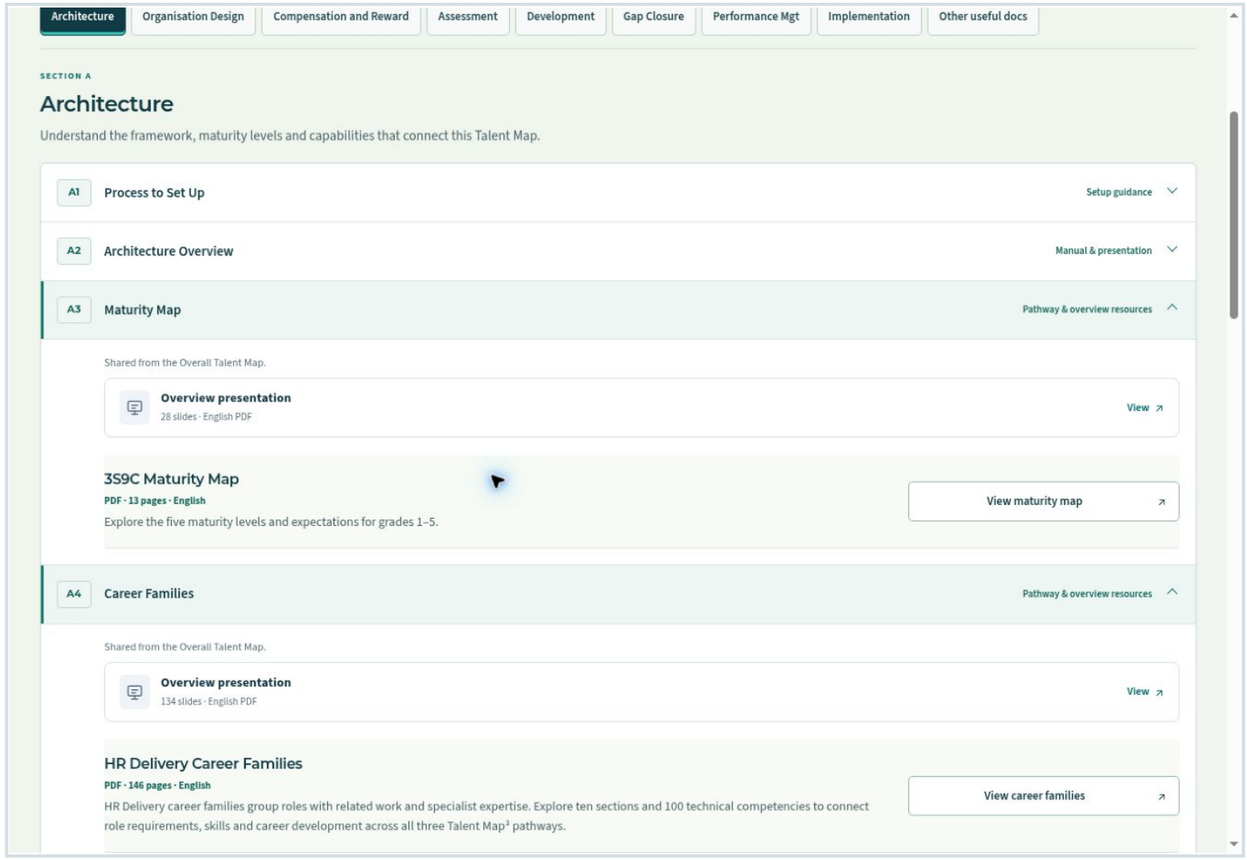
CHECK The discussion begins from related work and capability.

02 Compare meaningful role changes

Identify changes in knowledge, accountability, judgement and technical requirements between stages. Avoid treating additional tenure as automatic progression.

CHECK Each stage represents a substantive contribution difference.

PRIOR REVIEWED SCREEN



Career-family and maturity references support progression discussions.

SET THE ARCHITECTURE / STEPS 3–4 OF 5

OPEN SOURCE

Build a sensible career progression discussion

03 Consider specialist and management routes

Use Individual Contributor, SME, Manager and Leader distinctions where appropriate. Progression need not create another line-management layer.

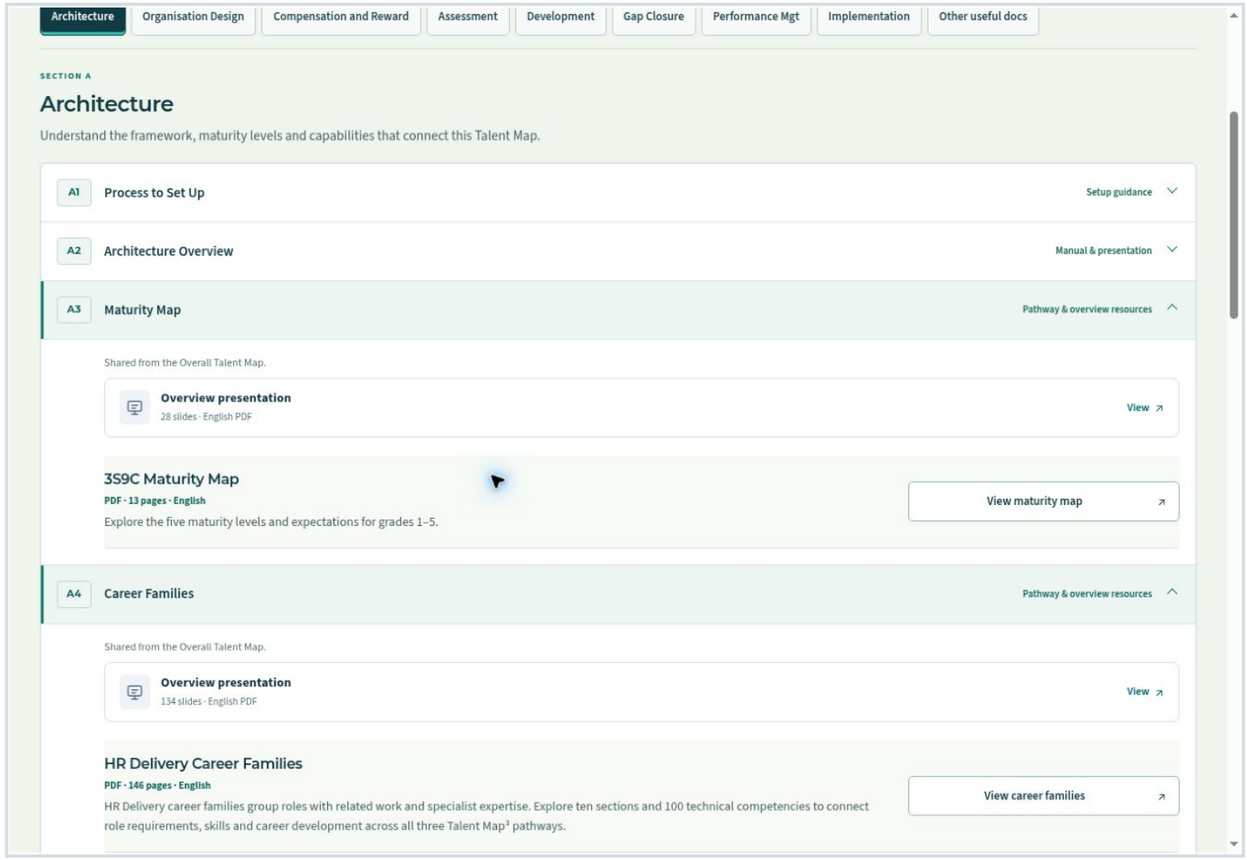
CHECK The pathway preserves useful specialist progression.

04 Check resource availability

The reviewed Individual Contributor Career Paths card was labelled Coming soon. Separate professional/paraprofessional explorers were not independently located. Use the available references and ask Lama for the current route.

CHECK The team does not rely on a missing interactive explorer.

PRIOR REVIEWED SCREEN



Career-family and maturity references support progression discussions.

SET THE ARCHITECTURE / STEPS 5–5 OF 5

OPEN SOURCE

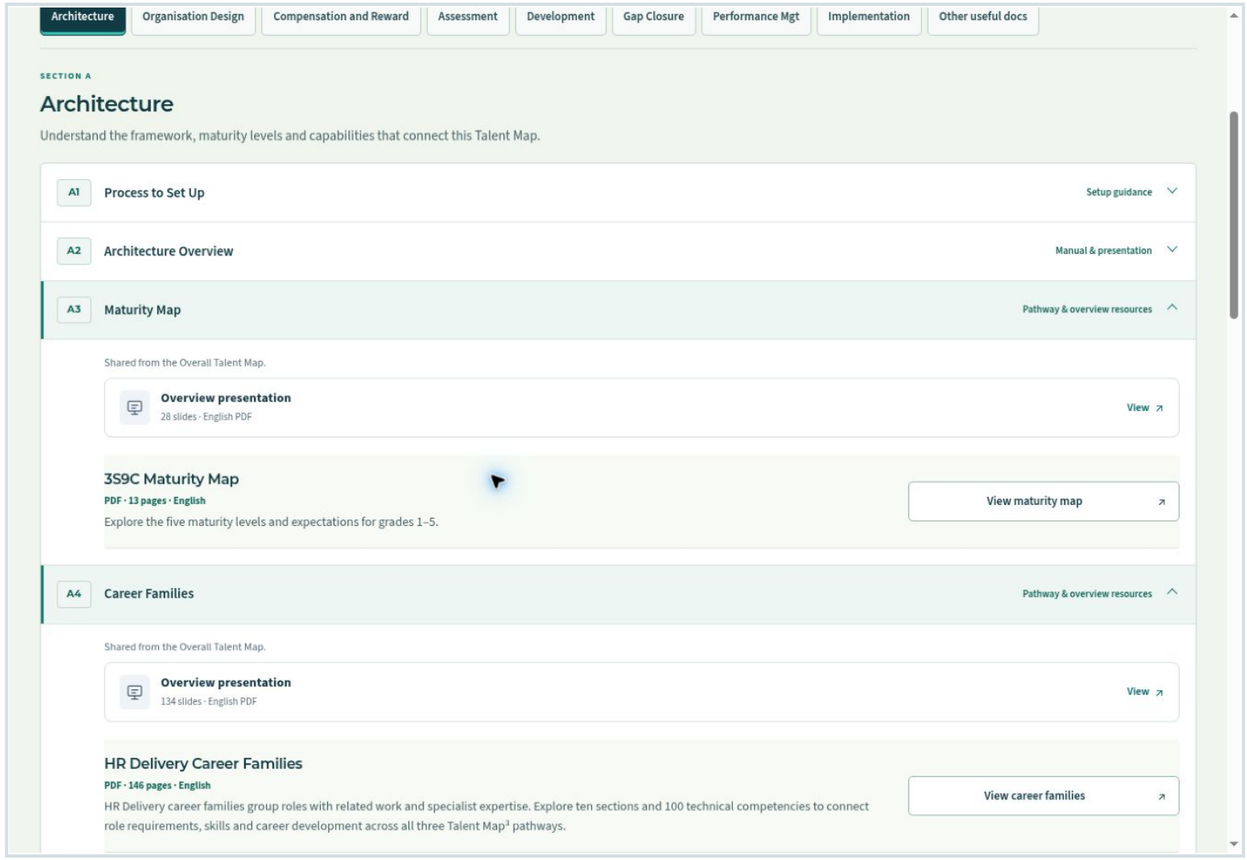
Build a sensible career progression discussion

05 Document local decisions

Record adopted stages, evidence requirements and development opportunities for professional or paraprofessional roles before communicating the framework.

CHECK The pathway is clear enough for a meaningful career conversation.

PRIOR REVIEWED SCREEN



Career-family and maturity references support progression discussions.

02 Define roles and job value

Create a role description that can support the rest of the design.

03 PRACTICAL TASKS

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

DEFINE ROLES AND JOB VALUE / C-02-01

OPEN SOURCE

Find a role in the Job Description Bank

Locate a supplied reference profile using the three-step selector.

WHO USES THIS Manager or HR role designer

BEFORE YOU BEGIN

- Relevant section
- Career family
- Approximate role level

WHAT YOU WILL HAVE

- Selected job-description reference
- Role-adaptation brief

CHECK BEFORE YOU FINISH

- Country and role context fit
- Responsibilities reflect actual work
- An example grade is not an automatic evaluation

The title is close but the work differs

Compare accountabilities and career family, then adapt the role through the approved design process rather than relying on title similarity.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Selection and reading were observed; private editable downloads and saved adaptations were not tested.

DEFINE ROLES AND JOB VALUE / STEPS 1–2 OF 6

OPEN SOURCE

Find a role in the Job Description Bank

01 Open 'Find a job description'

Use the Job Description Bank and its Three choices. The right role selector. The reviewed catalogue contained 1,300 supplied role profiles.

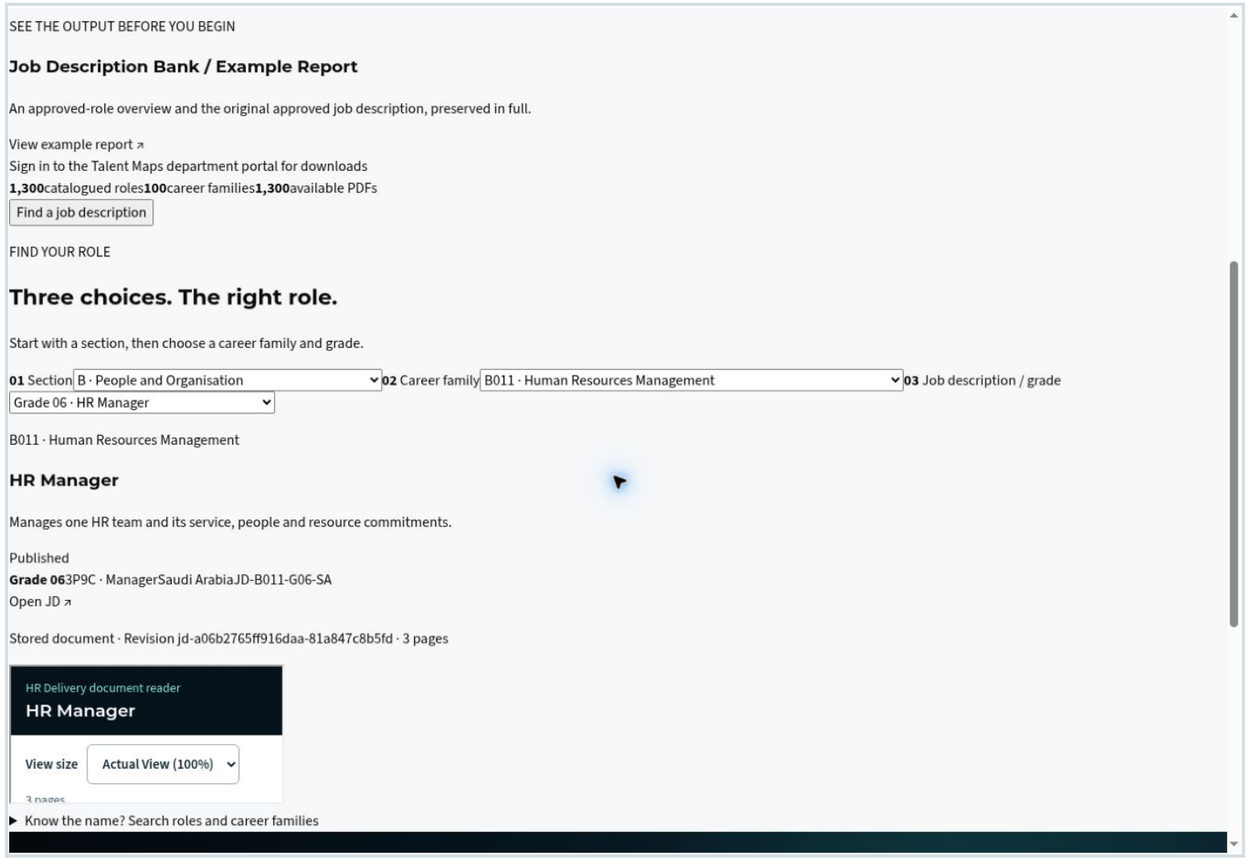
CHECK The three selection controls are available.

02 Choose '01 Section'

Select the A–J work area. For the worked example, use B · People and Organisation.

CHECK Career families are filtered to the selected section.

PRIOR REVIEWED SCREEN



Job Description Bank with section, family and Grade 6 HR Manager selection.

DEFINE ROLES AND JOB VALUE / STEPS 3–4 OF 6

OPEN SOURCE

Find a role in the Job Description Bank

03 Choose '02 Career family'

Select the appropriate family. The example uses B011 · Human Resources Management. Check related families if the title is ambiguous.

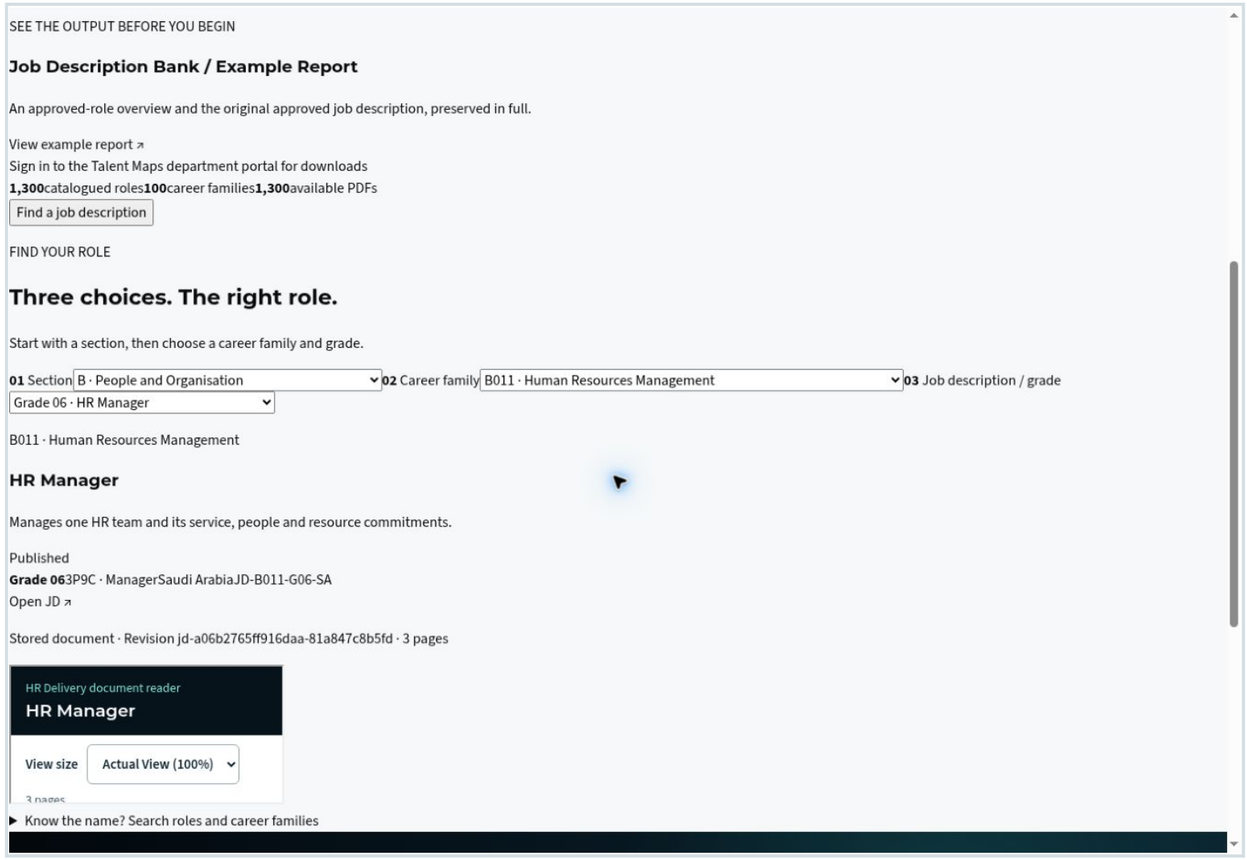
CHECK The role choices reflect the selected career family.

04 Choose '03 Job description / grade'

Select the required reference role and grade. The reviewed example is Grade 06 · HR Manager.

CHECK The role card shows the selected title and reference.

PRIOR REVIEWED SCREEN



Job Description Bank with section, family and Grade 6 HR Manager selection.

DEFINE ROLES AND JOB VALUE / STEPS 5–6 OF 6

OPEN SOURCE

Find a role in the Job Description Bank

05 Open 'Open JD ↗'

Read the document in the viewer. Check country context, responsibilities, qualification and capability assumptions before adapting it.

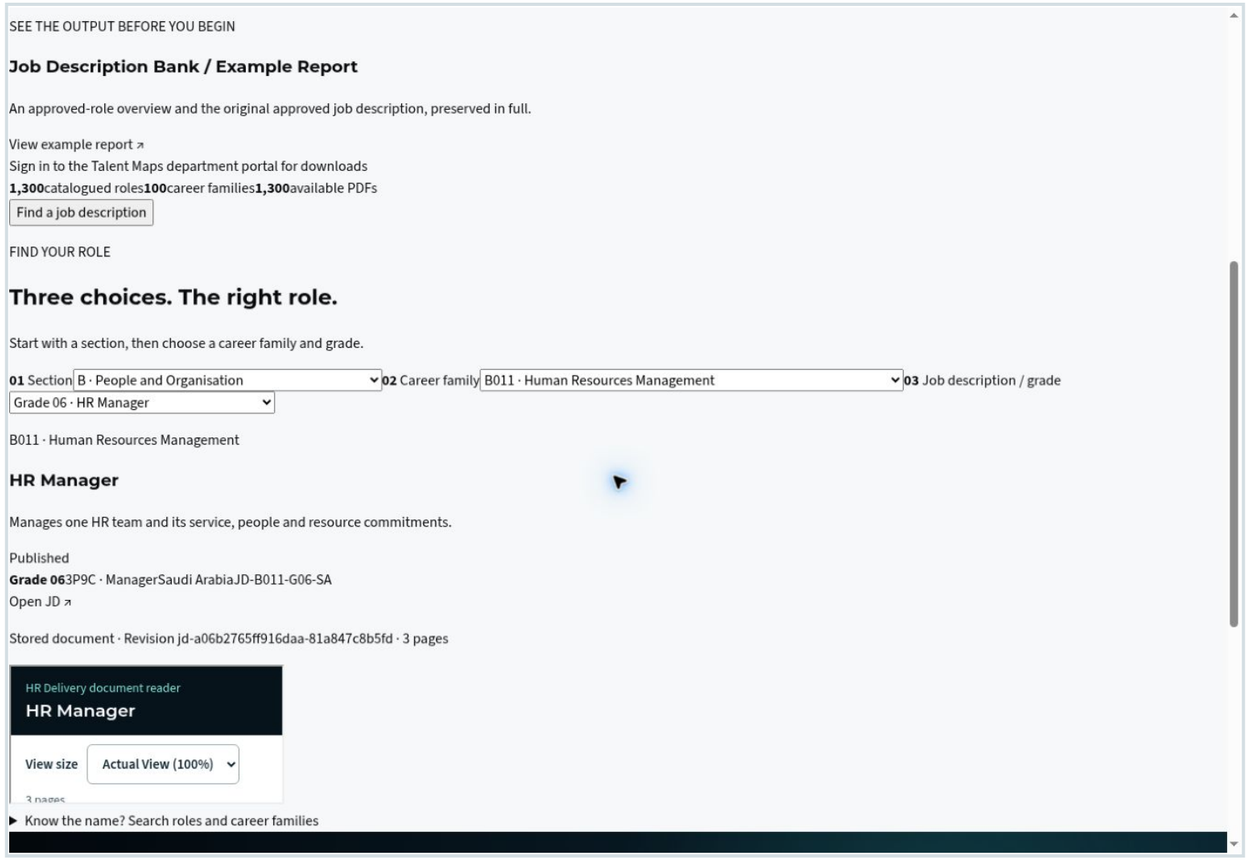
CHECK The source role can be reviewed in full.

06 Use authorised downloads for adaptation

The page directs users to the TalentMaps department portal for downloads. Confirm access to editable originals and keep the source and edited copy distinguishable.

CHECK The adapted role can be traced back to its reference.

PRIOR REVIEWED SCREEN



Job Description Bank with section, family and Grade 6 HR Manager selection.

DEFINE ROLES AND JOB VALUE / C-02-02

OPEN SOURCE

Prepare the job-design record

Turn the reference profile into an accurate description of authorised work.

WHO USES THIS Role owner with HR

BEFORE YOU BEGIN

- Selected reference profile
- Current accountabilities and decision limits
- Organisation structure and capability requirements

WHAT YOU WILL HAVE

- Reviewed role brief
- Evidence references for evaluation

CHECK BEFORE YOU FINISH

- Current scope is described
- People served and people managed are distinguished
- Required capability is justified

The draft describes an aspirational future role

Separate the current authorised role from a proposed redesign and state the effective date and approval needed.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The preparation process is supported by observed role-fact fields. Private Job Design saving/versioning was not tested.

DEFINE ROLES AND JOB VALUE / STEPS 1–2 OF 5

OPEN SOURCE

Prepare the job-design record

01 Confirm the role identity

Use a stable role reference and the current title, team, country and reporting relationship. Keep the work separate from an incumbent's personal characteristics.

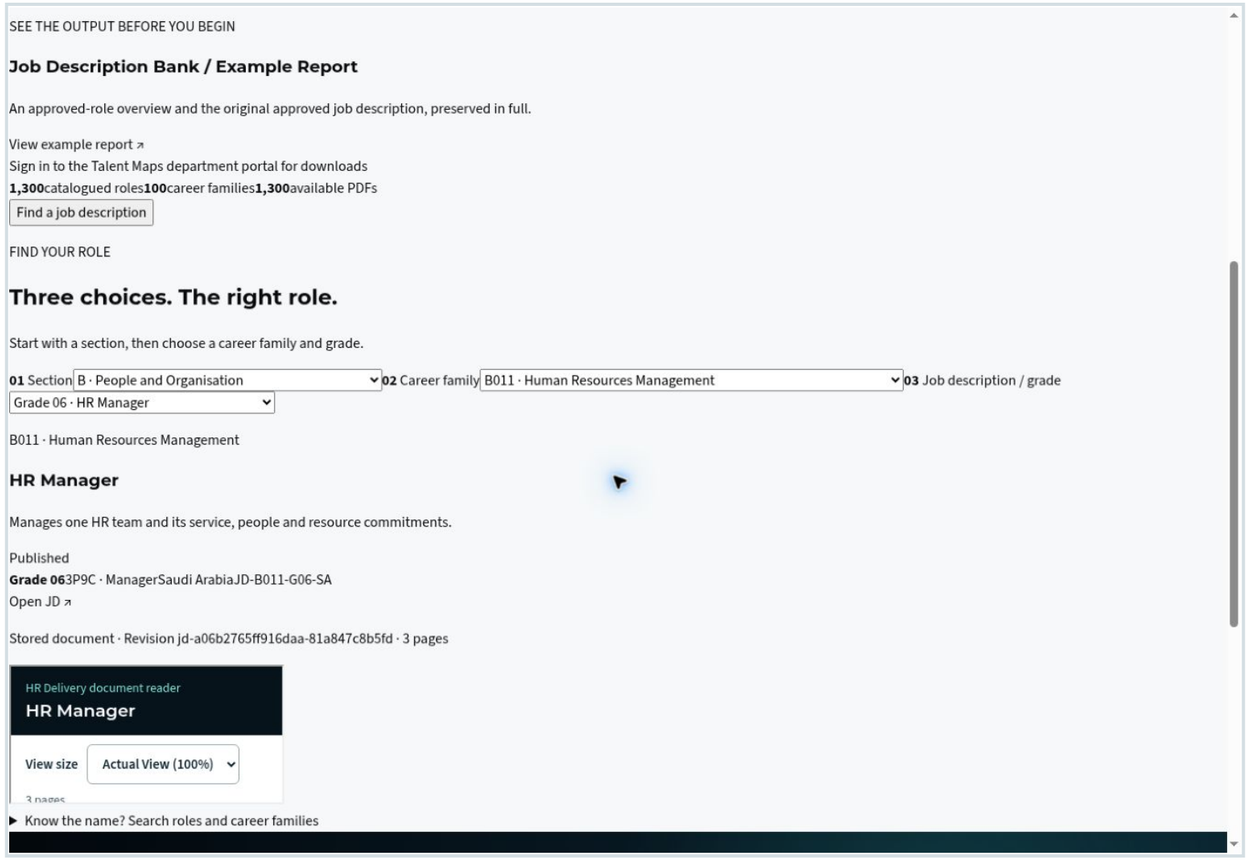
CHECK The role has an unambiguous identity.

02 Describe purpose and results

State why the role exists and the few outcomes it owns. Distinguish accountability from an activity list and from work merely supported.

CHECK The role's contribution is clear.

PRIOR REVIEWED SCREEN



Supplied role profile as a starting point for job design.

DEFINE ROLES AND JOB VALUE / STEPS 3–4 OF 5

OPEN SOURCE

Prepare the job-design record

03 Specify decisions and relationships

Record delegated authority, escalation, dependencies and the people or technical resources for which the role is responsible.

