User Journeys Suite
Global HR Design

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Global HR Design: Setting the standard for future focused, technology enabled and user centric HR services in Government
Purpose

• The purpose of this document is to outline critical user journeys in core areas of focus across the Global HR Process Taxonomy.
• User journeys highlighted within this pack align to the significant moments, or ‘moments that matter,’ for Civil Service employees. These were identified and prioritised through employee focus groups.
• User journeys outline the aspirational, future employee HR experience, and provide a benchmark for HR teams. They are aligned to the CSHR Global Design Principles and articulate role and technology interactions, as well as touch-points across end-to-end processes.
• In addition, they incorporate features and enablers for enhancing employee experiences of HR in the Civil Service, including policies, metrics and technology, in turn creating a framework to be leveraged across all departments, with the aim of defining a consistent and quality experience, and accelerating HR systems implementations.

Contents and scope

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The concept of the ‘total employee experience’, focussed on design thinking and the simplification of work, is now becoming a major focus in HR. Following Josh Bersin’s predictions, most HR teams will stop designing ‘programs’ and start designing ‘experiences’.

• Rather than focus narrowly on employee engagement and culture, organisations are developing an integrated focus on the entire employee experience; bringing together all the workplace, HR and management practices that impact people at work.

• Technology is advancing at an unprecedented rate. Technologies such as artificial intelligence (AI), mobile platforms, sensors, and social collaboration systems have revolutionised the way we live, work, and communicate – and the pace is only accelerating\(^1\). Integrated employee self-service tools are helping HR functions understand and improve experience.

Note: for additional information on the approach please refer to ‘GSS Process Phase 2 – UJ Approach Document v1’
1) Rewriting the rules for the digital age, 2017 Deloitte Global Human Capital Trends
Global HR Design Principles were established during earlier design phases; these underpin all activity across User Journey development. The Design Principles and the HR Process Taxonomy can be found in detail in accompanying documents.

- **User Focused**: The user experience is positive, intuitive and consistent for all.
- **Consistent Outcomes**: HR Service Delivery is characterised by common features, measures and outcomes.
- **Clear Accountability**: Roles and accountabilities are clearly defined and communicated effectively.
- **Strong Foundations**: Technology is up to date, secure and high quality, underpinned by robust data.
- **Empowered Employees**: Line Managers and Employees are empowered, motivated and able to self-serve.
- **Functional Excellence**: The HR function is capable, high performing and joined up, facilitating business outcomes.

Design principles will guide detailed design activities across all areas of the Civil Service employee lifecycle.
Focus Group Insights
Focus Group Insights

Approach

Outlined below is the approach taken to developing Civil Service HR User Journeys, serving as a component of Global HR Design – setting the cross-government standard for customer experience, services and interactions with roles and technologies. Departments will be expected to adhere to standards set by User Journeys to ensure consistency across critical moments in the employee lifecycle.

User Journey scope and template agreed, and aligned with Government Finance.
Initial draft of User Journeys developed using leading practice insight, external perspectives, and Civil Service knowledge.
Leading practice features were drafted across all relevant process areas to support and inform user journey development.

Focus groups with nominated business representatives across employee and line managers conducted to discuss:
- Existing pain points across interactions with HR
- Critical moments from the employee perspective
- Opportunities and the ambition for interactions with HR services and the wider operating model

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Throughout the focus groups, User Journeys for agreed personas were developed and refined to focus on demonstrating the desired experience and interactions with critical roles. Both User Journeys and leading practice features ensure alignment to global design principles and were refined on an ongoing basis.

Following internal stakeholder validation, User Journey workshops will be conducted with relevant stakeholders to validate and review User Journeys and gather additional information on the intended experience. Once validated, User Journeys and leading practice principles will be shared with relevant Design Authorities as appropriate for sign off.

Focus Groups

16 Cross-government Focus Groups were conducted

Organisations involved in the focus groups were:
HMRC, Cabinet Office, VOA, HMPPS, DfE, NCA, DExEU, HO, DIT

Attendees

Focus Groups have been attended by over 120 Civil Servants to date, representing around 40 employees (excl. line managers), 50 line managers and 30 HR representatives.
Focus Group Insights
Summary of key themes

**Key themes**

### Interactions with HR

- Channel choice and accessing HR through a preferred route is important
- An initial single point of contact for HR
- ‘Human-touch’ where appropriate (personal and/or complex)
- Interactive tools like you’d have at home
- Use of a tracking system and notifications so that employees can see the progress of their queries and transactions

### HR Skills and Capabilities

- One point of contact for HR related matters
- Knowledgeable HR representatives able to resolve queries and requests in a timely manner
- Lack of detailed SLAs mean employee queries are managed inconsistently and to varying quality
- Service provider accountability needs to be embedded and appropriately monitored
- Departments need to have defined responsibilities and scope to prevent employees being bounced around departments, looking for the advice they need
- HR services need to be fully joined up, with accountability clearly assigned
- Need to ensure HR representatives have the right level of access to systems
- Communication channels and contact details for HR need to be better advertised
- More consistent, up-to-date guidance on the intranet

### Line Manager Roles and Responsibilities

- Expectations of the role of the line manager vary
- Onboarding, absence and supporting high performing employees are areas of particular challenge for line managers
- Lack of managerial input in recruitment process causes issues and consultation from CSR
- Managers need to be able to update information and provide advice themselves, without the need for HR involvement – self-service
- Prompts and checklists need to be sent to managers to support them in managing their employees
- Conversation guidance is needed; could be provided in the form of scenarios, scripts and videos
- Line managers need access to and visibility of data for their current workforce/direct reports
- Peer review and line manager chat rooms as a collaborative resource for managers to ask one another for advice on past experiences regarding similar issues
Focus Group Insights

Summary of impact opportunities

### High impact opportunities

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<th>Process &amp; Policy</th>
<th>Technology</th>
<th>People</th>
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| • Process improvement areas:  
  - Attendance Management  
  - Recruitment and Onboarding  
  - Other Government (OGD) Transfers  
  - Internal Role Moves  
  - Pensions and MyCSP  
  - Managing Probation  
  • Definition of an approvals framework  
  • Notification strategy  
  • Policy review and harmonisation  
  • Definition of a Service Catalogue containing details of all HR services being performed, together with clear demarcation of ownership between role in the HR Operating Model, including SLAs and KPIs | • Intuitive portal and HCM systems to drive self-service  
• Implementation of Case Management System  
• Knowledge and Content Management solutions  
• Determination of technology access for HR (e.g. HCM, CMS, Telephony)  
• Document Management  
• Access to self-service reports  
• Analytics and insight derived from robust data  
• Single source of the truth for HR data | • Detailed definition of the CS HR Operating Model  
  - Roles and responsibilities across HR  
  • Definition of the of the line manager  
  - Responsibility and accountability  
  • Line manager upskilling  
  • HR capabilities  
  • Change management  
  - Behavioural and cultural change  
  - New ways of working defined |

### Other key impact opportunities

- Design of the HR Service Delivery Model – determination of the CS HR Operating Model that will govern HR Operations, including all interactions
- Channel Strategy definition – an effective Channel Strategy is a critical enabler for HR Operations as it provides definition of how Customers’ requests are prioritised and managed
- Knowledge Management Strategy – including technology, processes, and governance to ensure that accurate information is available on a timely basis to optimise query resolution and deal efficiently with queries and transactions
- Development of a Service Management Framework
- Access to appropriate learning and development opportunities
Jeremy is pleased to be asked to develop the strategic workforce plan, and glad that he has Nafeesah’s support. He is very impressed with her knowledge and capability in this area.

Jeremy has been asked by the head of a department, Zoe, to conduct a strategic workforce planning review to understand the impact of estate consolidation.

Jeremy explains the strategy on consolidation of the estates to Nafeesah. Nafeesah outlines some of the critical information she will require to assess and model the future workforce. She defines information including the department’s strategy, organisation data, job family, job and skill data. They have a meeting with finance and HR to get their input.

Jeremy then works with Nafeesah, and consults with his HRBP, Melissa, who understands the Organisation Design (OD) of the department, to identify and prioritise critical roles and hard to replace roles and skills needed to deliver the strategy. They agree what level of detail they should go to in analysing these roles, and review the hierarchies and job families on the HCM System to get an initial view of the roles and structures across the department. They agree to define workforce segments to navigate to make assumptions on the impact of roles across the departments.

Jeremy conducts a few meetings with other leaders across the department to verify the assessment that they have made, and updates their analysis accordingly.

Jeremy is impressed by the functionality of the HCM system, especially as he realises there are a great deal of information and nuances across the department to take into account.

Jeremy thinks that the assumptions they are making are fair based on the information they have, and can easily amend the data according to the assumptions that they have made.

Jeremy explains the model to Melissa that they will build a model to predict workforce demand using internal workforce supply and demand data. They will then augment the model by taking into account external information on the future work, such as the impact of automation, market and industry statistics, as well as the political landscape.

The employee data is pulled from the HCM system and consolidated with data from other systems as appropriate, e.g. finance.

Nafeesah engages and collaborates with other stakeholders through the Case Management System to get their input on for the model.

Jeremy and Nafeesah use this data to make assumptions on the department’s workforce over the next five years, and visualises trends within the department. Jeremy consults with Melissa to provide additional input to these assumptions based on his knowledge and insight of the department. They also meet with the Government Property ‘estates’ team, to get their input on contractual considerations.

Jeremy and Nafeesah develop different scenarios based on their assumptions, and assess the impact of these changes in line with the estate consolidation strategy. They develop insights to report back to the head of department, and agree an approach to tracking and measure the impact of these changes over the next five years.

Jeremy then works with Melissa to discuss potential organisation and talent interventions to provide recommendations on how the department should plan for the estate consolidation initiatives, aligned to the workforce insights.

Jeremy presents the insights and recommendations from the strategic workforce planning review to Zoe. Jeremy works with Melissa to develop a more tactical short term plan.

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Jeremy and Nafeesah make assumptions on the workforce and develop scenarios to assess the impact on the department’s workforce and considerations for estate consolidation.

Jeremy presents the insights and recommendations from the strategic workforce planning review to Zoe. Jeremy works with Melissa to develop a more tactical short term plan.

Jeremy, a line manager responsible for a large team, is aware that there will be some consolidation of estates taking place across his department in the next five years.

Jeremy has been asked by the head of his department, Zoe, to conduct a strategic workforce planning review to understand what the workforce will look like, and the considerations and implications for the estate consolidation.

Jeremy reviews his dashboard and can see the department’s employee data and MI. He realises that he needs more strategic input and consults with his HR Business Partner (HRBP), Melissa. Melissa knows who should be involved for these discussions, and advises Jeremy to raise a request on the HR portal. A member of the Strategic Workforce Planning (SWP) CoE, Nafeesah, picks up the case and contacts Jeremy.

Jeremy explains the strategy on consolidation of the estates to Nafeesah. Nafeesah outlines some of the critical information she will require to assess and model the future workforce. She defines information including the department’s strategy, organisation data, job family, job and skill data. They have a meeting with finance and HR to get their input.

Jeremy then works with Nafeesah, and consults with his HRBP, Melissa, who understands the Organisation Design (OD) of the department, to identify and prioritise critical roles and hard to replace roles and skills needed to deliver the strategy. They agree what level of detail they should go to in analysing these roles, and review the hierarchies and job families on the HCM System to get an initial view of the roles and structures across the department. They agree to define workforce segments to navigate to make assumptions on the impact of roles across the departments.

Jeremy conducts a few meetings with other leaders across the department to verify the assessment that they have made, and updates their analysis accordingly.

Jeremy is impressed by the functionality of the HCM system, especially as he realises there are a great deal of information and nuances across the department to take into account.

Jeremy is confident in the insights and recommendations he is presenting to Zoe. Whilst the plan contains complex information about demand and supply, Zoe finds it easy to interpret and use in the business and believes it will allow her to facilitate new insights and discussions, engaging stakeholders beyond HR.
HR1 Moment

“We’re consolidating our estates; I need to understand what our workforce will look like in five years”

Additional actors and responsibilities (2/3)
HR1 Moment
“We’re consolidating our estates; I need to understand what our workforce will look like in five years”
Journey interactions, opportunities and enablers (3/3)

Opportunities for providing a great experience

Interventions

Key:
Gold - Pioneering measures to provide excellent service
Silver - Enhanced measures to provide good experience
Bronze - Minimum measures to provide satisfactory experience

Note: CSFs are indicative and will require validation

**Opportunity for providing a great experience**

![Process Flow Diagram]

1. **Identify Need**
   - Easy to navigate HCM system
   - Manager dashboard allow viewing of metrics at a glance
   - Informative and supportive HRBP
   - Business ownership of Workforce Planning (WFP) activities

2. **Analyse**
   - Easy to navigate HCM system
   - Specialist SWP capabilities

3. **Model**
   - Accurate data
   - Visualisation tools
   - Workforce segmentation
   - Statistical relationships established to enable prediction of workforce requirements in the future

4. **Assess**
   - Compare internal and external demand and supply data to identify workforce gaps, to inform workforce decisions and measure outcomes
   - Analytical tools and techniques help stakeholders see the CS workforce differently and uncover new insights
   - Evidence based decision making #Feedback loop between business, talent strategy and workforce planning, so that the strategy is informed and enabled by workforce planning

5. **Business & Talent Interventions**
   - Head of department
   - Line manager
   - HRBP
   - SWP CoE

Interactions

- Line manager
- HRBP
- SWP CoE

Critical Success Factors to enhance the experience

- Manager dashboards
- Identification of critical workforce segments
- Specialist SWP capabilities

- Positions, job families and hierarchies managed and updated on HCM system

- Predictive modelling
- Manager dashboards including infographics
- Repeatable solutions to modelling the workforce
- Workforce Planning (WFP) tools to adjust parameters and explore alternative interventions
- Reporting and analytics systems capability
- External data insights, e.g. market statistics
- Case Management System

- Skills forecasting by talent segment
- Data sets combined to create organisational views of activities, supply, and demographics
- Organisation visualisation tools
- Insight drive organisation
- Plans are tracked, measured and adjusted in real time

**Key**

- Gold: Pioneering measures to provide excellent service
- Silver: Enhanced measures to provide good experience
- Bronze: Minimum measures to provide satisfactory experience

**Note:** CSFs are indicative and will require validation

**Metrics**

- Process-specific metrics
- Service metrics

- Civil Service Workforce Plan 2016 – 2020
- State of the Estate Report

- % of jobs at risk & % critical roles
- Available property space
- Time to complete associated changes
- Resource requirements
- Return on investment
- Headcount / FTE actuals vs forecast
- % skill gaps

- Employee and line manager satisfaction with departmental changes

**Policies**

- % of jobs at risk & % critical roles
- Available property space
- Time to complete associated changes
- Resource requirements
- Return on investment
- Headcount / FTE actuals vs forecast
- % skill gaps

- Employee and line manager satisfaction with departmental changes

**SLA**

* Please refer to the Glossary for further information
HR3 Joining Work
HR3-01 Recruitment
HR3-03 Onboarding
Remi would like to work for the Civil Service, and has registered for alerts from the careers website when suitable roles arise. He often checks this on the go and is really excited when an opportunity arises to work in a department he is interested in. He decides to apply for the role by filling in the online application template. Remi is able to upload his CV which autovulpts some of the information to make it easier for him. He has also chosen to link his professional LinkedIn profile to populate relevant information. Remi does not have immediate access to a computer and finds the mobile application very straightforward. On receiving an automated alert to download the app so that he can easily track his eligibility criteria have been met, Remi is invited to say that his application has been received and that all very straightforward. On receiving an automated alert to access to a computer and finds the mobile application relevant information. Remi does not have immediate access to a computer and finds the mobile application very straightforward. On receiving an automated alert to download an app so that he can easily track his eligibility criteria have been met, Remi is invited to say that his application has been received and that all eligibility criteria have been met, Remi is invited to download an app so that he can easily track his application.

**Feelings**

Remi is excited that he has found a role that he would like to apply for, and is really excited when an opportunity arises to work in a department he is interested in. He decides to apply for the role by filling in the online application template. Remi is able to upload his CV which autovulpts some of the information to make it easier for him. He has also chosen to link his professional LinkedIn profile to populate relevant information.

**Enablers**

- Candidate Portal optimised for mobile viewing
- Mobile app
- Candidate application dashboard to show stage of application
- Push notifications/alerts
- Civil Service careers site
- Online interactive tests through the mobile app
- Mobile app
- Candidate dashboard
- Automatic interview scheduling
- Online interview feedback survey
- Cognitive agent (AI)
- E-signature on documents
- Candidate Portal optimised for mobile viewing
- Automated pre-employment check notifications
- Phone call
- Candidate dashboard
- Phone call
- Mobile app
- E-signature on documents
- Candidate Portal optimised for mobile viewing
- Automated pre-employment check notifications

Remi searches the Civil Service careers site on, based on the experience and interests he has registered, a role is suggested to him. Remi submits his application.

Remi’s application passes through the initial screening and he is asked to complete a video interview and psychometric assessment.

Remi is selected for interview. He gives his availability and meets the Hiring Manager for interview at the appointed time. Following the interview Remi completes a short candidate satisfaction survey.

Following a debrief with the Hiring Manager, the Recruiter calls Remi to congratulate him and offer the role. The Recruiter answers any questions & outlines the next steps.

Remi discusses a particular aspect of the offer, and then accepts. Remi receives a call from the Hiring Manager congratulating him.

**HR3 Moment**

“I found a role online I’d like to apply for”
HR3 Moment
“I found a role online I’d like to apply for”

Additional actors and responsibilities (2/3)

User Journey

1. Remi searches the Civil Service careers site and, based on the experience and interests he has registered, a role is suggested to him. Remi submits his application.

2. Remi’s application passes through the initial screening and he is asked to complete a video interview and psychometric assessment.

3. Remi is selected for interview. He gives his availability and meets the Hiring Manager for interview at the appointed time. Following the interview Remi completes a short candidate satisfaction survey.

4. Following a debrief with the Hiring Manager, the Recruiter calls Remi to congratulate him and offer the role. The Recruiter answers any questions & outlines the next steps.

5. Remi discusses a particular aspect of the offer, and then accepts. Remi receives a call from the Hiring Manager congratulating him.

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Candidate

Civil Service Hiring Manager

Recruiter

The HR Operations team oversee the recruitment system. After receiving Remi’s application and following an initial screening process they invite Remi to download the app to track his application.

The CV parser sifts through applications submitted. HR Ops screens them to invite a long list of candidates to complete the psychometric tests. Those who pass the tests are then invited to complete the video interview.

HR Operations sends the Hiring Manager and other panel members a standard template with suggested interview questions. Once the interview slot is confirmed, reception is automatically notified and Remi is added to the visitors list.

Following the interview, the Recruitment team receive feedback from the Hiring Manager; they are able to ring Remi to give him the good news. They also call unsuccessful candidates and provide feedback on development areas.

The HR Operations team draft the formal contract for Remi, they then notify the Onboarding team to begin induction and Onboarding procedures.
HR3 Moment
“I found a role online I’d like to apply for”

Journey interactions, opportunities, and enablers (3/3)

Opportunity for providing a great experience

Key:
- Gold: Pioneering measures to provide an excellent service
- Silver: Enhanced measures to provide a good experience
- Bronze: Minimum measures to provide a satisfactory experience

Note: CSF’s are indicative and will require validation

Interactions

- Candidate
- Mobile App

Critical Success Factors to enhance the experience

- Recruitment process via mobile application
- Candidate dashboard showing stage of application process
- Notification alerts for relevant job interest
- Automated response to confirm receipt of application

- Online interactive tests through mobile app with downloadable results available

- Cognitive agent (AI) available for process questions and query resolution

- Phone call feedback from Recruiter

- Mobile application for pre employment checks
- Phone call from Hiring Manager

KPIs

- Average time to hire
- Applications started but not completed
- Percentage of applicants by channel
- Ratios for page view : application : CV : interview : offer : acceptance
- Diversity ratios
- Average cost per hire
- Drop out during the process / no shows
- Percentage of jobs filled internally
- Internal versus external hiring

Policies

- Civil Service Recruitment Principles
- Anonymised recruitment
- Fixed Term Appointments
- Agency Worker Regulations
- Civil Service Competency Framework

SLA*

- Level of satisfaction with mobile app
- Candidate satisfaction survey
- Line Manager satisfaction survey
- Understanding and ease of gamification psychometric tests
- Recruiter support

* Please refer to the Glossary for further information

Glossary

SLA: Service Level Agreement
HR3 Moment
“A member of my team has left and I need to fill their role”

User Journey Overview (1/3)

1. A member of Aditi’s team has resigned and she needs to fill the position. Aditi searches on the HR portal and finds guidance on the recruitment process. She is able to use web chat to ask questions about the process. Aditi knows what sort of skills are required and searches on the job description catalogue for a standard template that includes role requirements and refers to the relevant Civil Service Profession for further information. Aditi gets approval for the headcount and funding from her budget holder through the HCM system, and raises a self-service approval for the headcount and funding from her budget holder through the HCM system, and raises a self-service request to start the recruitment process.

2. Aditi is contacted by an HR Operations Specialist Recruiter and is asked questions about her hiring need. The Recruiter provides Aditi with insightful and strategic sourcing advice, including market trends and options for filling the role. Aditi understands there is a reserve list of pre-interviewed, talented candidates on the Applicant Tracking System but none of them match the specific skillset she needs to fill this role. Aditi agrees that advertising externally would be the best option in this case. The Recruiter posts the role through various channels, including government sites and targeted, associated social media. Aditi is kept informed by the Recruiter with regular check-ins. She can also view her manager dashboard, shown on the HR portal, which includes insights on the recruitment process, such as number of candidates targeted and applications received.

3. The Applicant Tracking System filters the applications and uses a parser to do the initial sift. The Recruiter screens the applications and invites a long list of candidates to complete a psychometric assessment then, if successful, record a video interview. The recruiter watches the interviews to ensure suitability, then selects a shortlist. Aditi is given a shortlist of five candidates from the HR Operations Recruiter. This contains a detailed synopsis of the candidates, their application and video interview. Aditi reviews the information with a management colleague, they use a scoring framework to help them select which candidates to interview. Aditi then receives automatic scheduling notifications and calendar invites for the interviews.

4. As this is Aditi’s first recruiting experience in the Civil Service she watches online videos via the HCM system on conducting panel interviews, and accesses hints and tips. Aditi and her panel conduct interviews with each candidate. The panel ask some strength-based, behavioural and experiential questions in line with the guidance they are provided. The HR Operations Recruiter calls Aditi to understand the panel’s feedback and scores for each candidate. Aditi and the Recruiter agree that one of the candidates should be offered the role due to their consistently good performance and suitable skillset. As the position was previously approved by Aditi’s line manager, and the salary is within the pre-agreed band, the Recruiter calls the candidate to offer the role.

5. Aditi receives confirmation that the candidate has accepted and interacts information about the new hire’s start date together with on-boarding logistics from the Recruiter. Aditi is satisfied that she found the right candidate for her team and is assured that the new hire will be on-boarded in a timely manner.

Detail

- **Civil Service Line Manager**
- **Employee / Candidate Manager**
- **HR Operations Specialist**

Roles covered within the journey

- Line Manager
- Civil Service Recruitment System
- Applicant Tracking System (ATS)
- Self-service and online support available
- Reward analytics/insights
- Dashboards/analytics to provide the Recruiter with the information on job posting

Enablers

- Intuitive portal
- Job description catalogue
- Self-service and online support available
- Applicant Tracking System (ATS)
- Civil Service careers site
- RPA enabled web chat ensuring online support 24/7

Feelings

- User friendly.
- process, but is pleased that the guidance is clear and helpful. She feels more confident about the interview panel, scoring and selecting candidates.

User Journey Overview (1/3)
HR3 Moment
“A member of my team has left and I need to fill their role”

Additional actors and responsibilities (2/3)
HR PORTAL GUIDANCE ON RECRUITMENT PROCESS

UNDERSTANDING AND POSTING THE ROLE
- Recruiter supporting the line manager
- Recruiter to provide the line manager with only the most relevant applications put forward
- Manager dashboard to show insights on recruitment process

SELECTING CANDIDATES
- Shortlist provided to line manager with only the most relevant applications put forward
- Automated scheduling tool for interviews

INTERVIEW PROCESS
- Clear online video training and interviewing hints and tips available for managers new to hiring
- Recruiter feedback session conducted

OFFER AND ACCEPTANCE
- Notification updates on stage of acceptance
- Regular updates from candidate negotiations
- New hire information sent to allow for on-boarding preparation

Opportunity interactions, opportunities, and enablers (3/3)

HR3 Moment
“A member of my team has left and I need to fill their role”

Journey interactions, opportunities, and enablers (3/3)

Critical Success Factors to enhance the experience
- Access to relevant information, content and guidance
- Access to recruiting information on the HCM system
- Online HR support

Interactions
- Line manager
- HR Operations
- Applicant Tracking System

• Personalised portal search
• RPA enabled web chat ensuring online support 24/7
• Suggested learning courses and interventions based on aggregated performance feedback data
• Human enabled web chat
• Intuitive portal

• Recruiter with business acumen (insightful and strategic sourcing advice including market trends)
• Line manager dashboard Notifications ‘pushed’ for all roles involved in the process (e.g., line manager and Recruiter)
• Regular ‘check-ins’ to ensure the line manager is aware of updates

• Pre-sifted candidate applications to allow for easy review
• Automated scheduling assistant for interviews

• Suggested online learning courses and interventions based on aggregated recruitment feedback data
• Suggested interview questions based on aggregated application and CV data
• Recruiter/interviewer feedback call post interview

• New hire information is automatically sent to the line manager to allow for Onboarding initiation
• Notifications ‘pushed’ for all roles involved in the process (e.g., Line manager and Recruiter)
• Regular ‘check-ins’ to ensure line manager is aware of updates

KPIs
- Time taken to fill position
- Time taken from application to interview stage
- Time taken for candidate to accept offer
- Ratio of applications to interviews
- Percentage of offers accepted
- Percentage of salary negotiations post offer
- Average cost to hire

• Line manager satisfaction survey
• Candidate satisfaction survey
• Satisfaction of portal search returns

Policies
- Civil Service Recruitment Principles
- Anonymised recruitment
- Fixed Term Appointments
- Agency Worker Regulations
- Civil Service Competency Framework

Service metrics

SLA* • Please refer to the Glossary for further information
HR3 Moment
“A candidate has accepted our offer and needs to be on-boarded.”