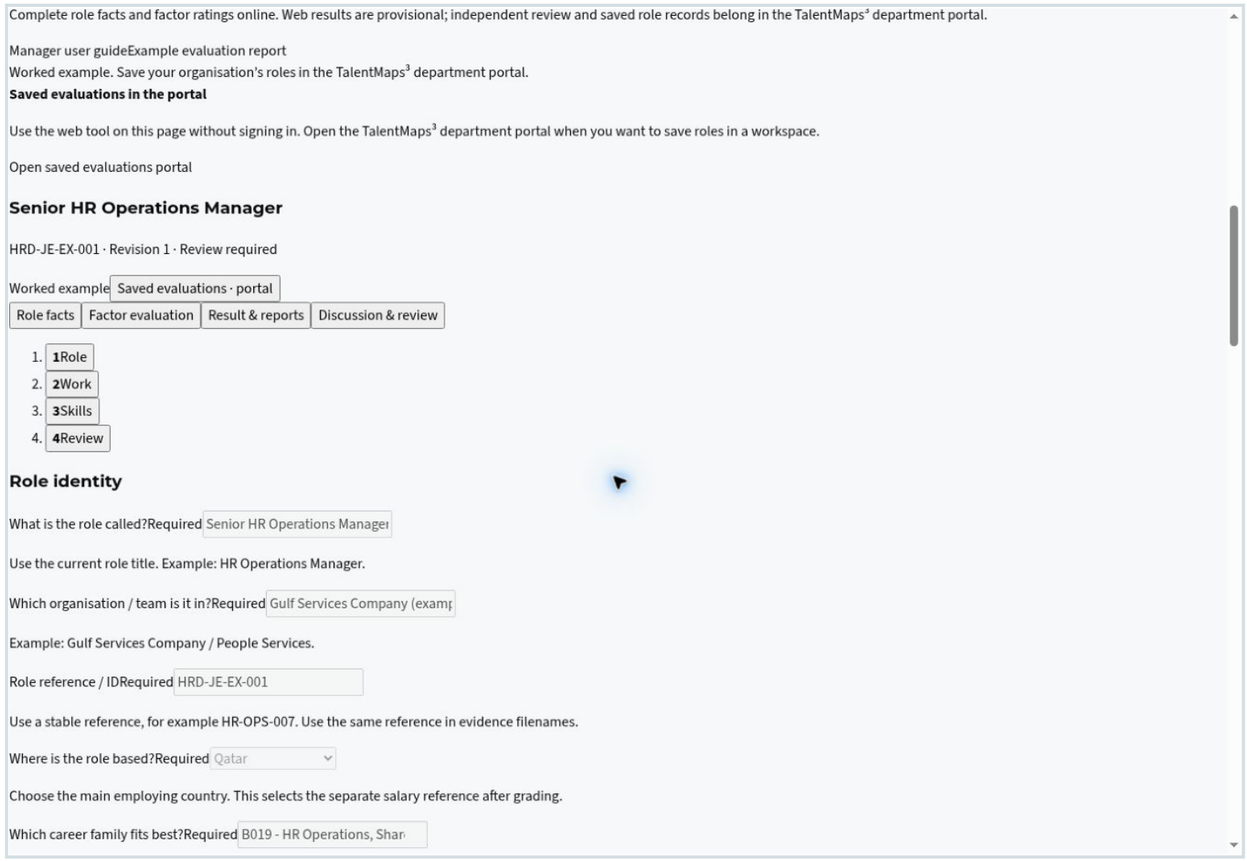
CHECK The boundaries of the role can be examined.

04 Set capability requirements

Use the selected behavioural and technical references to describe necessary knowledge, qualifications and proficiency. Justify essential requirements.

CHECK Requirements follow from the work.

CURRENT LIVE SCREEN



Evalu8's supplied role-identity example shows the kind of facts required; the example is read-only.

DEFINE ROLES AND JOB VALUE / STEPS 5–5 OF 5

OPEN SOURCE

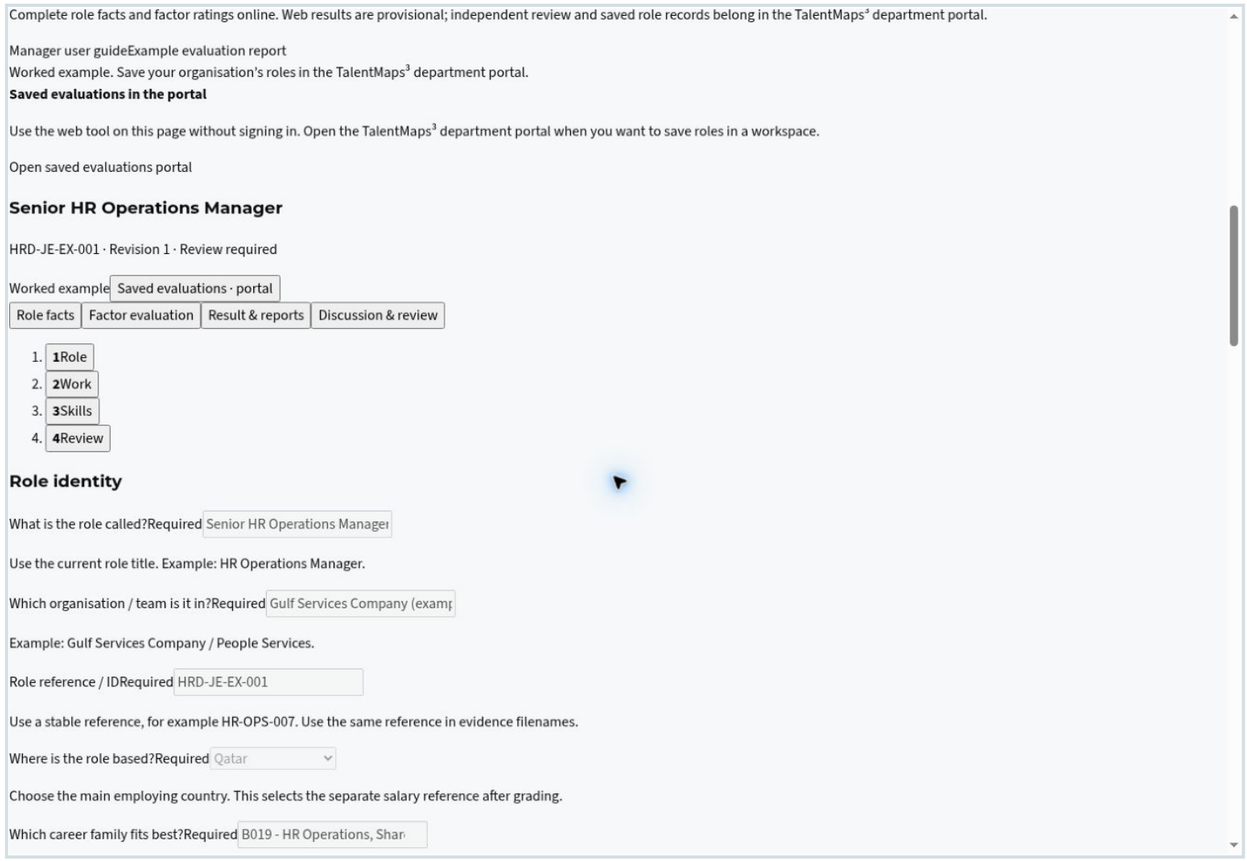
Prepare the job-design record

05 Review with the role owner

Check the facts against the organisation chart, service plan and delegation evidence. Retain the approved version before evaluation or recruitment use.

CHECK The role brief is ready for an evidence-led evaluation.

CURRENT LIVE SCREEN



Evalu8's supplied role-identity example shows the kind of facts required; the example is read-only.

DEFINE ROLES AND JOB VALUE / C-02-03

OPEN SOURCE

Connect the role to job evaluation and salary context

Use the design record as evidence for grading and reward discussion.

WHO USES THIS Role owner, evaluator and reward specialist

BEFORE YOU BEGIN

- Confirmed role facts
- Relevant supporting evidence
- Adopted evaluation process

WHAT YOU WILL HAVE

- Provisional evaluation and review record
- Country salary context

CHECK BEFORE YOU FINISH

- Factor evidence supports the degrees
- Independent review is retained
- Salary basis and currency are explicit

A grade is changed to fit a salary expectation	Revisit the evaluation evidence and handle salary policy separately through the reward process.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public example and lookup observed; private approval and saved evaluation workflow unverified.

DEFINE ROLES AND JOB VALUE / STEPS 1–2 OF 5

OPEN SOURCE

Connect the role to job evaluation and salary context

01 Open the job-evaluation route

Use Job Evaluation from the design tools or the public Evalu8 worked example. Guide F explains the role, work, skills, review and eight-factor sequence in detail.

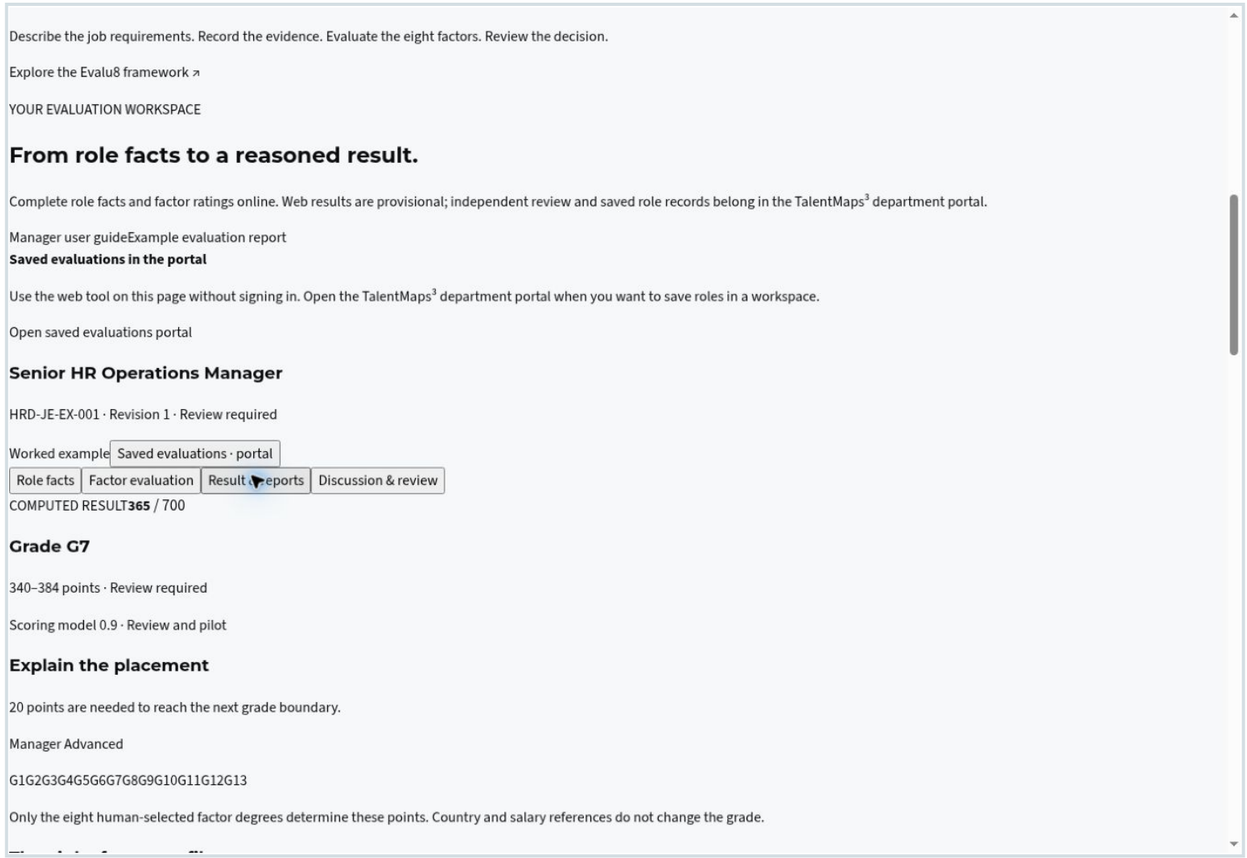
CHECK The evaluator has the approved role context.

02 Evaluate the work against the factors

Rate the highest fully supported degree for each factor and record its rationale. Do not use desired salary or the incumbent's performance to determine job size.

CHECK Each degree is linked to role evidence.

CURRENT LIVE SCREEN



Live read-only Evalu8 result for the supplied Senior HR Operations Manager example.

DEFINE ROLES AND JOB VALUE / STEPS 3–3 OF 5

OPEN SOURCE

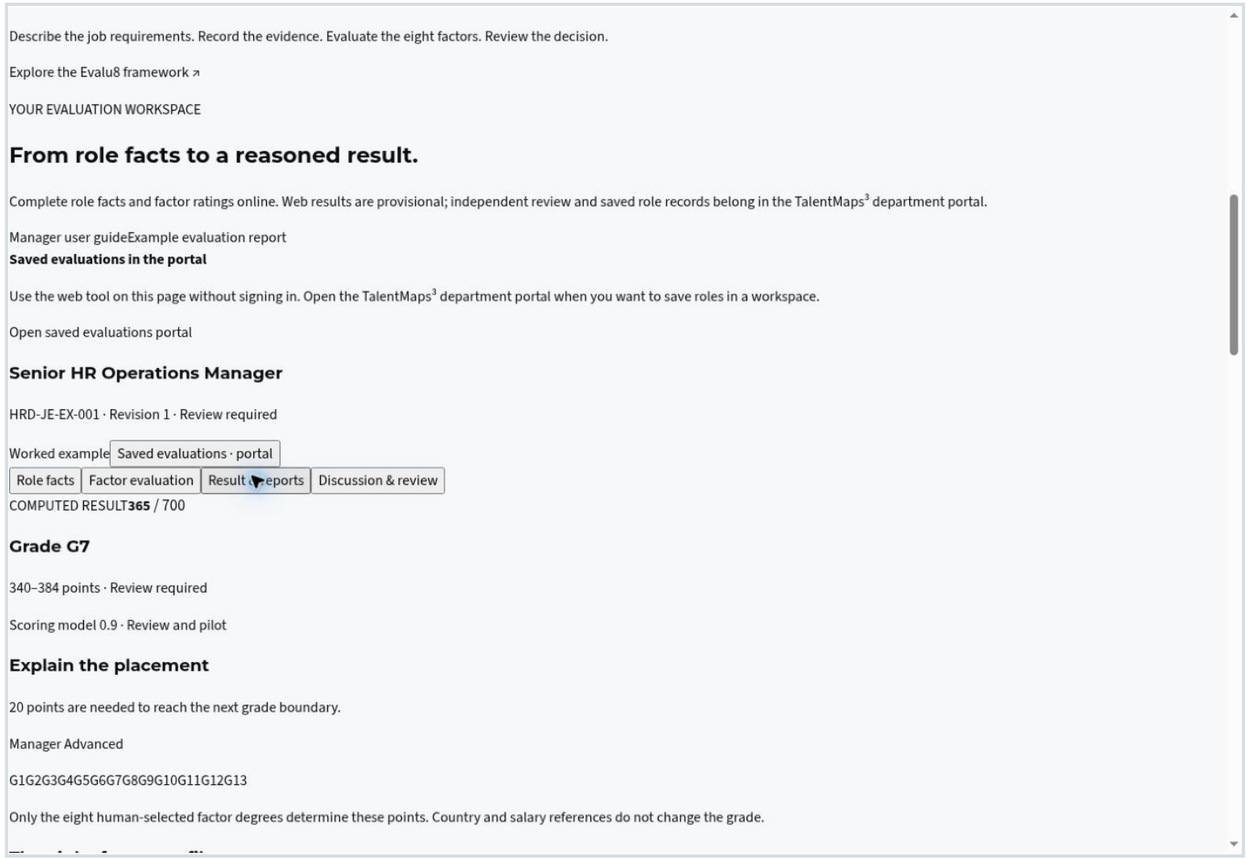
Connect the role to job evaluation and salary context

03 Review the computed result

Check the factor profile, total and grade boundary. The supplied example is 365 points, Grade G7, with review required.

CHECK The provisional grade is explainable and subject to review.

CURRENT LIVE SCREEN



Live read-only Evalu8 result for the supplied Senior HR Operations Manager example.

DEFINE ROLES AND JOB VALUE / STEPS 4–5 OF 5

OPEN SOURCE

Connect the role to job evaluation and salary context

04 Consider salary separately

Use the correct country, family, grade and pay basis in Salary Benchmark. Currency conversion and salary references do not change the evaluation grade.

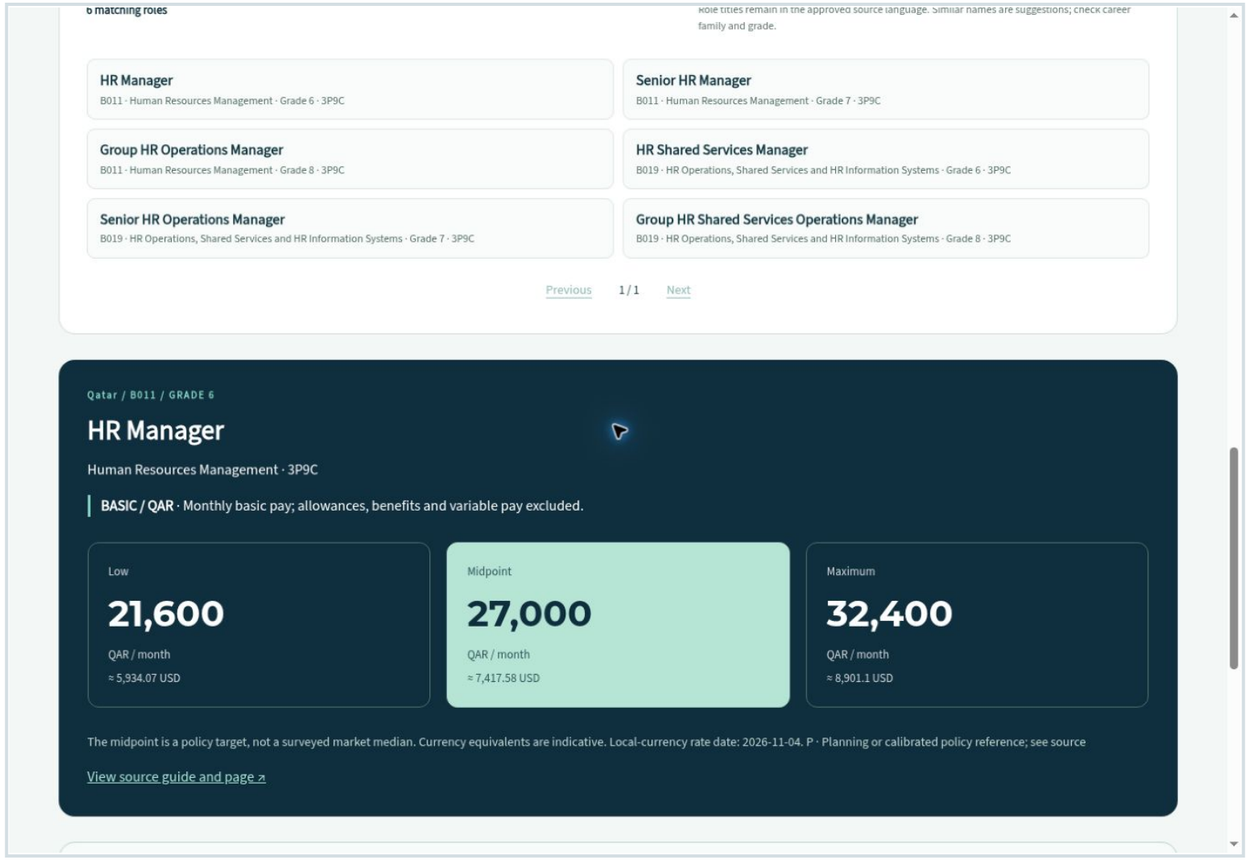
CHECK Reward context remains separate from job-value scoring.

05 Retain the adopted decision

Use the authorised portal review and saved-record process. Keep the approved role, evaluation rationale and relevant salary basis together.

CHECK The design decision can be revisited and audited.

CURRENT LIVE SCREEN



Current salary lookup for a separate Grade 6 HR Manager reference; salary and evaluation are distinct tasks.

03 Model workforce demand

Select the method that represents the work and make its assumptions visible.

05 PRACTICAL TASKS

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

MODEL WORKFORCE DEMAND / C-03-01

OPEN SOURCE

Choose a workforce profile and method

Set the planning context before calculating FTE.

WHO USES THIS Workforce planner with work owner

BEFORE YOU BEGIN

- Planning period
- Country and work area
- Available effective capacity

WHAT YOU WILL HAVE

- Planning context and method choice

CHECK BEFORE YOU FINISH

- Period is consistent
- Profile fits the work
- Inputs are locally supported

The result looks implausibly large or small Check units, period and effective productive hours before changing the demand assumption.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public calculator observed. Private baseline records and saved planning functions are separate.

MODEL WORKFORCE DEMAND / STEPS 1–2 OF 5

OPEN SOURCE

Choose a workforce profile and method

01 Open Workforce Planning Studio

Use the public calculator for a transparent calculation, or enter the full private planning studio for saved multi-period work.

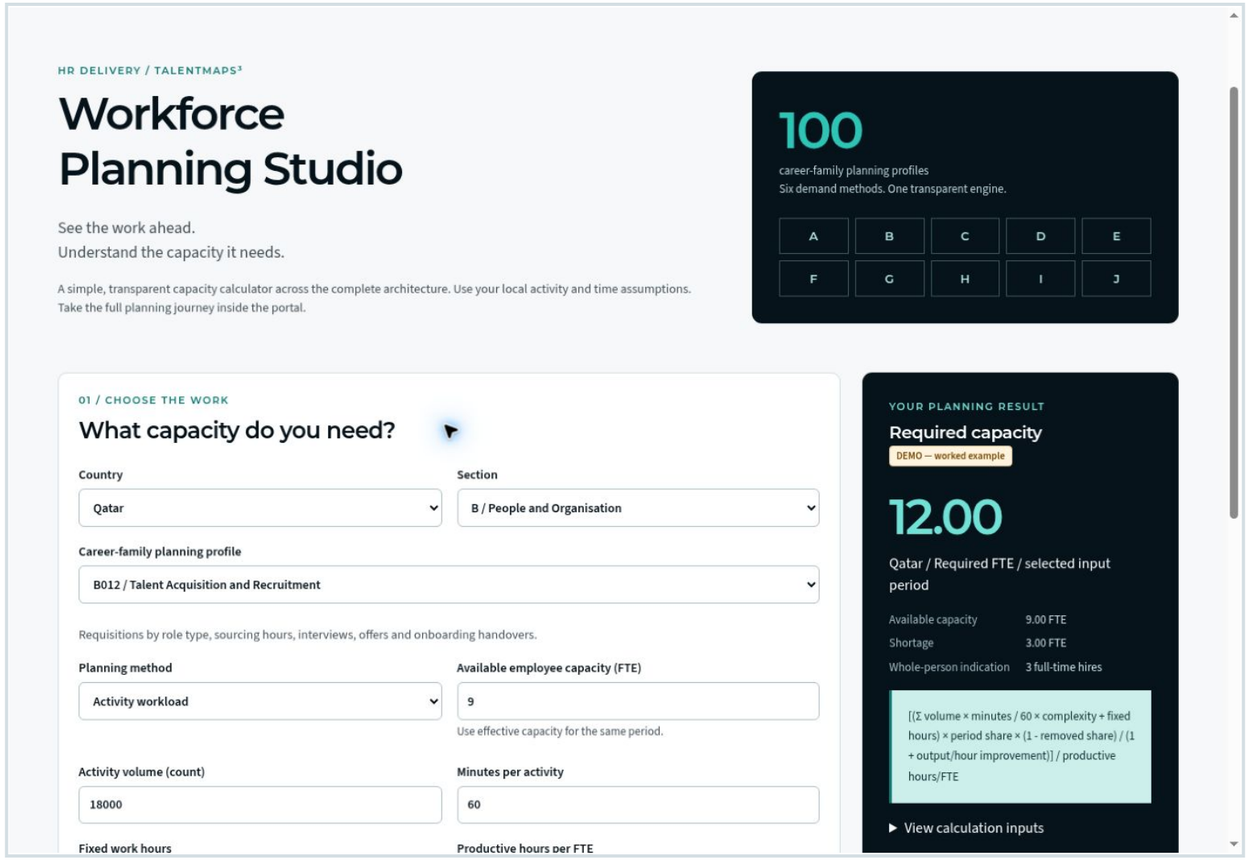
CHECK The country, section and career-family controls appear.

02 Choose the work context

Select 'Country', 'Section' and 'Career-family planning profile'. Read the profile’s guidance before selecting the demand method.

CHECK The profile describes the work being planned.

PRIOR REVIEWED SCREEN



Prior full view of the same supplied activity-workload example.

MODEL WORKFORCE DEMAND / STEPS 3–4 OF 5

OPEN SOURCE

Choose a workforce profile and method

03 Choose 'Planning method'

Select Activity workload, Staffed coverage, Project work, Approved local ratio, Growth from a baseline or Approved establishment. Use the method that matches the evidence.

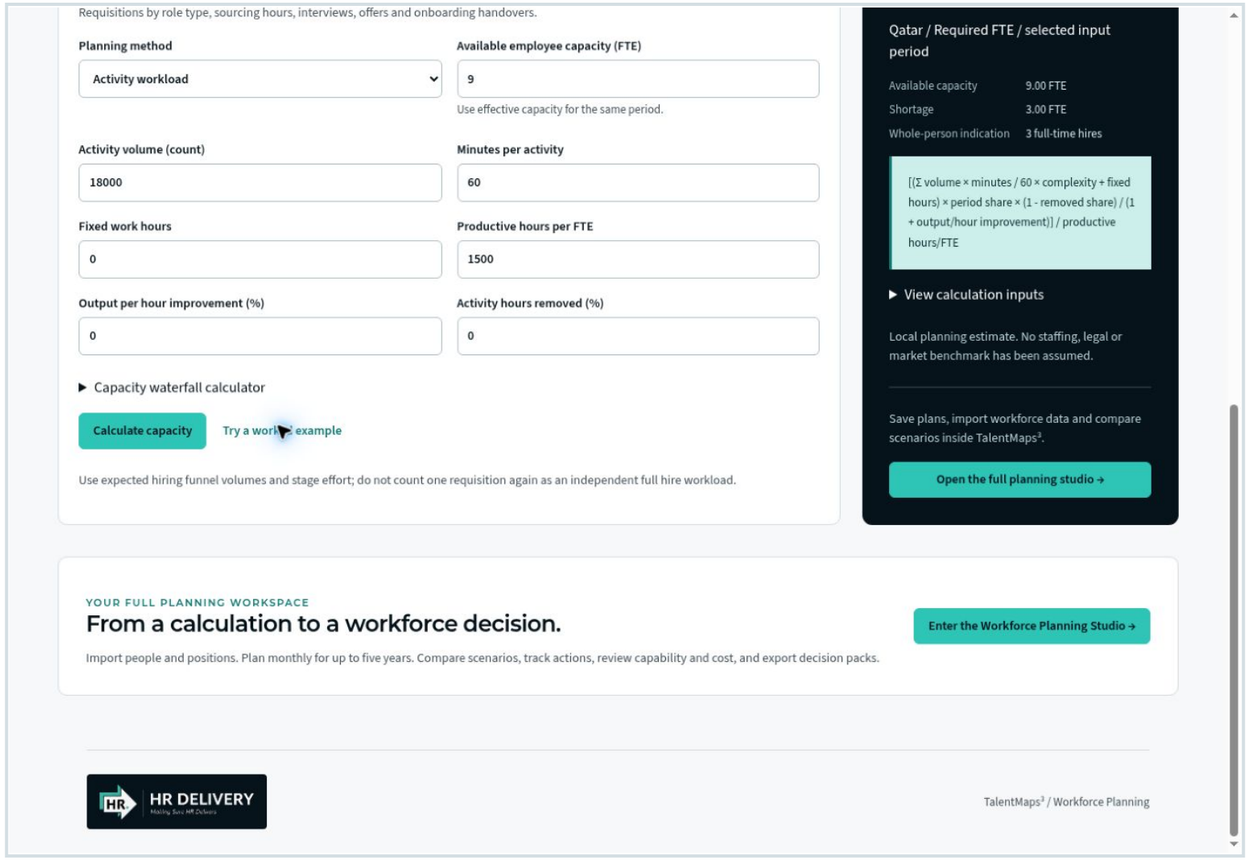
CHECK The form shows inputs for the chosen method.

04 Enter available capacity

Use 'Available employee capacity (FTE)' for the same period as demand. Effective capacity may differ from the number of people on the payroll.

CHECK Demand and available capacity have a common time basis.

CURRENT LIVE SCREEN



Public workforce calculator and supplied 12-FTE example.

MODEL WORKFORCE DEMAND / STEPS 5–5 OF 5

OPEN SOURCE

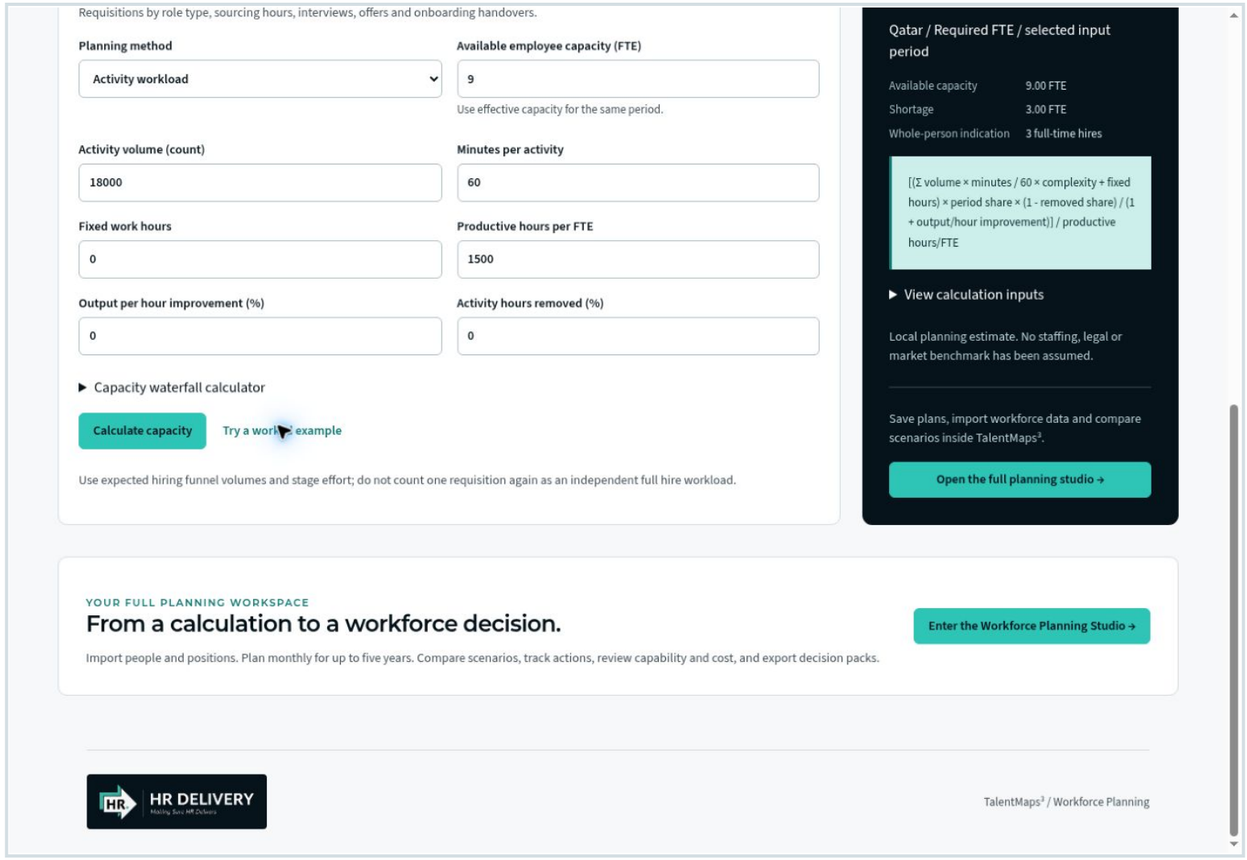
Choose a workforce profile and method

05 Record the assumptions

Keep the period, volume sources and local capacity basis. A calculation is a local planning estimate; the page does not assume a staffing, legal or market benchmark.

CHECK The estimate can be checked and repeated.

CURRENT LIVE SCREEN



Public workforce calculator and supplied 12-FTE example.

MODEL WORKFORCE DEMAND / C-03-02

OPEN SOURCE

Calculate activity-based demand

Convert expected activity and effort into required capacity.

WHO USES THIS Workforce planner

BEFORE YOU BEGIN

- Activity volumes for the period
- Minutes per activity and fixed work
- Productive hours per FTE

WHAT YOU WILL HAVE

- Required FTE calculation
- Capacity gap and assumptions

CHECK BEFORE YOU FINISH

- Activity units are consistent
- Productive hours fit the period
- Improvements are not double counted

A changed method still shows the old result	Complete the new method’s required inputs and select Calculate capacity before interpreting the displayed result.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The supplied synthetic example was calculated. No private plan was saved.

MODEL WORKFORCE DEMAND / STEPS 1–2 OF 6

OPEN SOURCE

Calculate activity-based demand

01 Choose 'Activity workload'

Use this method when activity volume and the effort per activity are the basis of demand. Avoid counting the same work at multiple process stages.

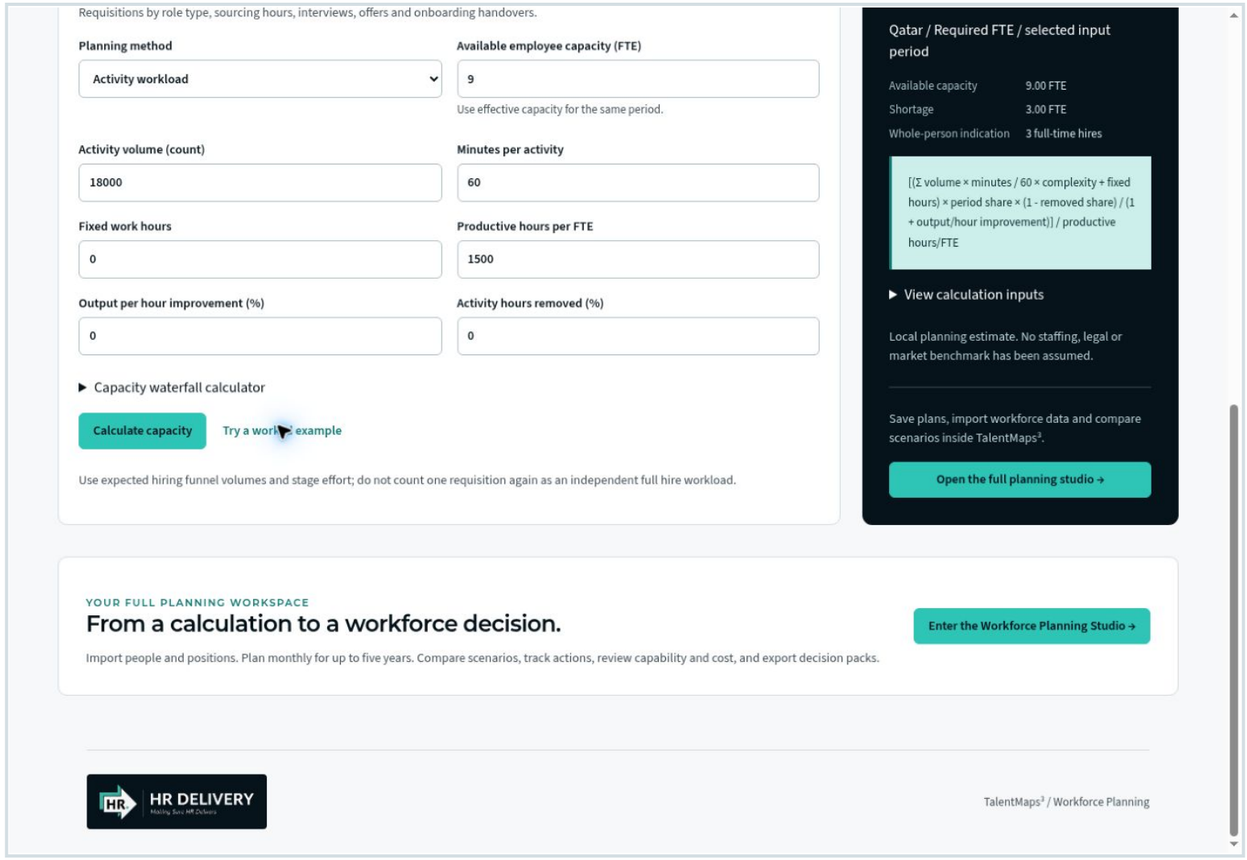
CHECK Activity-specific input fields are displayed.

02 Enter the work requirement

Complete 'Activity volume (count)', 'Minutes per activity' and 'Fixed work hours'. Make the volume and fixed work refer to the same period.

CHECK The required work is expressed in compatible units.

CURRENT LIVE SCREEN



Current supplied activity-workload result: 12 required FTE, 9 available and a 3 FTE gap.

MODEL WORKFORCE DEMAND / STEPS 3–4 OF 6

OPEN SOURCE

Calculate activity-based demand

03 Enter capacity and improvements

Complete 'Productive hours per FTE'. Use 'Output per hour improvement (%)' and 'Activity hours removed (%)' only when the change is justified.

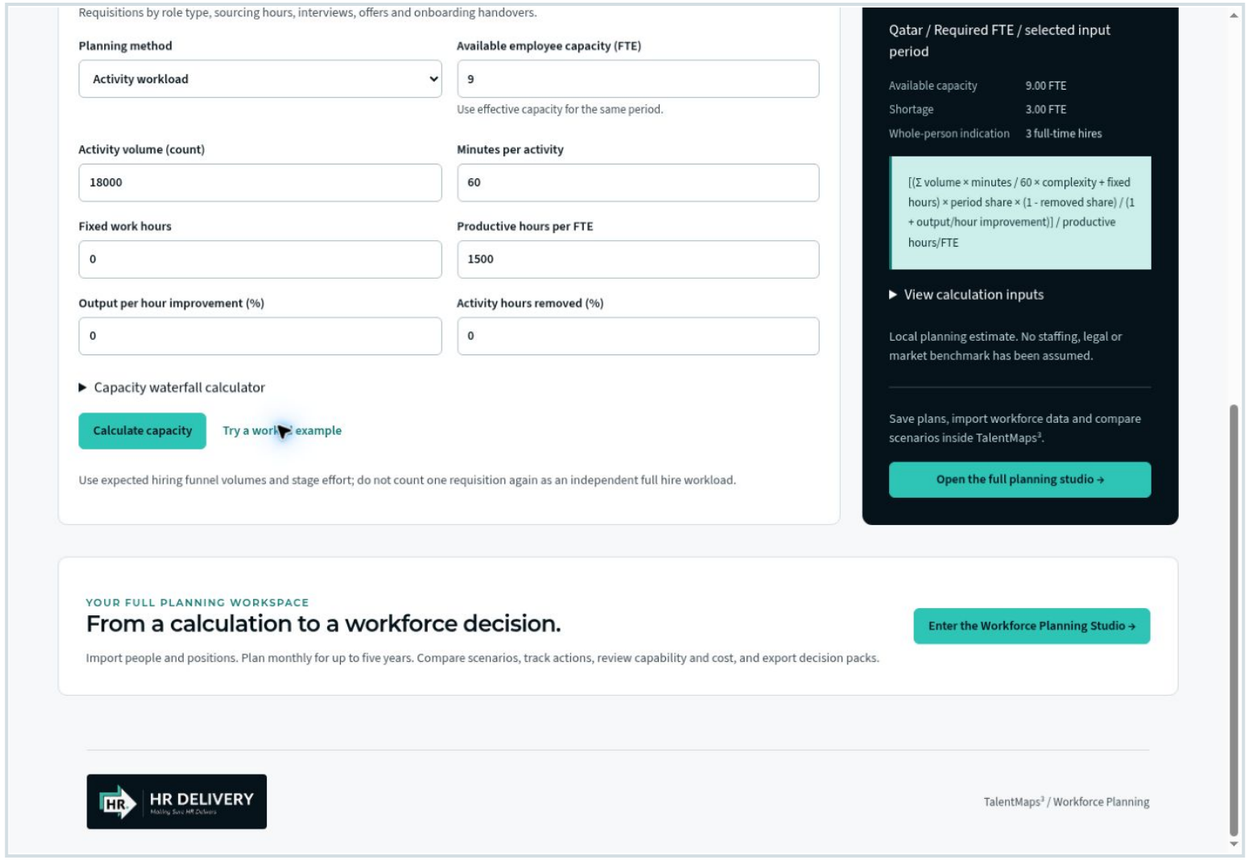
CHECK The assumptions distinguish faster work from removed work.

04 Select 'Calculate capacity'

Read Required capacity, Available capacity and Shortage. The supplied worked example uses 18,000 activities, 60 minutes, 1,500 hours and 9 available FTE.

CHECK The example produces 12.00 required FTE and a 3.00 FTE shortage.

CURRENT LIVE SCREEN



Current supplied activity-workload result: 12 required FTE, 9 available and a 3 FTE gap.

MODEL WORKFORCE DEMAND / STEPS 5–6 OF 6

OPEN SOURCE

Calculate activity-based demand

05 Review 'View calculation inputs'

Inspect the formula and input summary. Recalculate after changing inputs; a previous displayed result must not be read as the new scenario.

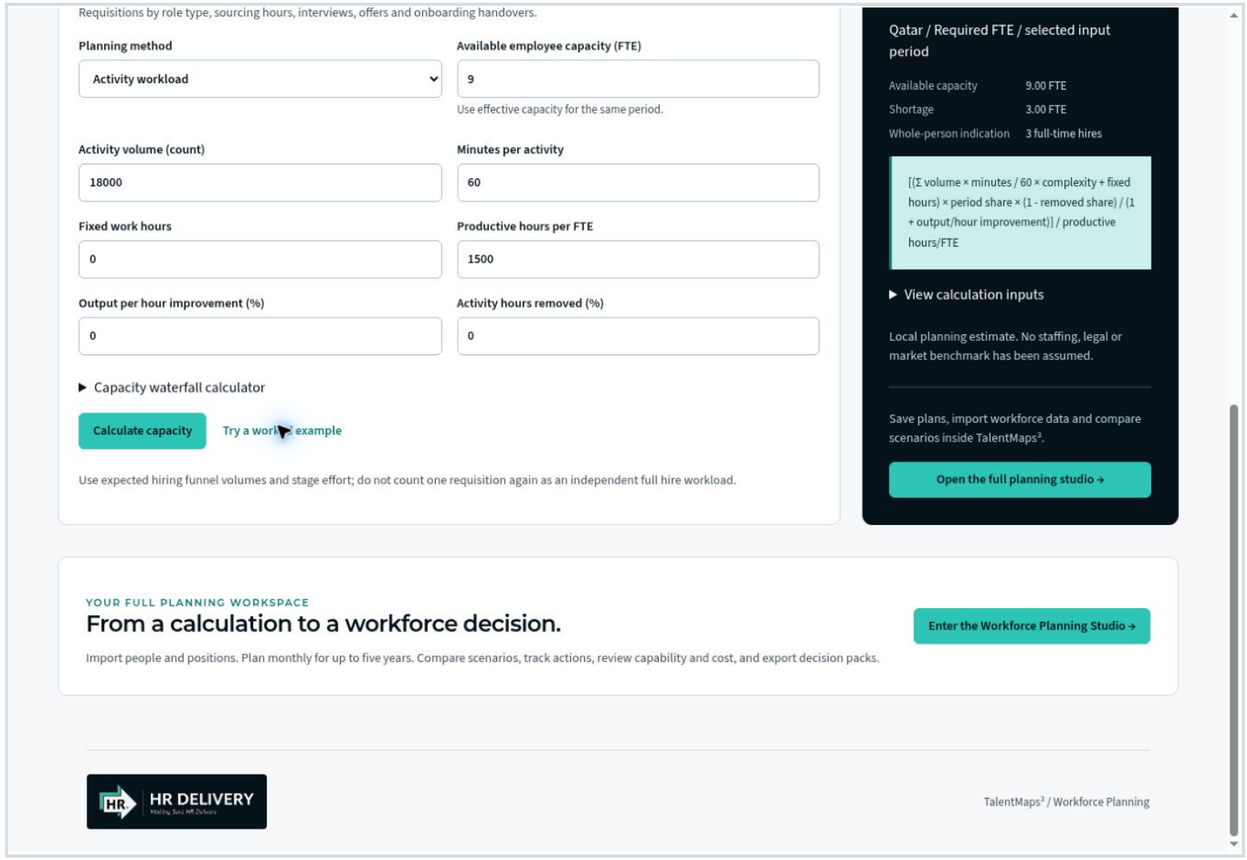
CHECK The result is traceable to the current calculation.

06 Discuss the practical response

Consider changes to work, capacity, scheduling or capability before interpreting a whole-person indication as an approved hiring decision.

CHECK The calculation supports a reasoned workforce action.

CURRENT LIVE SCREEN



Current supplied activity-workload result: 12 required FTE, 9 available and a 3 FTE gap.

MODEL WORKFORCE DEMAND / C-03-03

OPEN SOURCE

Calculate coverage or project demand

Use time coverage or planned project effort when activity counts are inappropriate.

WHO USES THIS Workforce planner

BEFORE YOU BEGIN

- Coverage requirement or approved project estimate
- Common planning period
- Attendance/productive capacity

WHAT YOU WILL HAVE

- Coverage or project FTE requirement
- Time and phasing assumptions

CHECK BEFORE YOU FINISH

- Coverage and project methods are not mixed
- Monthly weights total 1
- Attendance and productive hours are used appropriately

Project phasing produces unexpected monthly demand	Check that weights are fractions, cover the intended months and total 1 before recalculating.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

All six public input forms were inspected. Only the activity worked example was exercised end-to-end.

MODEL WORKFORCE DEMAND / STEPS 1–2 OF 5

OPEN SOURCE

Calculate coverage or project demand

01 Select the appropriate method

Use 'Staffed coverage' for posts that must be staffed over time; use 'Project work' for a known project effort distributed across months.

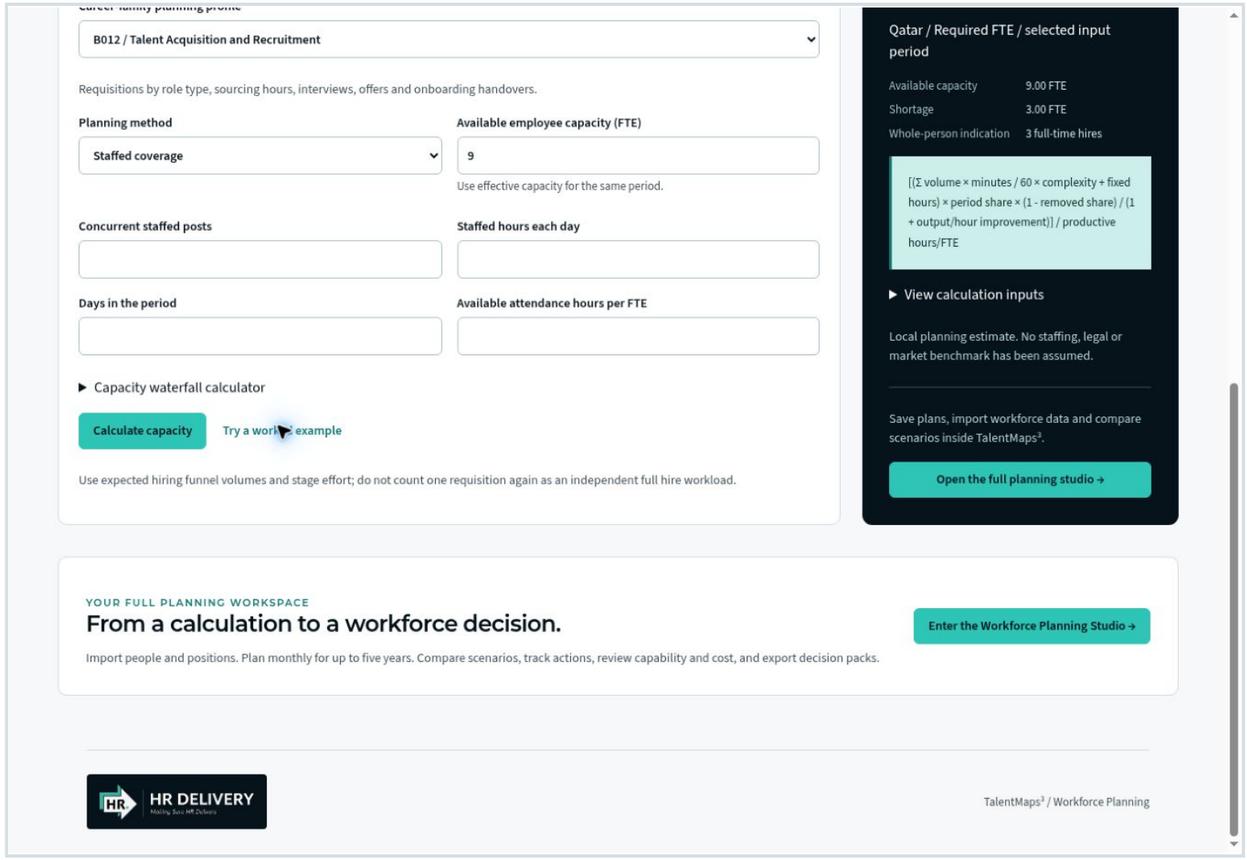
CHECK The form presents the relevant time-based inputs.

02 For coverage, enter staffed time

Complete 'Concurrent staffed posts', 'Staffed hours each day', 'Days in the period' and 'Available attendance hours per FTE'.

CHECK The model can compare required staffed hours with attendance capacity.

CURRENT LIVE SCREEN



Staffed coverage input fields. The right-hand result still belongs to the earlier activity example until recalculated.

MODEL WORKFORCE DEMAND / STEPS 3–4 OF 5

OPEN SOURCE

Calculate coverage or project demand

03 For projects, distribute the effort

Complete 'Total project hours', 'Monthly weights (fractions totalling 1)' and 'Productive hours per FTE per month'. Use an agreed phasing profile.

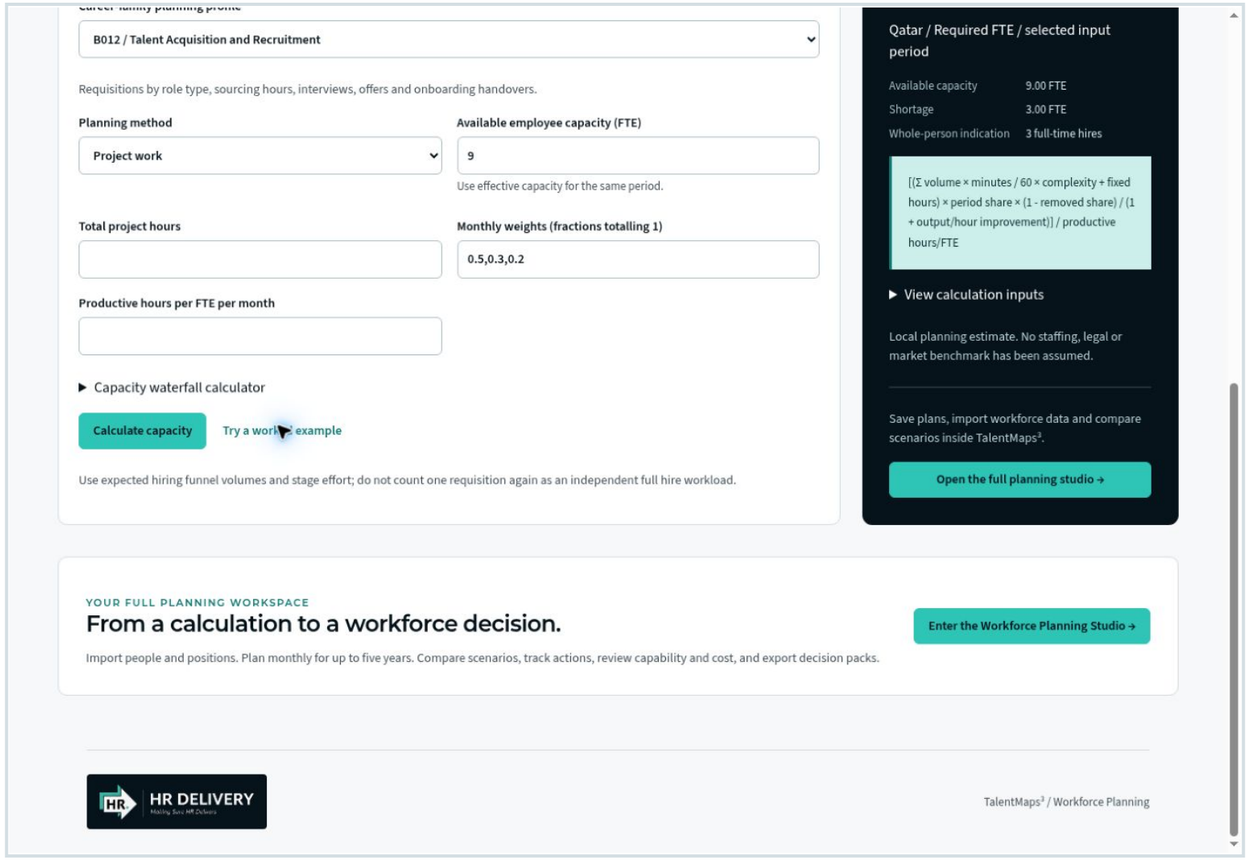
CHECK Monthly fractions represent the whole project effort.

04 Enter comparable available capacity

Use the same time basis for the available FTE. Check that holidays, absence or other work are handled consistently in the adopted capacity assumption.

CHECK Demand and supply can be compared meaningfully.

CURRENT LIVE SCREEN



Project work input fields and monthly weights. Recalculate after entering the project assumptions.

MODEL WORKFORCE DEMAND / STEPS 5–5 OF 5

OPEN SOURCE

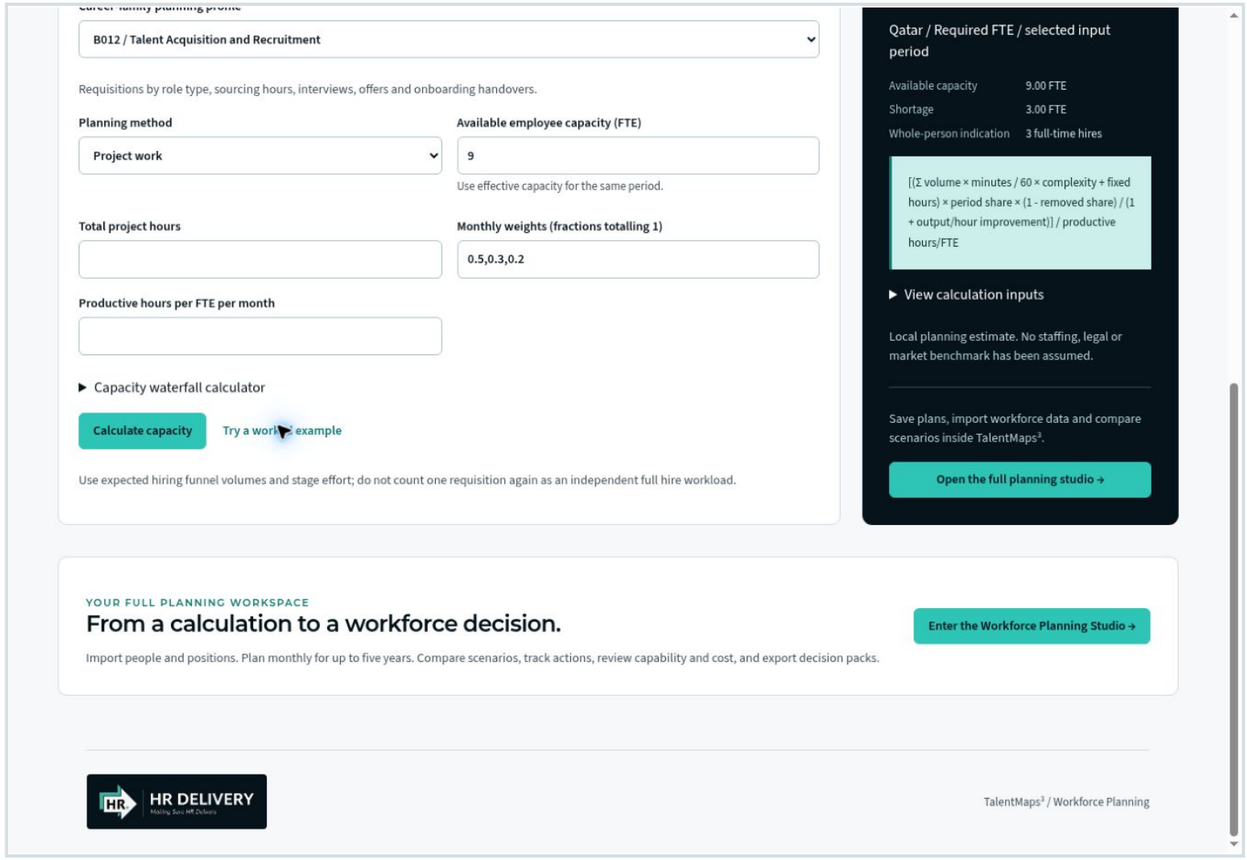
Calculate coverage or project demand

05 Select 'Calculate capacity'

Review the result and input summary for the selected method. Explain coverage or project assumptions in the decision pack.

CHECK The calculation can be reviewed by the work owner.

CURRENT LIVE SCREEN



Project work input fields and monthly weights. Recalculate after entering the project assumptions.

MODEL WORKFORCE DEMAND / C-03-04

OPEN SOURCE

Use ratio, growth or establishment methods

Apply an approved local basis without presenting it as a universal benchmark.

WHO USES THIS Workforce planner

BEFORE YOU BEGIN

- Approved local ratio, justified baseline or establishment
- Documented scope and period
- Available capacity

WHAT YOU WILL HAVE

- Locally supported demand estimate
- Source/approval reference

CHECK BEFORE YOU FINISH

- Ratio is locally approved
- Baseline is justified
- Indices use 1 for unchanged demand/productivity

No approved ratio or justified baseline exists	Choose a method supported by actual evidence or develop the missing assumption with the work owner before producing a decision figure.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Method forms inspected; no private establishment or approval record was created.

MODEL WORKFORCE DEMAND / STEPS 1–2 OF 5

OPEN SOURCE

Use ratio, growth or establishment methods

01 Select the evidence-based method

Choose 'Approved local ratio', 'Growth from a baseline' or 'Approved establishment' according to the organisation's actual planning basis.

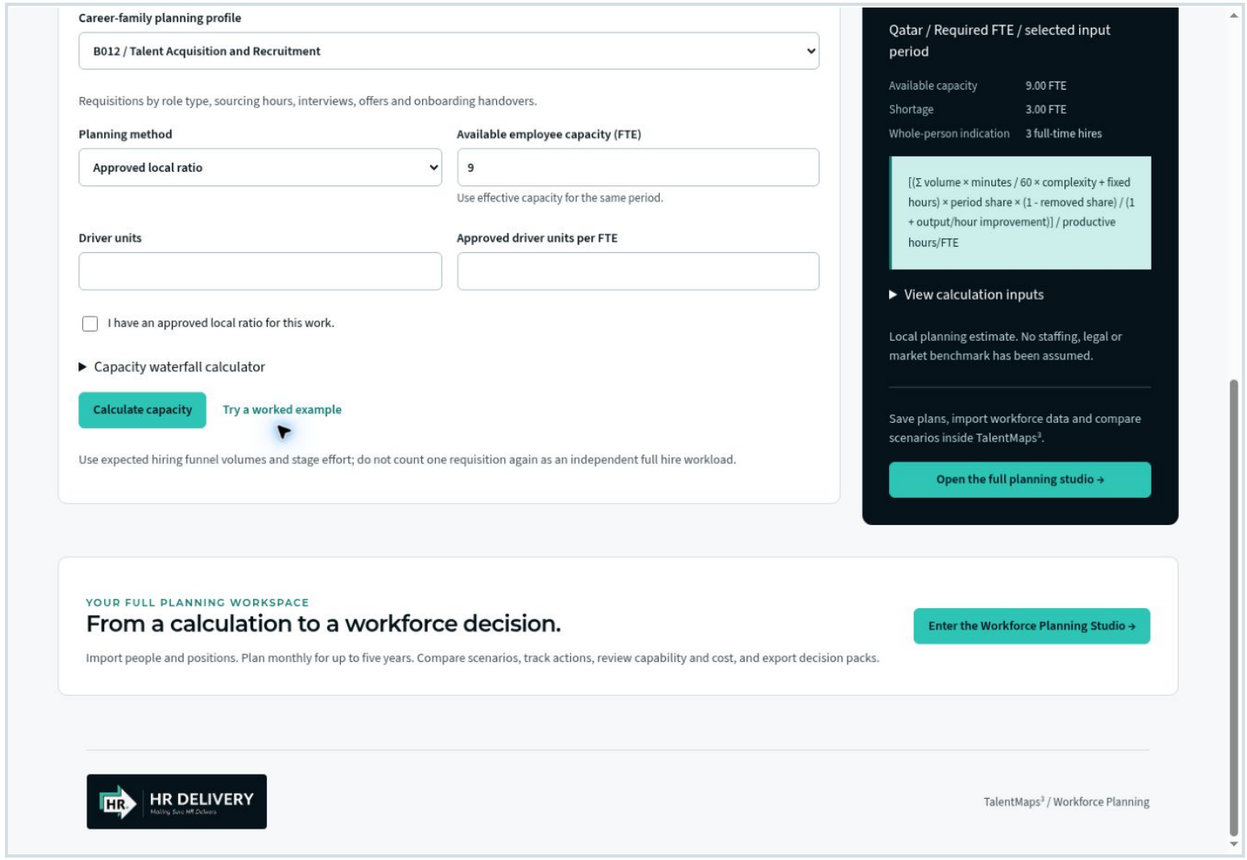
CHECK The form matches the source of the demand estimate.