User Journey Overview (1/3)

User Journey

1. Remi, a candidate, has come back to the HR Ops Recruiter to confirm he will accept the department’s offer. The Recruiter updates the status and the case is passed to Grace, an HR Operations representative, to prepare Remi’s contract.

2. Grace sends Remi his contract, which is conditional, and a welcome pack including on-boarding information. Once she receives the necessary documentation, Grace triggers the pre-employment checks and security vetting.

3. Grace triggers Remi’s access to the on-boarding portal. As Remi has the recruitment app already this is ‘unlocked’ on the app, but he can also choose to view on-boarding online on his desktop.

4. Grace liaises with various stakeholders to ensure that the new hire is ready for Day 1.

5. Grace has been on hand to answer Remi’s queries in the run up to Day 1 and makes sure that all on-boarding actions are complete. On Day 1 Grace ensures that Remi’s necessary documentation is collected.

Feelings

- Grace knows how important it is to make sure that all the contract information is accurate, and knows she is responsible for this being accurate.
- Grace is pleased that Remi is so excited about his role and that he has returned the documentation so quickly, so there are no unnecessary delays.
- Grace likes the fact that she can give Remi access to more information and people before his first day; this means that she usually receives fewer queries.
- Grace feels very organised as she works through her checklist for Remi’s on-boarding.
- Grace is pleased that everything has run smoothly and that she has been able to hand over the rest of Remi’s on-boarding to his line manager.

Enableurs

- Applicant Tracking System (ATS)
  - HCM system
  - Push notifications/alerts
  - On-boarding Portal optimised for mobile viewing
  - Integrations between HCM system and other systems (PECs and vetting)
- On-boarding Portal/app
  - Phone call
  - HCM system
  - Push notifications/alerts

- HCM system
- Integration with document management solution
HR3 Moment
“A candidate has accepted our offer and needs to be on-boarded.”
Additional actors and responsibilities (2/3)

**User Journey**

1. Remi confirms his offer to the HR Operations Recruiter that he has been dealing with. He is told that someone from HR Operations (Grace) will be in touch with documentation shortly.

2. Remi receives his contract and all welcome information. He completes all required documentation and sends back to Grace to process.

3. Remi sees that an on-boarding portal has been unlocked on his app, and reviews content about the Civil Service including a welcome video from a Minister. He also joins a social media group with other new joiners.

4. Remi can see on a dashboard on the on-boarding portal that various activities have been completed, and the countdown to his start date reminds him of any other actions he should complete.

5. Remi has been able to refer to the new joiner community he is part of on most things, but gets in touch with Grace on a final question about expenses. He is all set to start on Day 1.

Remi's line manager receives a notification that Remi has accepted the offer. She gives Remi a call to congratulate him and to let him know what the next steps are.

Remi's line manager receives an on-boarding checklist from Grace. They can clearly see all the activities that they will need to complete to be ready for Remi's first day.

Remi's line manager starts to work through the activities they need to complete for Remi's on-boarding.

Remi's line manager receives a quick call from Grace to make sure everything is arranged for Remi's first day and confirms that she has completed everything her end.

Remi's line manager blocked time on his first day to welcome him properly to the team and introduce him to his buddy.

Remi, a candidate, has come back to the HR Ops Recruiter to confirm he will accept the department’s offer. The Recruiter updates the status and the case is passed to Grace, an HR Operations representative, to prepare Remi’s contract.

Grace sends Remi his contract, which is conditional, and a welcome pack including on-boarding information. Once she receives the necessary documentation, Grace triggers the pre-employment checks and security vetting.

Grace triggers Remi’s access to the On-boarding Portal. As Remi has the recruitment app already this is ‘unlocked’ on the app, but he can also choose to view on-boarding online on his desktop.

Grace liaises with various stakeholders to ensure that the new hire is ready for Day 1.

Grace has been on hand to answer Remi's queries in the run up to Day 1 and makes sure that all on-boarding actions are complete. On Day 1 Grace ensures that Remi's necessary documentation is collected.
OFFER ACCEPTED TRIGGER

- Hand-off between ATS and HCM system
- Warm hand-off between Recruiter and HR Operations team
- Notification of offer accepted

CONTRACT AND WELCOME PACK

- Review and acceptance of contract by candidate
- System triggers allowing to easily initiate relevant actions, e.g. vetting
- Notifications with on-boarding checklist

ON-BOARDING PORTAL

- Access to On-boarding Portal triggered
- Mobile app notifications/alerts
- Engaging On-boarding Portal content
- Communities/social collaboration

DAY 1 READINESS

- On-boarding checklist and activities
- Relevant parties/teams notified about steps requiring completion
- Timely completion of on-boarding actions

NEW JOINER SHOWS UP ON DAY 1

- All equipment ready for Day 1
- Welcome meeting for the team and new joiner
- New joiner interaction with buddy
- HR Portal interaction on Day 1

Interactions

- HR Operations Recruiter
- Candidate
- HCM system
- ATS

Critical Success Factors to enhance the experience

- Single sign on available
-ATS – HCM system interface enables automatic flow of information
- Notifications ‘pushed’ for all roles involved in the process
- Auto case creation
- Mobile app accessibility
- The contract is accessible online and e-signatures enabled
- Payroll interface enables automatic flow of information
- Checklist of next steps easily viewable for line manager
- On-boarding Portal available on mobile app
- Mobile optimisation to view alerts
- On-boarding app sends prompts to candidate to ensure relevant actions are completed
- Welcome video message from the Department lead
- On-boarding information and welcome pack sent by HR Operations with new joiner information
- Welcome notifications provided to employee on first day of work
- Certification form automatically loaded to employee personnel file
- On-boarding Portal available on mobile app
- Mobile optimisation to view alerts
- On-boarding app sends notifications for all roles involved in the process
- On-boarding Portal available on mobile app
- Mobile optimisation to view alerts
- On-boarding app sends notifications for all roles involved in the process

Metrics

- % of start dates that are postponed due to delay in background check
- Time on task to complete onboarding information
- % of pre-hires that require assistance from to complete onboarding
- % of hires who dispute information in background check
- % of new hires who attend orientation within 2 weeks of start
- % of new hires who failed to be completely provisioned with required equipment on 1st day
- Employee Customer Effort Score for completing onboarding tasks in Employee Portal
- Employee’s self-reported “Day 1 readiness” score prior to first day
- Customer satisfaction provided by employee on New Hire survey sent 30 days after start date

Policies

- Civil Service Recruitment Principles
- Anonymised recruitment
- Fixed Term Appointments
- Agency Worker Regulations
- Civil Service Competency Framework
- Probation Policy
- Payroll Policy

Journey interactions, opportunities, and enablers (3/3)
HR4 Building the Workforce

HR4-01 Learning & Development

HR4-02 Talent & Succession
HR4 Moment

“I am becoming a line manager for the first time and I’m not sure where to start!”

User Journey Overview (1/3)

1. Sam has recently been told that she was successful in applying for a promotion, which will be effective from next month. Sam receives notifications about relevant training and guidance she can find on the HR portal. As Sam has never managed a team before, she particularly wants to find guidance to understand what the expectations will be from her as a line manager, and how she can begin to lead her team.

2. Suggested content appears on the HR Portal based on Sam’s promotion date and the line management responsibilities which have been pre-set in the HCM system. She navigates to the employee portal to find videos and links with hints and tips on becoming a manager.

3. Sam is a newly promoted manager and wants support in understanding what the expectations from her will be in the new role. Sam looks for guidance on the HR portal and finds useful links.

4. Sam signs up for the suggested training courses that are sent to her based on her management role. She also reviews the team’s performance information to better understand her team’s specifics.

5. Sam schedules regular check-ins with her team - she understands the importance of this from the video training. Sam has her first handover meeting with Brad, their previous line manager.

Following advice about the level of sickness absence in her team, Sam wants to push a wellbeing initiative out to her team to tackle the sickness days recorded.

6. Following advice about the level of sickness absence in her team, Sam wants to push a wellbeing initiative out to her team to tackle the sickness days recorded.

7. New Manager

Roles covered within the journey

• New Manager

Details

1. Sam is satisfied with the quality and variety of guidance and tools available on the HR portal.

2. Sam feels well supported to start her new role, and finds the alert reminders very useful. She is satisfied that the information on her role expectations she viewed on the HR portal matched the reality of her role.

3. Sam feels well informed on her new team, she thinks the dashboard really allows her to plan ahead as she understands her team’s availability.

4. Intuitive Portal

- Suggested content based on user role
- HCM system
- Dashboards/analytics indicating key team information
- Push notifications/alerts
- Automatic triggers pushing next appropriate action directly to the user

5. Sam completes her final handover meeting and finishes her training for the new role. Sam reviews how many of her team have completed the wellbeing course she sent to them.

Feelings

Sam feels empowered by the training she has completed – she feels she is able to make decisions on how to improve problems in the team. She is grateful that she was sent a reminder to complete her training, as this helps her stay compliant.

Sam feels supported in her first month of being a line manager. She feels confident she can meet the expectations of her in the role.

Enablers

- Intuitive Portal
- Video training
- Self-service and online support
- Suggested content and knowledge articles, based on previous activities
- Cognitive agent (AI)

Sam’s promotion date and the line management responsibilities which have been pre-set in the HCM system – she sends a chaser to the relevant team members. She then sets weekly catch ups with the team to discuss priorities.

- Intuitive Portal
- Push notifications/alerts
- Dashboards/analytics indicating completed learning
HR4 Moment

“I am becoming a line manager for the first time and I'm not sure where to start!”

Additional actors and responsibilities (2/3)

User Journey

1. Sam is a newly promoted manager and wants support in understanding what the expectations from her will be in the new role. Sam looks for guidance on the HR portal and finds useful links.

2. Sam signs up for the suggested training courses that are sent to her based on her management role. She also reviews the team’s performance information to better understand her team’s specifics.

3. Sam schedules regular check-ins with her team - she understands the importance of this from the video training. Sam has her first handover meeting with Brad, their previous line manager.

4. Following advice about the level of sickness absence in her team, Sam wants to push a wellbeing initiative out to her team to tackle the sickness days recorded.

5. Sam completes her final handover meeting and finishes her training for the new role. Sam reviews how many of her team have completed the wellbeing course she sent to them.

Brad meets Sam to give her some more background on the role and the expectations of her.

The HR Operations team can answer any queries that Sam has about the learning platform or her courses, though she is able to get most information on the HR Portal.
Understanding the expectations

Training and understanding the Manager Portal

Handover activities

New initiatives and support

Handover completed

Interactions

Critical Success Factors to enhance the experience

KPIs

Policies

HR4 Moment

“I am becoming a line manager for the first time and I’m not sure where to start!”

Journey interactions, opportunities, and enablers (3/3)

Understanding the expectations

Training and understanding the Manager Portal

Handover activities

New initiatives and support

Handover completed

Online HR support, webchat, chatbot
Access to HR portal information
HCM system integration with learning portal
Video training with suggested content based on HCM updates / HR portal searches

Pop up notifications alerts for new information on training
Suggested learning content, pulled from HCM system updates
Manager dashboard available to view team details e.g. those on sick leave

HR support and additional support networks available
Handover / takeover support with guidance on activities prioritised
Documented handover procedure with regular check-in meetings
Courses pushed out to team via HCM system

Manager dashboard, visibility to see updates on team progress
Access to HR portal information

Manager dashboard showing statistics of team
Intuitive portal
Reminder alerts for deadline approaching
HCM department data, allowing for business decisions on initiatives
HR team support available
Intuitive portal

Opportunity for providing a great experience

Interactions

Critical Success Factors to enhance the experience

KPIs

Policies

Manager dashboard

Pioneering measures to provide excellent service
Enhanced measures to provide good experience
Minimum measures to provide satisfactory experience

Key:
Gold
Pioneering measures to provide excellent service
Silver
Enhanced measures to provide good experience
Bronze
Minimum measures to provide satisfactory experience

Note: CSF’s are indicative and will require validation

- Number of courses / average learning hours completed per employee
- Training cost budget vs. spend per employee
- Learning spend to course feedback comparison
- Percentage of training hours that are delivered through e-learning, instructor-based online training and classroom training
- % managers upskilled
- Mandatory training completion rate
- Course cancellation rate
- Employee satisfaction survey
- Course feedback/satisfaction
- Availability satisfaction
- Total number of continuous professional development hours undertaken by employees during the reporting period

* Please refer to the Glossary for further information
Remi is glad that he was sent recommended training prior to completing these courses through pop-up notifications on the learning portal. Remi was auto enrolled in his new role. There is a deadline set next to each of the recommended training to be completed once he begins. Prior to Remi joining the team he had been sent a notification alerting him of both mandatory and key courses which are due to be taken into account capabilities and skills required to become a line manager, and key courses are pre-enrolled in the mandatory learning initiatives, which are due to be completed within his first week. Remi is reminded about completing these courses through pop-up notifications on the HR portal.

Sophie reviews her line manager dashboard, she can see the detail of capabilities Remi needs to develop. Sophie sends Remi extra learning initiatives to help address these. Remi reviews his progress against this.

When Sophie and Remi review his development plan, they can see on the HCM system that the gap in Remi's leadership capability relative to his aspirational roles has decreased due to the extra learning he has completed. To help Remi further, Sophie suggests some additional activities which could help with Remi's case for promotion; they look into Remi becoming a mentor and update his development plan accordingly.

**User Journey Overview (1/3)**

**1. Remi joins a new department. Prior to him joining he was sent a notification alerting him of both mandatory and pre-recommended training to be completed once in his new role.**

**2. Remi wants to understand what he needs to do to become a line manager as he can currently see there is a gap in his learning, capability and skillset needed to progress.**

**3. A development plan is created to help address the gaps through informal and formal learning. Remi reviews his progress against this.**

**4. Sophie reviews her line manager dashboard, she can see the detail of capabilities Remi needs to develop. Sophie sends Remi extra learning initiatives to help address these.**

**5. Remi is on track on his development plan, however he unfortunately missed some of his deadlines for training. Sophie suggests some additional activities to help Remi progress.**

**HR4 Moment**

“I want to explore learning opportunities available to me that are relevant to my role”

**Enablers**

- **Portal**
  - Push notifications/alerts
  - Learning Management System
- **Intuitive Portal**
  - Personal Learning Platform
  - Suggest learning content based on input
  - Push notifications/alerts
  - Deep links directly from transaction completion
  - Career pathway
- **Intuitive Portal**
  - Suggested development content based on input
  - Push notifications/alerts
  - Career pathway
- **Intuitive Portal**
  - Suggested learning content based on input
  - Push notifications/alerts
  - Dashboard with analytical information
  - Deep links directly from transaction completion
  - HCM system
- **Intuitive Portal**
  - Suggest learning content based on input
  - Push notifications/alerts
  - Dashboard with analytical information
  - Deep links directly from transaction completion

**Feelings**

- What he was sent recommended training prior to joining, this allowed him to get a head start on training.

- Remi is pleased there is a clear pathway to follow, he thinks Sophie tracking him will allow for extra support.

- Remi is clear on his areas for development, he can clearly see the gaps and the timeframe he has to work on them.

- Based on conversations with Sophie, Remi understands where he can improve, and his development plan allows him to see his progress.

- Remi is glad to understand his key area for development and he is also satisfied with the amount of support from Sophie.
Additional actors and responsibilities (2/3)

"I want to explore learning opportunities available to me that are relevant to my role"

User Journey

HR4 Moment

1. Remi joins a new department. Prior to him joining he was sent a notification alerting him of both mandatory and priority recommended training to be completed once in his new role.

2. Remi wants to understand what he needs to do to become a line manager as he can currently see there is a gap in his learning, capability and skill set needed to progress.

3. A development plan is created to help address the gaps through informal and formal learning. Remi reviews his progress against this.

4. Sophie reviews her line manager dashboard; she can see the detail of capabilities Remi needs to develop. Sophie sends Remi extra learning initiatives to help address these.

5. Remi is on track on his development plan, however he unfortunately missed some of his deadlines for training. Sophie suggests some additional activities to help Remi progress.

Sophie aligns her team’s objectives with business priorities, and sets training to help her team develop in the required areas. Sophie monitors Remi’s progress in completing the training curriculum for new joiners through her manager dashboard.

Following their initial performance conversations, Sophie updates Remi’s learning page to reflect his aspiration to be a Line Manager. She tracks the gaps highlighted and searches on the portal how best to support Remi to reach his goals.

Sophie is sent Remi’s development plan. She looks at the development plan page on the portal to ensure she is able to interpret it correctly.

Following the review of Remi’s learning portal on her dashboard, Sophie can see that Remi needs further development in leadership capability. She adds additional courses to help decrease his capability gap.

Sophie is flagged that Remi had not met course completion deadlines. She discusses the reason with Remi and extends his deadline. She suggests Remi becomes a mentor and after agreeing this Sophie updates the portal.
HR4 Moment

“I want to explore learning opportunities available to me that are relevant to my role”

Journey interactions, opportunities, and enablers (3/3)

Opportunity for providing a great experience

Auto enrolment in mandatory learning initiatives

- HCM system integration with Learning Management System
- Video training with suggested content based on HCM updates / workflows / portal searches for courses
- Pre-set deadlines of completion

Identifying the gap in learning, capability and skillset

- Pop up notifications and alerts for new information on training
- Suggested learning content pulled from HCM system updates linked to workflows
- Specified learning pathway based on career plan

Development plan created

- Development plan created, based on HCM updates
- Suggested learning content pulled from HCM system updates
- Line Manager pop up notifications alerts with new information

Line Manager dashboard analytics

- Manager dashboard available to view team details e.g. learning hours
- Suggested improvement areas based on updates to development plan
- Pop up notifications alerts

Additional activities to help achieve goals

- Notification of missed deadlines
- Manager dashboard available to view team details e.g. gaps in capability
- Suggested improvement areas based on updates to development plan

Interactions

Key:
- Gold: Pioneering measures to provide an excellent service
- Silver: Enhanced measures to provide a good experience
- Bronze: Minimum measures to provide a satisfactory experience

Note: CSF’s are indicative and will require validation

Critical Success Factors to enhance the experience

- Line Manager
- Portal
- HCM system
- Learning Management System

- Personalised Learning Platform and curated content based on chosen career pathway
- Pre-determined learning options enabled from HCM system updates
- Straightforward user interface to aid action completion
- Intuitive Portal

- Personalised Learning Platform based on chosen career pathway
- Use of mobile platform to promote anytime / anywhere training
- Pop-up notification alerts
- Intuitive Portal

- Personalised development plan based chosen career pathway
- Pop-up notification alerts
- Straightforward user interface to aid action completion
- Intuitive Portal

- Manager dashboard showing statistics of team
- Employee individual dashboard to review detailed development in comparison to career plan
- Pop-up notification alerts
- Intuitive Portal

- Reminder alerts for deadline approaching
- Employee individual dashboard to review detailed development in comparison to career plan
- Manager dashboard showing statistics of team
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- Intuitive Portal

KPIs

- Number of courses/average learning hours/days completed per employee
- Training cost budget vs. spend per employee
- Learning spend to course feedback comparison
- Percentage of training hours that are delivered through e-learning, instructor-based online training and classroom training
- % managers upskilled
- Mandatory training completion rate, no. of days course was completed in
- Course cancellation rate by reason
- Employee satisfaction survey with course effectiveness
- Course feedback/satisfaction
- Availability satisfaction
- Total number of continuous professional development hours undertaken by employees during the reporting period

Policies

- Mandatory Learning Policy
- CS Employee Policy

SLA*

* Please refer to the Glossary for further information

HR4 Moment

“I want to explore learning opportunities available to me that are relevant to my role”

Journey interactions, opportunities, and enablers (3/3)

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Policies

- Mandatory Learning Policy
- CS Employee Policy

SLA*

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HR4 Moment

“My team member is retiring in 2 years and I need to identify a successor.”

User Journey Overview (1/3)

1. Angela, a Director in Finance, has recently found out that someone in her team, Keith, is retiring within the next couple of years. Keith’s role is considered ‘critical’ within their government department, and Angela has been advised by business leaders that they will need strong succession planning to ensure continuity.

2. Angela understands the importance of succession planning and is confident in undertaking the activity with support when she needs it. Angela feels supported by a professional business partner. She finds it hugely valuable having access to so much rich data about the talent in her department. Angela trusts the quality of the data she is seeing.

3. Angela understands the importance of succession planning and identifies a number of criteria for candidates, and suggests some key candidates for her role. Shaz supports Angela in identifying a number of criteria for candidates, and suggests some key candidates for her role. Shaz informs her that transactional support from the HR Operations team can be provided to support her in navigating the system and run any relevant reports. Shaz also advises that the system and does not feel she needs support at this stage. Following the last talent review, a succession plan does exist, but they agree it needs updating as circumstances have evolved and Shaz has received an updated framework from the CoE. Angela and Shaz navigate to the Talent pages on the HCM system. Angela peruses a couple of employees in their hierarchy and can view individual talent profiles, including performance versus potential information. They spend some time reviewing the information of various employees. Shaz consults with a Finance Business Partner to get a view across the government departments.

4. Angela feels supported by a professional business partner. She finds it hugely valuable having access to so much rich data about the talent in her department. Angela feels confident that she has been able to identify a number of potential candidates. Angela feels supported by a professional business partner. She finds it hugely valuable having access to so much rich data about the talent in her department. Angela feels confident that she has been able to identify a number of potential candidates. Following confirmation of the succession plan, Angela contacts the employees that have been identified as potential successors for the role. She has consulted with Shaz on details of guidance and next steps to include in the communication – advising them of next steps, including reviewing and updating their objectives in the HCM system, and recommended learning modules. Angela has quarterly talent review meetings with the identified successor candidates, which she documents on their individual profile pages. The candidates include someone who may be ready for a managed move, as well as a couple of candidates that could develop into the role. She has updated the permission of the notes so only herself and Shaz can view them. Angela also inputs to the candidate’s development plans, and suggests learning modules tailored to their development needs. Shaz and Angela have regular meetings every quarter to discuss the progress of the candidates.

5. Angela and her Line managers have maintained a healthy talent pool and Angela feels confident that she has been able to identify a number of potential candidates. Angela and her Line managers have maintained a healthy talent pool and Angela feels confident that she has been able to identify a number of potential candidates. The successor is chosen after formal panel interviews. Angela and Shaz collate the succession plan data for Keith’s role, and suggests some key candidates for her role. Following confirmation of the candidate shortlist, Angela consults with Shaz ahead of communicating to candidates and proposing development opportunities.

HR4 Moment

“My team member is in a role that is considered business critical, he is planning to retire soon and I want to ensure a suitable successor is identified and will be ready”

Roles covered within the journey

- Employee
- Line manager
- HRBP
- HR Operations

Feelings

Angela understands the importance of succession planning and is confident in undertaking the activity with support when she needs it. Angela understands the importance of succession planning and is confident in undertaking the activity with support when she needs it. Angela feels supported by a professional business partner. She finds it hugely valuable having access to so much rich data about the talent in her department. Angela has updated the permission of the notes so only herself and Shaz can view them. Angela also inputs to the candidate’s development plans, and suggests learning modules tailored to their development needs. Shaz and Angela have regular meetings every quarter to discuss the progress of the candidates.

Enablers

- Intuitive Portal
- Video training
- Self-service and online support available
- HCM system
- Push notifications/alerts
- Pre-populated template for succession plan
- HCM system
- Integrations between HCM and other systems
- Dashboards/analytics indicating key team information
- Approval notifications
- Employee
- Line manager
- HRBP
- HR Operations

Within a specified time period prior to Keith’s planned retirement date Shaz advises that the formal process to select his successor should begin. Identified successor are encouraged to apply, and the role is also advertised in line with the Fair and Open Policy, because at this point the there is no one ready for a managed move. The candidates are interviewed as per the guidelines and policy. Key leaders are also given systems permission to view information from the succession planning activities on the HCM system. After deliberation the results are updated on the HCM system by Shaz, and Angela is notified to approve Keith’s successor. She is pleased that one of the original candidates has been successful. The results are communicated to the candidates with a new successor identified. Keith is sent a checklist of activities to support handover of his role, and is supported by Angela and Shaz to ensure the successor to ensure they are well equipped for the role.

Detail
Additional actors and responsibilities (2/3)

HR4 Moment

“I will be retiring in 2 years and need to identify my successor.”

User Journey

1. Someone in Angela’s team, in a business critical role, is retiring in the next couple of years. Angela understands from her business leaders the importance of robust succession planning to ensure continuity.

2. Angela consults with her HR business partner, Shaz, to identify requirements and review her workforce talent pool.

3. With support from Shaz, Angela identifies a number of suitable candidates using the HCM system. The data is collated and shared at a review meeting with Leadership where a shortlist is confirmed and captured in the HCM system.