02 For a ratio, confirm its authority

Enter 'Driver units' and 'Approved driver units per FTE'. Select 'I have an approved local ratio for this work' only when that statement is true.

CHECK The ratio has an identifiable local authority and scope.

CURRENT LIVE SCREEN



Approved local ratio inputs and confirmation checkbox. Recalculate to replace the earlier example result.

MODEL WORKFORCE DEMAND / STEPS 3–3 OF 5

OPEN SOURCE

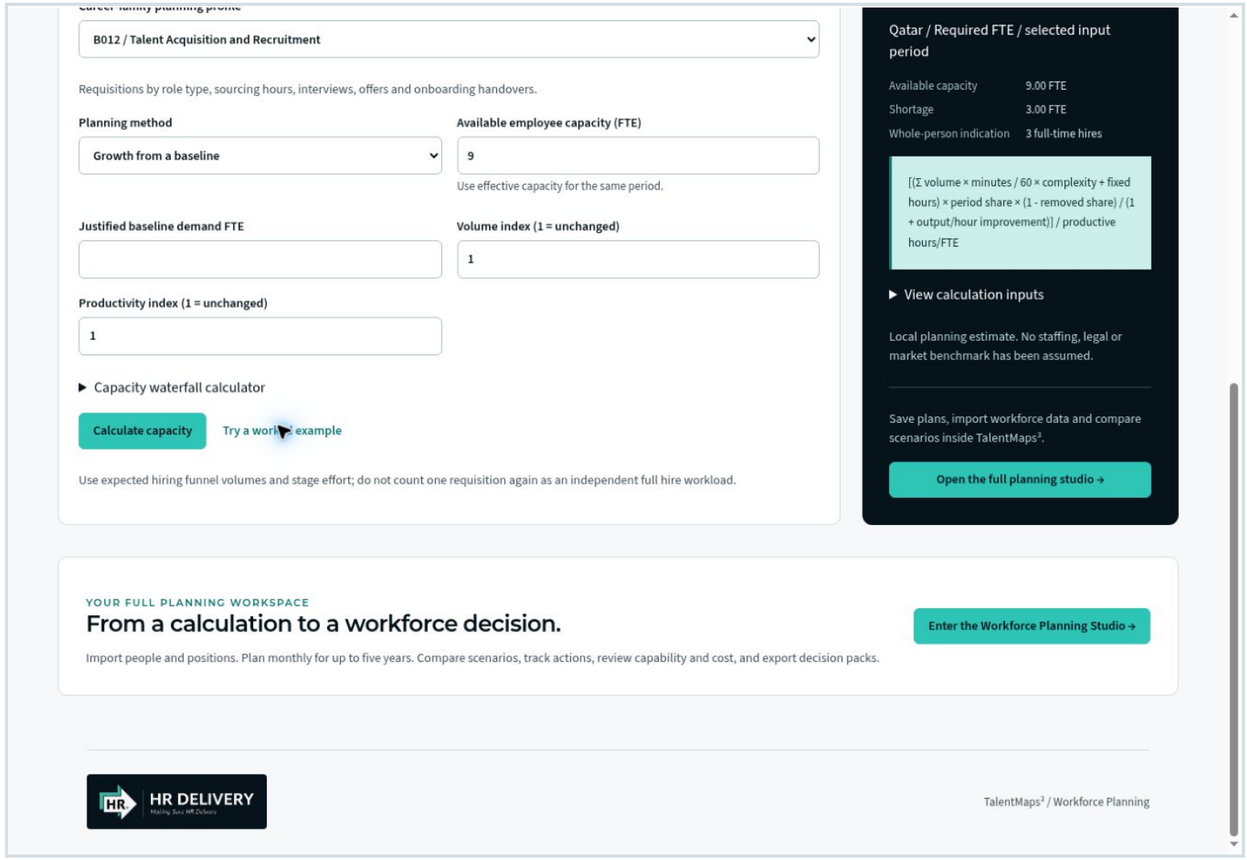
Use ratio, growth or establishment methods

03 For growth, state the baseline and indices

Enter 'Justified baseline demand FTE', 'Volume index (1 = unchanged)' and 'Productivity index (1 = unchanged)'. Distinguish a justified baseline from current staffing.

CHECK The growth estimate changes demand from a known baseline.

CURRENT LIVE SCREEN



Growth from a baseline inputs; an index of 1 means unchanged. The earlier example result has not been recalculated.

MODEL WORKFORCE DEMAND / STEPS 4–5 OF 5

OPEN SOURCE

Use ratio, growth or establishment methods

04 For establishment, enter the approved value

Use 'Approved establishment FTE' for the relevant scope and period. Record the approval reference outside or within the appropriate saved-plan field.

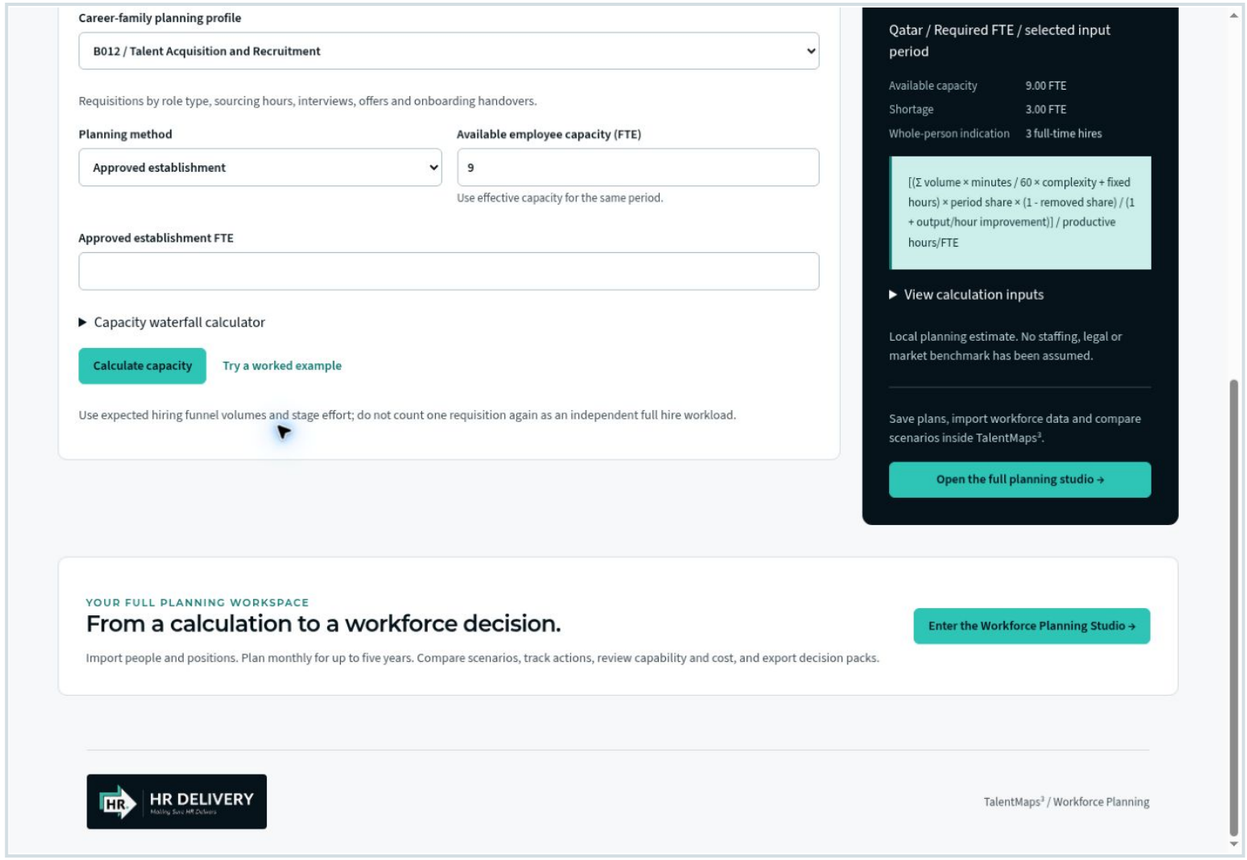
CHECK The model uses the actual approved establishment.

05 Calculate and review the gap

Select 'Calculate capacity' and compare with available capacity. Carry the source and qualification into the workforce decision.

CHECK The difference can be explained using the adopted planning basis.

CURRENT LIVE SCREEN



Approved establishment input and Calculate capacity control. Enter the authorised FTE before recalculating.

MODEL WORKFORCE DEMAND / C-03-05

OPEN SOURCE

Develop a complete workforce scenario

Connect baseline, demand, supply, capability, cost and actions.

WHO USES THIS Workforce planning lead

BEFORE YOU BEGIN

- Clean people and position baseline
- Agreed planning horizon
- Scenario assumptions and responsible owners

WHAT YOU WILL HAVE

- Workforce baseline
- Comparable scenarios
- Action plan and decision pack

CHECK BEFORE YOU FINISH

- Baseline reconciles
- Scenario assumptions are explicit
- Cost basis is consistent

Two scenarios are not comparable Align the population, horizon, currency, pay basis and scope before comparing the results.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private baseline import, multi-year plans, scenario saving and report export were not transaction-tested.

MODEL WORKFORCE DEMAND / STEPS 1–2 OF 6

OPEN SOURCE

Develop a complete workforce scenario

01 Enter the full planning workspace

Use Open the full planning studio or Enter the Workforce Planning Studio. The public page describes monthly planning for up to five years.

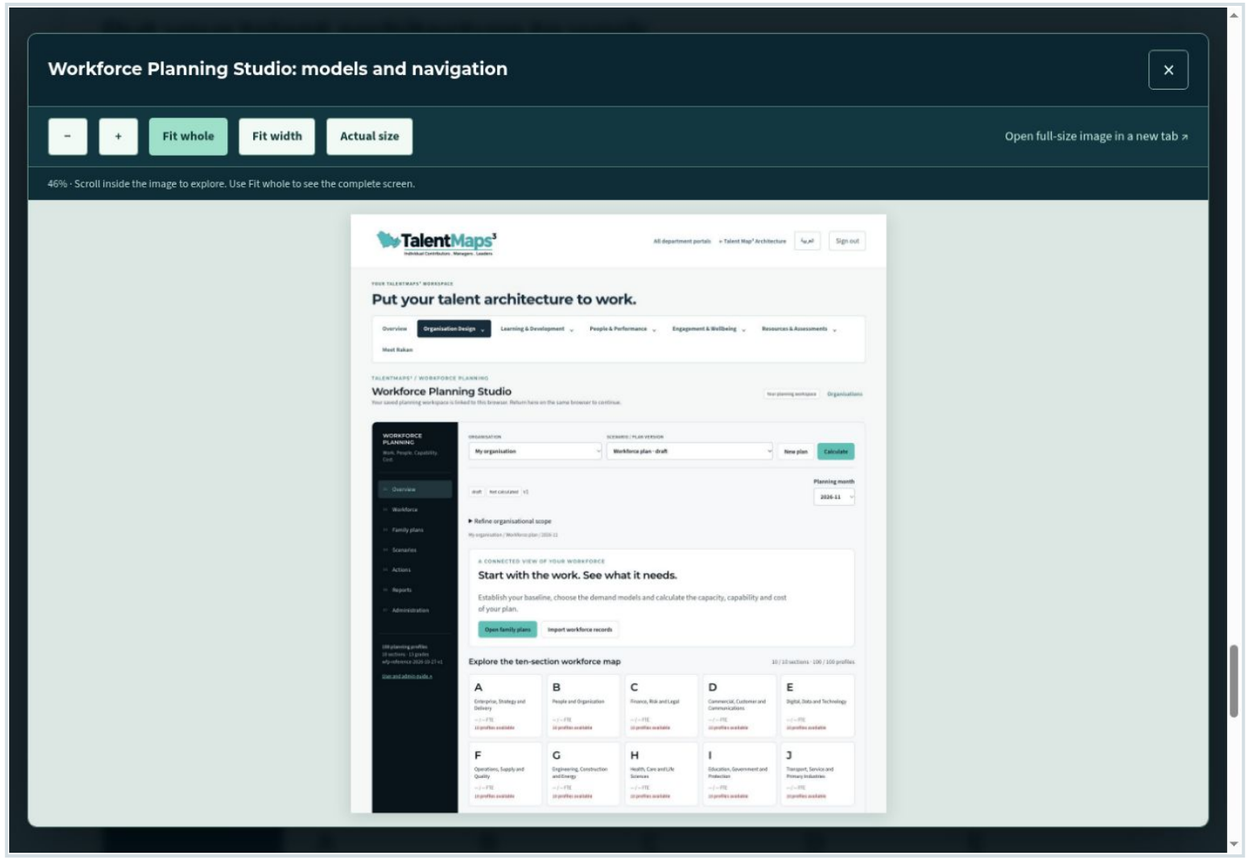
CHECK An authorised saved-planning workspace is required.

02 Reconcile the baseline

Review people, positions, vacancies, FTE and organisation structure before importing or entering data. Use the supported template and keep a recoverable source copy.

CHECK The starting workforce is consistent and traceable.

PUBLISHED DEMONSTRATION



Published TalentMaps³ demonstration; shows the connected planning workspace, not an authenticated client session.

MODEL WORKFORCE DEMAND / STEPS 3–4 OF 6

OPEN SOURCE

Develop a complete workforce scenario

03 Build demand and supply assumptions

Apply the appropriate work method, then consider known movements and available capacity. Keep planned changes separate from confirmed baseline facts.

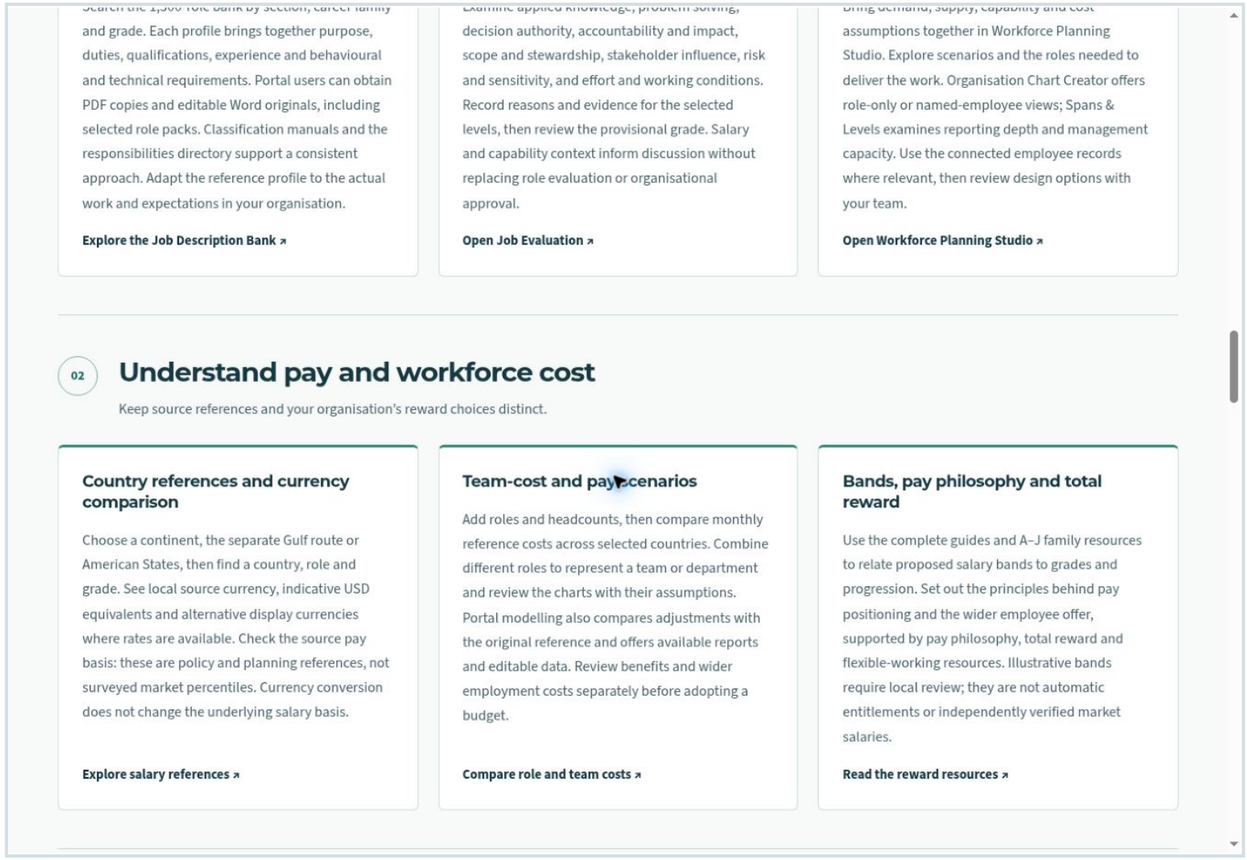
CHECK The scenario explains both required and available capacity.

04 Review capability and cost

Identify the skills needed and the salary or cost assumptions used. Use a common period, currency and pay basis across comparisons.

CHECK Capability gaps and financial implications are visible.

PRIOR REVIEWED SCREEN



Published guidance connects role/country/team scenarios with salary cost assumptions.

MODEL WORKFORCE DEMAND / STEPS 5–6 OF 6

OPEN SOURCE

Develop a complete workforce scenario

05 Compare alternative scenarios

Change one coherent set of assumptions at a time and name the scenario clearly. Compare service implications, capacity, capability and cost together.

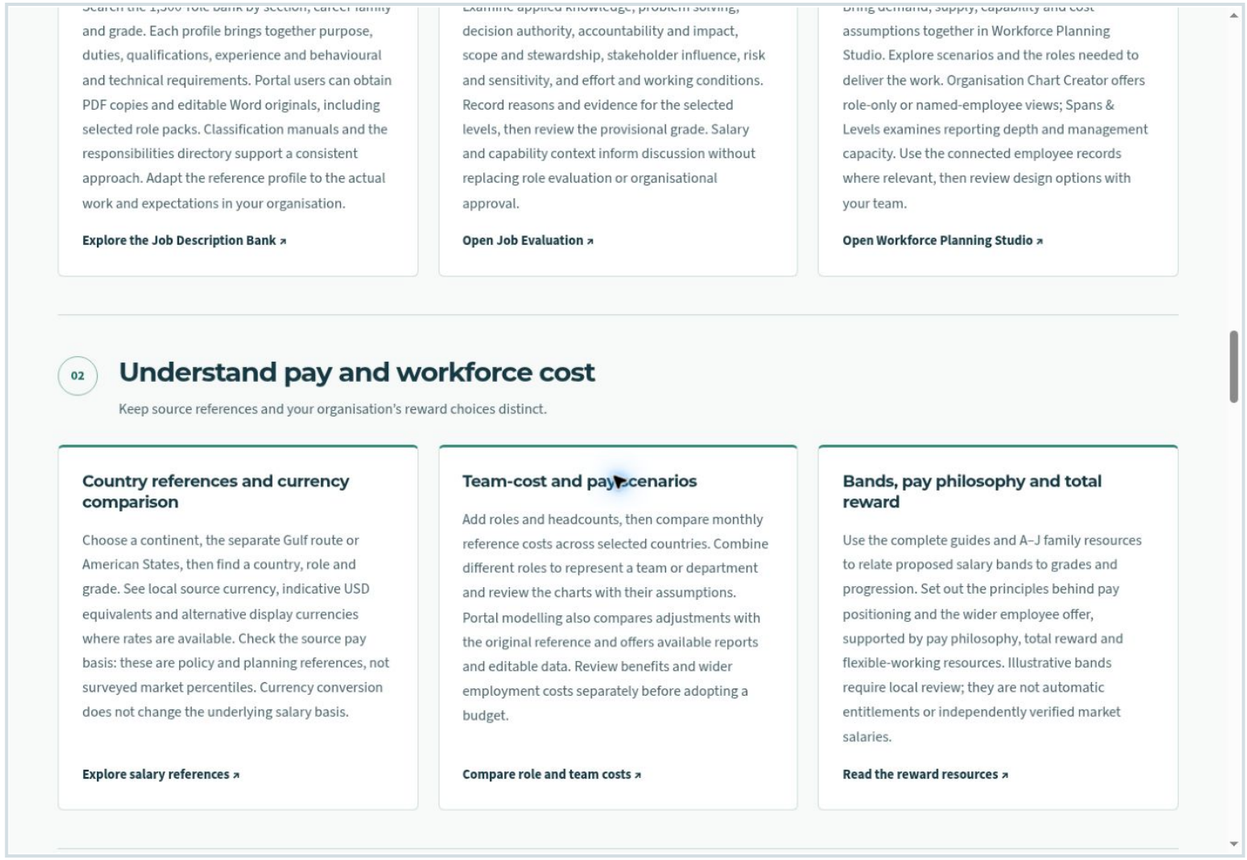
CHECK Decision-makers can understand why alternatives differ.

06 Agree actions and decision packs

Record owners, dates and review points for the adopted response. Use the available reports/import/export controls after confirming their exact behaviour in your workspace.

CHECK The plan can be implemented and revisited.

PRIOR REVIEWED SCREEN



Published guidance connects role/country/team scenarios with salary cost assumptions.

04 Build and check the organisation chart

Represent positions and reporting lines clearly, with optional people names.

03 PRACTICAL TASKS

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

BUILD AND CHECK THE ORGANISATION CHART / C-04-01

OPEN SOURCE

Enter position records

Create a chart from explicit reporting relationships.

WHO USES THIS Organisation designer

BEFORE YOU BEGIN

- Unique position identifiers
- Job titles, grades and tracks
- Reporting-line list

WHAT YOU WILL HAVE

- Position list
- Validated reporting chart

CHECK BEFORE YOU FINISH

- Position IDs are unique
- One scope head has no manager
- Grades and layers are not confused

The validator identifies a missing manager Compare Reports to ID with the exact Position ID of the intended manager and correct the reference.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public chart controls and supplied example inspected. No private employee data was entered.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 1–2 OF 6

OPEN SOURCE

Enter position records

01 Open 'Chart creator'

In Organisation Design Studio, use Chart creator. Select Load example to learn the structure or Start a new chart for an authorised local design.

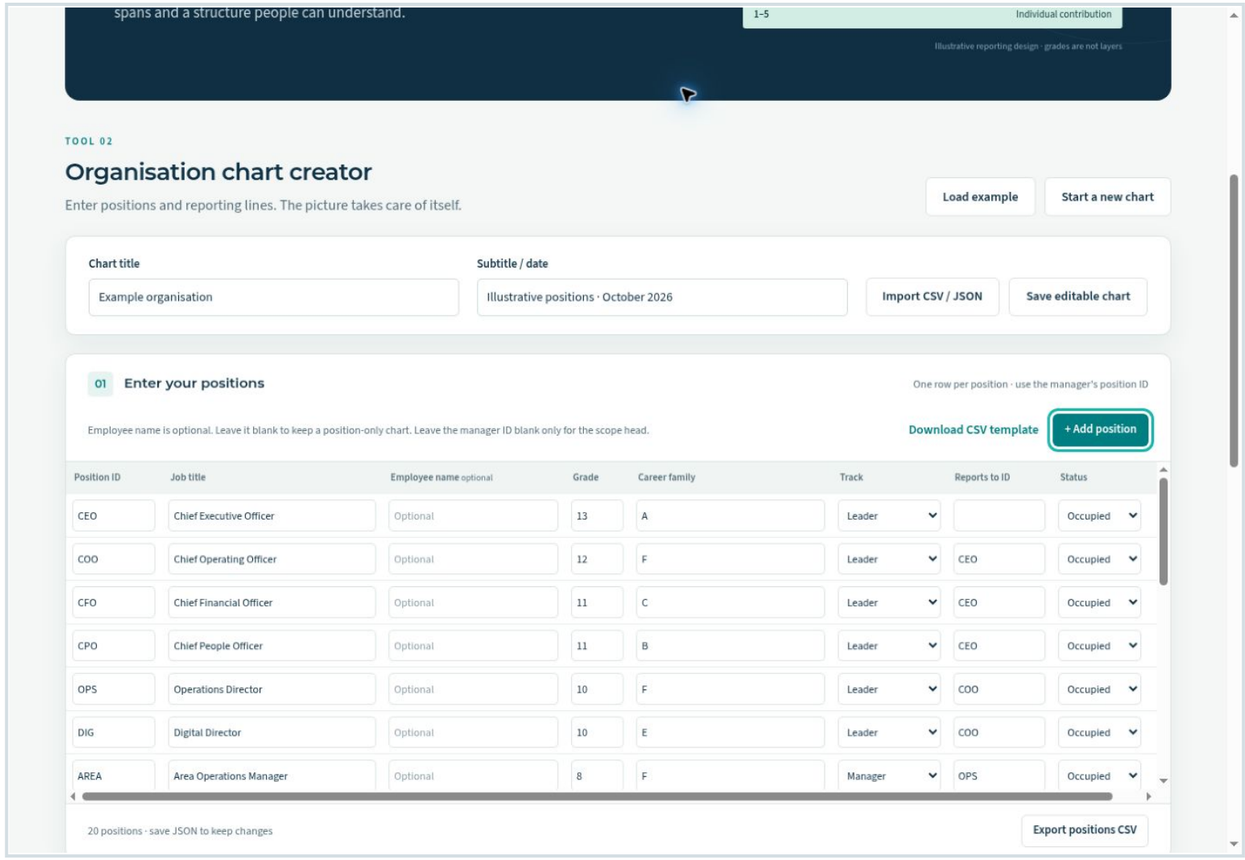
CHECK The chart title and position-entry area are visible.

02 Set the chart identity

Complete 'Chart title' and 'Subtitle / date'. Use a name that identifies the scope and version, especially for proposed structures.

CHECK The displayed chart can be distinguished from other versions.

CURRENT LIVE SCREEN



Current supplied chart position-entry table; all example rows use roles without employee names.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 3–4 OF 6

OPEN SOURCE

Enter position records

03 Open 'Enter your positions'

Use one row per position. Enter Position ID and Job title, then Grade, Career family, Track and Status as appropriate.

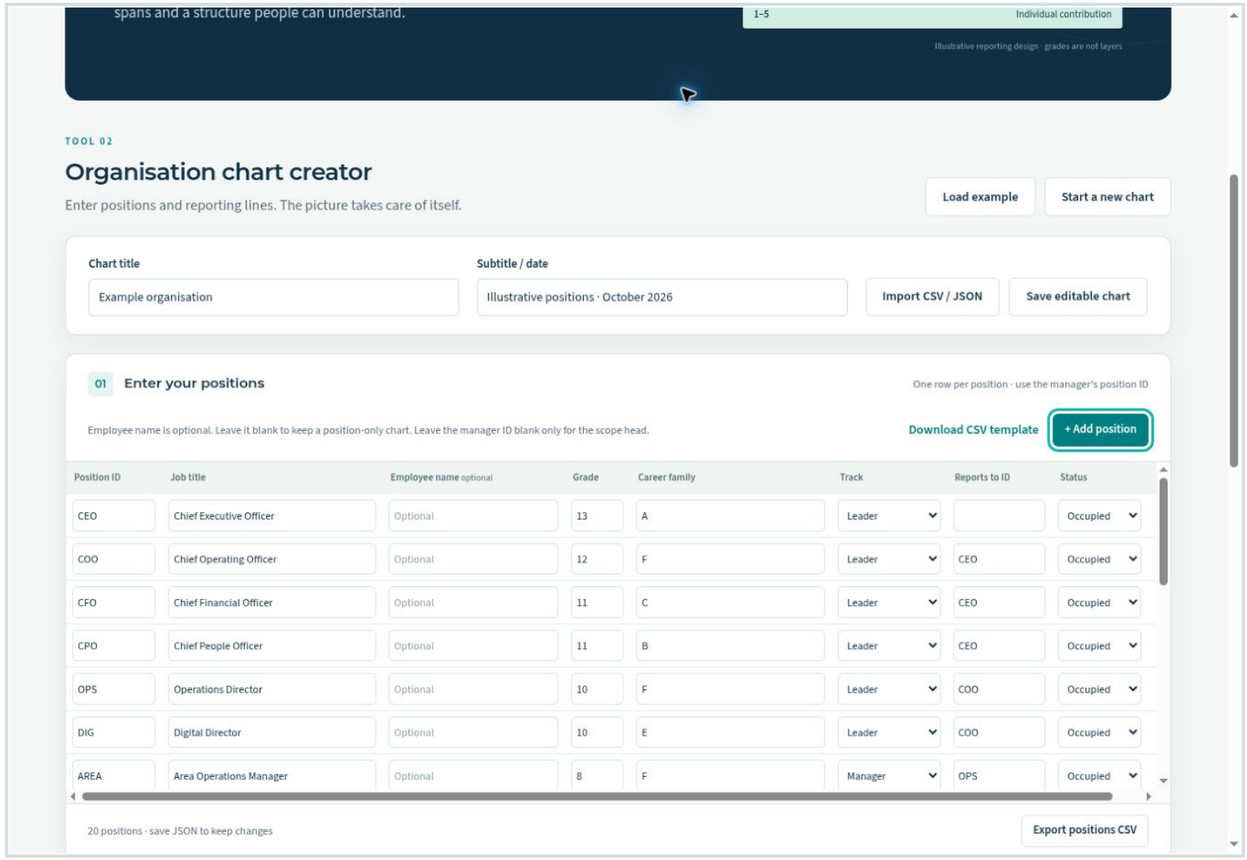
CHECK Every position has a distinct record.

04 Connect the reporting lines

In 'Reports to ID', enter the manager's position ID. Leave it blank only for the scope head. Use the same identifier spelling throughout.

CHECK The chart can calculate reporting relationships from the IDs.