4. Following confirmation of the candidate shortlist Angela consults with Shaz ahead of communicating to candidates and proposing development opportunities.

5. The successor is chosen after formal panel interviews. Angela is sent a checklist for the handover which she is to complete. The successor is supported in the handover from Keith by Angela and Shaz.

HR Operations Team

Angela initiates a webchat conversation with HR Operations to find out more information on succession plans. The HR Operations team send Angela relevant links to pages from the HR Portal where more information can be found.

Shaz is notified of the case on the HCM system so arranges a time to meet with Angela. During their meeting they discuss standards and requirements for the role. Shaz shows Angela how to navigate to the talent pages on the HCM system where they can analyse employee performance data.

Shaz provides Angela with details to include in the communications to potential successors. Shaz also provides guidance on how to work with candidates on suitable development plans. Shaz and Angela meet regularly.

Shaz flags to Angela that recruitment activity must be in line with the fair and open policy. Shaz selects interviewers for the role in line with the policy. He gives them permissions to view candidate details on the HCM system. Shaz communicates the results and helps develop a handover plan.

Civil Service Employee

Civil Service Line manager

HRBP

Employees are contacted by Angela asking them to review and update their objectives in the HCM system. They are informed that they have been selected, should they wish, to be part of the Angela’s succession plan for Keith.

Employees are notified that the role has now officially been opened and applications are being accepted. Selected employees are invited to begin the recruitment process. After interviewing, candidates are notified of the results within the specified timeframe.

The successor is chosen after formal panel interviews. Angela is sent a checklist for the handover which she is to complete. The successor is supported in the handover from Keith by Angela and Shaz.
HR4 Moment
“I will be retiring in 2 years and need to identify my successor.”
Journey interactions, opportunities and enablers (3/3)

WEBCHAT FOR INSTANCE RESPONSE FROM HR
- Access to relevant information on HR Portal
- Online HR support
- Cognitive agent available 24/7
- Query escalated to appropriate team

REVIEW TALENT POOL
- HRBP provides strategic support for Line manager
- Talent pages on HCM System easy to navigate
- Employee profiles up to date and informative

COLLATE SUCCESION PLANNING DATA
- HRBP provides support to Line manager
- Consolidated succession planning data and information

SHORT-LIST CONFIRMATION
- Guidance for Line manager on communications for potential succession candidates
- Clear online guidance available for identified succession candidates
- Development plans and regular check in meetings

INTERVIEW PROCESS
- Automated scheduling tool for interviews
- Notification updates on stage of acceptance
- Checklist to support handover

Interactions
- Line manager
- HRBP
- Candidates
- Line manager
- HRBP
- Succession candidates / employees
- Line manager
- HRBP
- Line manager
- HR Operations
- Line manager
- HRBP
- Line manager
- HRBP

Critical Success Factors to enhance the experience

Key:
- Gold: Pioneering measures to provide excellent service
- Silver: Enhanced measures to provide good experience
- Bronze: Minimum measures to provide satisfactory experience

Note: CSF’s are indicative and will require validation

Opportunity for providing a great experience

WEBCHAT FOR INSTANCE RESPONSE FROM HR
- Cognitive automation-enabled webchats ensuring online support 24/7
- Personalised Portal search
- Suggested content available on the Portal with guidance
- Straightforward user interface to aid action completion
- Case management
- Intuitive Portal

Review Talent Pool
- Employee profiles and hierarchies on HCM system
- Seamless interactions across the HR operating model
- Supportive and informative HRBP
- Clear and simple interface on HCM interface

Collate Succession Planning Data
- Retention risk flags on HCM system
- Internal talent pools on HCM system utilised to track talent
- Informative and strategic support from HRBP
- Straightforward user interface of HCM system
- HR transactional support available
- Clean and up to date position data

Short-list Confirmation
- Manager dashboard with details of succession candidates
- Suggested learning courses and interventions based on aggregated performance feedback data
- Framework for communications to succession candidates with links to suggested content available on the Portal
- Development plan templates

Interview Process
- New hire information is automatically sent to Line manager to allow for Onboarding initiation
- Notifications 'pushed' for all roles involved in the process (e.g. Line manager and Recruiter
- Handover checklist

Key:
- SCS Indicators of Potential
- Civil Service Recruitment Principles
- Equality and Diversity Strategy
- Pay and Grading Policy
- Civil Service Competency Framework
- Civil Service Leadership Statement
- Culture and Open Policy
- Recruitment Policy

Metrics

Process metrics:
- Retention risk / attrition risk (especially for high potentials)
- Successors candidates participating in leadership development programs
- Roles covered by succession process
- # of critical roles by location
- Rate of internal vs external hires

Service metrics:
- # of critical roles with "ready now" successors
- # roles filled by people on a succession plan
- Time to fill key / critical roles
- Total cost of development of an employee for a future role

Satisfaction/engagement of leaders with career management/talent management processes

Policies

- SCS Indicators of Potential
- Civil Service Recruitment Principles
- Equality Act 2010
- Pay and Grading Policy
- Pay and Grading Policy

SLA*

* Please refer to the Glossary for further information

Notes:
HR4 Moment

“\textbf{I have been asked to mentor a colleague}”

User Journey Overview (1/3)

1. The Community of Expertise (CoE) within HR have refreshed the Civil Service Mentoring Scheme. An email communication has been sent to all Civil Servants outlining it in more detail, including benefits to those involved. Though it is not obligatory, the email encourages enrolment to an online training course or attendance at a skills workshop, and provides a link to the HR portal where more information is available. The HR portal also has video content, case studies and personal reflections from mentors/mentees.

2. Having completed and submitted the online registration form, Freya receives a notification in her inbox advising that she should complete an online training course. She chooses to complete it securely at home over the weekend on her mobile. HCM system is automatically updated to reflect completion. Freya receives a notification via the HCM system informing her that she has been matched to a colleague, Hana. Whilst Freya and Hana sit in different departments, a mentor matching system allows them to be paired based on identified criteria. Freya views the HCM system as she is interested in. Guidance is sent to both Freya and Hana on the mentoring relationship and associated policies and Freya is recommended to schedule a meeting with Hana. Freya visits the HR portal and reviews the appropriate pages, she watches a number of short videos to better understand her role, she also watches videos on mentoring and how best she can support her mentee. She accesses the relevant pages to find details of the scheme.

3. Freya and Hana meet to discuss the relationship Hana is seeking. They decide that they think the relationship would work. Freya and Hana discuss her objectives. Hana explains that she is looking for support and guidance in preparing for the scheme’s assessment. Having established good rapport and believing that they are well matched, Freya and Hana agree to continue with the relationship. They agree their mentoring contract and agree a second meeting. During their second meeting, Freya and Hana discuss the details of the scheme. Hana is interested to learn from Freya’s own experience and so she shares insight from when she was part of the scheme. In preparation for the upcoming assessment for the FLS scheme, Freya and Hana meet on a number of further occasions, covering various aspects of preparation for the scheme. Due to Freya’s flexible working arrangements, they sometimes meet via video conference.

4. Freya and Hana continue to have a number of positive discussions about Hana’s personal, professional, and career development. They have objective discussions about Hana’s strengths and development areas, matching them against the requirements for the scheme. Freya continues to visit the Mentoring pages on the HR portal to refresh her understanding of the relationship and to seek guidance through tools and techniques she can employ in the relationship with Hana. Freya chooses the appropriate templates and tools from the Mentoring Toolkit, and watches a video on how to put some of the models suggested into practice with Hana. Freya actively listens to Hana through their discussions, she observes and probes carefully, summaries, and gives feedback where appropriate. Freya has a wide network and introduces Hana to address some specific areas for focus.

5. Freya and Hana continue their relationship as Hana prepares for the scheme’s assessment. Following the assessment, and having achieved their objectives, Freya and Hana agree that it’s an appropriate time to end the formal mentoring relationship. They discuss Hana’s achievements and identify further development objectives for her - and how they might be achieved. They agree to keep in touch, and Freya offers advice about her next steps. Freya asks for feedback from Hana about how she performed her role as a mentor, and also about the mentoring process more broadly. Once their mentoring relationship is ended on the system they are automatically sent a feedback survey on how the mentor scheme worked.

The mentoring scheme has been refreshed and Freya wants to sign up. She navigates to the HR Portal and completes an online form to register her interest. She completes the necessary online courses that are pushed to her.

Based on identified criteria, Freya is matched with Hana, who is on track to apply a scheme Freya has experience of. Freya accesses information and coaching videos to understand the expectations of her role as a mentor.

Hana wants support in achieving her career ambition and more importantly, in applying for a scheme she is interested in. Establishing good rapport they continue to meet regularly.

Freya continues to support Hana and accesses content on the HR Portal to ensure she is well informed and demonstrates attributes of a good mentor.

Freya continues to support Hana in line with their agreed contract. When Hana has met her original objectives, they agree to end the relationship and conduct a final meeting.

**User Journey**

**Civil Service Mentor**

**HR4 Moment**

“I want to provide support to my colleagues, I think mentoring is important for both my own development and that of others”

**Feelings**

Freya is excited to be involved in this important development opportunity. She is pleased to be able to complete the course at her leisure.

**Enablers**

- Intuitive Portal
- HCM system
- Push notifications/alerts
- Self-service and online support
- Video content
- Integrations between HCM and other systems
- On-demand learning
- Mobile

- Intuitive Portal
- HCM system
- Push notifications/alerts
- Self-service and online support
- Video content
- Integrations between HCM and other systems
- A mentor matching system

- Video conference
- Easily digestible learning content and guidance
- Video training
- HCM system

Freya, Civil Service Mentor

Roles covered within the journey

Employee (Mentee) Employee (Mentor) HR CoE

Freya and Hana meet to discuss the relationship Hana is seeking. They decide that they think the relationship would work. Freya and Hana discuss her objectives. Hana explains that she is looking for support and guidance in preparing for the scheme’s assessment. Having established good rapport and believing that they are well matched, Freya and Hana agree to continue with the relationship. They agree their mentoring contract and agree a second meeting.

During their second meeting, Freya and Hana discuss the details of the scheme. Hana is interested to learn from Freya’s own experience and so she shares insight from when she was part of the scheme.

In preparation for the upcoming assessment for the FLS scheme, Freya and Hana meet on a number of further occasions, covering various aspects of preparation for the scheme. Due to Freya’s flexible working arrangements, they sometimes meet via video conference.

Freya and Hana continue to have a number of positive discussions about Hana’s personal, professional, and career development. They have objective discussions about Hana’s strengths and development areas, matching them against the requirements for the scheme.

Freya continues to visit the Mentoring pages on the HR portal to refresh her understanding of the relationship and to seek guidance through tools and techniques she can employ in the relationship with Hana.

Freya chooses the appropriate templates and tools from the Mentoring Toolkit, and watches a video on how to put some of the models suggested into practice with Hana.

Freya actively listens to Hana through their discussions, she observes and probes carefully, summaries, and gives feedback where appropriate.

Freya has a wide network and introduces Hana to address some specific areas for focus.

Freya and Hana continue their relationship as Hana prepares for the scheme’s assessment. Following the assessment, and having achieved their objectives, Freya and Hana agree that it’s an appropriate time to end the formal mentoring relationship. They discuss Hana’s achievements and identify further development objectives for her - and how they might be achieved.

They agree to keep in touch, and Freya offers advice about her next steps.

Freya asks for feedback from Hana about how she performed her role as a mentor, and also about the mentoring process more broadly.

Once their mentoring relationship is ended on the system they are automatically sent a feedback survey on how the mentor scheme worked.

Freya is very happy that Hana was accepted onto the scheme. She is keen to support another mentee achieve their goals.

Freya continues to support Hana and accesses content on the HR Portal to ensure she is well informed and demonstrates attributes of a good mentor.

Freya continues to support Hana in line with their agreed contract. When Hana has met her original objectives, they agree to end the relationship and conduct a final meeting.

Freya is engaged and enthused by the opportunity to support Hana in her career development. She appreciates Hana’s understanding of her role and is always considerate of Hana’s time.

Freya feels she has struck up a strong relationship, and feels supported by the frameworks and tools she has been able to utilise.

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**HR4 Moment**

“I have been asked to mentor a colleague.”

Additional actors and responsibilities (2/3)

**User Journey**

1. The mentoring scheme has been refreshed and Freya wants to sign up. She navigates to the HR Portal and completes an online form to register her interest. She completes the necessary online courses that are pushed to her.

2. Based on identified criteria, Freya is matched with Hana, who is on track to apply a scheme Freya has experience of. Freya accesses information and coaching videos to understand the expectations of her role as a mentor.

3. Hana wants support in achieving her career ambition and more imminently, in applying for a scheme she is interested in. Establishing good rapport they continue to meet regularly.

4. Freya continues to support Hana and accesses content on the HR Portal to ensure she is well informed and demonstrates attributes of a good mentor.

5. Freya continues to support Hana in line with their agreed contract. When Hana has met her original objectives, they agree to end the relationship and conduct a final meeting.

**Additional Actors**

**Civil Service Mentor**

The HR CoE for L&D has refreshed the Civil Service Mentoring Scheme. They communicate the Scheme to all employees and ensure that the appropriate information and training is on the HR Portal. They also work with HR Operations to ensure they can answer any queries relating to the Scheme.

**Civil Service Mentee**

Hana logs into the HCM system from her mobile app and populates her profile. She adds criteria for what she wants in a mentor, i.e. someone who had been on the FLS. Hana is notified that she is paired with Freya, she is sent her profile along with guidance to mentees.

**HR CoE**

The mentoring scheme has been refreshed and Freya wants to sign up. She navigates to the HR Portal and completes an online form to register her interest. She completes the necessary online courses that are pushed to her.

**Civil Service Mentee**

Hana prepares for her assessment, using experiences and insight from Freya to prepare. Hana and Freya agree that it would be best for Hana to find another mentor once she starts the FLS. She found the mentoring relationship very useful and agrees to keep in touch with Freya.

**Civil Service Mentor**

As Freya and Hana build their relationship, Hana talks about her career goals and seeks advice on how to handle difficult situations – Freya is able to discuss these which Hana finds useful. Hana is grateful that Freya is able to introduce her to people and expand her network, she is able to.

**HR CoE**

Once their mentoring relationship is ended on the system they are automatically sent a feedback survey on how the mentor scheme worked. The HR CoE receives feedback from mentors and mentees to ensure that they can continually improve the offering and support in this area.
HR4 Moment
“I have been asked to mentor a colleague.”

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

Critical Success Factors to enhance the experience

Key:
- Gold: Pioneering measures to provide excellent service
- Silver: Enhanced measures to provide good experience
- Bronze: Minimum measures to provide satisfactory experience

Note: CSF’s are indicative and will require validation

Interactions

- CoE
- Employees
- Employee (Mentor)

- Employee (Mentor)
- Employee (Mentee)

- Employee (Mentor)
- Employee (Mentee)

- Employee (Mentor)
- Employee (Mentee)
- CoE

Opportunities

- Online registration form integrated with mentor matching system
- Suggested content pushed to employee
- Straightforward user interface to aid action completion
- Intuitive Portal
- Automated response to confirm receipt of registration

- Automatic mentor matching based on identified criteria
- Use of mobile platform for anytime / anywhere training
- Straightforward user interface to aid action completion
- Intuitive Portal

- Pop-up notification alerts
- Intuitive Portal
- Regular check in meetings via different channels

- Online tools and frameworks available on HR portal with accompanying online learning and video training, and guidance
- Intuitive Portal

- Online feedback form
- Mentoring system updated to reflect mentor relationship conclusion

SLA*

- Number of mentors volunteering
- Number of mentor requests
- Number of employees promoted with formal mentor relationship
- Turnover of employees with a mentor as a % overall turnover

- Objectives achieved
- Split across grades using mentoring
- Departments using mentoring
- Reasons for requesting a mentor
- Length of mentoring relationship

- Employee satisfaction with mentoring scheme
- Employee satisfaction with guidance on mentoring
- Impact of mentoring on career prospects

* Please refer to the Glossary for further information

Journey interactions, opportunities and enablers (3/3)
“I am conducting a Talent Review to consider learning initiatives and future workforce planning”

User Journey Overview (1/3)

1. James, an HR Operations Specialist, has received instruction from the Centre of Expertise (CoE) responsible for Talent to alert him that the Talent Review period has opened. Talent Reviews happen regularly, but James is provided with specific details of timelines for supporting the Talent Review process. During the Talent Review period, James will work with the CoE and HRBP on communications, query handling and resolution, and reporting and metrics needed for the Talent Review.

2. James is notified of the HCM system via an alert to add value. James is supporting an upcoming Talent Review, James is notified via the HCM system on the progress, and can provide reporting and metrics as required. James creates Talent Review reports using data from the HCM system to track completion, and progresses and resolves queries from HR and the business during this time.

3. Following the Talent Review Meeting, James works with the HRBP to complete the next steps. James supports the HRBP in drafting and communicating the outcomes.

4. James works with the line managers to review the reports and identifies any areas that require further attention and discussion. They discuss any concerns in order to achieve a resolution prior to the Talent Review Meeting. James tracks completion as employees update their profiles on the HCM system as required.

5. James sends out a notification to remind Line Managers to inform their employees of the outcome of the Talent Review.

***HR4 Moment***

“*The talent review period has opened and I am involved in supporting the process*”

James is excited about the Talent Review and is keen to use his specialist knowledge to support the process and add value. James is keen to be able to provide as much useful data as he can to the HRBP. He understands that the more data available the more informative decisions making can be.

**Roles covered within the journey**

- Employee
- Line Manager
- HR Operations Specialist
- HRBP
- HR CoE

**Enablers**

- Criteria selection in the HCM system within the manager view of career profiles
- Manager Dashboards
- Analytics
- Notifications
- HCM system
- Diary scheduling
- Case Management System
- HCM system
- Market research
- Manager Dashboards
- Analytics
- HCM system
- Approval framework and notifications

**Feelings**

- James is excited about the Talent Review and is keen to use his specialist knowledge to support the process and add value.
- James is satisfied that the correct decisions were made during the Talent Review Meeting. He wants to ensure the succession plan he creates is reflective of market research and insights from the meeting.
- James is glad to be able to provide insight based on reviews made from the reports.
- James is keen to see how the new initiatives progress. He is satisfied that the implementation and looks forward to sharing with results.
“I am conducting a Talent Review to consider learning initiatives and future workforce planning”

Additional actors and responsibilities (2/3)

1. Employees are sent an email asking them to update their career profiles on the HCM system.
   1. As the annual Talent Review process is approaching, the CoE sends an email to Line Managers and HR colleagues reminding them of the process and timelines. They send an email to employees asking them to update their profiles on the HCM system.

2. In addition to their performance conversations, employees have regular talent conversations with their line managers where they discuss strengths and development areas.
   2. James creates Talent Review reports using data from the HCM system to track completion, and progresses and resolves queries from HR and the business during this time.

3. The CoE is informed of decisions made during the Talent Review meeting by the HRBP. They discuss what this means in terms of next steps and progression of initiatives.
   3. The HRBP consults with the CoE and leadership to confirm decisions made. The HRBP then works with James to communicate the outcomes to leadership and line managers.

4. Line Managers communicate the outcome of the Talent Review meeting to employees. There is information available on the portal on how the initiatives will directly impact employees. They are encouraged to ask questions to line managers if they would like more information.
   4. Following the Talent Review meeting, James works with the HRBP to prepare the next steps. James supports the HRBP in drafting and communicating the outcomes.

5. Employees are sent an email asking them to update their career profiles on the HCM system by completing a predefined form. The email also has links to guidance on the HR Portal to get more information on how best to populate this.
   5. James works with the learning and recruiting teams to look into how the actions from the Talent Review meeting can be implemented. He provides an update to the HRBP, CoE and business leaders on progress.
HR4 Moment

“I am conducting a Talent Review to consider learning initiatives and future workforce planning”

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

- Notifications / alerts on HCM system
- Manager and employee self service on HCM systems
- Managers supported in talent conversations with their teams

Critical Success Factors to enhance the experience

- HR Operations Specialist
- CoEs
- Line managers
- Employees

Interactions

- RPA enabled webchats ensuring online support 24/7
- Employee career profiles on HCM system
- Pop up notification alerts
- Well defined roles within the HR operating model
- Case management
- Straightforward user interface to aid action completion
- HR Operations support for query resolution

Reporting and analytics to support Talent Review is defined on the HCM system
- Manager dashboard with team statistics
- Timely updates on progress of Talent Review
- Quick reference guide available on the HR Portal

Performance snapshots available in HCM system, including real-time aggregated feedback data to feed into Talent Review
- HCM system utilised to track talent following review
- Internal talent pools on HCM system utilised to track talent
- Retention risk flags on HCM system
- Case management
- Informative and strategic support from HRBP

Data from talent review provided to other talent areas including learning and recruitment
- Next steps and associated reminders are well defined and follow up on

• % career profiles updated
• % employees ready for promotion
• % employees on Performance Improvement Plans
• % high potential talent identified
• % talent identified on succession plans

Speed / length of time to promotion
• # moves across departments
• Time taken for end-to-end talent review process
• Diversity metrics
• Correlation of people who have been on particular programmes

% of managers who make talent decisions believe the data from Talent Reviews help them make informed Talent decisions
- Effectiveness of Talent Reviews for employees

Policies

- SCS Indicators of Potential
- Civil Service Recruitment Principles
- Equality and Diversity Strategy
- Quality Act 2010
- Fair and Open Policy
- Recruitment Policy

- Civil Service Competency Framework
- Civil Service Leadership Statement
- Pay and Grading Policy

SLA*

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Key:
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Journey interactions, opportunities and enablers (3/3)
HR5 Managing the Workforce

HR5-01 Manage Performance
HR5-02 Absence, Health & Wellbeing
HR5-03 Employee Changes
HR5-08 Conduct & Discipline
HR5 Moment

“I am participating in an on-going performance review”

User Journey Overview (1/3)

1. Anisha, Civil Service Employee
2. Roles covered within the journey
   - Employee
   - Line Manager
   - HR Operations

Elina's line manager, Elin, reviews team objectives against organisational objectives. Once they have discussed the team objectives, Anisha is offered guidance on how to set her individual objectives.

Anisha meets with Elin to discuss her individual objectives, she uploads these onto the HCM System. Elin is able to advise Anisha on how to set career focused objectives.

Anisha prepares a list of reviewers to ask for feedback from. She shares this with Elin, Elin adds additional colleagues to the list. Anisha initiates the feedback processes in the HCM system.

Anisha reviews her performance feedback. Anisha and Elin have a check in meeting and update her objectives and development plan based on the feedback received. Elin helps to look for opportunities which demonstrate her strengths.

Anisha decides to actively address her development opportunities and engages in a project which can enhance her skillset. She is notified that a touch-point with Elin is due.

Elina receives an email notification in her inbox, where she finds an embedded link which takes her to the revised team objectives in the HCM system. On entering the system, she gets a notification with revised team objectives in the HCM system.

Anisha feels well informed on what the organisation's and her line managers. They discuss their career aspirations and performance. They agree some additional colleagues to her objectives in order to support her ambitions and career goals, which she updates in the HCM system.

Anisha feels satisfied with the amount of support she receives through both her line manager and mentor. She has a clear goals and objectives together with an understanding of how to achieve these.

Anisha is intrigued to understand what feedback her reviewers will provide, she finds the process for asking for feedback simple and easy to follow. She is pleased to be able to receive feedback from a number of relevant sources and the transparency gives her confidence.

Anisha feels well informed on what the organisation's and her line managers. They discuss their career aspirations and performance. They agree some additional colleagues to her objectives in order to support her ambitions and career goals, which she updates in the HCM system.

Anisha feels satisfied with the amount of support she receives through both her line manager and mentor. She has a clear goals and objectives together with an understanding of how to achieve these.

Anisha is intrigued to understand what feedback her reviewers will provide, she finds the process for asking for feedback simple and easy to follow. She is pleased to be able to receive feedback from a number of relevant sources and the transparency gives her confidence.

Anisha finds the clear development plan useful as she can actively address the development areas with a full understanding of what is expected from her. She is glad that she can keep Elin well informed about her progress through regular check ins.

Enablers
- HCM system
- Intuitive Portal
- Video guidance, suggested content and knowledge articles
- Embedded (deep) links from guidance directly through to HR actions
- Push notifications/alerts
- HCM system
- Intuitive Portal
- Video guidance, suggested content and knowledge articles
- Push notifications/alerts
- HCM system
- Push notifications/alerts
- Suggested development and role change opportunities based on data/skills view available in the system
- Real-time aggregated feedback data
- Intuitive Portal
- Push notifications/alerts
- RPA-enabled diary scheduling

Feelings
- Anisha feels well informed on what the organisation’s and her line manager objectives are. She feels the guidance was able to support her with objective setting.
- Anisha feels satisfied with the amount of support she receives through both her line manager and mentor. She has clear goals and objectives together with an understanding of how to achieve these.
- Anisha is intrigued to understand what feedback her reviewers will provide, she finds the process for asking for feedback simple and easy to follow. She is pleased to be able to receive feedback from a number of relevant sources and the transparency gives her confidence.
- Due to the clear and timely performance feedback, Anisha has clarity on what her strengths and development areas are. Anisha feels well supported by both her mentor and Elin in the potential role move.
- Anisha finds the clear development plan useful as she can actively address the development areas with a full understanding of what is expected from her. She is glad that she can keep Elin well informed about her progress through regular check ins.
Additional actors and responsibilities (2/3)

HR5 Moment
“I am participating in an on-going performance review”
HR5 Moment
“I am participating in an on-going performance review”

Journey interactions, opportunities, and enablers (3/3)

**Interactions**

- Line manager
- Portal
- HCM system

**Critical Success Factors to enhance the experience**

- Personalised Portal search
- RPA enabled webchats ensuring online support 24/7 for portal advice
- Human enabled webchat
- Mentor alignment to employee based on skill matching / availability
- Suggested video learning content
- Prompts/alerts sent to employee
- Advanced search bar functionality
- Quick reference guide available on the intranet
- Prompts/reminder notifications pushed out to colleagues for feedback completion
- Intuitive HR portal
- Performance snapshots available in HCM system, including real-time aggregated feedback data
- Suggested development opportunities based on inputted data
- Prompts/alerts sent to employee
- Data enabled online dashboard highlighting key performance data points
- Suggested project / training areas which will help employees with development areas based on data analytics
- Automated calendar invites to both line manager and employee scheduling check in meeting
- Suggested video learning content
- Prompts/alerts sent to employee
- Advanced search bar functionality
- Quick reference guide available on the intranet
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- Prompts/alerts sent to employee
- Advanced search bar functionality
- Quick reference guide available on the intranet
- Prompts/reminder notifications pushed out to colleagues for feedback completion
- Intuitive HR portal
- Performance snapshots available in HCM system, including real-time aggregated feedback data
- Suggested development opportunities based on inputted data
- Prompts/alerts sent to employee
- Data enabled online dashboard highlighting key performance data points
- Suggested project / training areas which will help employees with development areas based on data analytics
- Automated calendar invites to both line manager and employee scheduling check in meeting

**KPIs**

- Number of employee feedback requests completed on time
- Referrals to EAP, trajectory of improvement
- Outcomes of performance reviews (exit, improvement, development plan)
- Manager satisfaction with the performance management process
- Employee satisfaction with the performance management process
- Number of queries raised to HR concerning the performance management process

**Policies**

- Performance Management
- Managing Poor Performance

**SLA**

*Please refer to the Glossary for further information*
Peter, Civil Service Line Manager

"One of my employees isn't performing very well. I want to make sure I'm following the correct process in handling the situation."

Roles covered within the journey

- Employee
- Line Manager
- HR Operations

User Journey Overview (1/3)

1. Peter has identified Sana as an employee who is performing below expectations, so he seeks guidance on how best to approach the situation.

2. In line with the guidance, Peter invites Sana to meet to discuss her performance. This is captured in writing, with information about her performance to date and possible consequences. Sana is also invited to bring a colleague or union representative.

3. Following the meeting, Peter documents critical points, agreed steps, and interventions to support Sana improve her performance. He shares it with her via email so that they both are aware of timelines and expectations. Sana understands that if her performance does not improve it may result in a written warning and set review period. Peter then prepares a performance improvement plan for Sana with her input, having watched the training video on how to prepare one. He downloads a template from the HR portal. Peter consults with HR to ensure he is approaching the situation correctly. He requests support from HR by initiating a webchat session, which is routed to an HR Operations representative. They confirm that this would be the best course of action to help Sana get back on track and that his actions have been in line with the policies and procedures.

4. Peter meets Sana to review her Performance Improvement Plan and they agree regular touchpoints to review her progress.

5. The final touchpoint for Sana's performance improvement plan approaches, and given the positive output since they put the plan in place, Peter decides that Sana has addressed her performance issues. They discuss options for continued support without the plan in line with the guidelines and the organisation's performance management approach.

User Journey

1. Peter is having issues with a member of his team, Sana, who has not been performing well for quite some time, with her being consistently late for work, tasks taking longer than expected and outputs being below expectations.

2. Peter has tried to address Sana's performance through performance conversations, and has sought guidance on the HR portal on how to manage poor performance as he wants to make sure he handles the matter in a thorough way. Peter has already checked with Sana that there are no external factors affecting her performance. Having reviewed the suggested videos on how to address underperformance and how to create an informal performance improvement plan, Peter feels that this may be a structured way to help Sana improve at work.

3. Peter feels that he is following the correct procedure, and hopes that he has made it clear to Sana that he really wants to help her improve.

4. Peter feels he has given Sana all the support available to her, and is pleased with the quick response and guidance from the HR Operations team.

5. Peter is glad that Sana has improved sufficiently and that she has addressed her performance issues.
HR5 Moment
“I have identified that one of my employees is struggling with their performance.”

Additional actors and responsibilities (2/3)

1. Peter has identified Sana as an employee who is performing below expectations, so he seeks guidance on how best to approach the situation.

2. Sana is aware that she has not been performing well compared to some of her peers. She never seems to prioritise the right work, is often late, and has been told that she must take more care on her attention to detail.

3. A formal meeting is scheduled between Peter, Sana and her chosen colleague. They discuss Sana’s poor performance and solutions to improve. They agree to implement a performance improvement plan.

4. Peter prepares a performance improvement plan with guidance from the HR portal. He also consults with HR Operations who are able to advise him.

5. Peter meets Sana to review her performance improvement plan and they agree regular touchpoints to review her progress.

The HR Operations team are contacted by Peter via webchat to provide advice on the best course of action to help Sana get back on track. They also discuss the performance improvement plan and its appropriateness.

The HR Operations team are available to support Peter with any questions he may have in relation to setting and managing the performance improvement plan.

Peter is able to assess Sana’s improvement from the plan. She is greatly improving and he is being notified of the learning courses she has been completing. He decides to conclude the performance improvement plan.

Sana reviews the performance improvement plan with Peter and agrees to look at the additional resources Peter suggested for her.

Sana meets Peter for regular touchpoints to review progress against the performance improvement plan. Sana’s performance improves over time and she is taken off the plan post their review meeting.

Peter meets Sana to review her performance improvement plan and they agree regular touchpoints to review her progress.

Peter is able to assess Sana’s improvement from the plan. She is greatly improving and he is being notified of the learning courses she has been completing. He decides to conclude the performance improvement plan.

Sana reviews the performance improvement plan with Peter and agrees to look at the additional resources Peter suggested for her.

Sana meets Peter for regular touchpoints to review progress against the performance improvement plan. Sana’s performance improves over time and she is taken off the plan post their review meeting.
HR5 Moment

“I have identified that one of my employees is struggling with their performance.”

**Counterbalancing measures to provide an excellent service**

<table>
<thead>
<tr>
<th>Key:</th>
<th>Gold</th>
<th>Silver</th>
<th>Bronze</th>
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</thead>
<tbody>
<tr>
<td>Pioneering measures to provide an excellent service</td>
<td>Enhanced measures to provide a good experience</td>
<td>Minimum measures to provide a satisfactory experience</td>
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**Note:** CSF’s are indicative and will require validation

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**Opportunity for providing a great experience**

**Critical Success Factors to enhance the experience**

- Personalised portal search
- Performance analytics/dashboards enabling early intervention
- Suggested role-based content to support performance improvement discussions
- Intuitive Portal

- Notifications ‘pushed’ for all roles involved in the process
- Performance analytics/dashboards enabling early intervention
- Pre-loaded templates to support performance improvement conversations
- Intuitive Portal

- RPA enabled webchats ensuring online support 24/7
- Human enabled webchat
- Pre-determined selection options to enabled routing of queries to specialist teams as required
- HR team support available

- Prompts/alerts sent to employee and line manager with action completion
- Pre-loaded templates to support performance improvement conversations
- Online support available (both for employee and line manager)

- Suggested learning courses and interventions based on aggregated performance feedback data
- Supplementary information available to the employee to support their development
- HR team support available

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**Metrics**

| Performance rating distribution statistics | Performance slippage rate | Manager satisfaction with the performance improvement process |
| Number of employee performance reviews conducted p/a | Performance recovery rate | Number of performance improvement/poor performance queries raised to HR Operations |
| Number of employees in poor performance measures | Average attainment of development plan by employee in performance recovery | Time to resolve the first related query submitted by employee |

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**Policies**

- Managing Poor Performance
- Performance Management
- Attendance Management
- Discipline and Grievance

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**SLA**

*Please refer to the Glossary for further information*
HR5 Moment

“My employee doesn’t seem on target to pass their probation, what are the next steps?”

User Journey Overview (1/3)

1. Talha has a direct report, David, who is approaching the end of his probation period as a new employee. As his probation dates are recorded in the HCM system, Talha receives a notification reminding him that David’s probation expires in one month; however, Talha is very concerned about David’s performance and suitability for the role.

2. After David’s mid-probation review they had put a performance development plan in place to support David and track his progress. Talha and David have had both informal and formal conversations about David’s poor performance during the period, with formal conversations being recorded in the HCM system by Talha. HR have also been made aware of the issues. Talha has thoroughly checked that there are no external circumstances for David’s underperformance, and has ensured that all performance check-ins, objectives and development feedback have been recorded in the HCM system. Talha is not sure what they are to proceed, so he seeks support from HR by initiating a webchat session on the HR portal.

3. Talha’s webchat session, initiated from the HR portal, is managed by a cognitive agent (AI). Although Talha is helped to understand the options available to him from the webchat session, due to the complex nature of his query the cognitive agent routes him to the ‘live’ HR Operations Specialist who will support him from now on. A case is automatically created and populated in the Case Management System (CMS).

4. The HR Operations Specialist arranges a time to talk to Talha to understand the query in detail and accesses the case on the system. They talk through the available options, which would be either to extend the probation period as the contract permits them to or to dismiss David. Talha explains that David’s performance has not improved sufficiently and he does not want to consider extending the probation period. The HR Operations Specialist and Talha discuss the information gathered throughout the probation period and reasons for failing the probation. The HR Operations Specialist advises Talha on next steps to proceed to dismissal. They share some relevant information.

5. The HR Operations Specialist advises Talha on next steps to proceed to dismissal. They share some additional information and resources on how to handle difficult conversations and ensure that the meeting will be held and documented appropriately. The HR Operations Specialist offers help throughout this period and offers to attend the meeting to make sure that Talha follows the procedures, documents evidence and actions taken, and updates the CMS with relevant information. Talha accesses some short video resources on handling difficult conversations on the HR Portal.

Talha feels well informed on how best to approach the conversation with David. He appreciates the support received from the HR Operations Specialist.

Telha contacts the HR Operations team for further support via webchat and is then referred to the HR Operations Specialist who will be the dedicated person supporting him.

Talha and the HR Operations Specialist discuss next steps. Talha refers to additional resources available on the HR portal on how to deliver the message.

Talha schedules a meeting with David to inform him that he has failed his probation. Following the meeting, Talha, the HR Operations Specialist and David discuss the end of David’s employment.

Talha completes and sends the dismissal letter to David. HR Operations update the Case Management System and HCM system with the dismissal information, notifying relevant HR Operations teams.

A CMS alert reminds Talha to complete and send the dismissal letter to David via post. A copy of the letter is attached to the case with updated notes from the meeting. The HR Specialist updates the HCM system with the dismissal and triggers dismissal actions in the system, automatically notifying payroll and HR Operations teams to finalise pay and outstanding holiday pay, information, IT and security are also made aware so that the assets are returned and security access is revoked. All actions taken are recorded on the Case Management System by the HR Specialist.

I have noticed that one of my direct reports, David, is not performing to a satisfactory level. He is still within his probation period, and I’m not sure what to do.’
HR5 Moment
“My employee doesn’t seem on target to pass their probation, what are the next steps?”

Additional actors and responsibilities (2/3)
CONCERNS OVER PERFORMANCE OF EMPLOYEE ON PROBATION

- Access to previous performance information
- Accessible and clear guidance available on the HR portal
- Awareness of probation end date approaching

SEEKING SUPPORT

- Cognitive agent available 24/7
- Query assignment to the HR Operations Specialist team
- Single point of contact dealing with query

CONSULTATION WITH THE HR OPERATIONS SPECIALIST TEAM

- Single point of contact dealing with the query
- Interaction between HR Operations Specialist and line manager
- Agreement/communication of next steps

FINAL PROBATIONARY REVIEW MEETING

- Interaction between the line manager and the employee
- Access to templates and resources
- Communication of the decision and next steps to employee

FINAL OUTCOMES AND ACTIONS

- Case Management System alerts reminding to complete actions
- Automatic notifications to relevant stakeholders
- Access to case information on CMS

Interactions

- Portal
- HCM system
- Personalised portal search
- System triggers to consider probation end review
- Suggested role-based content to support probation management
- Intuitive portal
- RPA enabled webchats ensuring online support 24/7
- Ability to initiate a webchat with few clicks on the Portal
- Friendly and supportive agent to deliver help and advice

Critical Success Factors to enhance the experience

- Personalised portal content
- Friendly and supportive agent to deliver help and advice
- Seamless Case Management System is updated with all relevant actions taken
- Prompts/alerts sent to line manager about actions to be taken
- Template letters pre-loaded in Case Management System and available via alerts
- Integration between HCM system and payroll
- Role based access rights to HCM system provided to HR Specialist
- Case reminders applied to ensure SLAs are achieved
- Seamless Case Management System is updated with all relevant actions taken

Opportunity for providing a great experience

- Number of employees who passed/failed probation p/a as a percentage of total employees within Dept.
- Number of employees who passed probation following mid-probation review
- Number of employees who failed probation (per reason for failure) p/a
- No. of employees who passed as a % of total hires/rehires in past year
- No. of employees who failed probation but have rejoined the Civil Service in a different role
- First-time resolution rates as percentage of overall queries
- Customer satisfaction scores across probation query resolution
- Amount of time taken to escalate webchat queries to a live HR representative

Key:
- Gold: Pioneering measures to provide an excellent service
- Silver: Enhanced measures to provide a good experience
- Bronze: Minimum measures to provide a satisfactory experience

Note: CSF’s are indicative and will require validation

* Please refer to the Glossary for further information
HR5 Moment
“I’m ill and not well enough to work”

User Journey Overview (1/3)

Helen needs to report sick absence so navigates to the HR Portal, where she can quickly find the Attendance policy. The policy provides a link to the absence reporting page.

The HR Portal link provided allows Helen to report the absence and inform her line manager.

Helen has a conversation with the proxy line manager about her reasons for absence and when she might be expected back.

Upon her returning and following a return to work conversation, Helen is requested to fill in a self-certification form on the system.

Helen is approached by her line manager a few days later. He makes sure that she has successfully settled back in.

1. Helen is feeling very unwell and needs to take some sickness absence. She was off sick for a week earlier in the year and isn’t sure if this absence means she has now exceeded her trigger point for a warning, as her line manager flagged in her last return to work meeting that she has been off quite a bit recently. She would like to check her record and isn’t sure how to report her sickness as her line manager is on leave, so she refers to the HR Portal for guidance on her work mobile phone. On the HR Portal Helen quickly finds her department’s attendance policy covering line manager delegation and absence trigger points. She can find the guidance easily as the search returns relevant content immediately.

2. Helen feels content that it is very easy to keep people informed about being off work, and can concentrate on her health rather than admin.

3. The proxy manager picks up the alert about Helen’s absence and phones Helen. They have a discussion about how she is taking medication and expects to be well within a day or two. The manager asks if there is any further support required. The system tracks the absence and adds to her previous absences on the record.

4. After a couple of days Helen calls her manager to let him know she will be returning to work the next day. Helen’s manager conducts a return to work interview. Once Helen has returned to work, the HCM system triggers an alert for Helen to complete a self-certification form based on the length of absence and the department’s policy via the HR Portal. The link takes her directly to the form which she fills in. When submitting the certificate the she selects the dates and reasons for her sickness from a drop down menu. The trigger has not yet been reached, and the manager feels that no further action is required from Helen. Helen’s manager conducts a welcome back discussion with Helen. Once the certificate has been submitted, the HR Operations team receive a notification to close the absence and by doing so send the line manager a notification to complete any return to work actions (stress risk assessments and workplace adjustments).

5. A few days later Helen’s manager approaches Helen for a catch up to ensure she is feeling better after returning to work. Coaching workshops are suggested to him via the HR Portal to support Helen. Suggested content is pushed to Helen on the HR Portal reminding her how to keep healthy at work, including forums, Employee Assistance Programmes (EAP) and other tips on wellbeing.

Feelings
- Helen is quite anxious about potentially getting a warning. She feels reassured by the clarity of information, level of support and clear contact options available to her on the HR Portal.
- Helen feels content that it is very easy to keep people informed about being off work, and can concentrate on her health rather than admin.
- Helen appreciates the fact that the manager is supportive and concerned about her health. She feels that her manager is well informed and capable, and able to support her.
- Helen is happy to be returning to work – she feels supported in completing actions related to her return, and she is clear on her current absence record.
- Helen appreciates the support from her managers and department in promoting her wellbeing at work.

Enablers
- Intuitive Portal
- Embedded (deep) links from guidance directly through to HR actions
- System-supported reporting
- Push notifications/alerts
- Self-service and online support
- Webchat
- Suggested content and knowledge articles, based on previous activities
- Automatic prompts pushing next appropriate action directly to the user
- Single sign-on (incl. mobile)
- Push notifications/alerts
- Embedded (deep) links from guidance directly through to HR actions
- Push notifications/alerts
- Suggested content and knowledge articles, based on previous activities
- Manager/HR dashboards
The manager welcomes Helen back to the office and has a conversation about how to keep healthy at work, whilst checking if there is any additional support required (e.g. workplace adjustments).

The manager receives a call from Helen confirming that she will be returning to work the next day. He refers to his guidance, reflects on his training and reassures Helen that he will check in on her recovery.

Helen’s proxy line manager is contacted via email by Helen to report her absence request notification. The proxy manager then receives notification to say Helen has logged her sickness.

The HR Portal link provided allows Helen to report the absence and inform her line manager.

Upon his return to work Helen’s line manager sees Helen’s absence request notification. The manager calls Helen each day as appropriate to check on her recovery. He also reaches out to the HR Operations to check further training on absence management.

Helen has a conversation with the proxy line manager about her reasons for absence and when she might be expected back.

Upon her returning and following a return to work conversation, Helen is requested to fill in a self-certification form on the system.

The HR Operations team are contacted by the manager to provide additional support (insights and knowledge) and guidance in managing sickness.

The manager receives a call from Helen confirming that she will be returning to work the next day. He refers to his guidance, reflects on his training and reassures Helen that he will check in on her when she is back. He carries out a return to work interview, recording the information on the system.

The HCM system triggers an alert to the HR Operations team if the self-certification is not provided by Helen upon her return to work.

Helen is approached by her line manager a few days later. He makes sure that she has successfully settled back in.

User Journey

HR5 Moment
“I’m ill and not well enough to work”
**Critical Success Factors**

- **Gold**: Pioneering measures to provide an excellent service
- **Silver**: Enhanced measures to provide a good experience
- **Bronze**: Minimum measures to provide a satisfactory experience

*Note: CSF’s are indicative and will require validation*

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**Opportunity for providing a great experience**

**HR5 Moment**

“I’m ill and not well enough to work”

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**Interactions**

**SICKNESS AND ATTENDANCE RECORD QUERY SUPPORT**
- Access to relevant information
- Clarity on how and who to report the absence to
- Online HR support

**ABSENCE NOTIFICATION**
- Reporting sickness in a user-friendly, straightforward way
- Entering relevant details
- Keeping the right people updated

**ONGOING COMMUNICATION**
- Contact between employee and line manager during absence
- Further support available from HR Operations if needed

**RETURN CONFIRMATION**
- Support actions from line manager
- Completion of return to work actions
- Return to work conversation between line manager and employee

**RETURN FOLLOW UP**
- Ongoing wellbeing support and activity aimed at preventing avoidable sickness absence

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**Interactions**

**Suggested wellbeing content pushed to the employee upon return to work**
- Supplementary information available to the employee to support them in managing their condition
- HR team support available

**Prompts/alerts sent to line manager about suggested next actions to manage absence effectively**
- Online support 24/7 (both for employee and line manager)

**Absence reporting in a few clicks (deep links)**
- Notifications ‘pushed’ for all roles involved in the process
- Suggested role-based content to support absence management
- Intuitive Portal
- Absence dashboard (line manager only)

**Cost of sickness absenteeism per Dept.**
- Average percentage of employees on sick leave p/a
- Average working days lost

**Number of sickness incidents**
- Attendance cost as a percentage of Department budget

**Manager satisfaction with the sickness absence management process**
- Number of sickness absence queries raised to HR Operations
- Time to resolve the first related query submitted by employee

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**Policies**

- Attendance management
- Discipline
- Grievance

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**OPPORTUNITY**

**Journey interactions, opportunities and enablers (3/3)**

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**Key:**
- Gold: Pioneering measures to provide an excellent service
- Silver: Enhanced measures to provide a good experience
- Bronze: Minimum measures to provide a satisfactory experience

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**SLA**

*Please refer to the Glossary for further information*
Philipp is too unwell to attend work and needs to report sickness absence, so navigates to the HR Portal, where he can quickly find the Attendance guidance and link to the absence reporting page.

He feels content that his line manager is fully notified about his absence.

Philipp feels anxious about his illness and the affect it may have on his ability to work. He will require a lot of support.

Philipp takes time off due to illness and recovers as much as possible. He feels comfortable that Lucy will contact him via the agreed method, and involve Occupational Health as necessary.

Philipp feels that Lucy cares about the situation and is enabled to discuss Philipp's sick leave, associated entitlements, suggested methods to keep in touch and agree any next steps, like pay. Lucy understands that he can find policy information in the attendance management policy.

Philipp is contacted by Lucy to check on his circumstances and keep him informed on the progress of the introduction of his workplace adjustments.

Philipp is kept fully informed via keep in touch conversations and via the HCM app. Philipp and Lucy agree that they will continue to involve OHS as appropriate in order to get professional advice on better supporting Philipp at work.

Philipp feels engaged and appreciates the level of support provided to him to adjust back to being at work.

For ER/sensitive cases it is assumed that the HR Operations Specialist will manage the case from start to finish.
HR5 Moment
“My long-term illness means I’m not well enough to work”

User Journey Overview (2/4)

User Journey

1. Lucy is contacted by Philip who explains that he will be off work for an extended period of time due to a bad spell of illness related to his long term health condition. Lucy reassures him that she will get in touch with HR to inform them of his extended leave. Lucy reports Philip's long-term sickness to HR Operations. She notifies them by opening a new case on the Case Management System (CMS) to ensure the absence can be tracked, receiving a case reference. She wants to learn how to better support Philip so searches the Portal and quickly finds the FAQ page. Direct links to the full policies are also embedded in the policy.

2. Lucy considers ways to support Philip and as she has his consent, decides to raise an occupational health referral on the OH Portal. Lucy consults the Portal and finds the OH Portal page; she is able to raise Philip’s case with a few clicks. Lucy also tracks when Philip’s absence is approaching the review stage (and potential involvement from the HR Operations team). Lucy is notified to arrange a review meeting as Philip’s absence exceeds 14 days. The HR Operations Specialist also receives a notification and contacts Lucy to discuss the review meeting and the OHS report. Lucy and Philip agree that they will continue to involve OHS if necessary. Lucy logs details of review meetings on the CMS, where she can also read up on previous conversations she had.

3. Lucy reaches out to Philip via the earlier agreed method of contact to check up on him and discuss his circumstances. Lucy and the HR Operations Specialist discuss the details of Philip’s absence. The HR Operations specialist provides Lucy with the information she needs such as occupational sick pay policy. Lucy also reviews the impact of Philip’s absence on the team and actions as necessary. Lucy ensures that she keeps in touch with Philip and checks to see if he will require additional support in returning to work in addition to the workplace adjustments.

4. Lucy keeps in touch with Philip about his health circumstances and discusses steps such as additional workplace adjustments which can be taken to make his return to work as easy as possible. Lucy accesses the open case for Philip’s absence on self-service and adds a note which automatically informs HR Operations that Philip may require support in transitioning back to work due to the severity of his illness. The HR Operations Specialist suggests arranging an attendance Review Meeting with Philip to see what support may be needed to manage his return to work. Lucy and HR Operations Specialist receive an alert in ONS to review the absence details as Philip’s absence is approaching end. Lucy discusses the case with HR Operations Specialist to agree the best way forward.

5. In Philip’s return to work discussion, Lucy discusses flexible working arrangements to support his transition back to work. She arranges regular check-ins with Philip to check how he is getting on. She updates the case notes and initiates the working pattern change in the HCM system, which she can access in a few clicks. Lucy adds the relevant information and notifies HR Operations Specialist who closes the case. Lucy also consults the policy and after discussing with Philip, amends his absence trigger point to account for his condition; this is recorded.

Lucy, Civil Service Employee

Roles covered within the journey

- Employee
- Line Manager
- HR Operations
- Occupational Health

Enablers

- Push notifications/alerts
- Case Management System
- Self-service
- Case Management System
- Suggested content and knowledge articles, based on previous activities
- Automatic triggers pushing next appropriate action directly to the user
- Self-service
- Case Management System
- Push notifications/alerts
- Deep links directly to transaction completion

*For ER/sensitive cases it is assumed that the HR Operations Specialist will manage the case from start to finish.
HR5 Moment
“My long-term illness means I’m not well enough to work”

Additional actors and responsibilities (3/4)

1. Philip is too unwell to attend work and needs to report sickness absence, so navigates to the HR Portal, where he can quickly find the Attendance policy and link to the absence reporting page.

2. Lucy can track Philip’s absence pattern and is sent prompts to review the absence according to thresholds set out in policy. She can also consider the appropriateness of OHS referral.

3. Philip is contacted by Lucy to check on his circumstances and keep him informed on the progress of the introduction of his workplace adjustments.

4. The HR Operations specialist provides Lucy with the information she needs such as occupational sick pay policy.

5. Lucy has a return to work discussion with Philip to confirm any additional support mechanisms needed and adjusts the absence trigger point to appropriately cater for his condition.