CURRENT LIVE SCREEN



Current supplied chart position-entry table; all example rows use roles without employee names.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 5–5 OF 6

OPEN SOURCE

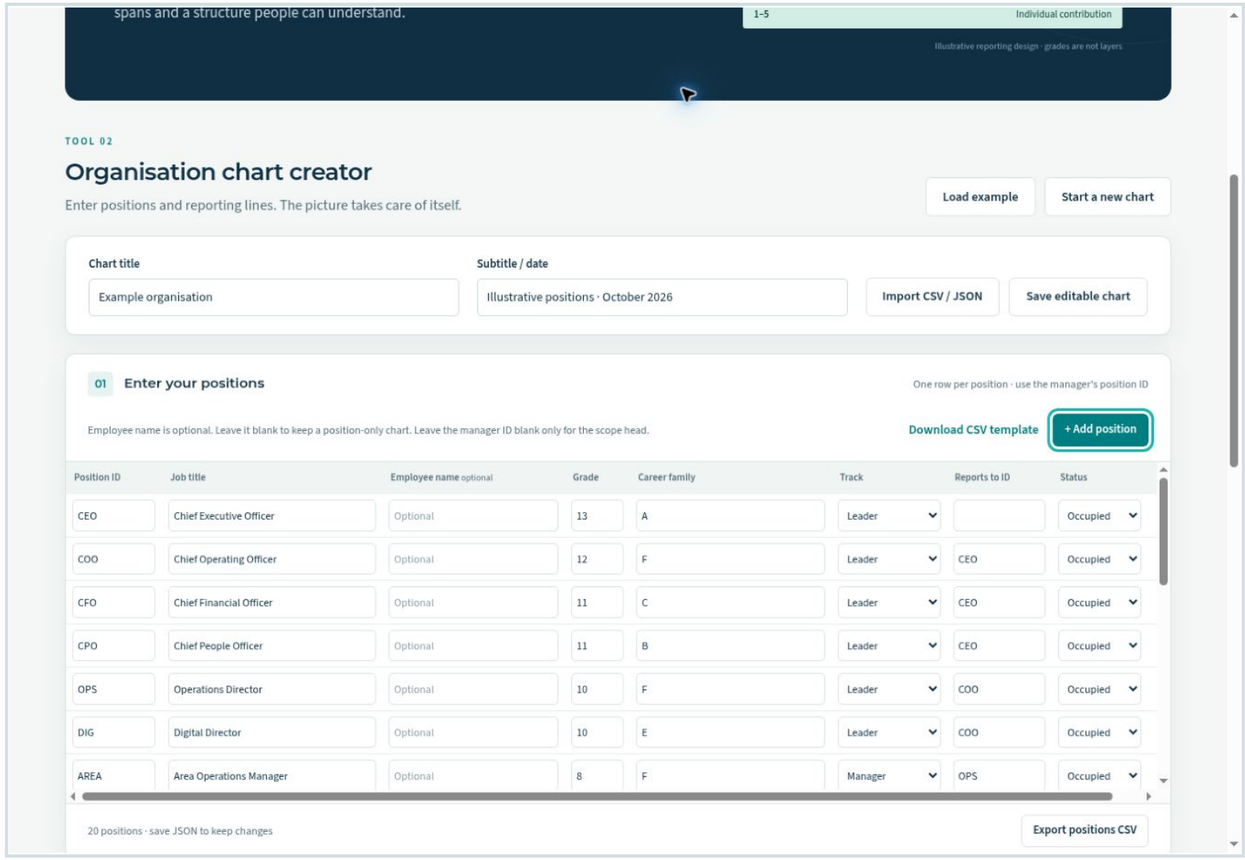
Enter position records

05 Choose whether to name employees

'Employee name' is optional. Leave it blank for a position-only design. Use real names only in an authorised internal context.

CHECK The chart carries only the personal detail needed for its audience.

CURRENT LIVE SCREEN



Current supplied chart position-entry table; all example rows use roles without employee names.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 6–6 OF 6

OPEN SOURCE

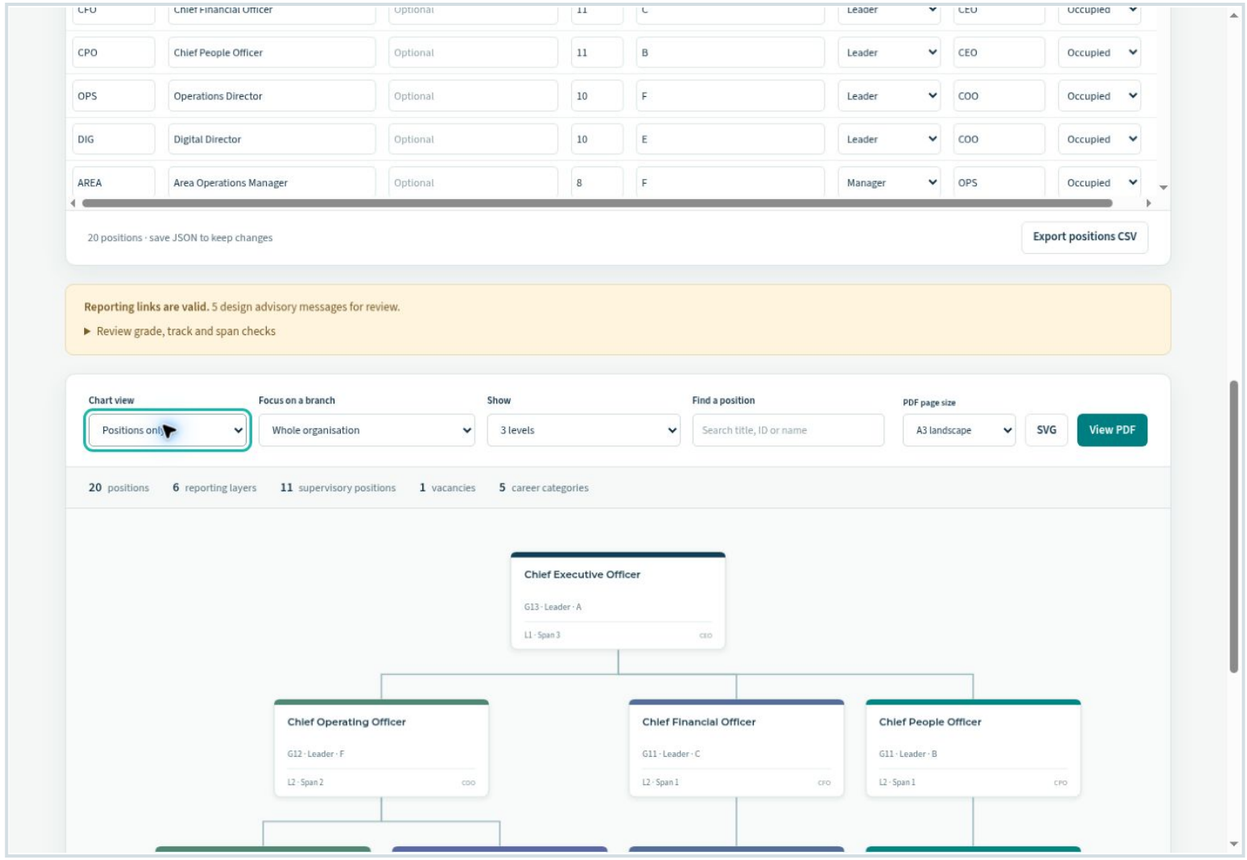
Enter position records

06 Review validation

Resolve missing managers, duplicate IDs and circular reporting. Read grade, track and span advisory messages rather than assuming a valid diagram is an approved design.

CHECK Reporting links are valid and advisories have been considered.

CURRENT LIVE SCREEN



Reporting-link validation and chart controls for the supplied roles-only example.

BUILD AND CHECK THE ORGANISATION CHART / C-04-02

OPEN SOURCE

Choose a readable chart view

Show the right part of a structure for the intended audience.

WHO USES THIS Organisation designer or presenter

BEFORE YOU BEGIN

- Valid position list
- Clear audience and diagram purpose

WHAT YOU WILL HAVE

- Readable branch or overview chart

CHECK BEFORE YOU FINISH

- Displayed count is understood
- Branch and depth match the purpose
- Names are appropriate for the audience

The full chart is too small to read	Export a top-level overview and separate branch views rather than forcing all positions onto one small page.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Chart view and branch filtering were exercised on the supplied synthetic example.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 1–2 OF 5

OPEN SOURCE

Choose a readable chart view

01 Select the name display

Use 'Chart view' to choose Positions only or Positions and people. The choice affects the chart and its output views.

CHECK The display uses the intended level of personal detail.

02 Set the scope of the diagram

Use 'Focus on a branch' for a directorate or team, or Whole organisation for the full scope. Use 'Show' to set the depth.

CHECK The diagram is limited to the relevant branch and levels.

CURRENT LIVE SCREEN

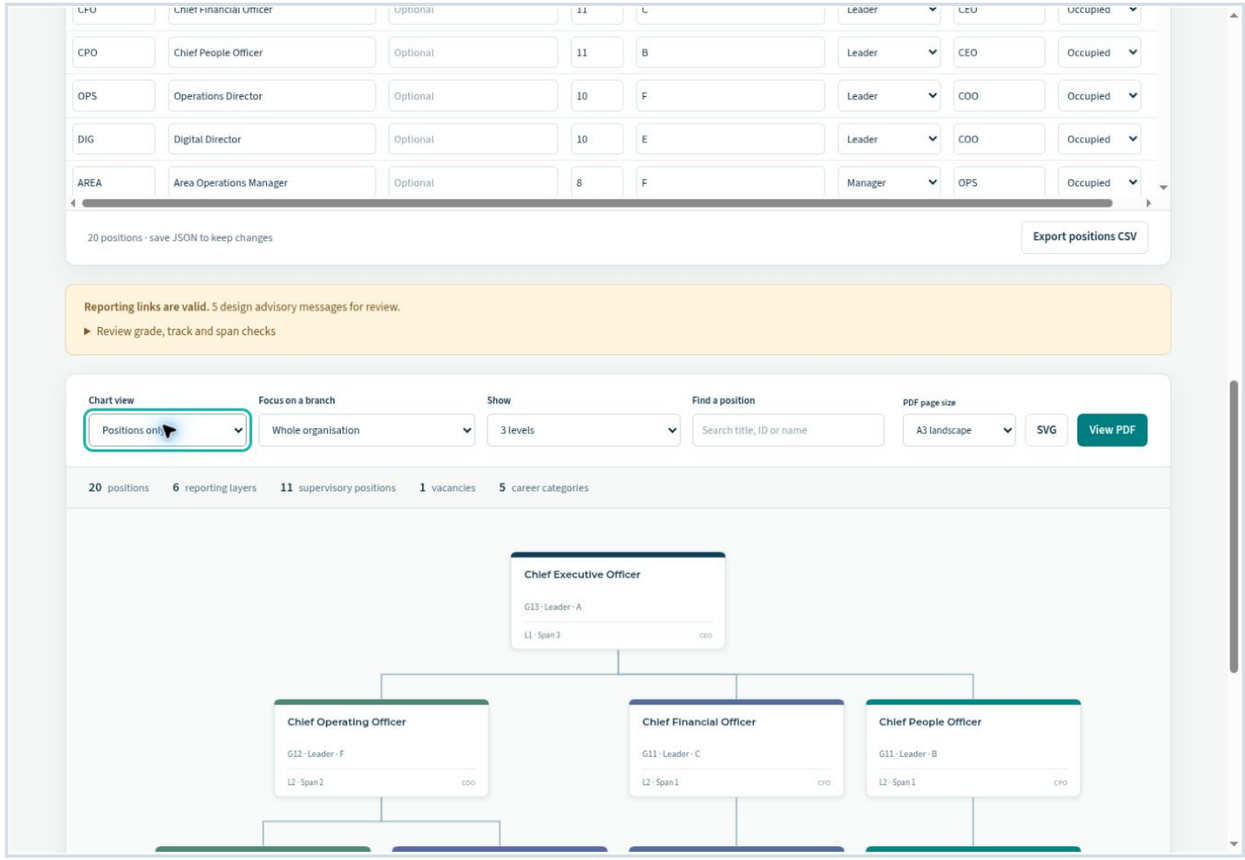


Chart view, branch, depth, position search and output controls for the supplied example.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 3–3 OF 5

OPEN SOURCE

Choose a readable chart view

03 Find a specific position

Use 'Find a position' to locate a role, or select a chart position to focus on that branch. Confirm the role identifier as well as its title.

CHECK The correct part of the reporting structure is in view.

CURRENT LIVE SCREEN

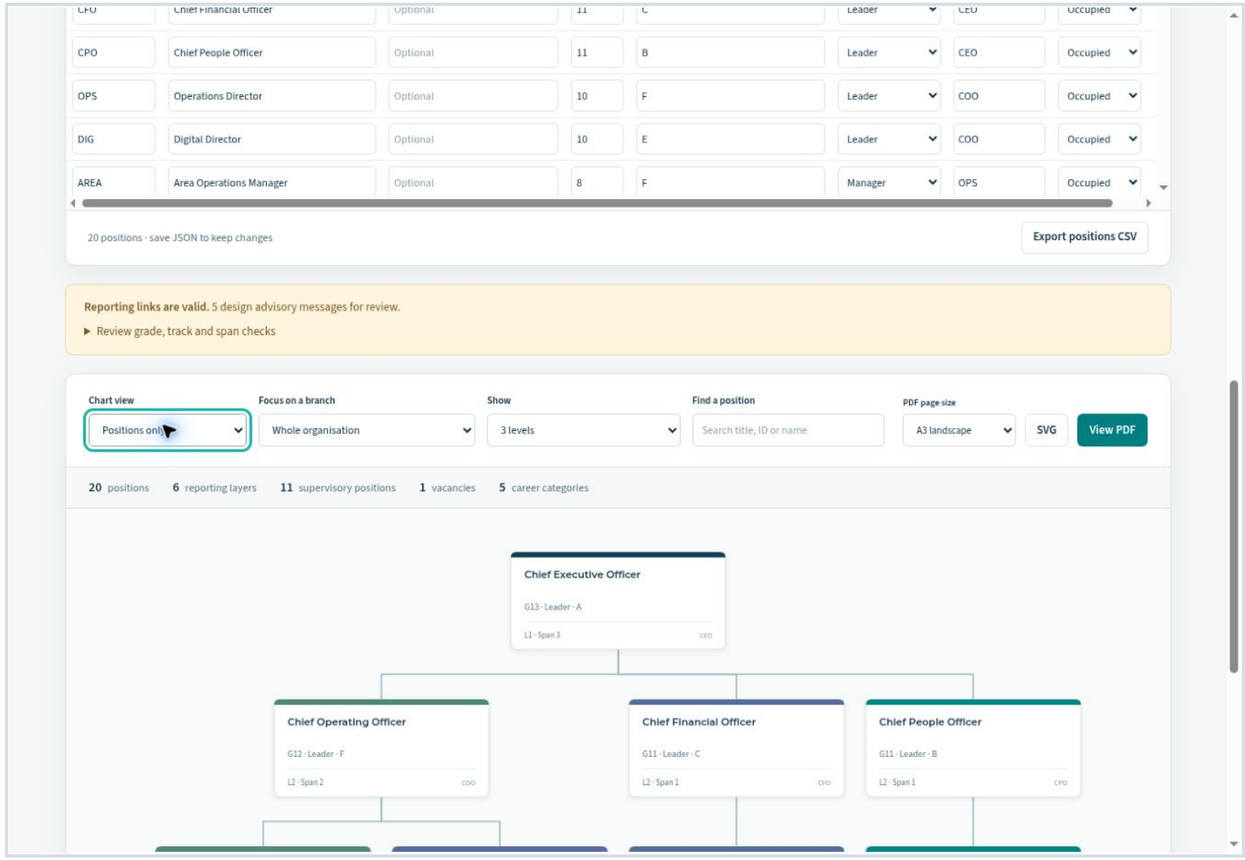


Chart view, branch, depth, position search and output controls for the supplied example.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 4–5 OF 5

OPEN SOURCE

Choose a readable chart view

04 Fit and inspect the layout

Use 'Fit view', Zoom out or Zoom in. Read the displayed count, such as 8 of 20 positions shown, before interpreting the picture as complete.

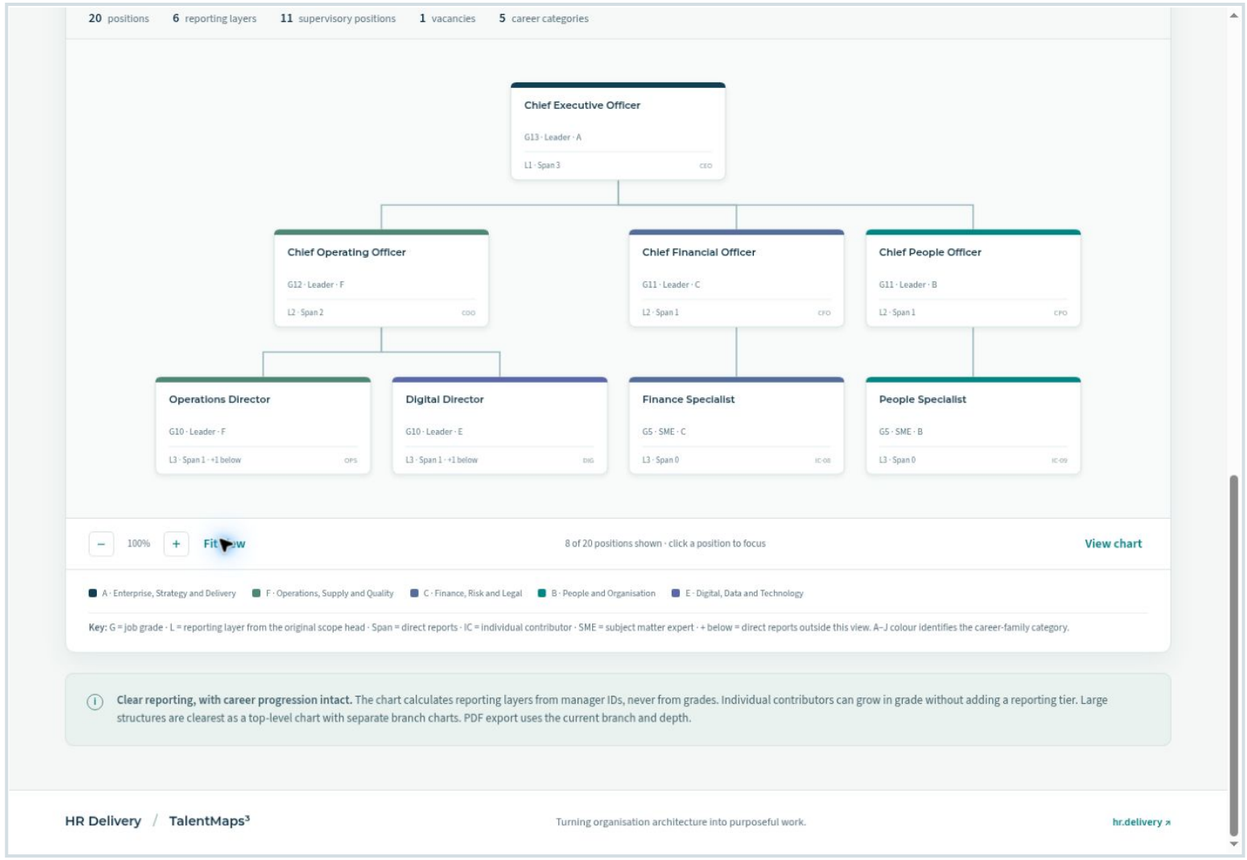
CHECK The selected view is readable and its coverage is understood.

05 Read the legend

Use G for job grade, L for reporting layer and Span for direct reports. A–J colours identify career-family sections.

CHECK The audience can interpret the chart correctly.

CURRENT LIVE SCREEN



Whole-organisation roles-only example, Fit view and legend; 8 of 20 positions are shown.

BUILD AND CHECK THE ORGANISATION CHART / C-04-03

OPEN SOURCE

Save and export chart work

Keep an editable version and a suitable sharing view.

WHO USES THIS Organisation designer

BEFORE YOU BEGIN

- Reviewed position list
- Approved file-storage location
- Intended output size and audience

WHAT YOU WILL HAVE

- Editable JSON
- Position CSV
- SVG or PDF view where permitted

CHECK BEFORE YOU FINISH

- Editable file is retained
- Import replacement is understood
- Export shows the intended branch and names

Closing the tab loses unsaved work	Reopen the last saved JSON. In future, save the editable chart before reloading or closing the public tool.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Controls and published persistence guidance inspected; file exports were not exercised in this review.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 1–2 OF 5

OPEN SOURCE

Save and export chart work

01 Use 'Save editable chart'

Save the editable JSON before leaving a public chart session. The published guidance says this public tool keeps work in the current tab's memory.

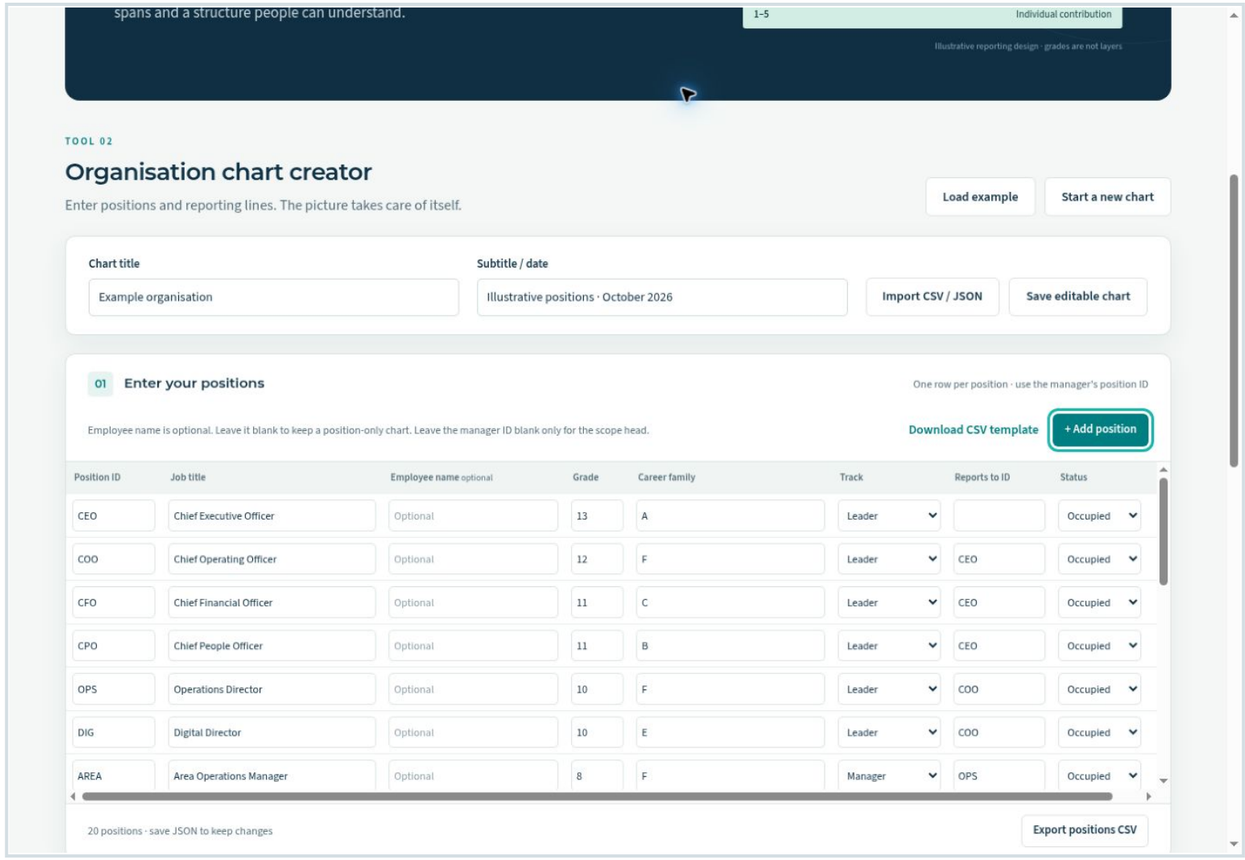
CHECK You have an editable file for continuing later.

02 Use CSV for rows

'Download CSV template' supplies the structure; 'Export positions CSV' carries the entered rows. Remember that CSV may include any employee names you entered.

CHECK The tabular file can be reviewed in the intended spreadsheet workflow.

CURRENT LIVE SCREEN



Position table with Save editable chart, Import CSV / JSON, Download CSV template and Export positions CSV.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 3–3 OF 5

OPEN SOURCE

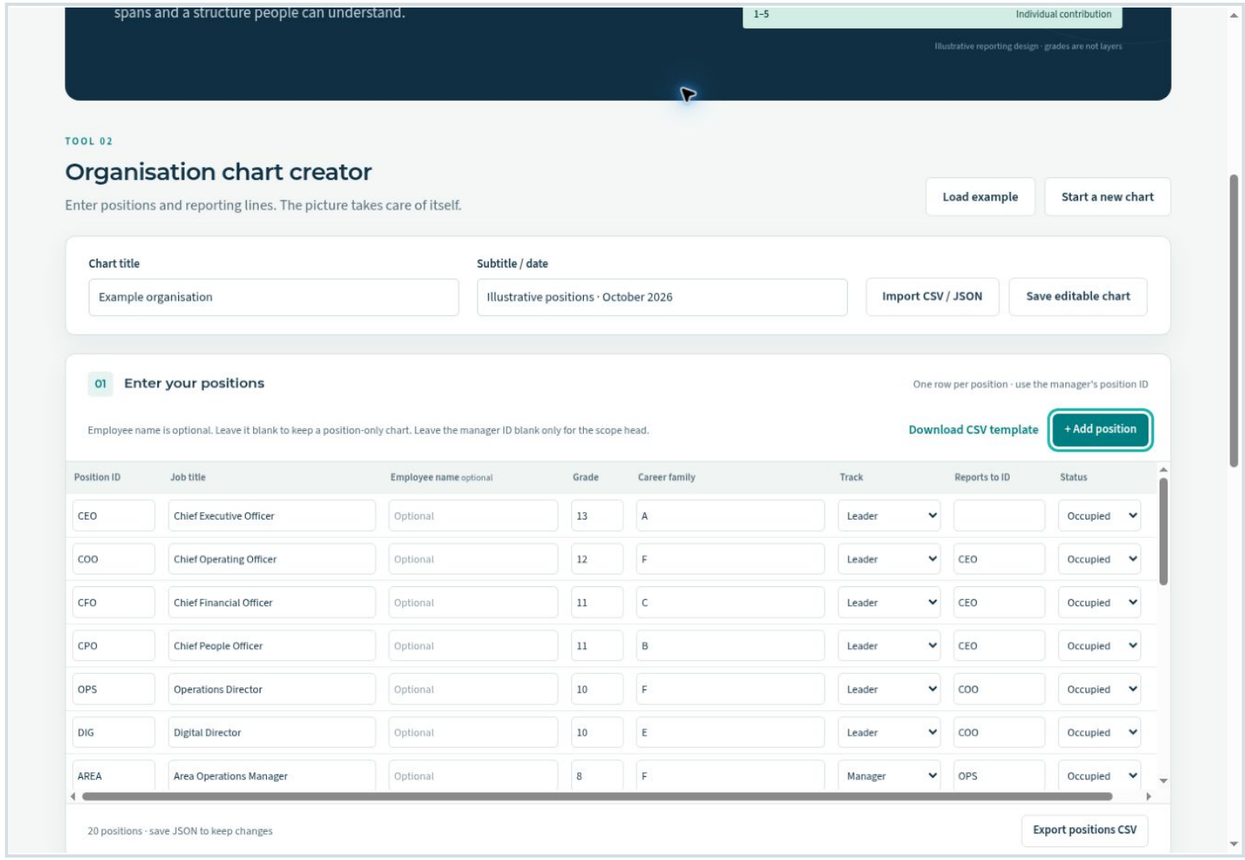
Save and export chart work

03 Import only a checked file

Use 'Import CSV / JSON' after confirming the file and current unsaved work. The published guidance says import replaces the current chart after confirmation.

CHECK The imported structure is validated before further use.

CURRENT LIVE SCREEN



Position table with Save editable chart, Import CSV / JSON, Download CSV template and Export positions CSV.

BUILD AND CHECK THE ORGANISATION CHART / STEPS 4–5 OF 5

OPEN SOURCE

Save and export chart work

04 Select the output view and size

Set the branch, depth and Chart view first. Choose the PDF page size, such as A3, A2 or A1 landscape, according to readability.

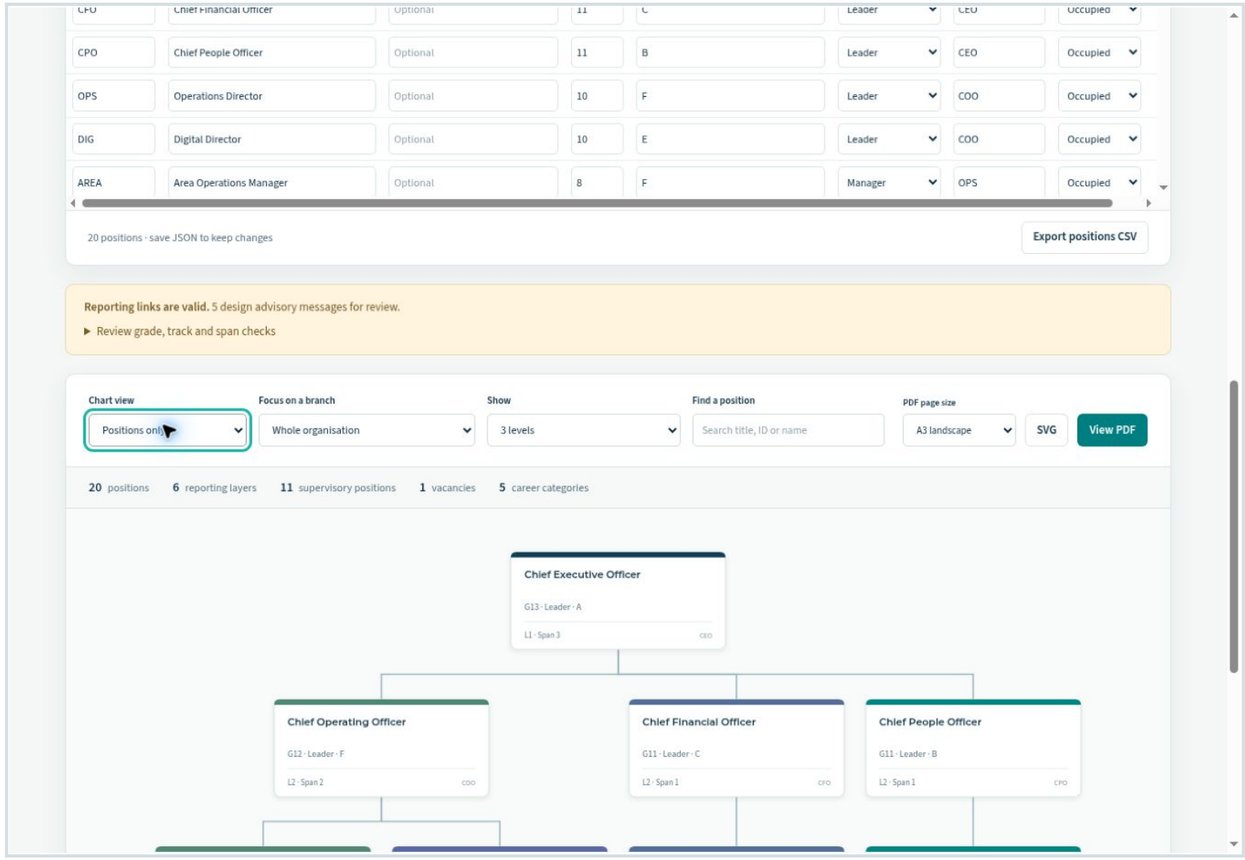
CHECK The intended view is ready for export.