User Journey

Civil Service Employee

Civil Service Line Manager

HR Operations Team

Occupational Health Service

The Occupational Health Service provides advice and guidance on Philip’s condition to Lucy and HR Operations.
HR5 Moment
“My long-term illness means I’m not well enough to work”
HR5 Moment

“We’re having a baby”

User Journey Overview (1/3)

1. Peter discusses the situation and options available to him with his manager and seeks guidance on the HR Portal.
2. Peter calculates his paternity leave entitlements based on the guidance provided on the Portal before submitting a request on the HCM system.
3. The HR Operations representative receives the application via email. They allocate this case and contact Peter via Case Management System (CMS) explaining that an HR Operations team member will be in touch with the next steps within a specified timeframe.
4. A notification is triggered to Peter reminding him to submit his leave notice request. He clicks on the alert which opens a window from where he can complete the relevant details. Following submissions and a discussion with his line manager the arrangements are approved. The HR Portal alert notifies Peter of this fact.
5. During his leave Peter keeps his manager notified and keeps in touch via the HCM mobile app. He can also attend any training and company events he is kept in the loop about. The HR Operations team can also view an update about his expected return dates in the HCM system.

Enablers

- Automatic triggers pushing next appropriate action
- Self-service
- Case Management System
- Push notifications/alerts
- Embedded (deep) links from guidance directly through to HR actions
- Video guidance and learning on SPL

Self-service
- Phone call
- Self-service
- Case Management System
- Push notifications/alerts
- Intuitive Portal

During his leave Peter maintains contact with the line manager. Before his return, he is sent some actions requiring completion.

Peter feels that the HR team were quick to respond to his notification and outline next steps to Peter, including employee assistance programmes and any coaching available.

Employee

Peter feels that the HR and his line manager have been supportive in advising him how to start the process.

Case Management System (CMS)

Once Peter and his partner have had a discussion based on the policy information he speaks to his line manager and lets her know that he wishes to take shared parental leave. They agree to discuss a pattern of leave which will apply to Peter at a later date.

Self-service

Peter feels that the HR team were quick to respond to his notification and outline next steps to Peter, including employee assistance programmes and any coaching available.

Ops representative

Peter feels that the HR team were quick to respond to his notification and outline next steps to Peter, including employee assistance programmes and any coaching available.

Fire

Peter feels that the HR team were quick to respond to his notification and outline next steps to Peter, including employee assistance programmes and any coaching available.

Company

Peter feels that keeping his manager notified of his situation has been easy and is looking forward to returning to work.

During his leave Peter keeps his manager notified and keeps in touch via the HCM mobile app. He can also attend any training and company events he is kept in the loop about. The HR Operations team can also view an update about his expected return dates in the HCM system.

As Peter hasn’t changed his return to work date his manager is reminded about his return date a few weeks before to allow her to prepare for regular touchpoints with Peter upon his return. Peter is also sent a short summary of actions to complete before his return to work date via the HR Portal.
Additional actors and responsibilities (2/3)

HR5 Moment
“We’re having a baby”

The line manager has regular check ins with Peter via mobile. A notification is pushed to her a week before Peter’s return to work date, prompting her to arrange a meeting.

The HR Operations team receive the notification of Peter’s request and activate it for processing.

The line manager catches up with Peter a week later and checks to make sure that he has applied for the leave. She receives a request within the HCM system which she approves.

The HR Operations representative discusses the detail with Peter, including support available, his entitlements and next steps.

The line manager is informed by Peter that he intends to take shared parental leave. After discussing a pattern of leave, she advises Peter to consult the guidance.

The line manager makes sure to check in with Peter before his leave start date to confirm the best form of communication whilst he is away.

During his leave Peter maintains contact with the line manager. Before his return, he is sent some actions requiring completion.

The line manager agrees communication methods with his line manager and preferred method of contact with HR before he goes on leave.

The HR Operations representative outlines next steps to Peter, including employee assistance programmes and any coaching available.

The HR Operations are updated on Peter’s preferred method of communication throughout his leave.

The HR Operations team manage and monitor any changes to Peter’s case on the HCM system during his leave.

Peter submits a SPL notification form, which is approved by her manager and notification is received by the HR Operations team.

The HR Operations representative discusses the situation and options available to him with his manager and seeks guidance on the HR Portal.

The HR Operations representative outlines next steps to Peter, including employee assistance programmes and any coaching available.

The HR Operations team manage and monitor any changes to Peter’s case on the HCM system during his leave.
HR5 Moment
“We’re having a baby”

Journey interactions, opportunities and enablers (3/3)

Opportunity interactions, providing a great experience

<table>
<thead>
<tr>
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<th>Critical Success Factors to enhance the experience</th>
<th>Metrics</th>
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<tbody>
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<td>Personalised content relevant to the department and employee</td>
<td>Number of Shared Paternity Leave requests across the departments</td>
</tr>
<tr>
<td></td>
<td>Suggested content ’pushed’ out to employee</td>
<td>Volume of rejection of applications for SPL</td>
</tr>
<tr>
<td></td>
<td>Timelines for activity easily viewable on Portal</td>
<td>Number of amendments made to application</td>
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<tr>
<td></td>
<td>Online support 24/7</td>
<td>Number of discontinued leave applications rejected</td>
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<td></td>
<td>Cognitive agent</td>
<td>Employee satisfaction with the Shared Parental Leave process</td>
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<tr>
<td></td>
<td>Single sign-on</td>
<td>Number of queries raised to HR Operations</td>
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<td></td>
<td>HR team support available</td>
<td>Time to resolve the initial query submitted by employee</td>
</tr>
<tr>
<td></td>
<td>Online support 24/7</td>
<td>SLA*</td>
</tr>
<tr>
<td>SHARED PARENTAL LEAVE NOTICE</td>
<td></td>
<td>* Please refer to the Glossary for further information</td>
</tr>
<tr>
<td></td>
<td>Completion of the notification form</td>
<td>2. Employee satisfaction with the Shared Parental Leave process</td>
</tr>
<tr>
<td></td>
<td>Support available from HR</td>
<td>a. Number of queries raised to HR Operations</td>
</tr>
<tr>
<td></td>
<td></td>
<td>b. Time to resolve the initial query submitted by employee</td>
</tr>
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<td></td>
<td></td>
<td>c. SLA*</td>
</tr>
<tr>
<td>DOCUMENTATION AND ELIGIBILITY CONVERSATIONS</td>
<td>Completion of relevant documents</td>
<td>* Please refer to the Glossary for further information</td>
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<tr>
<td></td>
<td>Suggested next steps</td>
<td></td>
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<tr>
<td></td>
<td>Support available from the HR team</td>
<td></td>
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<td></td>
<td>Method of communication agreement</td>
<td></td>
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<tr>
<td></td>
<td>HR support available</td>
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<td></td>
<td>Keeping in touch with the Manager about circumstances and any changes</td>
<td></td>
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<tr>
<td></td>
<td>Communication and agreement on best actions to proceed</td>
<td></td>
</tr>
<tr>
<td>COMMUNICATION PREFERENCES</td>
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<tr>
<td>NEXT STEPS AND RETURN TO WORK</td>
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<tr>
<td></td>
<td>Supporting next steps and associated reminders (Line manager, employee and HR)</td>
<td></td>
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<tr>
<td></td>
<td>Providing HR app accessibility</td>
<td></td>
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<tr>
<td></td>
<td>Sending welcome back notifications provided to employee</td>
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<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Note: CSF’s are indicative and will require validation.
## User Journey Overview (1/3)

**User Journey:**

1. **Marta consults the HR portal to find out more information about how to apply for her maternity leave.** She completes the maternity notification form directly from the HR portal.

2. **The HR Operations team receive Marta’s notification and initiate an assessment of Marta’s entitlements. The HR Operations representative contacts Marta to congratulate her and explain next steps.**

3. **Marta notifies Neera, her manager, about the good news and they discuss arrangements to ease the transition. Marta and Neera continue to receive alerts reminding them of actions which need to be taken.**

4. **Marta and Neera have ongoing catch ups to discuss handover activities as well as the preferred “Keep in touch” method.**

5. **Marta keeps in touch with her manager throughout her maternity leave. She notifies HR Operations about her expected return to work date via a mobile app.**

### Details

**Marta:** Civil Service Employee  
**Neera:** Line Manager  
**HR Operations:**

<table>
<thead>
<tr>
<th>Step</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Marta has found out that she is pregnant and she would like to arrange her maternity leave. She consults the HR portal page for the maternity policy and guidance on her work mobile phone. The HR portal page highlights all relevant resources, policy and guidance in relation to maternity. Marta accesses the maternity notification link which takes her directly to a simple form enabling her to notify the HR Operations team about her Expected Week of Childbirth (EWC) and maternity dates, which she completes on her mobile. Upon completion, the form is automatically sent to HR Operations by being logged in the Case Management System (CMS).</td>
</tr>
<tr>
<td>2</td>
<td>The HR Operations team receive Marta’s notification and a representative automatically allocated to Marta’s case assesses her entitlements based on the information provided and her length of service. The HR Operations representative emails Marta to congratulate her on her pregnancy and explain next steps, timeframes, outline her entitlements, pay and additional support available to her. They also arrange for a maternity risk assessment to be followed up by her line manager and facilities if required. The HR Operations representative requests that Marta completes and submits the MATB1 form within a specified timeframe. They attach it to Marta’s case – she can easily access and download it via self-service and can upload it along with any doctor’s notes on the CMS.</td>
</tr>
<tr>
<td>3</td>
<td>The HR Operations representative checks if Marta has told her manager that she is expecting a baby, reminding her to do it as soon as possible. Marta speaks to Neera, her manager, who explains that they can discuss flexible working if Marta would like to consider it. Neera also suggests additional support available for her, such as networks or mentoring sessions. At all times Marta can see the interactive maternity checklist displayed on the HR portal, and receives alerts reminding her about actions she needs to take, which she can easily tick off as she completes them. The checklist is also made available to HR Operations and Neera; Neera can also collaborate by completing actions on Marta’s behalf. Marta can refer to additional content suggested on the HR portal, which provides her with extra resources she may find useful. She can also reach out to an HR Operations representative via self-service with questions at any point.</td>
</tr>
<tr>
<td>4</td>
<td>Marta and Neera have ongoing catch-ups to discuss additional support and preparations required. By the 11th week before her EWC, Neera and Marta finalise all performance feedback, have a performance conversation and discuss any team handover activities. A few weeks before Marta’s expected maternity leave, Neera receives an alert, reminding her to discuss the Keep In Touch (KIT) days option with Marta to make sure that Marta stays in touch and can be informed of team updates throughout her leave. Marta discusses the method and frequency of communications during her leave with Neera, along with all KIT arrangements. - Neera documents this on the HCM system. Within her final week of work HR Operations are notified of the KIT arrangements; it was agreed that Marta will inform Neera when her baby is born; they agree she can do this via text.</td>
</tr>
<tr>
<td>5</td>
<td>Marta notifies Neera, her team and HR Operations following the birth of her baby. Throughout her maternity leave she keeps in touch with her manager and discusses a flexible working option for when she returns to work. Marta has opted to have 1:1 coaching sessions from time to time, either over video call or in person, allowing her to prepare for return to work (RTW). She receives an alert reminding her to notify HR Operations about any changes to her return to work date within a specified timeframe which she can do via a mobile app. Upon RTW Neera welcomes her back to the team and suggests Marta joins a departmental new parent network to get back into the working environment. At all times Marta can also contact the HR Operations for additional advice.</td>
</tr>
</tbody>
</table>
I’ve just announced my pregnancy to my team and need to sort out my maternity leave

Additional actors and responsibilities (2/3)
HR5 Moment

“I’ve just announced my pregnancy to my team and need to sort out my maternity leave”

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

Interactions

Critical Success Factors to enhance the experience

Key:

Gold: Pioneering measures to provide an excellent service
Silver: Enhanced measures to provide a good experience
Bronze: Minimum measures to provide a satisfactory experience

Note: CSF’s are indicative and will require validation

Policies

- TAP Maternity Toolkit
- Workplace Adjustments
- Flexible Working
- Shared Parental Leave

Metrics

- Volume of returns to work post maternity leave as a percentage of total employees on maternity
- Number of employees not returning to work post maternity leave as a percentage of total employees on maternity
- Number of employees on maternity leave as a percentage of total employee headcount
- Number of employees promoted within the first year of return from maternity leave
- First-time resolution rates as percentage of overall queries related to parental leaves
- Customer satisfaction scores across parental leave query resolution
- Average employee engagement for employees who recently returned from leave

SLA*

- HCM system alert reminders to complete actions
- KIT communication and check-ins
- HR support and additional support networks available
- Query assignment to the HR Operations team
- Single point of contact dealing with query
- Communication on entitlements and next steps
- Support available from the line manager
- Discussion on alternative working patterns
- Access to maternity checklist reminding about maternity leave next steps
- Reminder of agreed KIT and next steps to employee
- Support available from the line manager
- Access to templates and resources
- Access to HR portal information
- Clarity on how and who to notify about the maternity leave
- Entering relevant details to submit notification

NOTIFICATION OF MATERNITY LEAVE

CONTACT WITH HR AND ENTITLEMENTS CALCULATION

LINE MANAGER SUPPORT AND NECESSARY ARRANGEMENTS

FINAL WEEK BEFORE MATERNITY LEAVE

KEEPING IN TOUCH AND RETURN TO WORK

* Please refer to the Glossary for further information
HR5 Moment
“I’m changing roles internally”

User Journey Overview (1/3)

1. Helen identified an opportunity to move to another role within her Department and discussed it with Paul, her line manager. Helen applied for the internal advert and has also interviewed for the role.

2. Helen's line manager navigates to the HR Portal and searches for guidance on initiating internal moves - the search returns relevant information to her team and her profile. Following the guidance, the line manager accesses the HCM system to initiate the request.

3. Action is needed by the HR Operations team and initiation of the request triggers a workflow through the Case Management System (CMS) to the HR Operations team.

4. The HR Operations team access the HCM system, navigate to the task details and review it to ensure all the information has been provided by the line manager. As the move is within the Department, does not entail promotion and there are no pay changes, the request does not need additional approval.

5. HR Operations team generate the move confirmation letter template with Terms and Conditions (T&Cs) directly in the HCM system within a specified timeframe, fill in outstanding details and send to Helen for review and acceptance.

Feelings
Helen feels excited about the new opportunity.

Enablers
- Intuitive Portal
- Automated workflows from HCM system to Case Management System
- Template letters pre-loaded in the HCM system
- Push notifications/alerts
- Integration with document management solution
- Integration with payroll and benefits
- Case Management System
- Personalised Portal messages linked to 'events'
- Push notifications/alerts
- Automated off-boarding checklist viewable on the Portal
- Automatic triggers pushing next appropriate action directly to the user
- Embedded (deep) links from guidance directly through to HR actions
- Push notifications/alerts
- Personalised Portal content and messages linked to 'events'
- Intuitive Portal
- Personalised Portal messages and actions
- Push notifications/alerts
- Online Voice of Customer survey

Roles covered within the journey
- Employee
- Line Manager
- HR Operations

Helen identifies an opportunity to move to another role within her Department and discussed it with Paul, her line manager. Helen applied for the internal advert and has also interviewed for the role.

The move is processed in the HCM system and Helen is sent the new terms & Conditions to review and sign.

Helen is able to track her move via the HR Portal page and is sent an alert to have a performance discussion with line manager Paul before leaving the team.

Helen is given access to all relevant systems and training on the first day in her new role. She can also set up her new objectives.

Helen is asked to provide feedback on her experience in moving roles and the level of support she received. She chooses to provide feedback.

Helen finds it quick and easy to submit and sign all relevant documents. She is also aware of her start date in the new role.

Helen feels that the offboarding process from her old role was comprehensive and managed efficiently by her line manager.

Helen feels well supported by HR and has a large amount of resources available to her 24/7 in her new role.

Helen feels welcomed by her new team and feels that her new manager has ensured she has been integrated with her new team.

Whilst Helen is able to provide feedback on her experience at any time using the usual channels, a month after her move she is asked to provide feedback on the experience including HR Portal content and resources available to her online.

A short survey which pops up on the HR Portal page asks for Helen’s opinion on how the team can improve experience during a role change. Feedback is also requested on Paul’s role and how well he supported Helen in her move. Information is sent to the HR Operations team for analysis.
### HR5 Moment

**“I’m changing roles internally”**

Additional actors and responsibilities (2/3)

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Civil Service Employee</strong></td>
<td><strong>Civil Service Line Manager</strong></td>
<td><strong>HR Operations Team</strong></td>
<td><strong>HR Operations Team</strong></td>
<td><strong>HR Operations Team</strong></td>
</tr>
<tr>
<td>Helen investigates and discusses role move options, agreeing a move with the relevant managers. Her line manager confirms that he will submit a request on the HCM system on Helen’s behalf.</td>
<td>Paul accesses the HCM system to initiate an move request. He enters the details of the change into the HCM system filling in the necessary information.</td>
<td>The move is processed in the HCM system and Helen is sent the new Terms &amp; Conditions to review and sign.</td>
<td>The HR Operations team generate the move confirmation letter with new Terms and Conditions directly in the HCM system before sending to Helen for review and acceptance. They receive a notification via the HCM system when Helen signs and submits the contract.</td>
<td>Helen is asked to provide feedback on her experience in moving roles and the level of support she received. She chooses to provide feedback.</td>
</tr>
<tr>
<td>Paul and Helen’s new line manager receive notifications informing them when Helen has signed and agreed her new contract.</td>
<td>Paul discusses Helen’s feedback on her performance before she moves roles. He can also view an automated checklist of activities to complete before Helen moves out of his Department.</td>
<td>Helen is able to track her move via the HR Portal page and is sent an alert to have a performance discussion with Paul before leaving the team.</td>
<td>Helen is given access to all relevant systems and training on the first day in her new role. She can also set up her new objectives.</td>
<td>Information gathered from Helen’s survey is sent to the HR Operations team for analysis and actionable insight.</td>
</tr>
</tbody>
</table>

*User Journey*
HR5 Moment
“I’m changing roles internally”

Journey interactions, opportunities and enablers (3/3)

**Critical Success Factors to enhance the experience**

- **Gold**
  - Pioneering measures to provide excellent service
- **Silver**
  - Enhanced measures to provide a satisfactory experience
- **Bronze**
  - Minimum measures to provide a satisfactory experience

**Note:** CSF’s are indicative and will require validation

**Interactions**

- **ROLE CHANGE INITIATION**
  - Conversation between the employee and current line manager
  - Initiation of role change in the system
  - Ability of ‘move’ actions to be future dated

- **CONFIRMATION LETTER RECEIVED AND T&Cs ACCEPTED**
  - Support available from HR (if needed)
  - Easy access to T&Cs information
  - Mobile app accessibility to view and accept T&Cs

- **OFF BOARDING AND NEW DEPARTMENT ROLE MOVE**
  - Support available from the HR team
  - Conversation between the employee and their line manager
  - New joiner conversation held with new line manager

- **DAY ONE IN A NEW ROLE**
  - Automated suggested training for new role
  - Useful resources and information for new role
  - Welcome notifications provided to employee on first day of work

- **FEEDBACK AND CONTINUOUS IMPROVEMENT**
  - Satisfaction survey shared to provide feedback

**Key:**
- Gold: Pioneering measures to provide excellent service
- Silver: Enhanced measures to provide good experience
- Bronze: Minimum measures to provide a satisfactory experience

**Opportunity for providing a great experience**

- Single sign on available
- Easy to complete transfer transactions in the HCM system
- HR team support available

- Alerts/reminders based on action completion to review personal data
- New T&Cs are easy to view and complete
- Notifications for receiving line manager are provided to keep them up to date and enable them to plan accordingly
- Payroll interface enables automatic flow of information

- All relevant information is moved over with employee record
- Suggested off boarding actions to be completed by sending line manager easily viewable on the Portal
- Notifications are sent to the receiving line manager
- Easy contact buttons to reach to HR (i.e. webchat)

- Welcome notifications provided to employee on first day of work
- Deep links to LMS learning content from Portal
- Intuitive Portal
- Online support 24/7
- Team objectives viewable from Day 1

- Omnypresent feedback button
- Analytics are available for the HR Operations team
- Customer satisfaction survey is simple and encourages feedback on the experience

**Metrics**

- **Process-specific metrics**
  - Number of employee changes processed on self-service
  - Cycle time/amount of days it takes for a transfer request to reach completion

- **Service metrics**
  - Number of queries raised to HR Operations team
  - Employee satisfaction with the lateral move process
  - Manager satisfaction level with the time taken to complete the transfer

**Policies**

- Fixed Term Appointments
- Recruitment Principles

---

* Please refer to the Glossary for further information
HR5 Moment

“An employee has been promoted by moving into my team.”

User Journey Overview (1/3)

User Journey

1. Kamil has a position open in his team. The position requires a fairly specialist skillset and he has spoken to the HR Operations Specialist to discuss the options. They prepare a job description based on the standard template, and agree to advertise the role for 10 days. In accordance with the fair and open policy, the role has been advertised outside of Kamil's area.

2. The HR Operations Specialist team keep Kamil updated on progress and provide him with a list of candidates following the initial sift. Kamil notices Petra, along with two other candidates, has applied for the role. Kamil has worked with Petra on a couple of matters from another team in the department. This move would be a promotion for Petra.

3. Kamil decides that all three candidates should be considered and follows the interview process in line with the set guidelines and standards. Ultimately Kamil believes Petra is most suitable for the role. Kamil submits his recommendation for her promotion to take this role, and an approval request is sent to Kamil's line manager. Kamil accesses the HCM system and tentatively submits details of the role, together with the new compensation details and information on when the promotion is effective from.

4. Once Petra formally accepts the role, confirmed details will be added to the HCM system. Petra’s new salary would be in line with the Department’s pay on promotion and reward policy, and so the promotion request is automatically routed to the budget holder for approval – Kamil sees a pop up window on the system which informs him of this.

5. Kamil and HR Operations receive a notification of promotion in the HCM system. Kamil’s notification includes a reminder for Kamil to schedule a conversation with Petra. This will include confirmation of Petra’s new role, promotion, salary, additional benefits and allowances. Kamil communicates with Petra on the new role, as well as reminder information from Petra’s current line manager and the interview process.

6. Before the meeting Kamil reviews the HR Portal pages and guidance, and accesses videos, hints and tips about preparing himself for the conversation. He also accesses additional information which provides some suggestions on how to support future career conversations.

User Journey (1/3)

1. Kamil has a position open in his team which he has advertised internally in line with the fair and open recruitment policy. Three suitable candidates apply, including Petra, who he has worked with on a couple of projects and knows is considered high potential. This would be a promotion for Petra.

2. Following the interview and careful consideration Kamil assesses that Petra is the most suitable candidate, and offers her the role on promotion. Once approved by the budget holder Kamil receives a notification, and notes relating to Petra’s upcoming promotion are added to the HCM system.

3. Kamil and HR Operations receive approval for the offer. Kamil consults the portal to find guidance to refresh his knowledge on how to handle promotion conversations effectively. He books a meeting with Petra to congratulate her and offer the role and associated promotion.

4. Petra and Kamil meet to discuss the role and promotion details. Kamil outlines next steps and schedules another conversation to discuss role expectations and Petra’s aspirations. They agree her start date following a handover period in her old team.

5. Kamil discusses mentoring options in line with Petra’s aspirations and expectations in the role. He will continue to support Petra to ensure the settle well in her new role. When Petra arrives in post, Kamil requests a change of manager on the HCM system, Petra’s old manager actions this.

Employee

Line Manager

Civil Service

HR Operations

Details

Feelings

Enablers

Push notifications/alerts

Intuitive Portal

Mobile app

• Suggested content and knowledge articles, based on previous activities

• Intuitive Portal

• Push notifications/alerts

• Deep links directly to transaction completion and content
Additional actors and responsibilities (2/3)

**User Journey**

1. **Kamil has a position open in his team which he has advertised internally in line with the fair and open recruitment policy. Three suitable candidates apply, including Petra, who he has worked with on a couple of projects and knows is considered high potential. This would be a promotion for Petra.**

2. **Kamil decides to offer the role to Petra, and submits his recommendation for her promotion. Once approved by the budget holder Kamil receives a notification and relevant details of Petra's promotion are added to the HCM system.**

3. **Following the interview and careful consideration Kamil assesses that Petra is the most suitable candidate, and offers her the role on promotion. Once approved by the budget holder Kamil receives a notification, and notes relating to Petra’s upcoming promotion are added to the HCM system.**

4. **Petra receives the offer letter which she accepts following an alert to prompt her. She then gets a message welcoming her to her new role.**

5. **HR Operations send Petra her offer letter. Once accepted, the HR Operations representative modifies the position in the HCM system and update tentative details previously submitted to confirmed. Once Petra accepts the role, HR Operations provide feedback to the unsuccessful applicants.**

**HR5 Moment**

“An employee has been promoted by moving into my team.”

**Civil Service Line Manager**

Kamil

**Civil Service Budget holder**

The budget holder in Kamil’s department receives an alert informing him about the approval pending. He approves Petra’s role move and promotion in the HCM system.

**Civil Service Employee**

Petra

Petra has received strong feedback and feels ready to go for a promotion. She knows that it is unlikely in her current team so she has been keeping her eyes on roles in other teams which would allow her to take this step up. Petra applies for a role in Kamil’s team when she sees it advertised.

Petra goes through the interview process for the role. She is confident that she has the right skills, but is aware that there are other candidates in the process. She gives the interview her best shot.

Petra is invited to a meeting by Kamil to discuss the interview outcome and the role.

Petra and Kamil meet; Kamil offers her the role on promotion. Petra receives the offer letter which she accepts following an alert to prompt her. She then gets a message welcoming her to her new role.

Petra and Kamil discuss the role expectations and any additional support she may need. Within her first month in role, Petra receives information supporting her in settling in the new role.

**HR Operations Team**

Petra and Kamil meet to discuss the role and promotion details. Kamil outlines next steps and schedules another conversation to discuss role expectations and Petra’s aspirations. They agree her start date following a handover period in her old team.

Petra and Kamil discuss mentoring options in line with Petra’s aspirations and expectations in the role. He will continue to support Petra to ensure she settles well in her new role. When Petra arrives in post, Kamil requests a change of manager on the HCM system. Petra’s old manager acts this.

HR Operations receive a notification of approval in the HCM system.

HR Operations Recruiters send all 3 candidates emails thanking them for their interview attendance, and puts together feedback to inform both the successful and unsuccessful candidates.

HR Operations send Petra her offer letter. Once accepted, the HR Operations representative modifies the position in the HCM system and update tentative details previously submitted to confirmed. Once Petra accepts the role, HR Operations provide feedback to the unsuccessful applicants.
Journey interactions, opportunities and enablers (3/3)

**HR5 Moment**

“A employee has been promoted by moving into my team.”

**Interactions**

- Role arises
- Promotion approval
- Promotion communication preparation
- Communicating promotion
- Settling in the new role

**Critical Success Factors to enhance the experience**

<table>
<thead>
<tr>
<th>Key</th>
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<th>Silver</th>
<th>Bronze</th>
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<td></td>
<td>Pioneering measures to provide an excellent service</td>
<td>Enhanced measures to provide a good experience</td>
<td>Minimum measures to provide a satisfactory experience</td>
</tr>
</tbody>
</table>

- Interaction between line manager and the employee
- Support available from Day 1
- Portal interaction on Day 1
- Buddy / mentor selection

**Opportunity for providing a great experience**

- Role advertised
- HR Operations Recruiter keeps line manager updated on applications from internal candidates
- Promotion request
- Approve / reject capability shown in the HCM system by pop up notifications
- Automatic notifications to relevant stakeholders
- Approval for promotion and offer
- Interaction between HR Operations Recruiter and line manager
- Accessible and clear guidance available on the HR Portal
- Interaction between line manager and the employee
- Communication of the decision and next steps to employee
- Interaction between line manager and the employee
- Support available from Day 1
- Portal interaction on Day 1
- Buddy / mentor selection

**Metrics**

- Number of promotions in the performance year
- Diversity of those who have been promoted (gender, age, ethnicity)
- Number of promotions as a percentage of total employee headcount
- Salary deviation from guidelines (actual vs target)
- Average time to promotion
- Average time to promotion by grade
- First-time resolution rates as percentage of overall queries related to promotion
- Customer satisfaction scores across promotion query resolution

**Policies**

- Civil Service Commission Recruitment Principles
- Pay frameworks

**Process-specific metrics**

- Service metrics

**SLA**

- Please refer to the Glossary for further information
HR5 Moment

“I have a sensitive issue and I want to raise a grievance”

User Journey Overview (1/3)

1. Nadun has a sensitive issue with another colleague which he wants to report. He accesses the HR Portal and after reading guidance on how to address the situation, he decides he wants to speak to someone from HR. He initiates a webchat with HR.

2. Nadun raises the issue to his line manager, Stephanie. After reviewing the policy and guidance on the HR Portal, Stephanie arranges to meet with Nadun to discuss the issue in more detail.

3. Stephanie discusses a potential resolution to the issue with Nadun, which he declines. She documents the discussion and submits it to the HR team via case management.

4. Stephanie appoints an investigating manager, Paul, to oversee the case. He receives details of the case via the CMS. Paul conducts an investigation meeting and shares outcome with Stephanie.

5. Following the investigation and determination that the case should not be upheld, Nadun is informed by Stephanie about the outcome. He also receives an outcome letter with the decision.

6. As Nadun decided he did not want to appeal against the decision, the case is closed. Stephanie receives the notification about the case closure.

Feelings

Nadun feels upset about the issue and wants it to be resolved quickly.

Enablers

- Intuitive Portal
- Personalised Portal content based on user role
- Case Management System
- Knowledge base

Roles covered within the journey

- Employee
- Line Manager
- Investigating Manager
- HR Operations

Nadun, Civil Service Employee

“I have a sensitive issue concerning my colleague and I want to know my options before raising a grievance against them.”
HR5 Moment
“I have a sensitive issue and I want to raise a grievance”

Additional actors and responsibilities (2/3)

1. Nadun wants to report a sensitive issue and decides to speak to someone from HR. He initiates a webchat with HR.

2. Nadun raises the issue to his line manager, Stephanie. After reviewing the policy and guidance on the HR Portal, Stephanie arranges to meet with Nadun to discuss the issue in more detail.

3. Stephanie discusses a potential resolution to the issue with Nadun, which he declines. She documents the discussion and submits it to the HR team via case management.

4. Following the investigation and determination that the case should not be upheld, Nadun is informed by Stephanie about the outcome. He also receives an outcome letter with the decision.

5. Stephanie discusses a potential resolution to the issue with Nadun, which he declines. She documents the discussion and submits it to the HR team via case management.

6. As Nadun decided he did not want to appeal against the decision, the case is closed. Stephanie receives the notification about the case closure.

Civil Service Employee

Civil Service Line Manager (Decision Manager)

HR Operations Team

Investigating Manager
HR5 Moment

“I have a sensitive issue and I want to raise a grievance”

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

**CONSULTATION WITH THE HR OPERATIONS SPECIALIST TEAM**
- Grievance policy available online
- Procedure and relevant contact details available online (incl. EAP)

**CASE ESCALATION**
- Conversation between employee and line manager
- Line manager support on conversations and action plan by HR Specialist

**ROLE ASSIGNMENTS**
- Case opened by HR Operations Specialist team
- Communication between employee and line manager

**GRIEVANCE CASE HANDLING ACTIVITY**
- Notification sent to the investigating manager to inform him of assignment to the case and next steps
- Notification to the employee about next steps

**FINAL OUTCOMES AND ACTIONS**
- Initial meeting with employee and investigating manager
- Investigation meeting conducted with appropriate representation
- Decisions clearly communicated to employees involved and documented in writing
- Notifications of case closure received

Interactions

Critical Success Factors to enhance the experience

Key:
- Gold: Pioneering measures to provide excellent service
- Silver: Enhanced measures to provide good experience
- Bronze: Minimum measures to provide a satisfactory experience

Note: CSF's are indicative and will require validation
Assumed line manager is the decision manager

**INTERNAL ACTIONS**
- Line manager
- Portal
- Webchat
- HR Operations

**External Actions**
- Intuitive HR Portal
- Relevant support lines highlighted on the system
- Clear information on how to seek support and Union representation where appropriate

**GRIEVANCE CASE HANDLING**
- Notifications of actions, next steps and timelines
- Employee kept informed of the status of their case by regular communication

**ACTIVITY**
- All information is added and recorded on case detail in the Case Management System
- Prompt assignment of investigating manager and information of next steps

**FINAL OUTCOMES AND ACTIONS**
- Investigating manager takes forward relevant actions to support to case
- HR Operations Specialist on hand to support the investigating and line manager
- The employee is supported appropriately throughout the duration of the case

**METRICS**
- Number of grievance queries raised to the HR Operations Specialist team
- Number of grievance cases raised p/a
- Number of employment tribunals p/a
- Number of appeals raised p/a

**POLICIES**
- Whistleblowing
- Discipline and Grievance
- Performance management

- Managing poor performance (should an investigation continue under a different process)
- Settlement Agreements
- Redundancy Policy
- Redeployment Policy

**SLA**
- Decision/Investigation manager satisfaction with support available to manage the support effectively
- Time taken to respond to first query (employee or line manager)

* Please refer to the Glossary for further information
HR6 Rewarding the Workforce

HR6-01 Manage Compensation
HR6-02 Manage Benefits
A government department is being re-organised. Hamish, a line manager, needs to review his team’s job grading to make sure they align across the department.

Hamish raises a request for support through the Case Management System. Marianne, an HR Operations Specialist, advises him about the process.

Marianne supports Hamish in starting the process and providing him with a template for communicating to his team. Hamish’s team, the ‘post holders’ fill out the online form to identify their evaluation criteria.

Marianne conducts interviews with Hamish’s team. Hamish reviews the report and signs off in the HCM system. A trained evaluator then uses the JEGS software to assess the posts, and provides the outcomes to the Panel.

1. A government department is being re-organised. Hamish, a line manager, has been asked to look at his team’s job grading, to ensure that their job grades are aligned across the new structure in terms of scope and responsibility. He understands that Trade Unions have been engaged and informed where required.

2. Hamish has not done Job Evaluation Grading (JEGS) before, so he has a look on the HR Portal for guidance. He finds a number of relevant policies and guidance, as well as a short training video, so easily finds the support he requires efficiently. He has been able to get the support he requires from HR.

3. Hamish finds the guidance really clear and is confident that his team fully understands the process, timelines and potential outcomes of the evaluation.

4. Due to the nature of the department change, Marianne supports Hamish by conducting interviews with his team. Marianne is fully trained in the process so is able to support. Following the interviews, Marianne then writes up the evidence in a report, which Hamish reviews on the HCM System and signs off.

5. Hamish understands that the posts are then scored by a trained evaluator using the JEGS software - an analytical technology system used to assess posts, and assigns grades to each post. The final step is for the evaluator to pass their recommendation to a trained Job Evaluation panel. The panel reviews the evidence and proposals before their meeting to discuss and agree the outcomes. All of the evidence and recommendations is tracked and uploaded to the HCM system.

As the department’s Job Evaluation Manager was not available for the panel meeting, the outcomes are automatically routed to them for approval. Once the relevant approvals are made, Hamish receives a notification. Marianne then supports Hamish in communicating the results to his team.

Although most of the posts will stay the same, one of his team may apply for a higher grade. Hamish discusses the outcome with the individual and they go through the related implications of moving up a grade, and the associated application process, which align to the Fair and Open Policy. Marianne updates the HCM System to reflect this change, and closes the case on the Case Management System.

Hamish is glad that Marianne is supporting and liaising with the various stakeholders and is reassured that he is updated at the appropriate milestones to know that the process is running according to the timeframes he had laid out to his team.

Hamish is relieved that most of his team are graded appropriately, and is glad that the individual whose grade is changing is pleased with the result of the evaluation.

“User Journey Overview (1/3)”

• Self-service and access to online support
• Video guidance
• Case Management System
• Online JEGS forms
• Communications templates
• Approval notifications
• HCM System
• JEGS software

Enablers

Feelings

Hamish understands how important job grading is to some of his team members and wants to make sure he gets it right.

Hamish finds the guidance really clear and is confident that his team fully understands the process, timelines and potential outcomes of the evaluation.

Hamish is pleased at how easily and efficiently he has been able to get the support he requires from HR.

Hamish is pleasantly surprised at how easily and efficiently he has been able to get the support he requires from HR.

HR6 Moment

“I’m not sure my team is graded correctly following a department re-organisation”
Additional actors and responsibilities (2/3)

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A government department is being re-organised. Hamish, a line manager, needs to review his team’s job grading to make sure they align across the department.</td>
</tr>
<tr>
<td>2</td>
<td>Hamish raises a request for support through the Case Management System. Marianne, an HR Operations Specialist, advises him about the process.</td>
</tr>
<tr>
<td>3</td>
<td>Marianne sends Hamish a link to an online JEGS form for his team, the ‘post holders’ to fill out. She also supports Hamish by providing him a communications template to explain the process with activities and timelines to his team. Marianne receives Hamish’s approved job profiles.</td>
</tr>
<tr>
<td>4</td>
<td>A trained evaluator assesses the jobs using the evidence and JEGS software and assigns grades to each post. The evaluator then passes their recommendation to a Job Evaluation panel. The panel reviews the evidence and proposals and agrees the outcomes.</td>
</tr>
<tr>
<td>5</td>
<td>The results of the job grading process come through. Marianne supports Hamish in telling his team. She also updates the records in the HCM system.</td>
</tr>
</tbody>
</table>
HR6 Moment
“I’m not sure my team is graded correctly following a department re-organisation”

Journey interactions, opportunities and enablers (3/3)

HR PORTAL GUIDANCE
- Manager self service
- Access to HR Portal information

JOB EVALUATION GRADING PROCESS INITIATED
- Cognitive agent available 24/7
- Online HR support
- Query escalated to appropriate team

POST-HOLDERS’ EVALUATION
- Guidance for Line manager on communication on JEGS process

POSTS ARE EVALUATED
- Evaluation review and approvals on HCM system

OUTCOMES COMMUNICATED
- Approvals on HCM system
- Guidance for Line manager on communication of outcomes of JEGS process
- Communication of the decision and next steps to employees

Interactions
- Line manager
- Line manager
- Line manager
- Line manager
- Line manager

Critical Success Factors to enhance the experience
- Personalised Portal search
- Seamless Case Management System is updated with all relevant actions taken
- Integrated online forms
- All information is added and recorded on case detail in the Case Management System
- Payroll interface enables automatic flow of information for re-graded employee
- Pay and Grading Policy
- Pay and Grading Policy
- Pay and Grading Policy

Opportunity for providing a great experience
- Access to videos, guidance and policies
- Straightforward user interface to aid action completion
- Intuitive Portal
- Intuitive Portal
- Suggested content pushed to the employee upon start of their role

Key:
- Gold: Pioneering measures to provide excellent service
- Silver: Enhanced measures to provide good experience
- Bronze: Minimum measures to provide satisfactory experience

Note: CSF’s are indicative and will require validation

Metrics
- Number of jobs re-graded
- Number of JEGS processes conducted
- Number of JEGS processes requiring Trade Union input
- Line manager satisfaction with JEGS process
- Employee Satisfaction with JEGS process
- Number of JEGS process outcomes contested

Policies
- CS Employee Policy
- Pay and Grading Policy
- Civil Service Recruitment Principles
- Civil Service Competency Framework
- Civil Service/Department Pay Policy

SLA*
* Please refer to the Glossary for further information
HR6 Moment
“"I will be retiring in a few years and want to know what my pension options will be”

User Journey Overview (1/3)

1. Henry wants to consider retiring in a couple of years but wants to better understand the options available to him. He searches the HR portal to get more information.

2. Henry navigates easily to the Compensation and Benefits pages of the HR Portal. From here he can access relevant content relating to Civil Service pensions.

3. In addition, Henry can access his Pension account directly through a link to the pensions portal where he can view and amend elements of his personal contributions and personal details.

4. Henry starts a webchat with HR Operations. The representative asks Henry to outline his query so that he can refer Henry to the relevant person. Henry is keen for some general advice on the pension schemes and help in understanding his contributions. Henry is referred to someone at the Civil Service pension provider.

5. The representative from HR Operations also sends him a link to his pensions portal.

User Journey

Detail

1. Henry has been employed by the Civil Service for over 20 years and is looking to retire in a couple of years. Throughout his time at the Civil Service Henry has contributed towards his pension. Annually Henry receives his pension statement, which lists the contribution amount he has put towards his pension, along with the organisation’s contribution. He is able to review this at any time on the HCM system.

2. Henry wants to understand more about the options available to him so refers to the HR Portal for more information. He finds guidance and links to the pension provider for more detail.

3. Henry uses the pension calculator along with the documents provided to make an informed decision regarding his pension. Riz confirms that Henry should inform his employer 3 months before his planned retirement.

4. After reviewing the additional documents Riz sent to him along with using the Pensions Calculator to work out his projected pension income. Henry has to enter information such as tenure, salary and any career breaks he has had in the past.

5. Henry decides he would like to consider a full retirement instead of a partial one. He would also like to consider taking a tax free lump sum available from his pension pot, which was an option outlined by Riz. Riz and Henry have a follow up conversation. Henry had another question regarding spousal pension, to understand the amount his wife would be entitled after his passing, and this was confirmed.

Feelings

1. Henry feels overwhelmed by the pension process as there seems to be a lot of options available to him.

2. Henry is satisfied with the instant response via webchat, he feels that this has saved him time.

3. Henry starts a webchat with HR Operations. He starts by outlining his query so that he can refer Henry to the relevant person. Henry is keen for some general advice on the pension schemes and help in understanding his contributions. Henry is referred to someone at the Civil Service pension provider.

4. Henry is grateful that a dedicated pensions specialist is there to answer his questions. He feels like he understands the difference between the options much better now.

5. Henry makes an informed decision based on the information provided by Riz and from the HR Portal, he feels ready to make this decision when he reaches the NPA.

Enablers

1. • Intuitive Portal
• Self-service and online support available
• Webchat
• HCM system

2. • Intuitive Portal
• Self-service and online support available
• Webchat
• HCM system
• Single sign on
• Pensions portal

3. • Intuitive Portal
• Self-service and online support available
• Video training
• Information automatically pushed from HCM system to pension provider

4. • Intuitive Portal
• Self-service and online support available
• Pension calculator
• HCM system
• Push notifications/alerts

5. • Intuitive Portal
• Self-service and online support available
• Webchat
• HCM system

Roles covered within the journey

1. Employee
2. HR Operations Specialist
3. Human Resources
4. Training and development specialist
5. Civil Service Employee

"I will be retiring in a few years so want to fully understand what pension options I have available to me, and understand when I should claim my pension."
HR6 Moment
“I will be retiring in a few years and want to know what my pension options will be”

Additional actors and responsibilities (2/3)
HR6 Moment
“I will be retiring in a few years and want to know what my pension options will be”

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

Critical Success Factors to enhance the experience

Key:
Gold  Pioneering measures to provide excellent service
Silver  Enhanced measures to provide good experience
Bronze  Minimum measures to provide satisfactory experience

Note: CSF’s are indicative and will require validation

Metrics

Policies

- Employee self service
- Access to HR Portal information

- Online HR support
- Query escalated to appropriate team
- Seamless integration with the Pensions Provider

- Supportive advisor from the Pensions Provider
- Access to HR Portal information

- Supportive advisor from the Pensions Provider

- Employee
- HR Operations

- Employee
- CS Pension Provider

- Employee
- CS Pension Provider
- HR Operations

- Personalised Portal search
- Straightforward user interface to aid action completion
- Intuitive Portal

- Employee self service pension portal
- Effective case escalation to the pensions provider
- Seamless integration between HR Operations and Pensions Provider

- Information automatically pushed from HCM system to pension system
- Guidance on pension information easily accessible on pension portal

- Online pension calculator
- Information to simplify the pension decision process

- Employee self service pension portal
- Online pension calculator

- Percentage uptake of CS pension schemes
- Tenure of employee retiring from CS
- Errors identified
- Pension Investments Performance

- Customer satisfaction score for pension related queries

- CO guidance on resigning
- Retirement Legislation Procedure
- CSPS Roles and Responsibilities

* Please refer to the Glossary for further information
HR7 Leaving Work

HR7-01 Exiting
Lizzy is intending to resign from the Civil Service and navigates to the HR Portal to find how to go about doing this.

Lizzy’s resignation from Civil Service is recorded in the HCM system, triggering appropriate checklists of the tasks to be completed.

Lizzy works through the Leavers Checklists and is invited to complete the Leavers’ Survey and to join the Alumni Network.

Lizzy works through her leavers’ checklist. She completes the Leavers’ Survey and opts to undertake an Exit Interview. She receives notification of her final payment entitlements.

On her final day Lizzy completes the final Leavers Form and actions outstanding tasks. She says goodbye to her colleagues and returns her IT equipment and pass.

Lizzy has been offered a role outside of the CS which she has accepted. She wants to understand how she goes about handing in her resignation and next steps for leaving the Civil Service as a permanent member of staff, and having worked at the Civil Service for a number of years.

Lizzy searches the HR Portal and is presented with top links directly from her search input, these are categorised by relevancy. She accesses the ‘Leaving the Civil Service’ page and reads through the content, there is also a support video with guidance. Included on the page is a ‘Leavers Checklist’ which highlights the activities she needs to address on leaving the Civil Service.

Following guidance on the portal page Lizzy contacts her line manager Ian, and schedules a meeting to inform him of her intention to tender her resignation. They discuss that Lizzy is not moving into a new job in a related field, her notice period, proposed final day of service, and make handover plans. Following their conversation, she sends Ian email confirmation.

Ian confirms that he will initiate the separation decision in the HCM system, including attaching her email confirmation for record keeping.

Lizzy receives a notification through the HCM system that the action has been taken by Ian. In addition to this, relevant Checklists are generated through the HCM system and pushed to Lizzy and Ian. Lizzy is aware from the guidance on the portal that HR will have received notification of her resignation, and that IT, Finance and Payroll will also be notified.

Over the coming weeks Lizzy access the Leavers Checklist through the HCM system and continues to action items as instructed, including a discussion with the Pensions provider to find out her options. Tasks are marked completed as they are actioned so she is able to easily keep track of her progress. As she has not taken out any Civil Service loans and is not currently completing any examinations she does not need to discuss discretionary repayment plans.

HR Operations track the status of the activities on the checklist and Lizzy is sent notification reminders to complete activities in line with specified timeframes. For example, Lizzy is flagged to complete a Leavers’ Survey, she must request her Employer Reference and is reminded to join the Alumni Network.

On joining the Alumni Network Lizzy is asked about joining email distribution lists – she is keen to stay engaged with the Civil Service and selects lists of interest to her.

Lizzy has a lot to do in preparing for her new job and to ensure she completes andhands over all her current work appropriately so she’s relieved that tasks are outlined, completed and tracked on the HCM system.

Lizzy feel organised and relaxed knowing what she needs to do to leave the Civil Service.

Lizzy feels reassured that the Civil Service are interested in understanding more about her reasons for leaving. She also feels happy to be invited to be part of the Alumni Network.

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Lizzy is sent an email by Ian asking her to action the incomplete activities. These were flagged to Ian after Lizzy failed to complete them after her first reminder by the HR Operations team. On her last day Lizzy is sent a final notification request to hand in her security pass, IT equipment and other Departmental property.

Lizzy sends out a goodbye email to her team before handing her assets to Ian.

Push notifications/alerts

HCM system

Embedded (deep) links from guidance directly through to HR actions

• Intuitive Portal
• Self-service and access to online support
• Leavers Checklist
• Video guidance

• Intuitive Portal
• Self-service and access to online support
• Push notifications/alerts
• HCM system
• Integrations between HCM and other systems
• Off-boarding Checklists
• Case Management System

• Intuitive Portal
• Self-service and access to online support
• Push notifications/alerts
• HCM system
• Integrations between HCM and other systems
• Pension Portal

• Intuitive Portal
• HCM system
• Mobile App
• Video call
• Data automatically fed through from HCM System to Pensions System
HR7 Moment
“I am handing in my resignation”

Additional actors and responsibilities (2/3)

User Journey

1. Lizzy is intending to resign from the Civil Service and navigates to the HR Portal to find how to go about doing this.

2. Following a conversation with Lizzy about her intention to resign, Ian initiates the separation in the HCM system, which triggers further actions for him, HR, Lizzy and other teams (e.g., IT and Payroll).

3. HR Operations are notified via the HCM system that Lizzy has resigned. They can view the confirmation email, if necessary. HR Operations begin work on the Off-Boarding Checklist that has been generated.

4. Lizzy works through the Leavers’ Checklists and is invited to complete the Leavers’ Survey and to join the Alumni Network.

5. HR Operations action items on their Off-Boarding Checklist and track progress of Lizzy’s tasks.

On her final day Lizzy completes the final Leavers Form and actions outstanding tasks. She says goodbye to her colleagues and returns her IT equipment and pass.

On her final day Lizzy completes the final Leavers Form and actions outstanding tasks. She says goodbye to her colleagues and returns her IT equipment and pass.

Ian follows up with Lizzy to complete a couple of final tasks. He receives a notification that Lizzy has completed her final Leavers Form and collects her Civil Service assets.

Lizzy's resignation from Civil Service is recorded in the HCM system, triggering appropriate checklists of the tasks to be completed.

Lizzy works through the Leavers’ Checklist and is invited to complete the Leavers’ Survey and to join the Alumni Network.

Lizzy works through her leavers’ checklist. She completes the Leavers’ Survey and opts to undertake an Exit Interview. She receives notification of her final payment entitlements.

Lizzy works through her leavers’ checklist. She completes the Leavers’ Survey and opts to undertake an Exit Interview. She receives notification of her final payment entitlements.