05 Use 'SVG' or 'View PDF'

Inspect the resulting output and confirm labels, scope and any personal names before sharing. Keep the JSON as the editing source.

CHECK The shared file is readable and matches the intended view.

CURRENT LIVE SCREEN



PDF page size, SVG and View PDF controls alongside the branch and depth settings.

05 Test layers and spans

Use explicit capacity assumptions to compare structure hypotheses.

02 PRACTICAL TASKS

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

TEST LAYERS AND SPANS / C-05-01

OPEN SOURCE

Model a reporting structure

Compare feasible depths for a clearly defined organisational boundary.

WHO USES THIS Organisation designer

BEFORE YOU BEGIN

- Scope and total positions
- Work-pattern and complexity assumptions
- Manager capacity information

WHAT YOU WILL HAVE

- Structure hypothesis
- Compared depths and design signals

CHECK BEFORE YOU FINISH

- All positions are within the same scope
- Management time assumptions are credible
- Headcount reconciles exactly

A proposed depth exceeds span ceilings — Review the scope, capacity assumptions and alternative depths; do not force a shallow structure merely to hit a target.

06 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

The supplied 10,000-position example was calculated; it is a planning heuristic, not an optimum or staffing prescription.

TEST LAYERS AND SPANS / STEPS 1–2 OF 6

OPEN SOURCE

Model a reporting structure

01 Open 'Layers & spans'

Use the modeller and set Organisation / area name. Choose Scope as Organisation, Directorate or Team and include the scope head in Total positions.

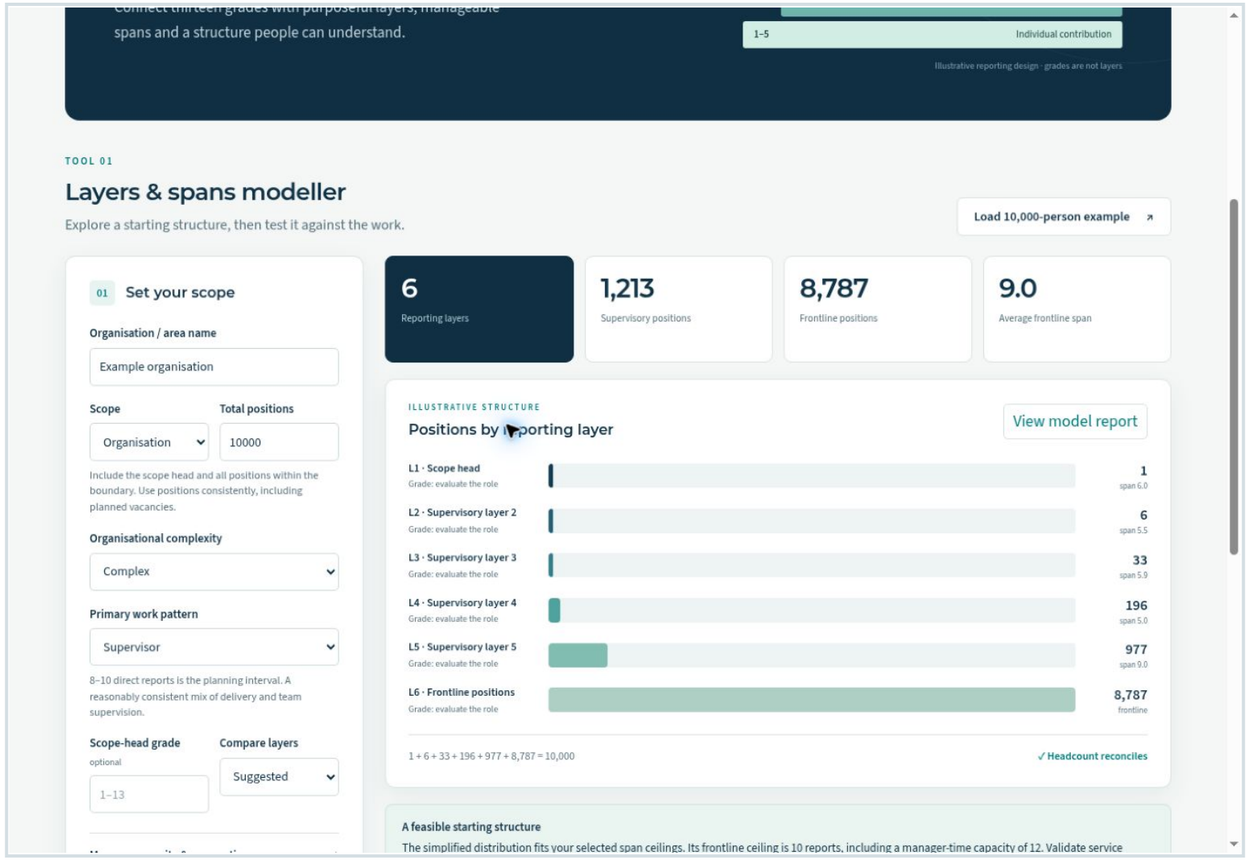
CHECK The calculation has a defined boundary and position count.

02 Select complexity and work pattern

Choose 'Organisational complexity' and 'Primary work pattern'. The intervals are design prompts, not minimum staffing rules.

CHECK The model reflects the dominant work context.

PRIOR REVIEWED SCREEN



Prior reviewed depth comparison and result view.

TEST LAYERS AND SPANS / STEPS 3–4 OF 6

OPEN SOURCE

Model a reporting structure

03 Choose how to compare layers

Use 'Compare layers' for Suggested or a specific depth from one to seven. Scope-head grade is optional and does not create a reporting layer.

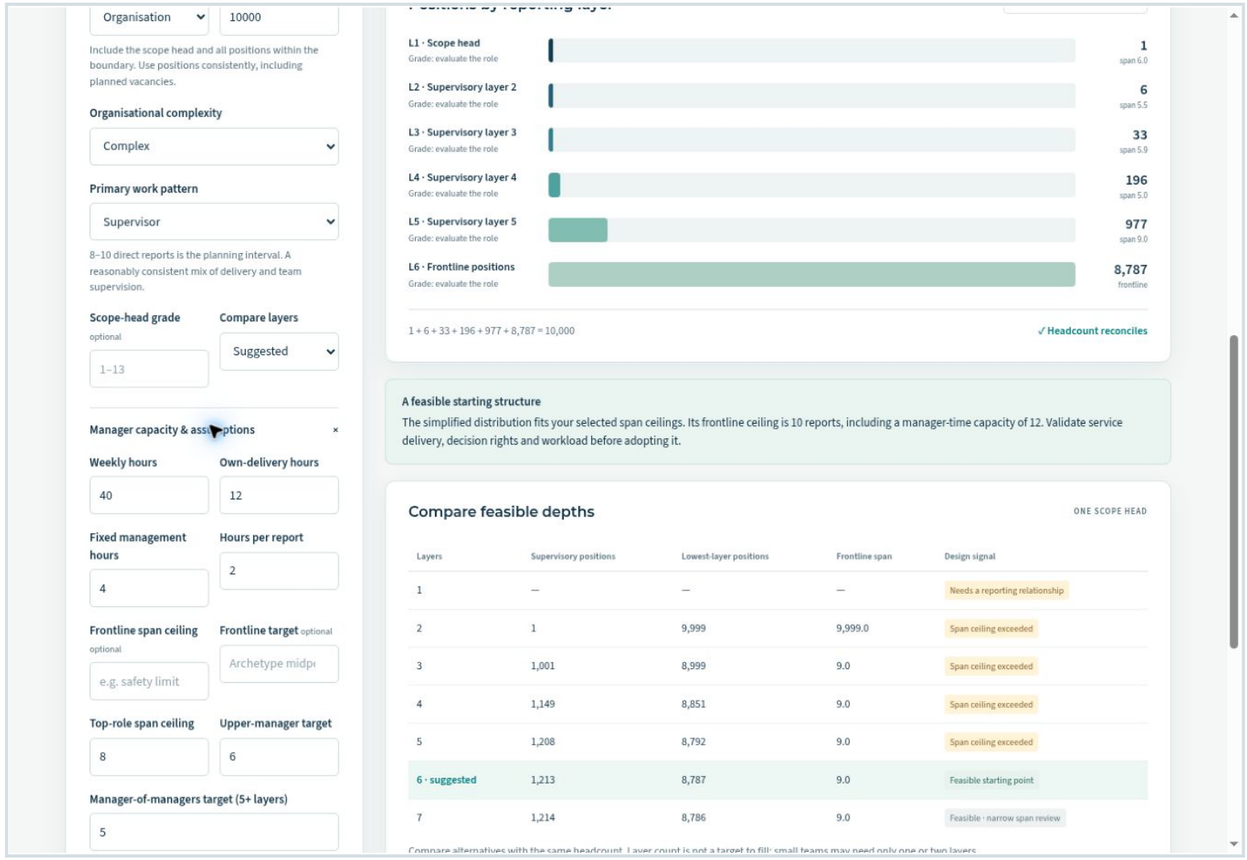
CHECK Depth is considered separately from evaluated grade.

04 Review manager capacity

Expand 'Manager capacity & assumptions'. Check weekly hours, own-delivery hours, fixed management hours and hours per report before accepting a span assumption.

CHECK The manager has a plausible time basis for supervising the team.

CURRENT LIVE SCREEN



Current manager capacity and span controls.

TEST LAYERS AND SPANS / STEPS 5–6 OF 6

OPEN SOURCE

Model a reporting structure

05 Select 'Model the structure'

Read Reporting layers, Supervisory positions, Frontline positions and Average frontline span, then check the headcount reconciliation.

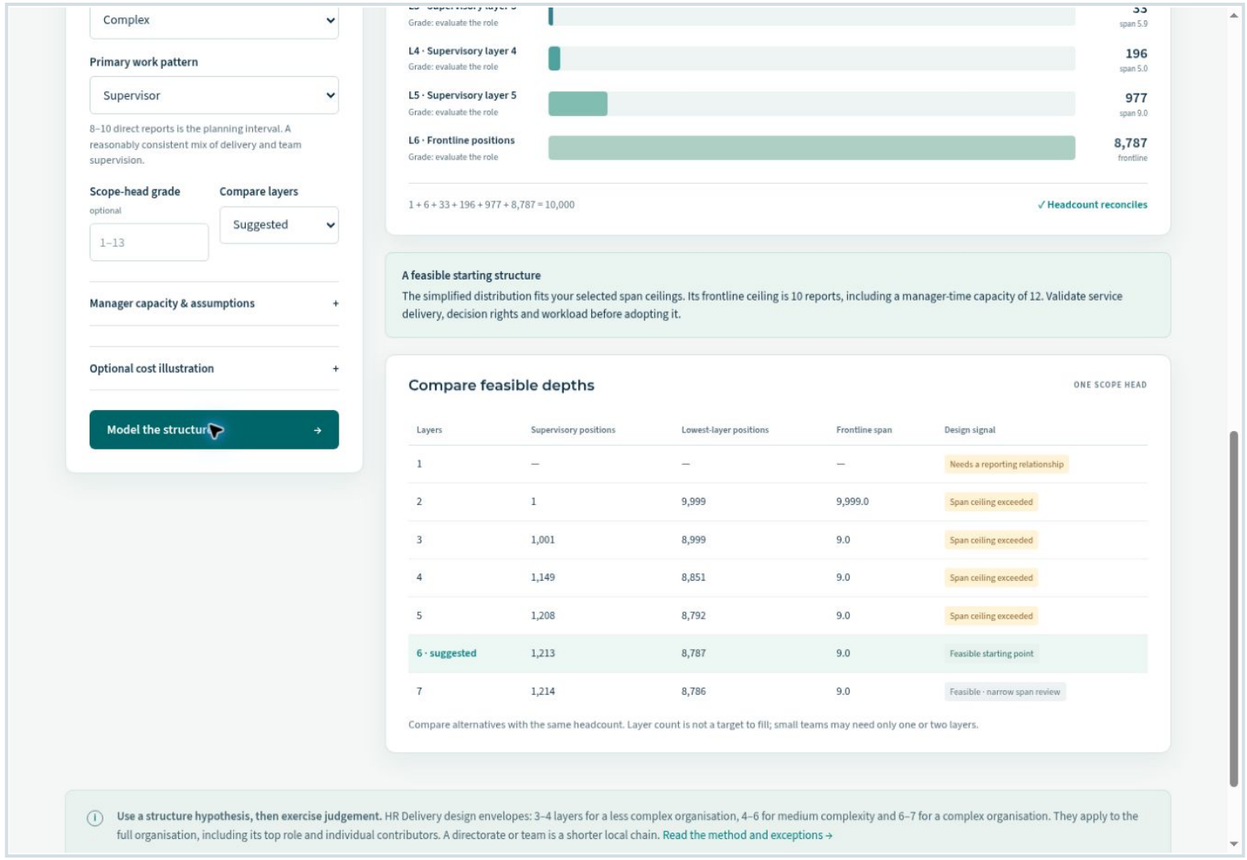
CHECK All modelled positions reconcile to the stated total.

06 Compare alternatives

Read Compare feasible depths and each design signal. Treat the result as a starting hypothesis to validate against service, decisions and workload.

CHECK A structure option is supported by explicit assumptions.

CURRENT LIVE SCREEN



Current 10,000-position worked model with six layers and reconciled totals.

TEST LAYERS AND SPANS / C-05-02

OPEN SOURCE

Review capacity, cost and design exceptions

Explain why a structure is practical before adopting it.

WHO USES THIS Organisation design lead and finance partner

BEFORE YOU BEGIN

- Modelled alternatives
- Known management workload
- Agreed cost basis if used

WHAT YOU WILL HAVE

- Documented assumptions and exceptions
- Model review/report view

CHECK BEFORE YOU FINISH

- Grade does not drive layer count
- Cost inputs are consistent
- Exceptions have a reason and review date

The model is being interpreted as a headcount reduction instruction	Return to the service and decision requirements. Review feasibility and implementation implications with the responsible leaders.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Capacity controls and model results observed; optional cost and report export were not transaction-tested.

TEST LAYERS AND SPANS / STEPS 1–2 OF 5

OPEN SOURCE

Review capacity, cost and design exceptions

01 Inspect manager-time assumptions

Calculate the time left after own delivery and fixed management work. Review the hours per report and any mandatory or contextual span ceiling.

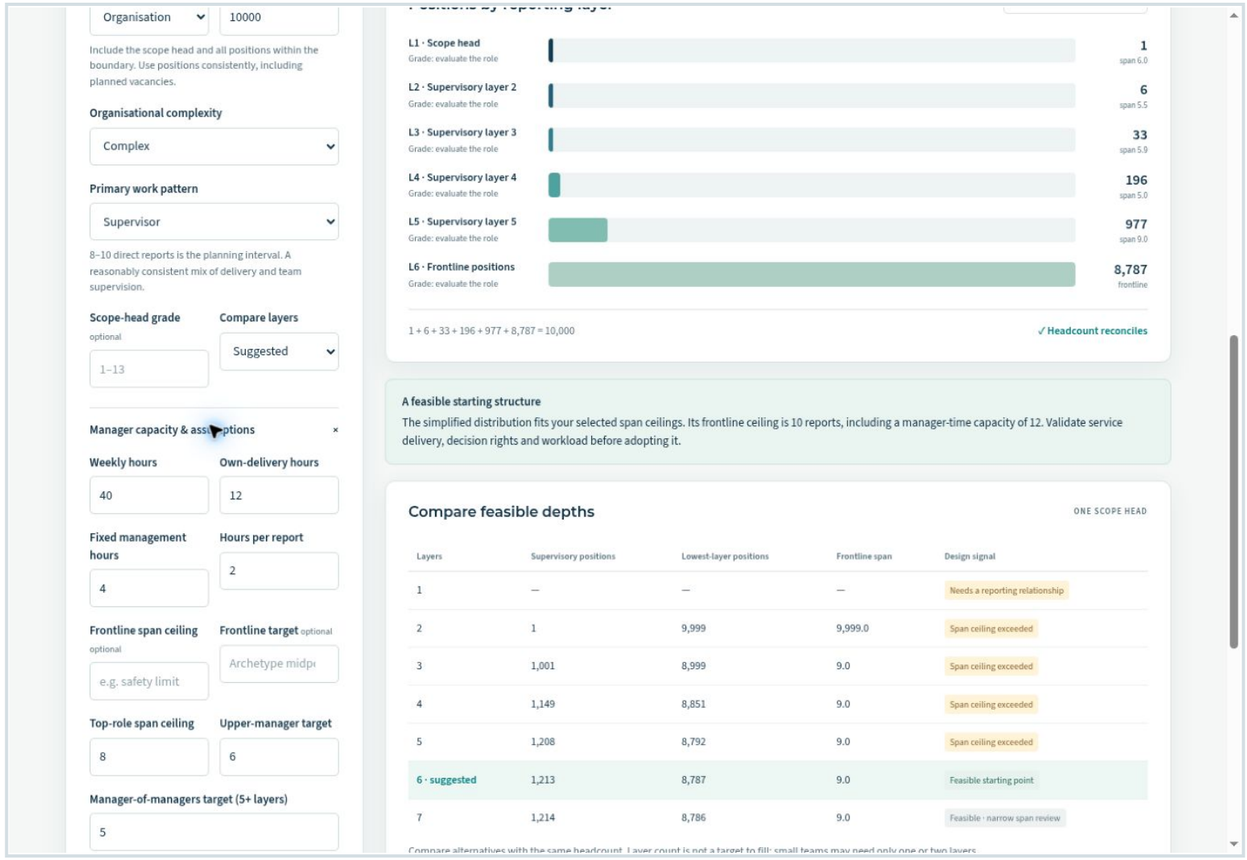
CHECK The span has a realistic management-capacity basis.

02 Check higher-layer targets

Review top-role span ceiling, upper-manager target and manager-of-managers target. A frontline ceiling does not automatically apply to every higher tier.

CHECK Each relevant tier has an appropriate assumption.

CURRENT LIVE SCREEN



Time, span and grade assumptions in the current modeller.

TEST LAYERS AND SPANS / STEPS 3–4 OF 5

OPEN SOURCE

Review capacity, cost and design exceptions

03 Review known grades separately

Use the optional grade labels for already evaluated roles. Keep grade, reporting distance and career progression distinct.

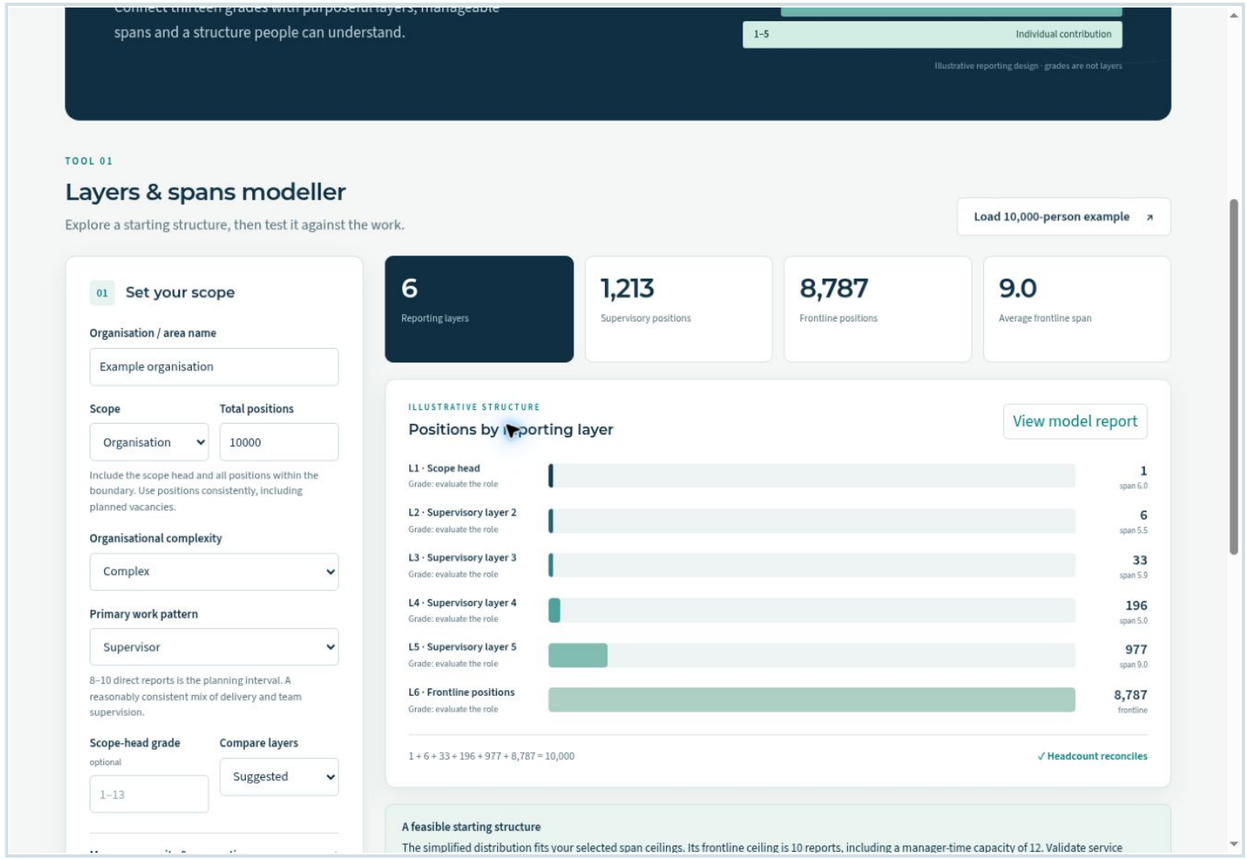
CHECK The model does not create layers merely to fill grades.

04 Use optional cost illustration carefully

If you enter cost assumptions, confirm the currency, population, loaded-cost basis and timing. Treat an illustration as a scenario, not a promised saving.

CHECK Financial implications are explicitly qualified.

PRIOR REVIEWED SCREEN



Prior reviewed depth comparison and result view.

TEST LAYERS AND SPANS / STEPS 5–5 OF 5

OPEN SOURCE

Review capacity, cost and design exceptions

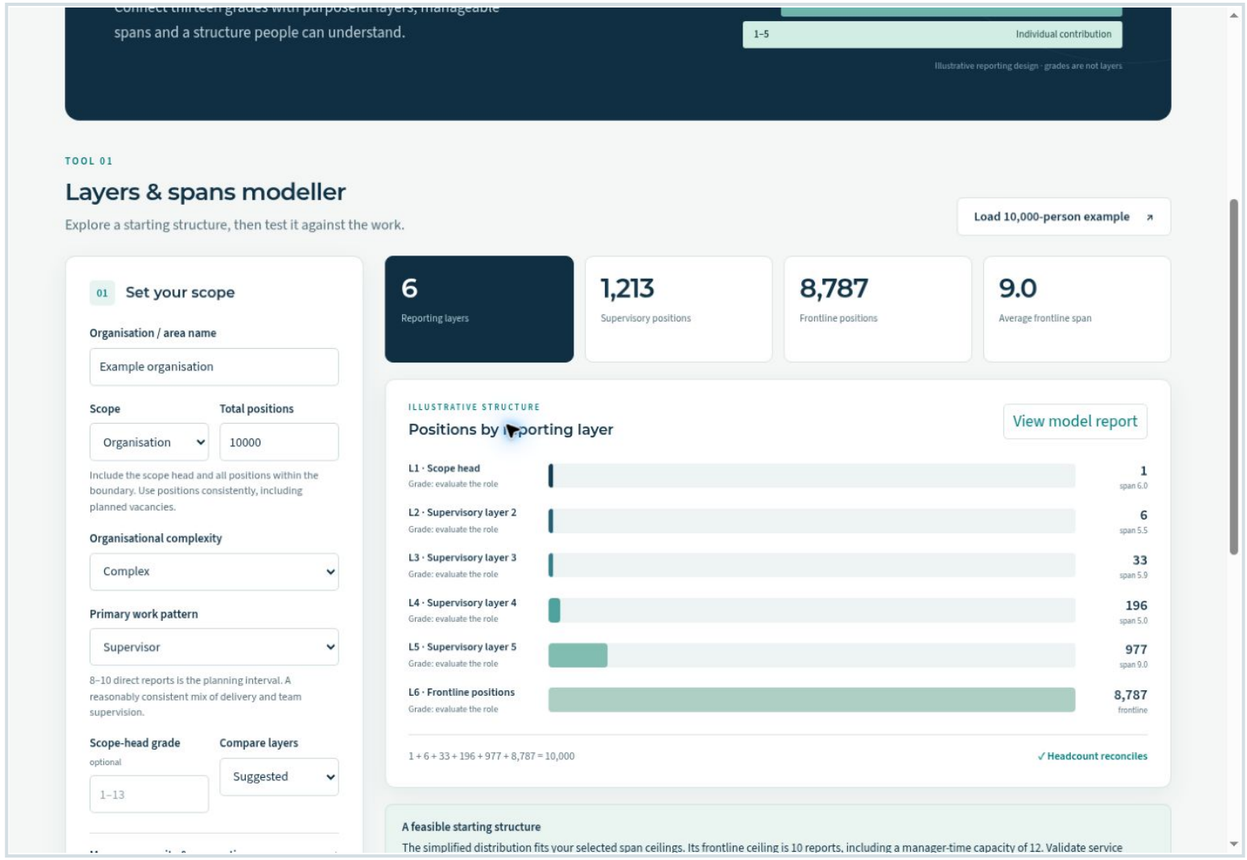
05

Record exceptions and export the model view

Use the displayed 'View model report' route and retain the chosen assumptions, exceptions, owners and review date through the available output process.

CHECK The design can be explained and reviewed after implementation.

PRIOR REVIEWED SCREEN



Prior reviewed depth comparison and result view.

06

Connect people and development

Use the adopted role architecture to maintain useful people and development records.

04 PRACTICAL TASKS

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

CONNECT PEOPLE AND DEVELOPMENT / C-06-01

OPEN SOURCE

Prepare Employee ERP records and imports

Connect employee records to approved roles and organisation structure.

WHO USES THIS Authorised people-data administrator

BEFORE YOU BEGIN

- Named-account access
- Approved employee and position sources
- Current role and organisation references

WHAT YOU WILL HAVE

- Prepared employee/position source data
- Reviewed assignments and people-report scope

CHECK BEFORE YOU FINISH

- Named account is authorised
- Identifiers and dates reconcile
- Report audience is appropriate

An employee cannot be matched to the expected role	Check the employee identifier, position/job reference and effective dates before altering either record.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private ERP screens, imports and people-report generation were not inspected.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 1–2 OF 5

OPEN SOURCE

Prepare Employee ERP records and imports

01 Use the named-account route

The TalentMaps entry includes 'Employee ERP — named account access'. Confirm the account and permitted organisation before viewing employee information.

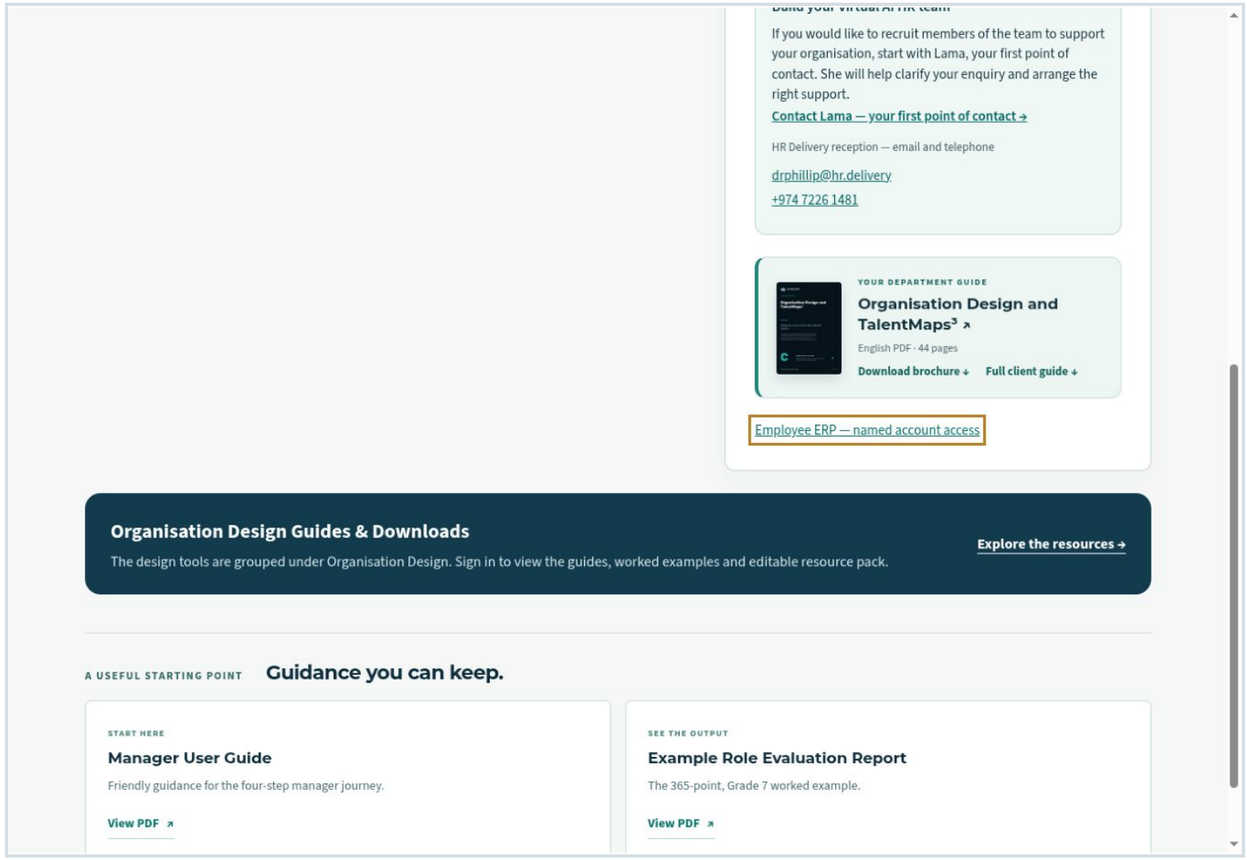
CHECK Access is appropriate to the private people records.