HR Operations send Lizzy the Leavers’ Survey and liaises with her following her request for an Exit Interview.
HR Portal Search
- Accessible and clear guidance available on the HR Portal
- Access to leavers checklist
- Video training with suggested content based on HCM updates / portal searches for courses

Separation in HCM System
- Approval / reject capability shown in the HCM system by pop up notifications
- Interaction between line manager and the employee
- Pop up notifications alerts

Completion of Tasks & Integration between Teams
- Integrations between HCM system and other systems (IT and Security)

Leavers Survey & Exit Interview
- Leavers survey suggested based on HCM update
- Access to networks available

Final Day
- HCM system alerts reminding to complete actions
- HR support and additional support networks available

Opportunity interactions, opportunities and enablers (3/3)

HR Portal Search
- Accessible and clear guidance available on the HR Portal
- Access to leavers checklist
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- Leavers survey suggested based on HCM update
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Final Day
- HCM system alerts reminding to complete actions
- HR support and additional support networks available

Interactions
- HCM system
- HR Portal
- Employee

Critical Success Factors to enhance the experience
- HCM system
- HR Portal
- Employee

Key:
- Gold: Pioneering measures to provide excellent service
- Silver: Enhanced measures to provide good experience
- Bronze: Minimum measures to provide satisfactory experience

Note: CSF’s are indicative and will require validation

Opportunity for providing a great experience

Journey interactions, opportunities and enablers (3/3)

HR7 Moment
“I am handing in my resignation”

Gold
- Voluntary turnover rate
- Employee turnover rate
- Cost of voluntary turnover
- Reasons for resignation
- Grade employees resign
- Regretted vs non-regretted leavers

Silver
- Time period employee has resigned after a promotion
- Time between resignation and leaving
- Average notice period worked
- Tenure of employee
- Customer satisfaction scores across resignation query resolution

Bronze
- The Business Appointment Rules for Civil Servants
- CS Employee Pension Guide
- Civil Service Management Code
- Approval / reject capability shown in the HCM system by pop up notifications
- Interaction between line manager and the employee
- Pop up notifications alerts

Interactive and mobile leavers checklist
- Intuitive Portal
- Personalised Portal search
- Access to videos, hints and tips and useful articles
- Interactive and mobile leavers checklist
- Straightforward user interface to aid action completion

Notes:
- CSF's are indicative and will require validation
- SLA: Please refer to the Glossary for further information

Metrics
- SLA
- Process metrics
- Service metrics

Policies
- The Business Appointment Rules for Civil Servants
- CS Employee Pension Guide
- Civil Service Management Code

* Please refer to the Glossary for further information
"My employee’s health has deteriorated and she is eligible for Ill Health Retirement"
**“My employee’s health has deteriorated and she is eligible for Ill Health Retirement”**

**Additional actors and responsibilities (2/3)**

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<thead>
<tr>
<th>Step</th>
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</tr>
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<tbody>
<tr>
<td>1</td>
<td>Nadia has been suffering with a condition which has severely deteriorated over the last year. She is no longer able to work.</td>
</tr>
<tr>
<td>2</td>
<td>Nadia contacts Bea to make her aware of her doctor’s recommendation to stop working. Nadia meets the eligibility criteria and decides to go through the ill health retirement assessment, which is undertaken by her pension provider.</td>
</tr>
<tr>
<td>3</td>
<td>Nadia receives a notification from her Pension Provider with her IHR assessment date, which will be undertaken by an independent scheme medical advisor. She undergoes this and is informed that the full report will be available to her within a specified time period.</td>
</tr>
<tr>
<td>4</td>
<td>Nadia reviews the assessment report which informs her that she qualifies for ill health retirement. She is contacted by the Occupational Health Assessment (OHA) and a calculation of how much she should expect her pension to be. Nadia is notified of her end date.</td>
</tr>
<tr>
<td>5</td>
<td>Nadia is sent an off-boarding checklist and she begins to complete activities. These include an online exit survey and an exit interview, which she can do remotely. She is notified of activities which are incomplete. On her final day Nadia is prompted to return her assets and ID.</td>
</tr>
</tbody>
</table>

**User Journey**

**Civil Service Employee**
- Nadia has been suffering with a condition which has severely deteriorated over the last year. She is no longer able to work.

**Civil Service Line manager**
- Nadia contacts Bea to make her aware of her doctor’s recommendation to stop working.

**HR Operations Specialist Team**
- The HR Operations team are contacted by Bea to ask for guidance on how to support Nadia. They send guidance material and contact details for the OHA who specialises in this area.

**Nadia’s case worker has supported her throughout her ill health.**

**Occupational Health Advisor**
- The OHA is contacted by Bea, to ask their advice on how she can best support Nadia. Following Nadia’s application for IHR, OHA conduct an initial assessment, and indicates that she is likely to qualify.

**Independent Scheme Medical Advisor**
- An independent IHR scheme medical advisor conducts a full medical assessment, and then signed off by the pensions provider. The pensions provider then provides the report to Nadia and to HR Operations.

**The OHA provides some support and input on discussions about Bea’s end date.**

**Bea is notified of Nadia’s end date and is sent the Line manager off-boarding checklist. Bea completes the activities.**

**The HR Operations team actions the leavers checklist which includes arranging an exit interview with Nadia. They are flagged with any outstanding activities Nadia and Bea need to complete from their checklists and send reminders asking them to complete these.**

**The HR Operations Specialist team share the report with Nadia for review, and notify Bea of the decision.**

**The team schedule a call with Nadia to discuss next steps. They liaise with Nadia’s GP and the OHA to set an end date, taking into account her notice period, and determine final salary.**

**Following confirmation that Nadia qualifies for IHR retirement, Bea speaks to Nadia to offer support. Nadia’s end date is discussed based on recommendations from her doctor and the Occupational Health Advisor.**

**Following approval to start filling Nadia’s role, Bea initiates recruitment activities.**

**The HR Operations team are contacted by Bea to ask for guidance on how to support Nadia. They send guidance material and contact details for the OHA who specialises in this area.**

**The HR Operations Specialist team share the report with Nadia for review, and notify Bea of the decision.**

**The team schedule a call with Nadia to discuss next steps. They liaise with Nadia’s GP and the OHA to set an end date, taking into account her notice period, and determine final salary.**

**The OHA is contacted by Bea, to ask their advice on how she can best support Nadia. Following Nadia’s application for IHR, OHA conduct an initial assessment, and indicates that she is likely to qualify.**

**An independent IHR scheme medical advisor conducts a full medical assessment, and then signed off by the pensions provider. The pensions provider then provides the report to Nadia and to HR Operations.**

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**Following approval to start filling Nadia’s role, Bea initiates recruitment activities.**

**The HR Operations team actions the leavers checklist which includes arranging an exit interview with Nadia. They are flagged with any outstanding activities Nadia and Bea need to complete from their checklists and send reminders asking them to complete these.**
HR7 Moment
“My employee’s health has deteriorated and she is eligible for Ill Health Retirement”

Journey interactions, opportunities and enablers (3/3)

Interactions
- Access to HR Portal information
- Clarity in support on ill health retirement
- Communication on entitlements and next steps
- Support available from Line manager
- Access to pensions provider about on next steps
- Communication of the report and next steps to employee
- HR support and additional support networks available
- Agreement/communication of next steps
- Automatic notifications to relevant stakeholders
- Timely communication between HR Specialist, Line manager and employee
- Timely completion of transactions by HR Operations

Critical Success Factors to enhance the experience
- Gold
  - Pioneering measures to provide excellent service
- Silver
  - Enhanced measures to provide good experience
- Bronze
  - Minimum measures to provide satisfactory experience

Note: CSF’s are indicative and will require validation

Opportunity for providing a great experience

Metrics
- Health reason for retirement
- Number of employees who have been signed off due to ill health
- Number of employees who are being supported/tracked due to known long term conditions
- Time taken for assessment results
- Number of appeals against assessment result
- Employee turnover rate
- Customer satisfaction scores across ill health resolution
- Customer satisfaction scores assessment report outcome
- Timings between assessments and integration

Policies
- Retirement Policy
- Ill Health Retirement Procedure
- Medical Retirement Policy
- Retirement-related legislation
- Partial retirement policy
- Attendance Management Policy
- Workplace Adjustment Policy
- Efficiency Departures Policy
- CS Management Code

SLA*
- Approval for absences
- Automatic notifications to relevant stakeholders
- Accessible and clear guidance available on the HR Portal

* Please refer to the Glossary for further information
**User Journey Overview (1/3)**

There are some structural changes happening in Tom’s department as hub locations are being introduced. Employees have been advised that they will be offered voluntary exits through a Voluntary Exit Scheme, and trade unions have already been informed. They have made it clear only Voluntary Exits will be considered, so a move to redundancy is unlikely.

A scheme administrator has been appointed to run the process. Tom has been considering leaving his department to take a different path in his career. When he received the email about voluntary exit scheme, he clicks on the embedded link and this takes him through to the relevant information on the HR Portal.

**Roles covered within the journey**

- **HR**
- **Operations**
- **Line Manager**
- **Employee**

**Details**

1. **A Voluntary Exit Scheme has been offered to employees.** Tom is interested so clicks on the link in the email, this directs him to the HR Portal.

2. **Tom decides to apply for the scheme and fills out an online form.** He checks his employment record is up to date.

3. **Tom’s application is considered alongside other applicants.** Each application is considered and scored against the scheme’s criteria.

4. **Following the approval of his application and discussions with his Line Manager, Tom decides to accept the offer.**

5. **Tom completes his various off-boarding activities which he checks against his off-boarding checklist, he also receives notifications for incomplete tasks.** Tom is informed on when to expect his final payment.

**Feelings**

- Tom in unsure whether to apply for the voluntary exit scheme so is glad to find further information available to him.
- Tom is pleased to see all his details are up to date on the HR Portal.
- Tom feels in control of the Voluntary Exit process as he understands the process and has been informed at every stage.
- Tom is pleased that his application has been accepted. He is kept well informed on the next steps by the HR Operations team and his line manager.
- Tom is satisfied with the clarity of the off-boarding checklist, he is also pleased with the notification reminders informing him of incomplete task. Tom is relieved to be kept well informed on when to expect his final pay.

**Enablers**

- Intuitive Portal
- Email with embedded ‘deep’ links
- Video
- Self-service and online support
- Payroll System
- HCM System
- Online form
- Integrations between HCM system and other systems
- Pensions Portal
- HCM System
- Push notifications/alerts
- Approval notifications
- Push notifications/alerts
- HCM System
- Automated checklist of off-boarding activities
- Automatic triggers pushing next appropriate action directly to the user

**Civil Service Employee, Tom**

“I am wondering whether it would make sense to take a voluntary exit”
HR7 Moment
“My department has just launched a Voluntary Exit Scheme and I am thinking about leaving”

Additional actors and responsibilities (2/3)

1. A Voluntary Exit Scheme has been offered to employees. Tom is interested so clicks on the link in the email, this directs him to the HR Portal.

2. Tom decides to apply for the Scheme and fills out an online form. He checks his employment record is up to date.

3. Tom’s application is considered alongside other applicants. Each application is considered and scored against set criteria.

4. Following the approval of his application and discussions with his Line Manager, Tom decides to accept the offer.

5. Tom completes his various off-boarding activities which he checks against his off-boarding checklist. He also receives notifications for incomplete tasks. Tom is informed on when to expect his final payment.

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**User Journey**

**Civil Service Employee**

Tom completes his various off-boarding activities which he checks against his off-boarding checklist. He also receives notifications for incomplete tasks. Tom is informed on when to expect his final payment.

**Civil Service Line Manager**

Tom discusses the Scheme with his line manager, who is able to explain in more detail about how the scheme works and manage his expectations accordingly.

**HR Operations Team**

With the support of the Scheme Coordinator, HR Operations sends out an email to employees in a department to let them know that a Voluntary Exit Scheme is being offered to them. They are able to deal with any queries that come through regarding the scheme.

**HR Operations**

HR Operations receives the Voluntary Exit applications and processes them. They send the HRBP and department leads a view of the applications.

**HR Operations**

HR Operations receives the outcomes of the selection process from the HRBP and processes the offers.

**An HR Representative**

An HR Representative helps moderate and support during the selection process for the Scheme. The HRBP ensures that HR Operations knows the outcome of the selection process in order to process the offers.

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**HRBP**

HR Operations has visibility of Tom’s off-boarding checklist and follows up on any incomplete items.
HR7 Moment

“My department has just launched a Voluntary Exit Scheme and I am thinking about leaving”

Journey interactions, opportunities and enablers (3/3)

### Opportunity for providing a great experience

**VOLUNTARY EXIT OFFERED**
- Access to HR portal information
- Clear communications with process and timelines

**APPLICATION**
- Support available from line manager

**SELECTION**
- Timely completion of transactions by HR Operations
- Application review and approvals on HCM system

**OFFER ACCEPTANCE**
- Support available from line manager
- Clear offer guidance

**OFF-BOARDING**
- Access to leavers checklist
- Communication to employees about outcomes of process

### Critical Success Factors to enhance the experience

**Interactions**
- Employee
- HR Operations

**Employee**
- Embedded (deep) links to guidance
- Online support 24/7
- Straightforward user interface to aid action
- Intuitive Portal
- Access to videos, guidance and useful articles

**HR Operations**
- Manager dashboard to provide team information
- Thoroughness and timeliness of the selection process

**Line manager**
- Integration between HCM system and payroll
- Timely and effective completion of transactions by the pensions provider
- Timely completion of transactions by HR Operations

### Metrics

#### Process metrics
- Voluntary Exit applications by reason / grade / Diversity group
- Frequency of Voluntary Exit Schemes per offer
- Voluntary Exit turnover rate

#### Time metrics
- Time taken to exit employees under the scheme
- How many people are exited per scheme
- Cost of scheme
- Cost / numbers of employees estimated vs actuals

#### Customer satisfaction metrics
- Customer satisfaction of Voluntary Exit process
- Leavers’ satisfaction
- Line manager satisfaction for Voluntary Exit support

#### SLA
- Mobile enabled Exit Survey
- Interactive and mobile leavers checklist
- Prompts/alerts sent to the employee about outstanding tasks and deadlines
- Self service for employee for off-boarding

### Note:
- CSF's are indicative and will require validation

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**Key:**
- **Gold**: Pioneering measures to provide excellent service
- **Silver**: Enhanced measures to provide good experience
- **Bronze**: Minimum measures to provide satisfactory experience

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**Opportunity for providing a great experience**

- Self service for employee for off-boarding

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**End to End Exit Process Aide Memoir**

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**Redeployment Policy**

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**Voluntary Exits and Redundancy Guidance**
HR7 Moment
“I am dismissing someone in my team for gross misconduct.”

User Journey Overview (1/3)

1. San has caught his employee, Jason, committing a serious offence. San tells Jason he is suspended from work.

2. San decides not to involve the police. He follows the correct disciplinary procedure, with support from Tim, a case worker in HR Operations. Jason admits he was in the wrong.

3. San liaises with the legal team and confirms that Jason has committed gross misconduct, which will result in a dismissal. San informs Jason of the outcome of the meeting.

4. San is informed that Jason has been added to the Internal Fraud Database. San confirms Jason’s annual leave and flexi-time accrual for his final pay calculations.

5. Jason does not wish to appeal the decision on his dismissal. Following his departure, San begins recruitment for a replacement.

San has caught his employee, Jason, trying to sell his old Civil Service (CS) laptop online which Jason still had possession of due to a management oversight. San searches on the HR portal for advice, and concludes that due to the seriousness of the incident, the actions are likely to amount to gross-misconduct. San initiates a webchat conversation with the HR Operations team and the HR Operations Specialist team assign San an investigation manager, Tim, to support him as a priority.

During the proceedings of Jason’s case and until the final outcome is determined, San tells Jason he will be suspended from work. He updates the HCM system to reflect this suspension. Jason’s security access is revoked along with his Civil Service equipment (including laptop and Civil Service phone), which San collects from him. Jason will continue to receive full pay until the outcome has been confirmed.

San is concerned about the seriousness of the incident but feels that they are following a correct and fair procedure. San finds Jason’s actions inexcusable. Due to the seriousness of the incident, including investigating the incident, and meeting Jason formally to give him a chance to offer mitigations and speak to his trade union representative if he wished. Jason admits he was in the wrong.

With Tim’s support, San liaises with the legal team to confirm the appropriateness of dismissal in this case. The legal team confirm that Jason has breached Civil Service policy and that he has committed gross misconduct, which is acceptable for a dismissal.

San keeps Tim up to date on proceedings, and Tim updates the Case Management System.

San informs Jason of the outcome at the agreed time, and writes to Jason with the decision using a pre-populated dismissal letter, along with other relevant documentation. These outline reasons for the dismissal, details of who to contact should he wish to appeal the decision and the effective date of dismissal. Jason’s dismissal is effective immediately.

San is sent an update from HR to say that Jason’s details have been added to the Internal Fraud Database. San begins to think of new initiatives to help prevent a breach like this occurring again. He attends a meeting with his Line manager and department lead. They agree that all employees should be sent an email re-emphasising the importance of security compliance and risk prevention within the organisation.

In order to confirm Jason’s final pay and pension calculations, San is sent an approval notification asking him to confirm Jason’s annual leave and flexi-time accrual which HR Operations calculated. He also confirms that Jason is not owed any notice due to the outcome of his disciplinary being gross misconduct.

Jason decisions not to appeal against the decision, as he does not believe he has any grounds to appeal and that San conducted a fair investigation. San continually checks on his dashboard that his team are up to date on the latest Responsible for Information manager updates.

San continually checks on his dashboard that his team are up to date on the latest Responsible for Information manager updates. Jason does not wish to appeal the decision on his dismissal. Following Jason’s departure, San gains approval for replacement headcount. He starts a webchat with HR to initiate the recruitment process.

San feels that they have done what they can to prevent an incident like this happening in the future.

San is informed that Jason has been added to the Internal Fraud Database. San confirms Jason’s annual leave and flexi-time accrual for his final pay calculations.

Jason does not wish to appeal the decision on his dismissal. Following his departure, San begins recruitment for a replacement.

San is glad that HR has explained what the next steps would be in the event of an appeal.

San feels that there is no other option but to dismiss Jason.

San begins to think of new initiatives to help prevent a breach like this occurring again. He attends a meeting with his Line manager and department lead. They agree that all employees should be sent an email re-emphasising the importance of security compliance and risk prevention within the organisation.

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HR7 Moment

“I am dismissing someone in my team for gross misconduct.”

Additional actors and responsibilities (2/3)
HR7 Moment

“I am dismissing someone in my team for gross misconduct.”

Journey interactions, opportunities and enablers (3/3)

Key:
- Gold: Pioneering measures to provide excellent service
- Silver: Enhanced measures to provide good experience
- Bronze: Minimum measures to provide satisfactory experience

Note: CSF’s are indicative and will require validation

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Interactions

- Employee
- Line manager
- HR Operations

Critical Success Factors to enhance the experience

- Cognitive agent (AI) able to understand the context and escalate appropriately
- RPA enabled webchats ensuring online support 24/7
- Ability to initiate a webchat with few clicks on the Portal
- Friendly and supportive agent to deliver help and advice
- Intuitive Portal
- Access to videos, guidance and useful articles

Opportunity for providing a great experience

- DISCIPLINARY PROCEEDINGS
  - Support and guidance for line manager
  - Access to HR portal information

- DISMISSAL
  - Communication of the decision and next steps to employee
  - Access to templates and resources
  - HCM system integration with IT and Security team

- FINAL CALCULATIONS
  - HCM system integration with Payroll
  - Manager dashboard available to view team details

- NEXT STEPS
  - HR support and additional support networks available
  - Query escalated to the HR Operations Specialist recruitment team

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Metrics

- Number of dismissals per department
- Reasons for dismissals
- Number of employees who failed to complete Risk training
- Employee turnover rate
- Involuntary exit turnover rate
- Disciplinary cases (minor/senior/gross)
- Disciplinary cases (minor/senior/gross) where a penalty is imposed
- Discipline cases resulting in dismissal
- # of suspensions resulting in dismissal
- Appeals (upheld/held)
- Line manager satisfaction scores for dismissal support
- Amount of time taken to escalate webchat queries to a live HR representative

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Policies

- Civil Service Employer Pension Guide
- Standards of Behaviour Policy
- CS Management Code
- Responsible for Information Policy

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Journey interactions, opportunities and enablers (3/3)
HR7 Moment
“Someone on my team has passed away.”

User Journey Overview (1/3)

1. Karolina receives a call from Leah, the wife of Andrew, a member of her team. Leah informs Karolina of a tragic accident which occurred over the weekend causing her husband’s death. Karolina offers her deepest sympathy and offers her support. She assures Leah that she will take the necessary actions.

2. Karolina searches the HR Portal to understand what she needs to do. The HR Portal provides step by step process guidance, and advises Karolina to contact HR Operations for support to help handle this sensitive situation. She also finds links to relevant pages and websites including The Charity for Civil Servants and the Employee Assistance Programme (EAP).

3. Karolina formally informs her team of Andrew’s passing. A sympathy letter is sent to Leah, she is also informed of the support networks and charities available to her.

4. Karolina discusses arrangements with Leah. Karolina discusses work cover arrangements with HR, and agrees next steps for the continuity of work.

5. Karolina discusses initiatives that could be put in place to help her team transition following their loss. Karolina later begins recruitment activities to fill Andrew’s role.

User Journey

Karolina is informed that one of her employees, Andrew, has passed away. She searches the HR portal for guidance. She tells her manager and contacts HR Operations straight away. An HRBP is alerted.

Karolina sends Leah, Andrew’s wife, a letter of sympathy and is reassured that HR Operations are dealing the entitlements. Karolina is offered additional support to help her through the bereavement.

Karolina formally informs her team of Andrew’s passing. A sympathy letter is sent to Leah, she is also informed of the support networks and charities available to her.

Karolina discusses arrangements with Leah. Karolina discusses work cover arrangements with HR, and agrees next steps for the continuity of work.

Karolina discusses initiatives that could be put in place to help her team transition following their loss. Karolina later begins recruitment activities to fill Andrew’s role.

Feelings

Karolina is shocked and saddened by the news of her employee’s passing. She is glad that the guidance is clear on what she must do as she to complete the appropriate actions for Andrew, his family and her team.

Karolina feels like the appropriate steps have been taken and she is clear on what actions need to take place.

Karolina feels it is appropriate to now fill Andrew’s role.

Enablers

- Intuitive Portal
- Self-service and access to online support
- Phone call
- Case management system
- Intuitive Portal
- Self-service and access to online support
- Phone call
- Templates for communications
- Intuitive Portal
- Push notifications/alerts
- HCM system
- Dashboards/analytics indicating key team information
- Push notifications/alerts
- Phone call
- Intuitive Portal
- Push notifications/alerts
- HCM system
- Approval notifications
- Dashboard

Roles covered within the journey
Line manager
HR Operations
HRBP

“Sadly someone in my team has passed away, and it’s a really difficult time”

Civil Service Line manager

HR7 Moment
“Someone on my team has passed away.”
**HR7 Moment**

“Someone on my team has passed away.”

**Additional actors and responsibilities (2/3)**

User Journey

1. Karolina is informed that one of her employees, Andrew, has passed away. She searches the HR portal for guidance. She tells her manager and contacts HR Operations straight away. An HRBP is alerted.

2. The HR Operations team are notified of Andrew’s passing. They create a case on the case management system and alert the relevant case worker as a high priority.

3. HR Operations arrange for a letter of sympathy to be sent to Leah, Andrew’s wife. HR Operations update the employee details on the HCM system and alert other teams (e.g. IT) of Andrew’s passing. They offer Karolina support from the Employee Assistant Programme (EAP).

4. HR Operations send Karolina a template to help her notifying the wider team of Andrew’s passing. Once populated by Karolina, the HR Operations team send this to Leah. The HR Operations team inform Karolina of the support networks available.

5. The HRBP is automatically notified in the case management system, and gets in touch with Karoline right away to ensure she has the right level of support.

- **Civil Service Line manager**
  - Karolina is informed that one of her employees, Andrew, has passed away. She searches the HR portal for guidance. She tells her manager and contacts HR Operations straight away. An HRBP is alerted.

- **HR Operations Team**
  - The HR Operations team are notified of Andrew’s passing. They create a case on the case management system and alert the relevant case worker as a high priority.

- **HRBP**
  - The HRBP is automatically notified in the case management system, and gets in touch with Karoline right away to ensure she has the right level of support.

- **Author**
  - At the right time, the HR Operations team begin the recruitment procedures to fill Andrew’s role.

- **HR Operations**
  - HR Operations arrange for a letter of sympathy to be sent to Leah, Andrew’s wife. HR Operations update the employee details on the HCM system and alert other teams (e.g. IT) of Andrew’s passing. They offer Karolina support from the Employee Assistant Programme (EAP).

- **HRBP**
  - The HRBP gives Karolina support throughout and ensures that she understands that all elements are being looked after and how Karolina can help and support her team at this difficult time. The HRBP supports Karolina in formally telling her team. She gives Karoline more information on the Special Leave Policy, in case any of her team require it.

- **Author**
  - The HRBP provides Karolina with support and advice around how to support and transition her team at this difficult time, for example in how to manage a desk move.
HR7 Moment
“Someone on my team has passed away.”

Journey interactions, opportunities and enablers (3/3)

Interactions

Critical Success Factors to enhance the experience

Key:
- Gold: Pioneering measures to provide excellent service
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Note: CSF’s are indicative and will require validation

Opportunity for providing a great experience

- Line manager
- Employee Next of Kin
- HRBP
- Line manager
- HR Operations
- Line manager
- Employee Next of Kin
- HRBP
- Line manager

Line manager
- Interactions
- Metrics
- Policies

Interactions

- Line manager
- HRBP
- Line manager
- HR Operations
- Line manager
- Employee Next of Kin
- HRBP
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HR8 Managing Service

HR8-02 Manage Employee Contact

HR8-04 Manage Service
HR8 Moment
“I received poor service from HR and want to make a complaint”

User Journey Overview (1/3)

1. Louise wants to submit a complaint against HR regarding an interaction she had with a HR Operations team member and the poor level of service she received from them. Before filing a complaint Louise seeks advice from her line manager on how to approach the situation. Following the conversation Louise decides the right thing to do is submit a complaint on the HR Portal.

2. Louise navigates to self-service from the HR Portal and selects the ‘Complaint’ category from the menu. She fills in brief details and submits the complaint. Once done, she receives a screen pop-up informing that the request has been received and that she will be contacted by the HR Operations team within a specified timeframe. She can also see the status of her request in the self-service window. The complaint is routed to the HR Operations team and a representative is automatically allocated to the case.