02 Prepare consistent source records

Check employee identifiers, employment history, job assignment and organisation references. Keep people, jobs and reporting relationships distinct.

CHECK Source records can be matched without ambiguity.

CURRENT LIVE SCREEN



Employee ERP named-account access below the TalentMaps³ department sign-in.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 3–4 OF 5

OPEN SOURCE

Prepare Employee ERP records and imports

03 Use the supported import structure

Confirm the actual template and validation rules with the administrator before uploading. Reconcile required fields and keep an approved source copy.

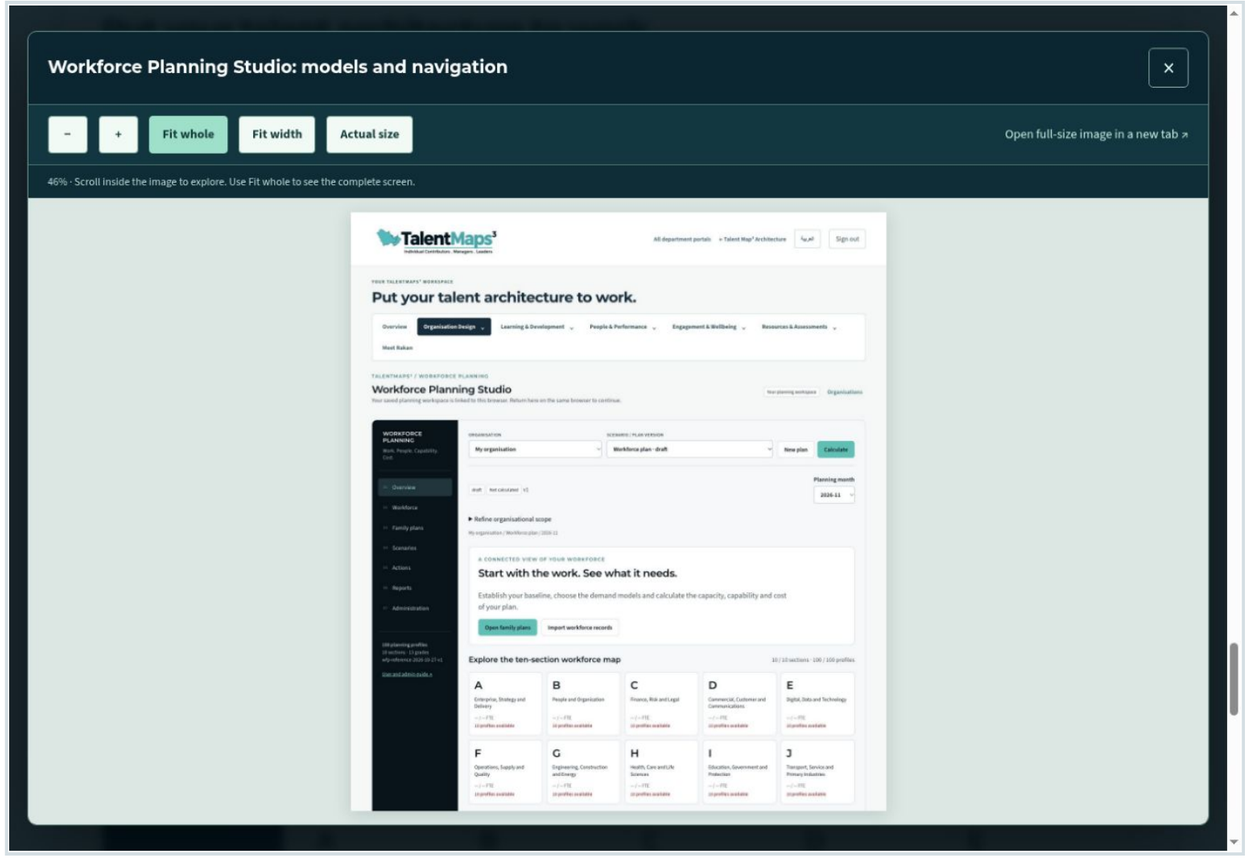
CHECK The import can be checked before affecting private records.

04 Review assignments and history

Confirm that the current assignment matches the approved role and structure while earlier employment history remains correctly dated.

CHECK The record tells a coherent employment and assignment story.

PUBLISHED DEMONSTRATION



Published TalentMaps³ demonstration; shows the connected planning workspace, not an authenticated client session.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 5–5 OF 5

OPEN SOURCE

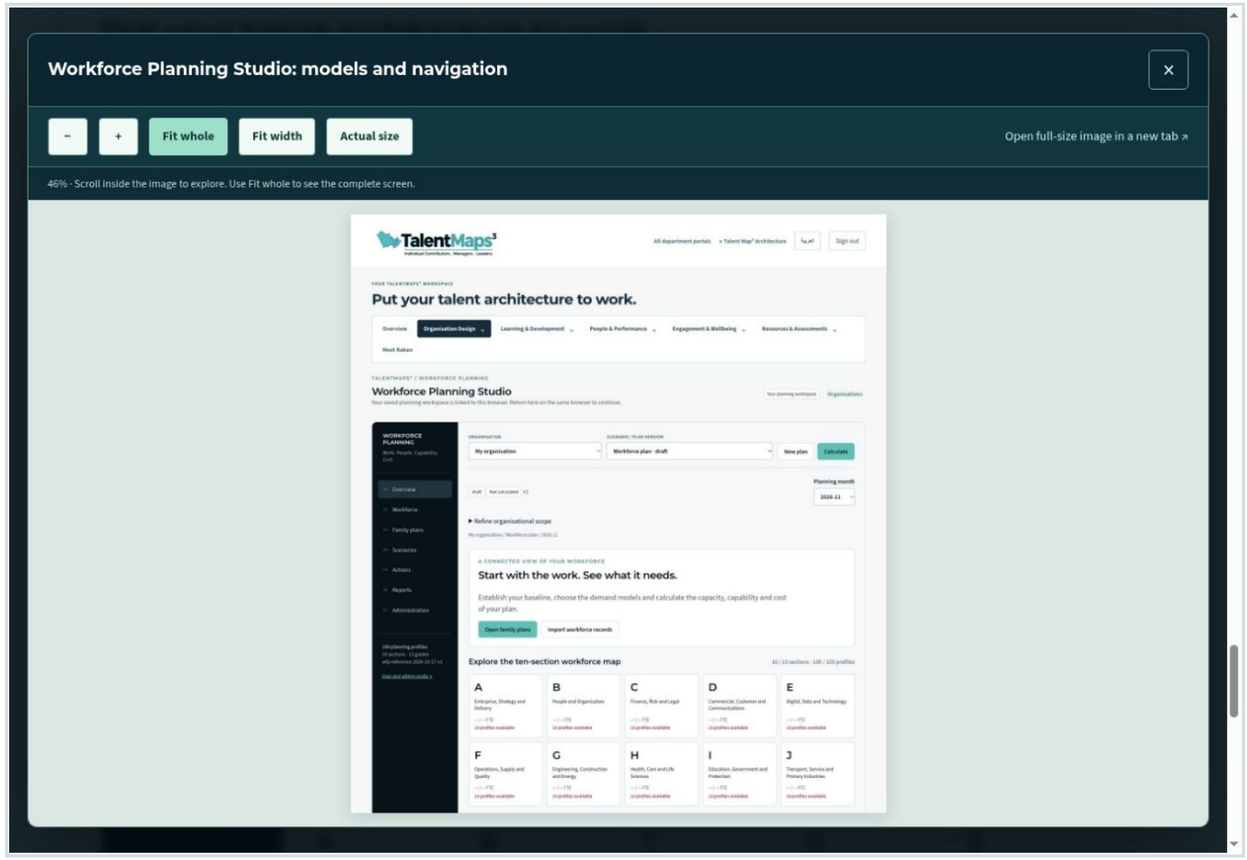
Prepare Employee ERP records and imports

05 Link development and review people reports

Associate authorised development activity with the relevant role requirement, then check people-report scope and counts before release.

CHECK Reports can explain current roles and development activity.

PUBLISHED DEMONSTRATION



Published TalentMaps³ demonstration; shows the connected planning workspace, not an authenticated client session.

CONNECT PEOPLE AND DEVELOPMENT / C-06-02

OPEN SOURCE

Prepare training-needs and succession reviews

Use role requirements to focus capability and future-readiness discussions.

WHO USES THIS HR development or succession lead

BEFORE YOU BEGIN

- Approved role requirements
- Relevant evidence of current capability
- Agreed review population and purpose

WHAT YOU WILL HAVE

- Prioritised training needs
- Succession development actions

CHECK BEFORE YOU FINISH

- Requirements are approved
- Evidence supports each gap
- Readiness is reviewed by responsible people

A generic training course is assigned to every gap	Reconsider the requirement and choose practice, coaching, experience or learning that addresses the actual need.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Private TNA and succession fields, scoring and saved reports were not inspected.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 1–2 OF 5

OPEN SOURCE

Prepare training-needs and succession reviews

01 Define the review population

Choose the roles, teams or critical positions and the purpose of the review. Keep training needs separate from an unapproved promotion or succession decision.

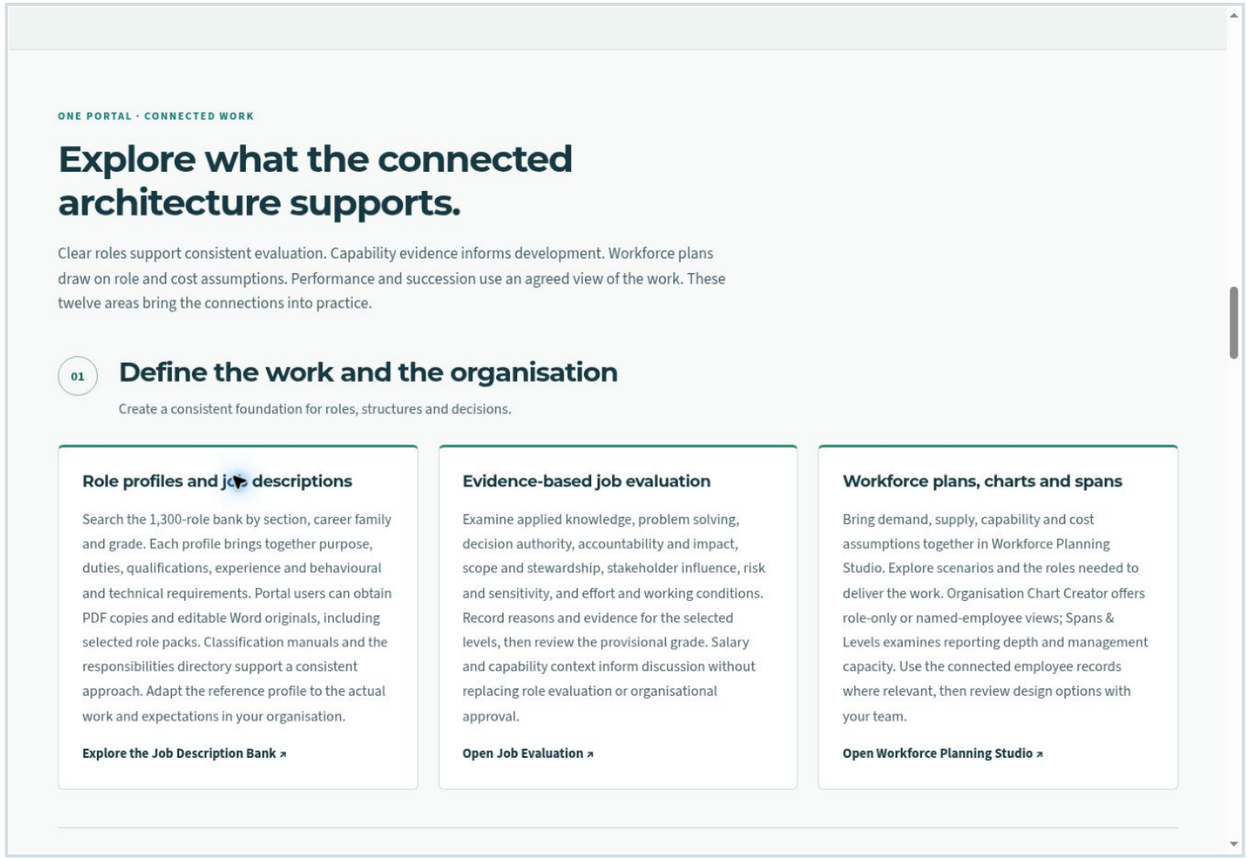
CHECK The exercise has a clear scope.

02 Compare requirements with evidence

Use behavioural and technical role requirements to organise current evidence. Identify specific gaps rather than relying on a broad judgement of potential.

CHECK Each need relates to an explicit work requirement.

PRIOR REVIEWED SCREEN



Published TalentMaps guidance on role profiles and connected HR processes.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 3–4 OF 5

OPEN SOURCE

Prepare training-needs and succession reviews

03 Use the relevant portal tool

Enter the described Training Needs Analysis or Succession Planning workspace after confirming its available controls and access. Public example-report routes show the intended outputs.

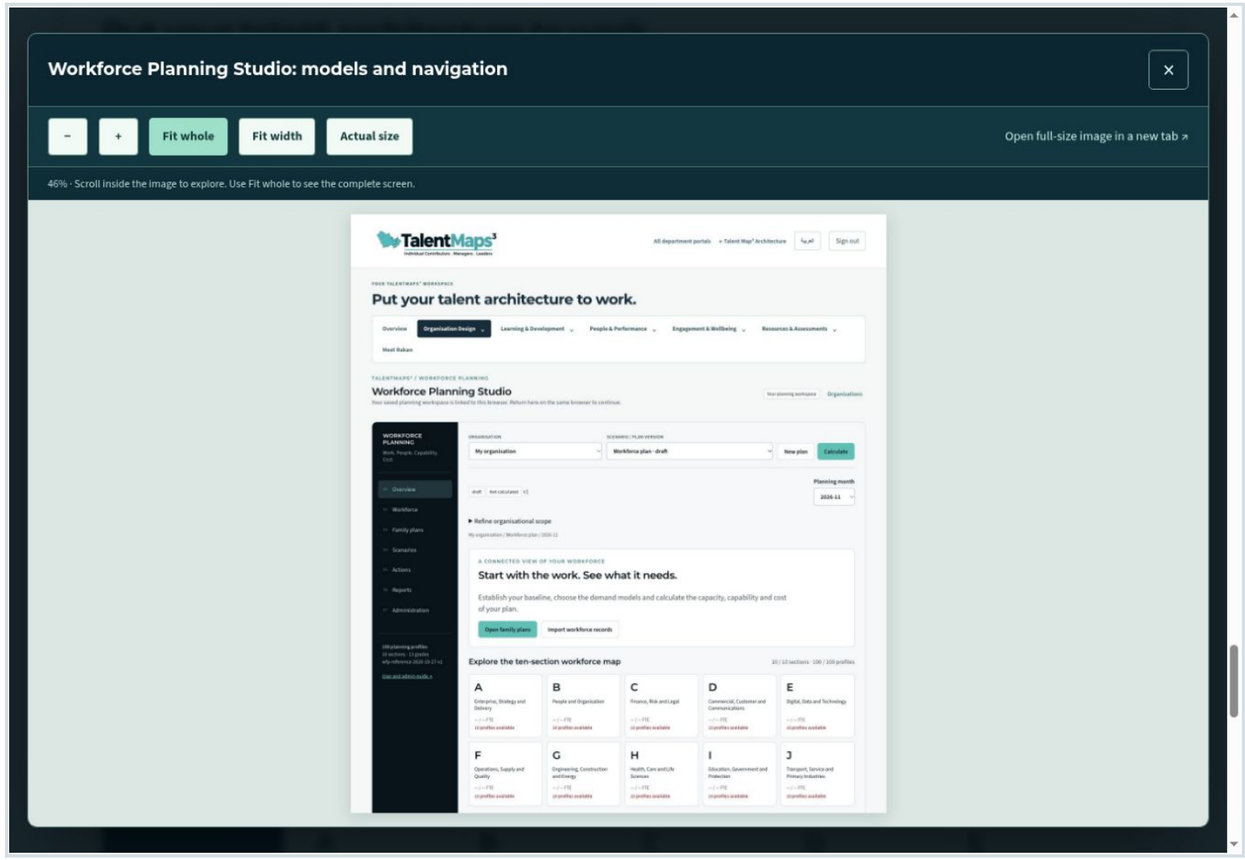
CHECK The selected process matches the review purpose.

04 Prioritise and plan action

For training needs, group common gaps and choose appropriate development. For succession, identify readiness evidence, gaps, experience and review dates for critical roles.

CHECK The review leads to a focused development response.

PUBLISHED DEMONSTRATION



Published TalentMaps³ demonstration; shows the connected planning workspace, not an authenticated client session.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 5–5 OF 5

OPEN SOURCE

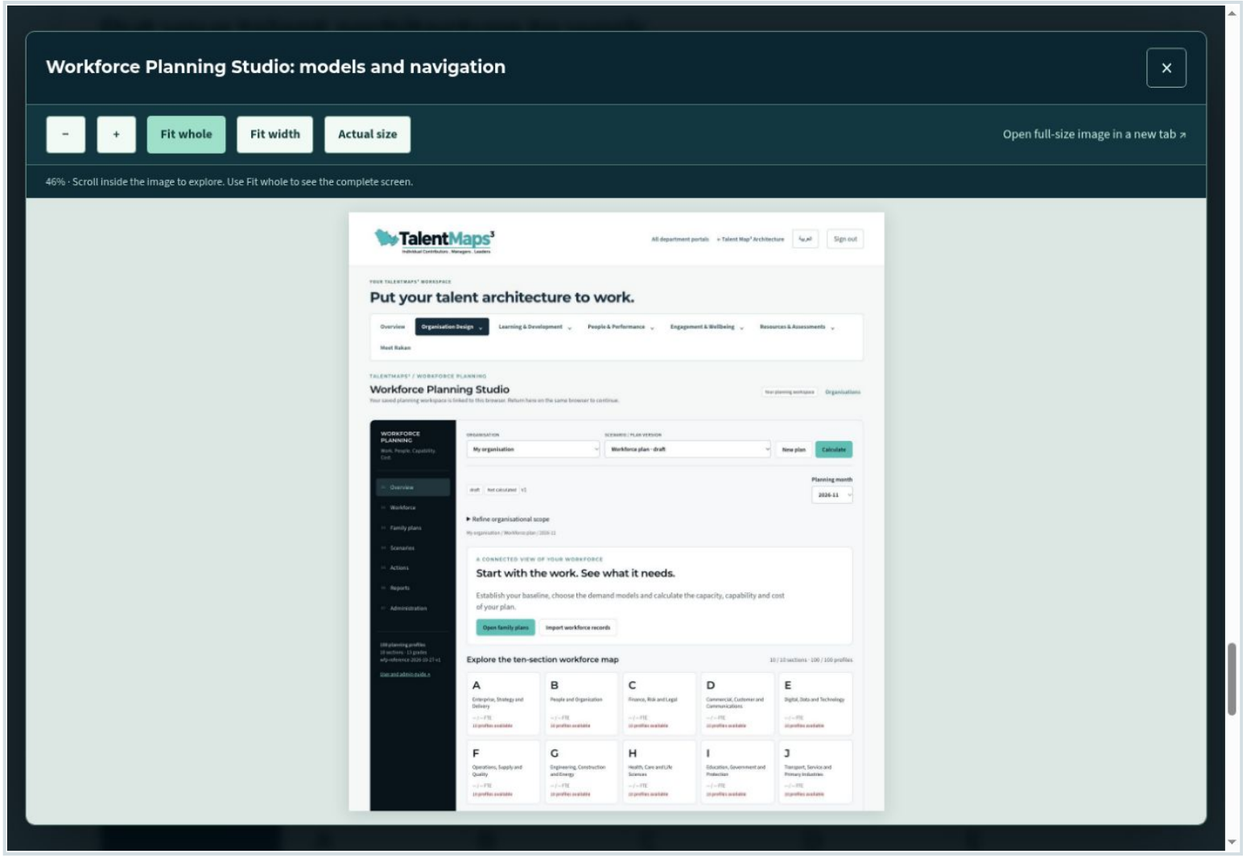
Prepare training-needs and succession reviews

05 Record human review and follow-up

Retain the agreed rationale, owner and review date. Keep sensitive readiness discussions within the authorised audience.

CHECK Plans remain reviewable as evidence and organisational needs change.

PUBLISHED DEMONSTRATION



Published TalentMaps³ demonstration; shows the connected planning workspace, not an authenticated client session.

CONNECT PEOPLE AND DEVELOPMENT / C-06-03

OPEN SOURCE

Create a role-linked individual development plan

Translate reflection against an approved role into focused development.

WHO USES THIS Employee and manager

BEFORE YOU BEGIN

- Correct role/family/grade
- Relevant background information
- Time for honest reflection

WHAT YOU WILL HAVE

- Role-linked development plan
- PDF output where delivery succeeds
- Agreed development actions and review dates

CHECK BEFORE YOU FINISH

- Role/family/grade are correct
- Self-reflection does not alter approved requirements
- Actions are realistic and evidence-based

The plan contains a technical requirement from another country context	Review the selected role source and discuss the appropriate local requirement with the manager or technical expert.

07 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

All six public input/result stages were inspected with synthetic data. Plan generation was observed; the PDF download attempt failed, so successful PDF export was not verified.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 1–1 OF 7

OPEN SOURCE

Create a role-linked individual development plan

01 Start at '01 Your role'

In IDP Creator, enter Your name and select Sector / section, Career family, Job grade and Your role. Confirm the role before continuing.

CHECK The plan uses the intended role requirements.

CURRENT LIVE SCREEN



Current public IDP role selection with synthetic Example Learner details.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 2–2 OF 7

OPEN SOURCE

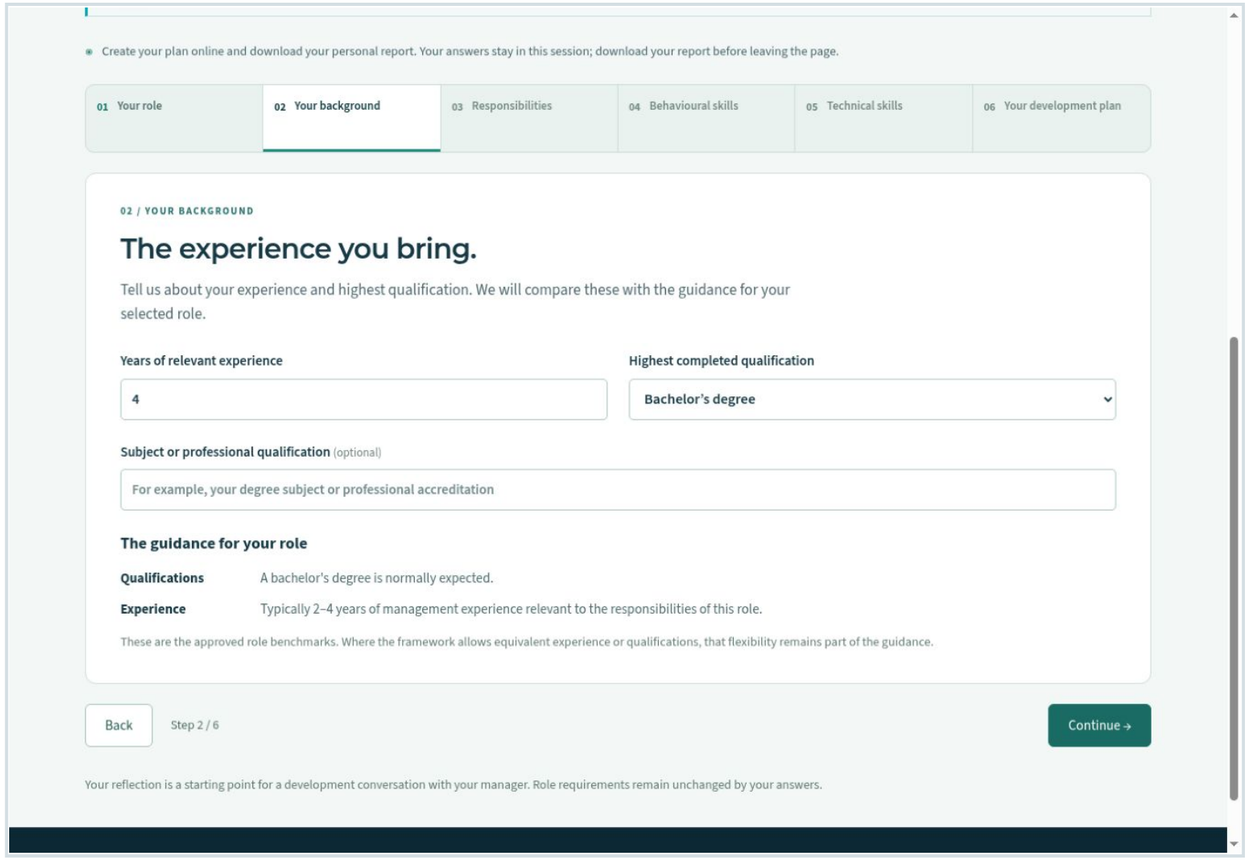
Create a role-linked individual development plan

02 Continue to '02 Your background'

Provide the background information requested, including experience and education where shown. Do not change the role requirement to fit your current profile.

CHECK The background can be interpreted against the selected role.

CURRENT LIVE SCREEN



Current background step with illustrative experience and qualification values.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 3–3 OF 7

OPEN SOURCE

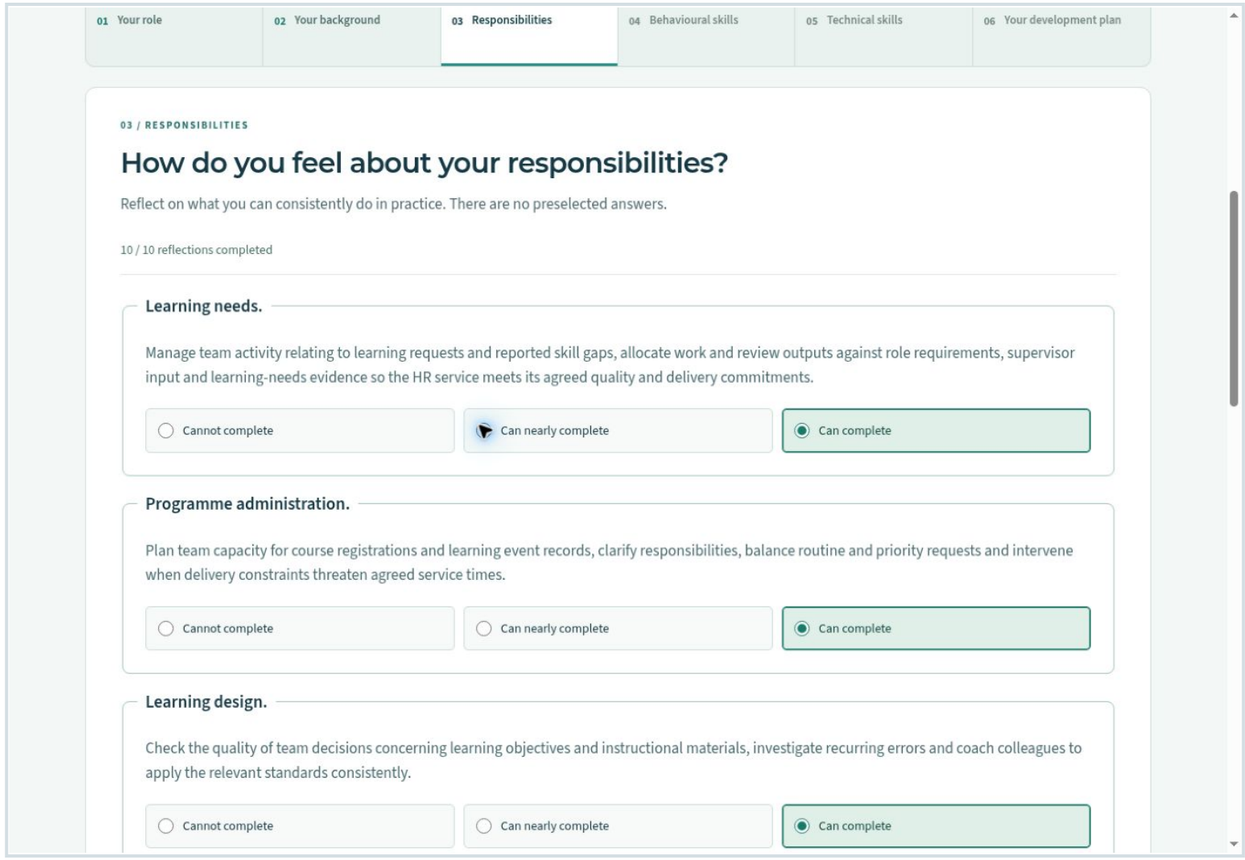
Create a role-linked individual development plan

03 Review responsibilities

In '03 Responsibilities', reflect on the supplied role duties and identify where more evidence or development is needed.

CHECK Responsibilities are reviewed against the actual role.

CURRENT LIVE SCREEN



Current responsibility ratings in the synthetic example.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 4–4 OF 7

OPEN SOURCE

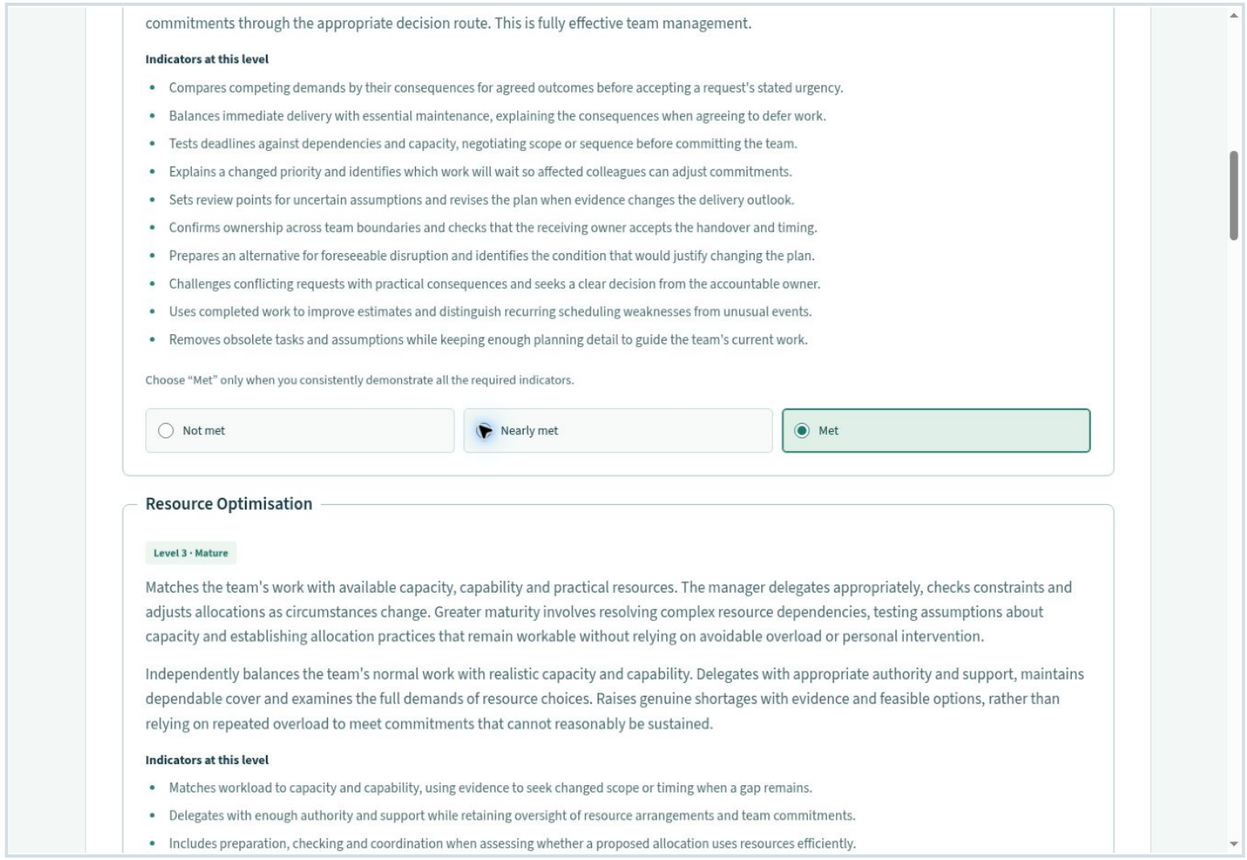
Create a role-linked individual development plan

04 Review '04 Behavioural skills'

Read each required behavioural level before selecting Not met, Nearly met or Met. Base each reflection on examples of work; identify a small set of meaningful priorities.

CHECK Behavioural development needs refer to the approved role expectations.

CURRENT LIVE SCREEN



Current behavioural indicators and rating controls; example values are illustrative.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 5–5 OF 7

OPEN SOURCE

Create a role-linked individual development plan

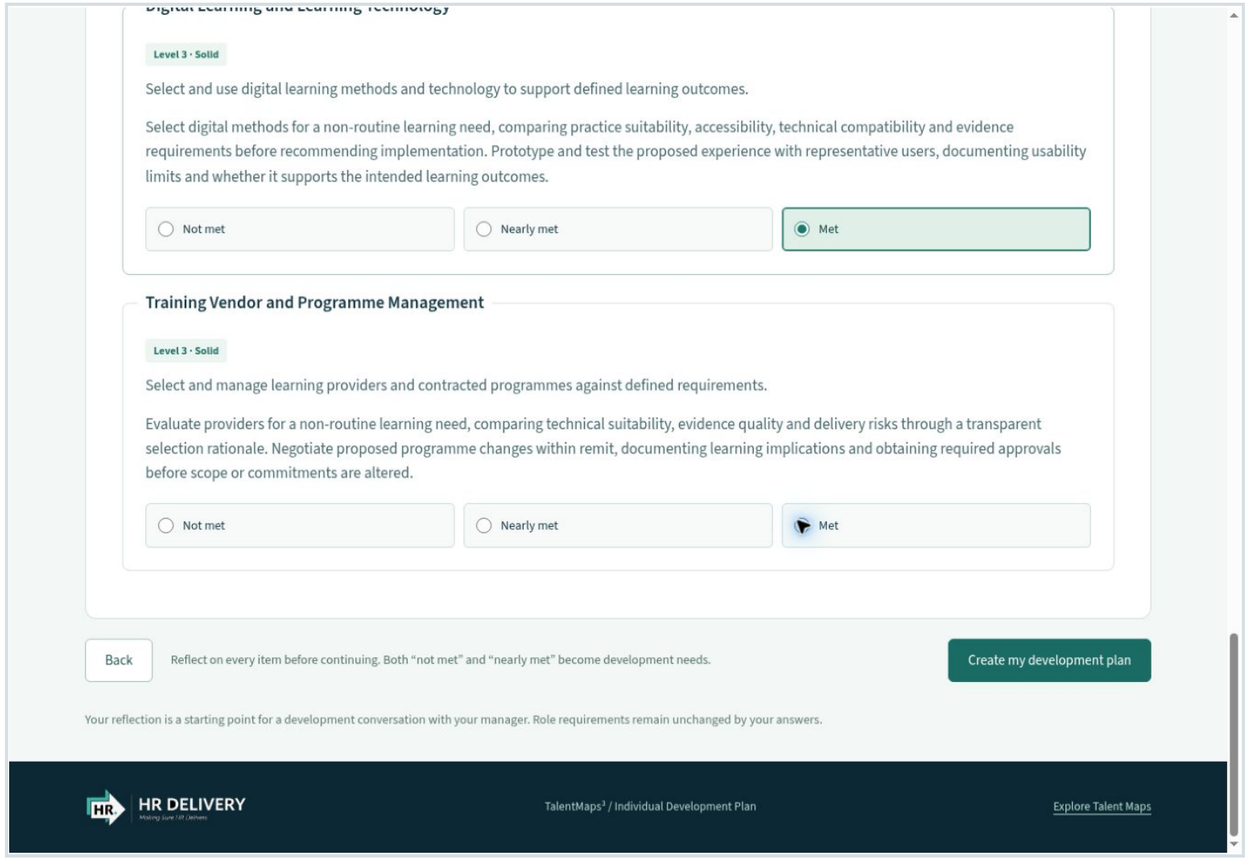
05

Review '05 Technical skills'

Read each required technical level and choose the supported reflection. Check that the country and professional context fits your role, then select Create my development plan.

CHECK Technical needs are specific, and the report is generated from the completed reflections.

CURRENT LIVE SCREEN



Current technical reflection page and Create my development plan control.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 6–6 OF 7

OPEN SOURCE

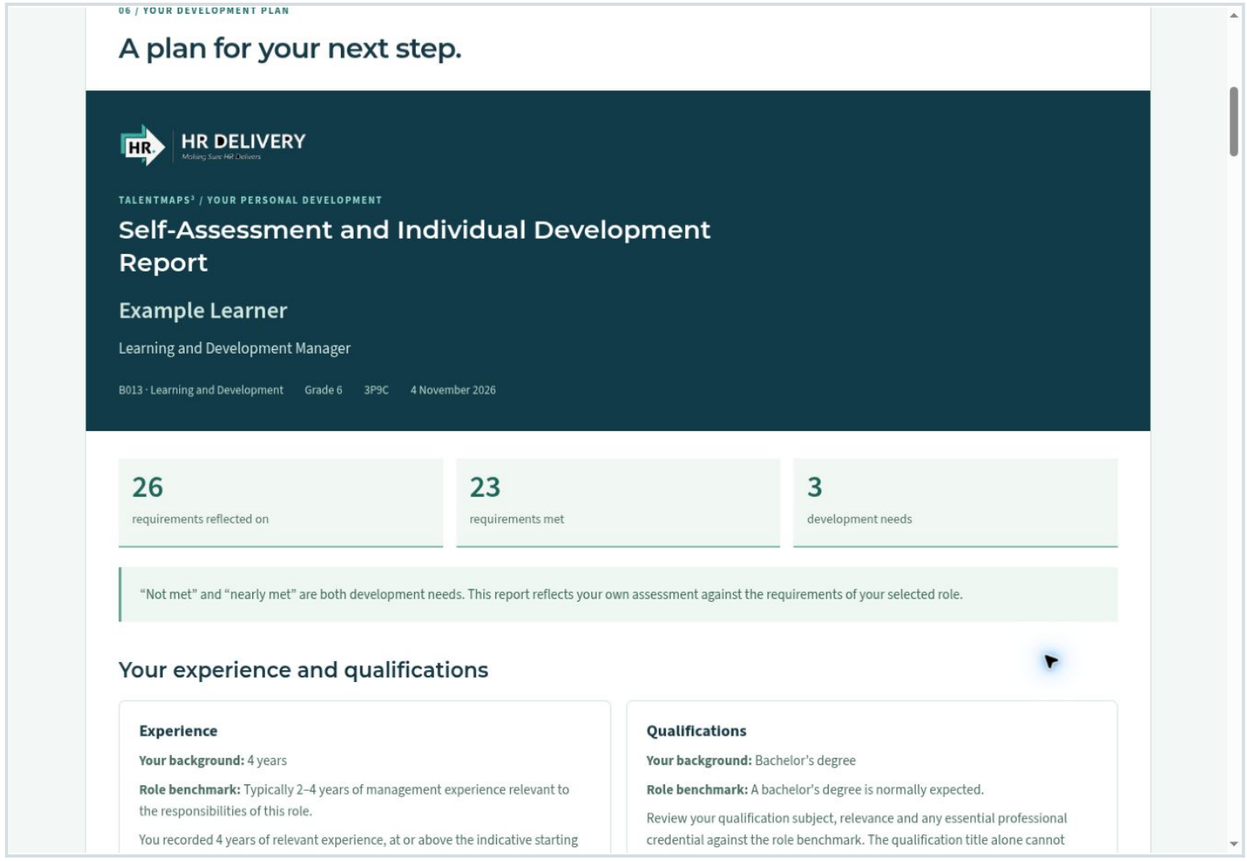
Create a role-linked individual development plan

06 Open '06 Your development plan'

Review the suggested learning, manual links and practical actions. Discuss which actions best fit the real work and support available.

CHECK The generated plan can be refined into an achievable programme.

CURRENT LIVE SCREEN



Current generated report summary for synthetic Example Learner.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 7–7 OF 7

OPEN SOURCE

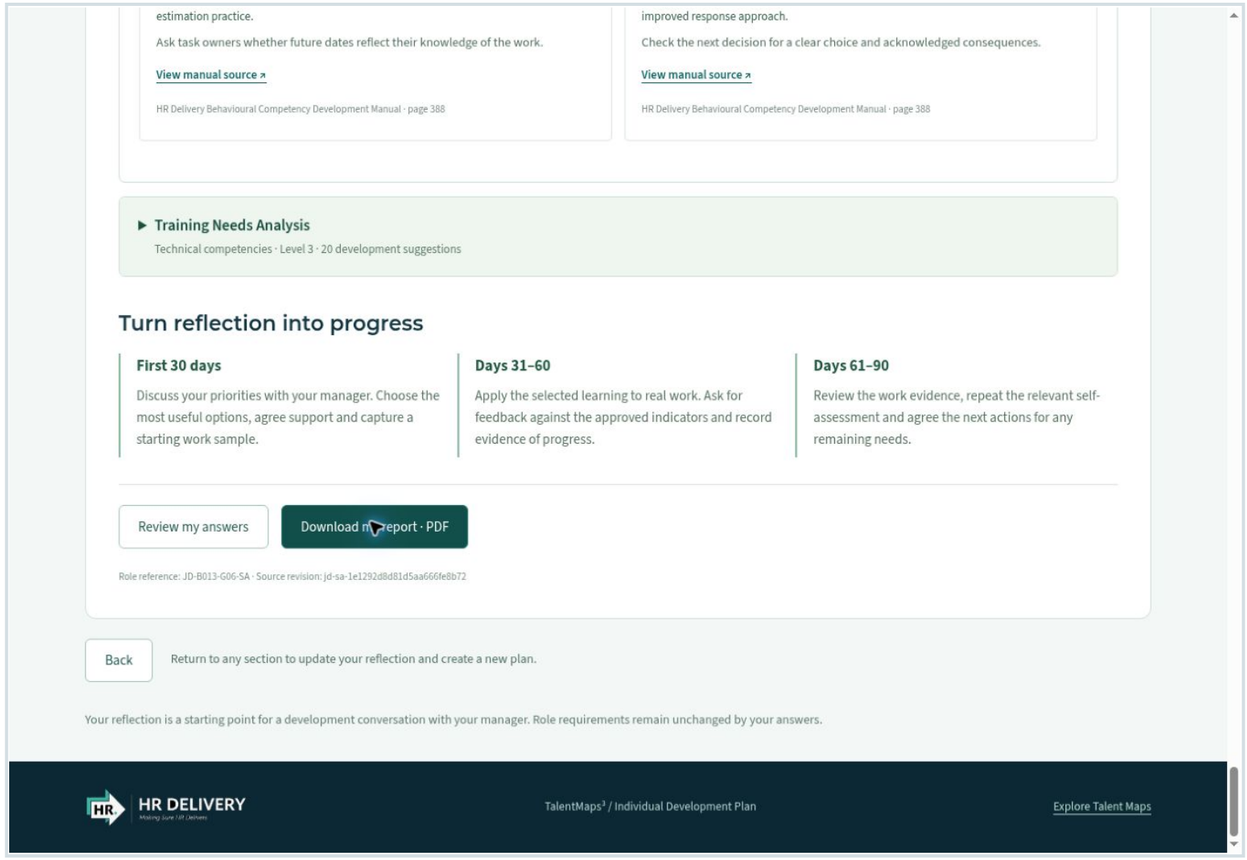
Create a role-linked individual development plan

07 Keep and review the plan

Use the available PDF output, check that the file actually downloads, and inspect it before leaving the session-only public calculation. Agree 30/60/90-day evidence checkpoints with the manager.

CHECK The plan has a usable document and review timetable.

CURRENT LIVE SCREEN



Current 30/60/90-day guidance, review and PDF download controls.

CONNECT PEOPLE AND DEVELOPMENT / C-06-04

OPEN SOURCE

Use competency workshops, manuals and guidance

Choose a focused resource for an agreed development need.

WHO USES THIS Manager, learner, coach or facilitator

BEFORE YOU BEGIN

- Named competency and required level
- Agreed development objective
- Delivery or self-study context

WHAT YOU WILL HAVE

- Selected workshop/manual resources
- Practical development activity

CHECK BEFORE YOU FINISH

- Resource matches the competency
- Level and audience are appropriate
- Application evidence is agreed

A resource is viewable but the download is restricted	Use the authorised portal route or ask Lama to confirm the resource entitlement and current document version.

05 STEPS / WALKTHROUGH ON THE FOLLOWING PAGES

Public catalogue and selected resources inspected; not every workshop or manual was audited.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 1–2 OF 5

OPEN SOURCE

Use competency workshops, manuals and guidance

01 Start from the competency need

Identify the behaviour or technical application to develop and the evidence of improvement you want to see. Avoid selecting a resource only by an attractive title.

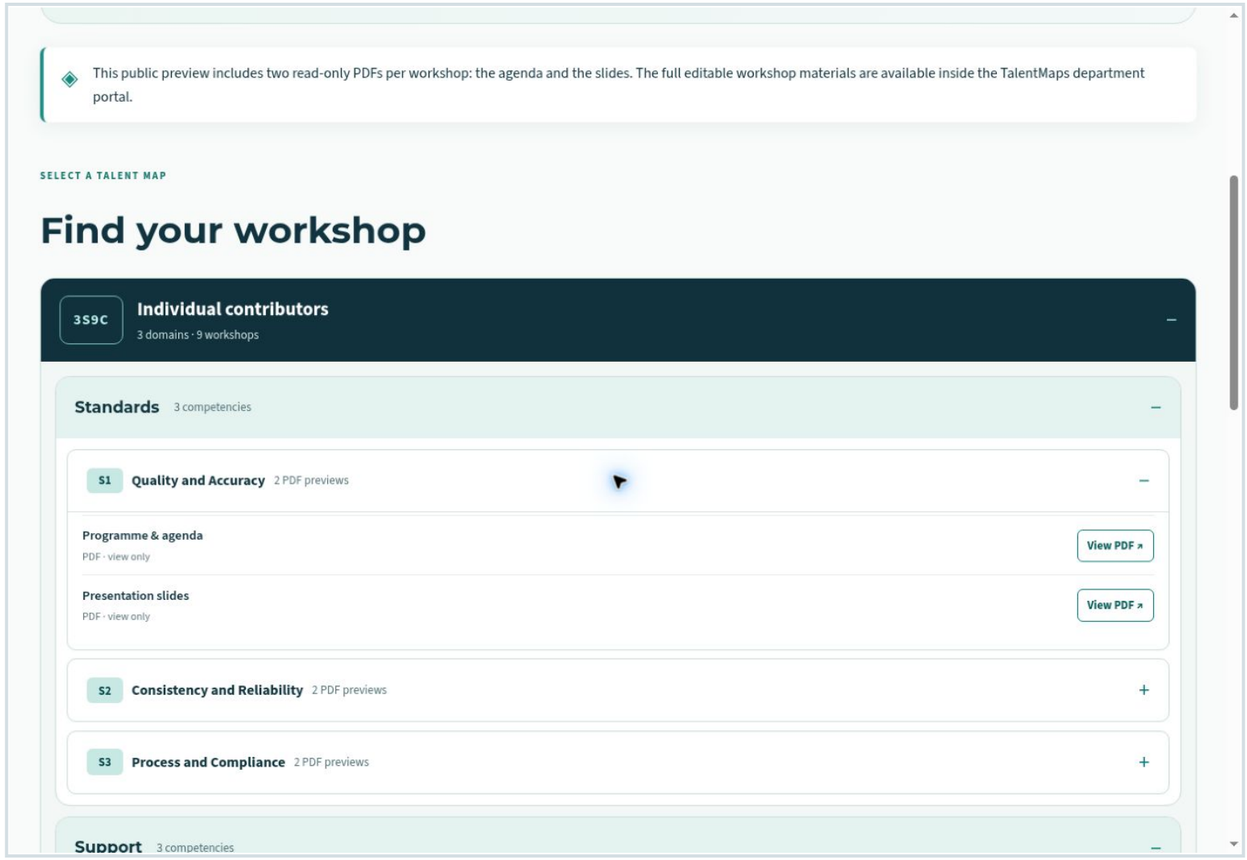
CHECK The resource choice serves a specific need.

02 Explore competency workshops

Use Explore competency workshops from the architecture. Select the relevant map/domain and review the workshop agenda and presentation links.

CHECK The session content matches the selected competency.

PRIOR REVIEWED SCREEN



Public catalogue of 27 competency workshops.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 3–4 OF 5

OPEN SOURCE

Use competency workshops, manuals and guidance

03 Open the development manual

Use Explore development manuals and select the relevant competency. The catalogue advertises 27 manuals; use the document's contents to locate the appropriate activity.

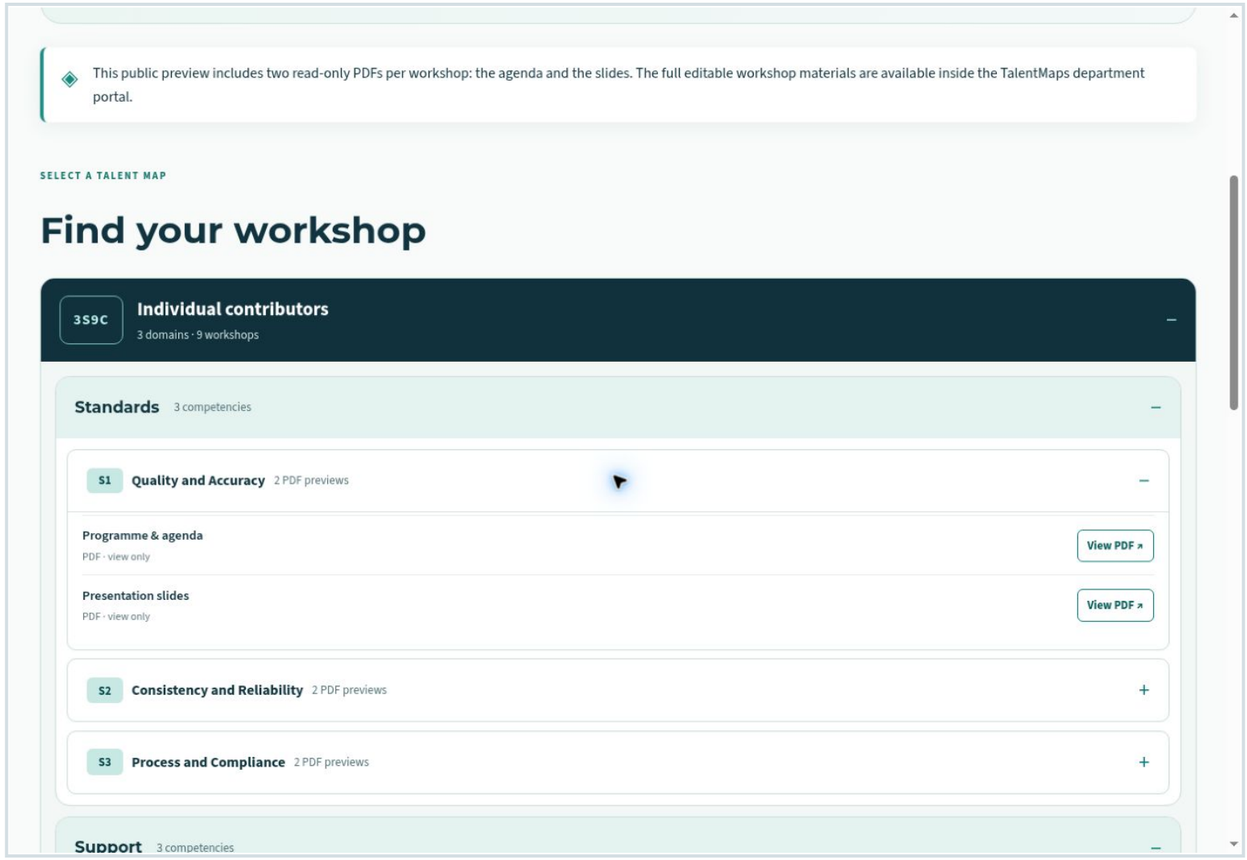
CHECK The learner can find an applicable exercise or practice.

04 Connect coaching and user guidance

Use the coaching materials or tool user guides when the action requires a structured conversation or a particular portal workflow. Confirm private download entitlement as needed.

CHECK Support material matches the intended activity.

PRIOR REVIEWED SCREEN



Public catalogue of 27 competency workshops.

CONNECT PEOPLE AND DEVELOPMENT / STEPS 5–5 OF 5

OPEN SOURCE

Use competency workshops, manuals and guidance

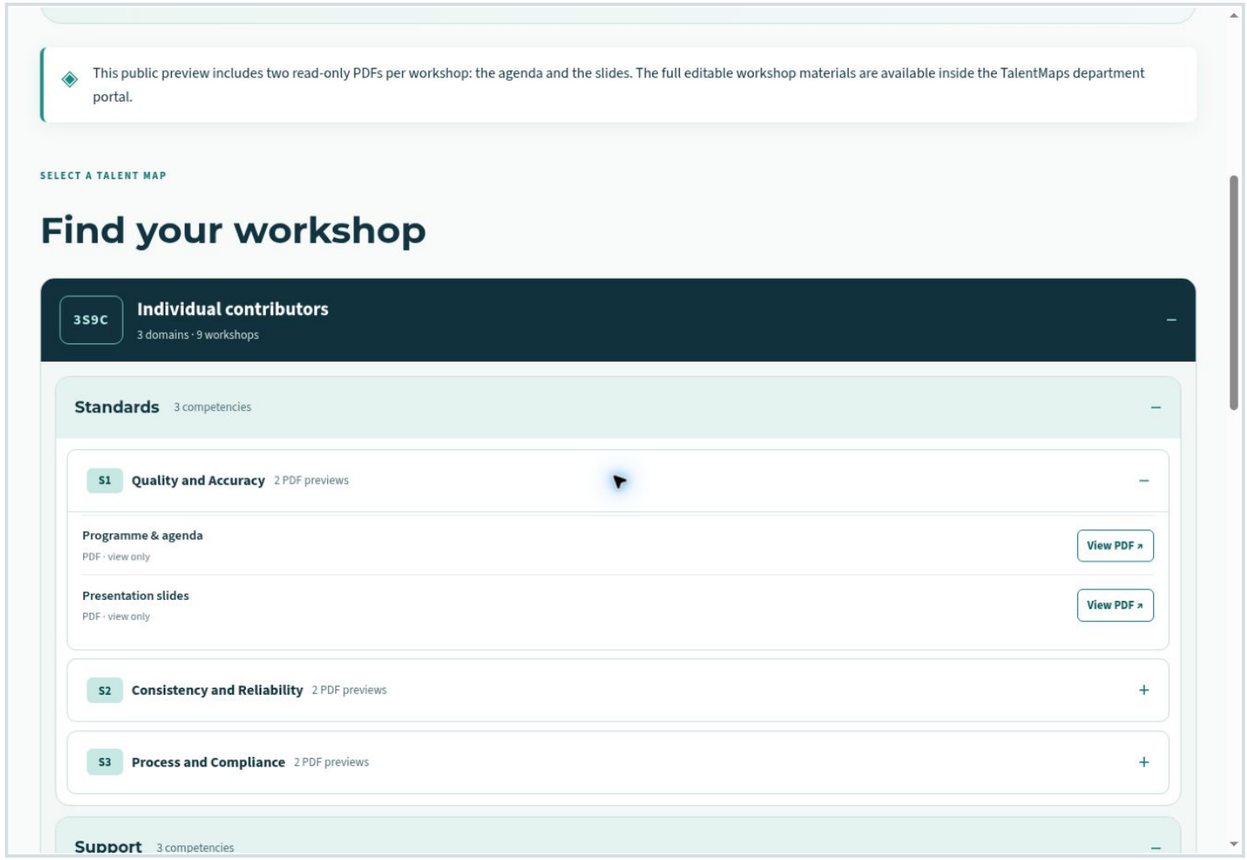
05

Agree application and review

Select one or two practical actions, an owner/supporter and a review point. Record what work evidence will demonstrate improvement.

CHECK Learning is connected to a change in practice.

PRIOR REVIEWED SCREEN



Public catalogue of 27 competency workshops.

REFERENCE / 1 OF 1

OPEN SOURCE

Three maps, different contribution

Map	Contribution	Domains
3S9C	Individual contributor	Standards · Support · Self-Management
3P9C	Manager	Productivity · People · Performance Management
3D9C	Leader	Direction · Development · Delivery

REFERENCE / 1 OF 1

OPEN SOURCE

Six workforce methods

Method	Use when	Core inputs
Activity workload	Countable work drives demand	Volume, minutes, fixed hours, productive hours
Staffed coverage	Posts must be staffed over time	Posts, hours/day, days, attendance hours
Project work	A defined project effort is phased	Total hours, monthly weights, productive hours/month
Approved local ratio	An adopted ratio is evidenced	Driver units, units/FTE and confirmation
Growth from a baseline	Demand grows from a justified base	Baseline FTE, volume and productivity indices
Approved establishment	A staffing establishment is approved	Approved establishment FTE

REFERENCE / 1 OF 1

OPEN SOURCE

Chart fields and their meaning

Field	Enter or check
Position ID	Unique stable identifier for a position
Reports to ID	The manager’s position ID; blank only for the scope head
Employee name	Optional; omit for a roles-only design
Grade	Evaluated job size, not reporting distance
Track	IC, SME, Manager or Leader as appropriate
Status	Occupied, Vacant or Planned
Chart view	Positions only or Positions and people

REFERENCE / 1 OF 1

OPEN SOURCE

Choose the output you need

Output	Purpose	Check before use
Role profile	Define authorised accountabilities	Country, source and adopted requirements
Workforce scenario	Compare capacity and actions	Period, FTE, assumptions and cost basis
Editable chart JSON	Continue the chart later	Save before closing the public tab
Position CSV	Review or maintain rows	Identifiers and any personal names
Chart SVG/PDF	Communicate reporting design	Branch, depth, readability and audience
IDP PDF	Guide development follow-up	Role requirements and practical actions

QUICK REFERENCE

Your final check

- [ ] **01** Use the correct contribution map and career family.
- [ ] **02** Keep role facts, evaluated grade and reporting layers distinct.
- [ ] **03** Reconcile workforce periods, units and assumptions before interpreting FTE.
- [ ] **04** Resolve chart validation errors and review advisory messages.
- [ ] **05** Save an editable file before closing a session-only public tool.

HELP AND SUPPORT

OPEN SOURCE

Continue with HR Delivery

Start with Lama when you need the correct workspace, an explanation of a tool, a missing resource or help arranging specialist support. Describe the task you were trying to complete and the last screen you reached. Include a redacted screenshot if useful, together with the record reference and relevant date.

OPEN LAMA'S RECEPTION

drphillip@hr.delivery

INCLUDE IN YOUR REQUEST

- Department and workspace name
- Task and last control selected
- Record or document reference, without personal data
- Exact error wording and a redacted screenshot

REFERENCE NOTES

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Guide scope and screen references

- Public screens and examples were inspected read-only. No client records were created, published, sent or approved.
- Screens labelled published demonstration show HR Delivery’s illustrative workspace, not this review’s authenticated access.
- Confirm private form labels, permission rules and save/export behaviour with the workspace administrator before using the source-described procedures operationally.
- TalentMaps assessment-suite cards are marked Planned/Coming soon and are separate from the Assessment Centre catalogue.
- The public Individual Contributor Career Paths card and dedicated Organisation Design Process resource were marked Coming soon in the prior review.
- Some public tools initialise after the page first appears. Wait for loaded controls before concluding a button has failed.
- The Evalu8 and Job Description Bank screens showed limited styling in this browser; their source content and observed controls remain genuine.

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