3. As it is a complaint, a faster response SLA is pre-set. The HR Operations representative accesses the case and reviews the complaint. They decide to reach out to Louise directly to fully understand the issue. They contact her on her preferred contact number which they access from her record pulled from HCM. During the call, the HR Operations representative accesses the knowledge base but realises that they cannot resolve the complaint. They advise Louise that they will personally investigate the complaint and will get back to her within a specified timeframe and that they will be Louise's main point of contact throughout the case. The HR representative update the case with call details, with part of it accessible to Louise via self-service. Louise is provided with a reference number and can use self-service to see that her query is now being treated as high priority due to her query being logged as a complaint.

4. The HR Operations representative escalates the complaint to their manager as high priority. They create a “child” case at the back of the original complaint and add additional details into it. Upon review, the HR Operations manager finds out the issue is with one of the team who has not handled the case despite it being assigned to them. The HR Operations manager reviews the original case and updates the details of the child case with the relevant resolution. The update triggers an alert in the representative's worklist. The representative and the manager arrange a call to agree resolution.

5. A follow-up reminder flags on the HR Operations representative’s worklist – they call Louise to apologise for the issue and ensure they outline why it occurred in the first place. The representative speaking to Louise was highly professional and well informed. They assure Louise that relevant action has been taken with the person previously dealing with her query and that her case is treated as a high priority. The HR Operations representative explains that Louise can apply for the childcare vouchers outside of the enrolment period as an exception due to the HR causing the delay and updates it on Louise’s behalf on the HCM system. The representative closes the case and Louise receives a notification informing her of this. Meanwhile the HR Operations manager runs a report on all complaints received last month to identify trends/behaviours patterns in their team which may need addressing.

Details

1. Louise wants to file a complaint against HR, after discussing the options with her line manager Louise decides to raise a complaint on self-service.

2. Louise submits the complaint using self-service and receives a notification that she should expect a reply within a specified timeframe. Due to the query being a complaint, Louise's case is given high priority status.

3. Louise is assigned a designated HR Operations representative as her point of contact who reaches out to her to discuss the nature of the complaint over the phone. Details are also recorded on the case.

4. Louise is informed that her issue will be investigated. The HR Operations representative escalates the complaint and the case is investigated. The HR representative and manager agree a resolution together.

5. Upon agreeing a resolution, Louise is contacted by her designated HR Operations representative who apologises and resolves the issue, helping Louise to enrol into the scheme for childcare vouchers.

Feelings

Louise feels HR should be informed of areas which need improvement.

Enablers

- Intuitive Portal
- Case Management System
- Case Management System
- Phone call
- Knowledge base
- Case Management System
- Integration between case management and HCM system
- Push notifications/alerts
- Priority levels given depending on query types
- Case Management System
- Push notifications/alerts
- Integration between case management and HCM system
- Dashboards/analytics with aggregated case data

prompts

- Employee
- Line Manager
- HR Operations
HR8 Moment
“I received poor service from HR and want to make a complaint”

Additional actors and responsibilities (2/3)

User Journey

1. Louise wants to file a complaint against HR, after discussing the options with her line manager. Louise decides to raise a complaint on self-service.

2. Louise submits the complaint using self-service and receives a notification that she should expect a reply within a specified timeframe. Due to the query being a complaint, Louise’s case is assigned as high priority.

3. Louise is assigned a designated HR Operations representative as her point of contact who reaches out to discuss the nature of the complaint over the phone. Details are also recorded on the case.

4. Louise is informed that her issue will be investigated. The HR Operations representative escalates the complaint as a matter of urgency to their team manager.

5. Upon agreeing a resolution, Louise is contacted by her designated HR Operations representative who apologises and resolves the issue, helping Louise to enrol into the scheme for childcare vouchers.

The line manager is approached by Louise about the complaint. He discusses the issue with her, suggesting that she submits a complaint to HR.

An automatic notification is sent to Louise as receipt of her query. The HR representative cannot see details of Louise’s case therefore asks her to raise another query.

The HR Operations team receive Louise’s complaint and a representative is automatically allocated to the case. The HR Operations representative reviews the complaint and advises Louise on next steps.

The HR Operations representative escalates the complaint to their manager as high priority. The representative and the manager arrange a call to agree resolution.

A follow-up reminder flags on the HR Operations representative’s worklist. They call Louise to apologise for the issue and resolve it by helping Louise enrol into childcare vouchers.

The HR Operations manager finds out the issue is with one of the team who hasn’t handled the case despite it being assigned to them. They jointly agree the resolution with representative.

The HR Operations manager runs a report on all complaints received last month to identify trends/behaviours patterns in their team which may need addressing following this incident.
HR8 Moment
“I received poor service from HR and want to make a complaint”

Journey interactions, opportunities, and enablers (3/3)

Opportunity for providing a great experience

INITIAL COMPLAINT PROCESS
- Contact between HR and employee regarding the query submitted
- Clear complaints procedure made available to the employee and visible on the HR Portal

FORMAL COMPLAINT
- User-friendly and straightforward complaint initiation
- Multiple channels available to raise a complaint
- Higher priority for complaint cases

GATHERING FURTHER DETAIL ABOUT COMPLAINT
- Single point of contact dealing with query
- Employee-HR interaction and tone of the conversation
- Agreement/communication of next steps

ESCALATED TO EXPERT MANAGER
- Complaint tracked on Case Management System
- Single point of contact maintained
- Resolution

RESOLUTION COMMUNICATION
- Single point of contact providing resolution
- Root cause of the complaint identified and addressed
- Review of unresolved complaints

Critical Success Factors to enhance the experience

Interactions
- Portal
- Line Manager
- HR Operations

HR Operations
- Case Management System
- HR Operations

Case Management System
- Case Management System
- HR Operations

Key:
Gold - Pioneering measures to provide an excellent service
Silver - Enhanced measures to provide a good experience
Bronze - Minimum measures to provide a satisfactory experience

Note: CSF’s are indicative and will require validation

Interactions
- HR dashboards with requests overdue or unassigned
- Prompts/alerts to HR on outstanding/overdue requests tracked in the Case Management System
- HR contact details clearly signposted and easily accessible on the Portal
- Acknowledgement of queries with receipt for the employee

Opportunity for providing a great experience

Ability to raise a complaint following simple steps and few clicks on the Portal
- Notifications ‘pushed’ to all parties involved in the process
- Complaint acknowledgement with response timeframes communicated to employee
- Consistent complaints handling process

Critical Success Factors to enhance the experience

Interactions
- Number of users accessing complaints via search as a percentage of all users who access the complaint pages
- Customer satisfaction score across effectiveness of complaints resolution reported by employees/managers

SLA*
- First-time resolution rates as percentage of overall complaint queries

* Please refer to the Glossary for further information

Metrics
- Percentage of users who encountered an error when attempting to submit the complaint
- Proportion of complaints issues versus overall queries
- Complaint abandonment rate
- Time taken to complete the complaint form
- Number of users accessing complaints via search as a percentage of all users who access the complaint pages
- Customer satisfaction score across effectiveness of complaints resolution reported by employees/managers

Policies
- N/A
- NB: Standard complaints procedure should be in place

Note: CSF’s are indicative and will require validation

Service metrics

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**HR8 Moment**

"I need to support a new joiner to be successful on their first day in the new role."

**User Journey Overview (1/3)**

Sara organises a meeting with Simon and the rest of the team to appropriately welcome him into Civil Service on his first day.

**Feelings**

Sara feels happy she has all relevant detail about Simon to hand and doesn’t have to reach out to multiple contacts to find further information.

**Enablers**

- Integrated HCM and learning systems
- Interactive, VR-enabled onboarding content viewable on mobile app
- Skills-driven buddy selection
- HCM mobile app

**Roles covered within the journey**

Employee → Line Manager → HR Operations

**User Journey**

Sara is the Civil Service Line Manager.

1. **Civil Service Line Manager**
   - Sara manages a team within one of the Civil Service departments. A notification from the recruitment system flags on the HR Portal that a new employee, Simon, will be joining her team within the next two weeks. She wants to make sure he is welcomed and supported on his first day in the new role. Sara reaches out to Simon via email to welcome him.

2. **Over the two weeks proceeding Simon’s start date, the recruitment system triggers alerts for Sara to complete actions related to preparing for Simon’s first day.**
   - The alert suggests she books an initial welcome chat with Simon and upon clicking the alert, a diary invite at a convenient time with video call details and room booking drops in Sara’s and Simon’s calendars.
   - Once scheduled, suggested content appears on Sara’s HR Portal with tips on how to hold effective conversations with new joiners. Sara has opted for videos as her preferred learning method, so she watches a short video and its completion will be marked on her learner profile.
   - On the day of the call, an alert reminds Sara to call Simon. They have a good discussion about the role, expectations and Simon can ask any questions he may have. Sara organises a ‘meet and greet’ with the team so that Simon can meet the team early.

3. **A week before he starts the new role, Simon receives an alert on his mobile app which prompts him to initiate a brief rich media on boarding training to ensure he is prepared on Day 1. He is also invited to take a virtual reality Day 1 tour via the mobile app so he knows what to expect.**
   - After adding Simon’s name to the reception list, it triggers an alert and informs security to provide the building pass for him. Simon is also asked to provide a temporary security pass picture for his first week at the Civil Service, he will then take his official CS picture once he joins the firm.

4. **Sara receives a notification reminding her that Simon’s start date is fast approaching. She reviews relevant information related to the role he will be placed in and reaches out to Simon via email to welcome him.**
   - During the two week period ahead of Simon’s start date, Sara prepares for his arrival. She receives reminders to schedule a welcome conversation with Simon and organises a ‘meet and greet’ for Simon and the team.

5. **Sara assigns a buddy for Simon directly from the HR Portal. She is able to identify the best match for Simon based on similar qualities, pre-loaded within the system.**
   - A week before he starts, Simon receives an alert on his mobile app which prompts him to initiate a brief rich media on-boarding training to ensure he is prepared on Day 1. He is also invited to take a virtual reality Day 1 tour via the mobile app so he knows what to expect. Simon puts regular catch ups with Simon so that they can discuss how his first few weeks go.

**Key Points**

- **Push notifications/alerts**
- **Integrated HCM and learning systems**
- **Interactive, VR-enabled onboarding content viewable on mobile app**
- **Skills-driven buddy selection**
- **HCM mobile app**

**System Features**

- **Intuitive Portal**
- **Self-service**
- **RPA-enabled diary and room scheduling**

**System Benefits**

- **Self-service**
- **RPA-enabled scheduling with interface to security**
- **Interactive, VR-enabled onboarding content viewable on mobile app**
- **Skills-driven buddy selection**
- **HCM mobile app**

**User Experience**

- **Sara**
  - Loves the fact that she doesn’t have to worry about the logistics and is reminded about the actions she should take. She also enjoys being able to view content in her preferred format.

- **Simon**
  - Knows what to expect when he goes into the office for the first time. Sara feels the team are prepared for Simon’s arrival.

**Employee Experience**

- **Sara**
  - She feels happy she has all relevant detail about Simon to hand and doesn’t have to reach out to multiple contacts to find further information.

**System Capabilities**

- **Self-service**
- **RPA-enabled scheduling with interface to security**
- **Interactive, VR-enabled onboarding content viewable on mobile app**
- **Skills-driven buddy selection**
- **HCM mobile app**

**Summary**

Sara is able to effectively onboard Simon using the Civil Service’s HR system, which includes push notifications, an integrated HCM and learning systems, and interactive VR-enabled onboarding content viewable on mobile apps. Simon is also provided with a buddy who can support him in his first few weeks. The system allows for seamless onboarding processes, ensuring a smooth transition for both the employee and the team.
**HR8 Moment**
“**I need to support a new joiner to be successful on their first day in the new role**”

**Additional actors and responsibilities (2/3)**

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<tr>
<th>Step</th>
<th>Action</th>
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<tbody>
<tr>
<td>1</td>
<td>Simon receives an alert 2 weeks prior to joining the Civil Service. He clicks on it via his mobile and is taken to the Candidate Portal. Here he can view information about the Department, his role and pay details. Sara receives a notification reminding her that Simon’s start date is fast approaching. She reviews relevant information related to the role he will be placed in and reaches out to Simon via email to welcome him to the team.</td>
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<td>2</td>
<td>Simon receives an invite from Sara for an initial welcome chat. They have a discussion and Simon has the chance to ask Sara any unanswered questions he has. During the two week period ahead of Simon’s start date, Sara prepares for his arrival. She receives reminders to schedule a welcome conversation with Simon and organises a ‘meet and greet’ for Simon and the team.</td>
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<td>3</td>
<td>Simon lets Sara know about his annual leave dates. He is given the payroll number and is enrolled into learning opportunities tailored to his needs. Simon’s IT profile is requested and set up. Once notified of his pre-booked leave dates, Sara requests this information to be added to his profile. She’s also informed of additional enrolments on the learning system and enrolls Simon.</td>
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<td>4</td>
<td>A week before he starts the new role, Simon receives an alert on his mobile app which prompts him to initiate on-boarding training to ensure he is prepared on Day 1. He takes a virtual-reality Day 1 tour. He is also assigned a buddy. Sara assigns the buddy for Simon directly from the HR Portal. She is able to identify the best match for Simon based on similar qualities, pre-loaded within the system.</td>
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<td>5</td>
<td>On Day 1, Simon’s profile is ready and accessible on the HCM system. He arrives in the office and is welcomed by Sara and the team. His buddy approaches him and sets up regular catch ups. Sara organises a meeting with Simon and the rest of the team to appropriately welcome him into Civil Service on his first day.</td>
</tr>
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</table>
HR8 Moment
“I need to support a new joiner to be successful on their first day in the new role”

Journey interactions, opportunities, and enablers (3/3)

Opportunity for providing a great experience

NEW JOINER NOTIFICATION

• Prompts and reminders about new joiner starting the new role
• New joiner notification with role and Department information

ONBOARDING PREPARATION 1st MANAGER/NEW JOINER CONTACT

• Prompts and reminders about actions requiring completion by manager
• Dates for 1st contact/call scheduled in the diary
• 1st new joiner and manager conversation

ADVANCE INFORMATION PROVISION

• Ability to load up information to new joiner’s profile
• Enrolment into learning opportunities
• Support available from HR when needed

ONBOARDING COMPLETION AND BUDDY ASSIGNMENT

• Prompts and reminders about actions requiring completion by manager
• Interactive onboarding activities
• Buddy/mentor selection

EMPLOYEE’S FIRST DAY

• Welcome meeting for the team and new joiner
• New joiner interaction with manager
• New joiner interaction with buddy
• HR Portal interaction on Day 1

Interactions

• Candidate Portal/App
• Portal

Critical Success Factors to enhance the experience

• Candidate Portal prompts welcoming the individual to the role
• New joiner CV, interview feedback and strengths/development areas report on new joiner pushed to the manager
• Ongoing manager alerts to inform about new joiner start dates approaching

• Suggested learning content available on the Portal to prepare for manager-new joiner conversations
• Content automatically ‘pushed’ based on pre-defined event
• Content format tailored accordingly to user preference
• Integrated RPA diary and room scheduling/logistics

• New joiner learning opportunities catalogue tailored to the learner profile, department, role requirements and skills
• Integration between HCM and learning system to simplify learning logistics
• Timely completion of transactions by HR Operations

• Automatic system alerts suggesting buddy selection
• Skills/match based buddy selection completed by manager in few clicks
• Engaging VR onboarding content ‘accessible everywhere’ and available pre-Day 1
• RPA-enabled security, IT & Facilities scheduling

• Welcome video message from the Department lead
• Notifications ‘pushed’ to welcome employee on their first day of work (‘Welcome to Civil Service’)
• Suggested content ‘pushed’ to the manager to support employee appropriately on Day 1
• Priority Day 1 information displayed on the Portal

Metrics

• New hire engagement score (for employees with less than 12 months tenure)
• Percentage of new hire turnover (for employees in tenure less than 12 months)
• Number of days spent on completing mandatory training
• Percentage of new hires who failed to be completely provisioned with required equipment on 1st day
• Customer satisfaction score on hiring process reported by applicants/managers
• Employee’s self-reported “Day 1 readiness” score prior to first day

Policies

• Recruitment Principles
• Agency Worker Regulations

Service metrics

• Process-specific metrics

Opportunity for providing a great experience

Gold
Pioneering measures to provide an excellent service

Silver
Enhanced measures to provide a good experience

Bronze
Minimum measures to provide a satisfactory experience

Note: CSF’s are indicative and will require validation

Key:

Gold
Pioneering measures to provide an excellent service

Silver
Enhanced measures to provide a good experience

Bronze
Minimum measures to provide a satisfactory experience

* Please refer to the Glossary for further information
"I have a query about my remaining holiday allowance"

User Journey Overview (1/3)

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<td>Adam suspects he has some holiday left but he can't remember where to exactly to check this. He has calculated a rough estimate using his personal records but would like to check his exact record and isn't sure how to do so, so he refers to the HR Portal to find out about it. He initiates a webchat session from the HR Portal, managed by a cognitive agent (AI). He briefly outlines his question. The cognitive agent provides a link which takes Adam directly to the annual leave policy. In the background, the cognitive agent searches through Adam's record on the HCM system and shares the remaining holiday entitlement information with Adam within the webchat window.</td>
</tr>
<tr>
<td>2</td>
<td>The cognitive agent checks with Adam whether his question has been answered. Adam responds that unfortunately it wasn’t and the remaining balance looks incorrect. The cognitive agent, routes his query to the ‘live’ HR Operations team who will support Adam from now on. A case is automatically created in the Case Management System (CMS) with query details, chat transcript, as well as Adam’s key employee information pre-populated within the case. Adam is informed within the webchat window that the query is escalated to the HR Operations team and he is given a reference number, which he can use to track progress of the case on self-service.</td>
</tr>
<tr>
<td>3</td>
<td>Adam’s query is escalated seamlessly to the HR Operations team within his webchat window which remains open and uninterrupted. An HR Operations representative enters the webchat. They can see the transcript of the conversation with the cognitive agent, which has also been automatically recorded on the CMS. The HR Operations representative has access to the relevant knowledge and guidance, and can check Adam’s annual leave record directly on the HCM system, due to the nature of their role and relevant access rights. They provide Adam with a detailed summary of dates which have been recorded in the HCM system. Adam’s query is escalated seamlessly to the HR Operations team within his webchat window which remains open and uninterrupted. An HR Operations representative enters the webchat. They can see the transcript of the conversation with the cognitive agent, which has also been automatically recorded on the CMS. The HR Operations representative has access to the relevant knowledge and guidance, and can check Adam’s annual leave record directly on the HCM system, due to the nature of their role and relevant access rights. They provide Adam with a detailed summary of dates which have been recorded in the HCM system.</td>
</tr>
<tr>
<td>4</td>
<td>Adam remembers that he had submitted a carry-over request prior to his manager, which may not have been reflected in his remaining leave allowance. He finds an email from his manager confirming this fact in his inbox, he drags and drops it directly into the webchat window. The email explains that he has two days’ leave carried over, approved for this year. The email is automatically attached to the case record and can be accessed easily by the HR Operations representative. Adam can also see a copy of it attached to his case in self-service. An HR Operations representative cross-references the manager details highlighted in the email provided by Adam with the detail provided within the HCM system record. Having confirmed that the request is valid and accurate, they inform Adam that his holiday allowance will be corrected. The HR Operations representative accesses Adam’s HCM system record and adjusts the allowance. Once they have updated the allowance, they confirm to Adam. They also share the link to the page within the HCM system via webchat, where he can check it himself. Once this is done and Adam is happy with the resolution, the HR Operations representative closes the case. Adam receives notification of this closure and is able to view the detail of the case for future reference via self-service. Following query resolution, feedback on his experience is requested from Adam via HR Portal alert.</td>
</tr>
<tr>
<td>5</td>
<td>Adam finds it quick and hassle free to upload documents directly within the webchat window. Adam appreciates the quick response to his query and support received. He is happy that the issue was resolved so quickly.</td>
</tr>
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Additional actors and responsibilities (2/3)

HR8 Moment
“I have a query about my remaining holiday allowance”

User Journey

1. Civil Service Employee
   - Adam thinks he has some holiday left but he cannot remember where to find it. He initiates a webchat session and is provided with entitlement information by a cognitive agent (AI)*.

2. HR Operations Team
   - Adam’s remaining balance seems incorrect, so his query is automatically escalated to ‘live’ HR Operations team for support. A case is created directly from the webchat window.

3. HR Operations Team
   - Adam’s query is routed to a ‘live’ HR Operations representative who enters the webchat and will be supporting Adam from now on.

4. Adam
   - Adam drags and drops the email directly into the webchat window. The email automatically attached to the case record and can be looked at by the HR Operations representative.

5. Civil Service Employee
   - Adam receives confirmation that his records have been adjusted accordingly. He can double-check it himself via a link provided to him.

An HR Operations team representative is allocated Adam’s request and enters the webchat. They check Adam’s annual leave record on the HCM system and provide Adam with a detailed dates summary.

An HR Operations team representative reviews the email information provided by Adam on webchat. The information has been automatically attached to the case.

The HR Operations representative cross-references the manager’s details highlighted in the email provided by Adam and informs him that his holiday allowance will be corrected. They adjust the allowance and close the case.

* A cognitive agent is an artificial intelligence digital assistant which can connect directly with applications, is able to ‘understand’ context and apply logic to conversations. Alternatives to cognitive agent include basic chatbot functionality or webchat with a ‘live’ person support.
HR8 Moment

“I have a query about my remaining holiday allowance”

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

Interactions

- Portal
- Cognitive agent
- Cognitive agent (AI), able to understand the context and link to the relevant information within the HCM system
- 24/7 live chat available
- Ability to initiate a webchat with few clicks on the Portal
- Query acknowledgement provided to the query initiator
- Webchat support with auto-case creation
- Seamless transition from the cognitive agent to ‘live’ HR Operations support
- Query routed to the appropriate HR Operations team for support
- Transcript automatically added to the case
- HR Operations

Critical Success Factors to enhance the experience

Key:

- Gold: Pioneering measures to provide an excellent service
- Silver: Enhanced measures to provide a good experience
- Bronze: Minimum measures to provide a satisfactory experience

Note: CSF’s are indicative and will require validation

Metrics

- Number of enquiries resolved
- Total number of enquiries reopened
- Amount of time taken to escalate webchat queries to a live HR representative
- Contact rate for queries related to holiday allowance
- Percentage of users who start a query in self-service/webchat and complete query via call to HR Operations
- Number of users who access a webchat session using search, as a percentage of all users who access the webchat page
- First-time resolution rates as percentage of overall queries
- Customer satisfaction scores across general query resolution
- Customer effort score reported by employees for submitting a general enquiry

Service metrics

- SLA*

- Omnigress feedback button available to access
- Positive/negative sentiment tracking
- Opportunity to provide feedback with few clicks

Policies

- Attendance management

NB: Standard complaints procedure should be in place

* Please refer to the Glossary for further information
HR8 Moment

“I am trying to understand my bonus and changes to my compensation”

User Journey Overview (1/3)

1. Ruth is looking at details of her compensation and bonus over the weekend and she is quite confused as she thinks she may have received short pay. She wants to understand the detail as soon as possible. She accesses the HR Portal on her phone on Sunday. From here, she is able to initiate a webchat session with the cognitive agent (AI).

2. She outlines the detail of her query, but the cognitive agent is unable to resolve it as it looks quite complex. It is out of hours, so the cognitive agent automatically creates the case from the webchat Ruth initiated. The cognitive agent notifies Ruth that a case has been created so the cognitive agent automatically creates the case from the webchat Ruth initiated.

3. The case is automatically routed to an HR Operations representative’s worklist. The representative arrives on Monday and sees a new case flagged in their worklist which needs addressing. They open the case and review details including a transcript of Ruth’s discussion with the cognitive agent which has automatically been recorded on the case.

4. The HR Operations Specialist accesses the HCM system to review the details which have been recorded on the system, realising that the data has been erroneously added on HCM system. The HR Operations Specialist arranges a call with Ruth to confirm the details and discuss the case.

5. Having been updated by the HR Operations Specialist, Ruth wants to provide feedback on positive service she received. She accesses her case on self-service and selects an option to provide feedback. She is asked to choose whether the feedback is positive or negative. She selects the ‘positive’ option and provides additional detail using free text.

Feedback will be routed to HR Operations for analysis.

User Journey

Ruth takes a detailed look at her bonus and compensation over the weekend and is confused about the amount. She initiates a chat with a cognitive agent over the weekend as she wants her query to be resolved quickly.

She is contacted on Monday by an HR Operations representative who researches the case and initiates an escalation to an individual with more specialist knowledge.

Whilst her query is escalated and being reviewed by HR Operations Specialist, Ruth is expecting an update within the timeframe originally provided to her.

Ruth is positively surprised by a prompt response from HR and appreciates the honesty about her case needing further analysis. She likes the fact that she is given a timeframe for when someone will be in touch.

Ruth is contacted via phone by the HR Operations Specialist to discuss the proposed actions to reimburse her for the mistake.

Ruth is impressed with the professionalism of the Specialist and wants to provide some positive feedback on the support she received.

“Over the weekend I have been looking at my bonus that I recently received and I want to understand changes to my compensation.”

Enablers

- Knowledge base
- Case Management System
- Push notifications/alerts
- Seamless case management and telephony integration
- Auto-routing of cases

Menu

- Case Management System
- Push notifications/alerts
- Seamless case management and telephony integration
- Case Management System
- Single sign-on
- Dashboards/case analytics

Roles covered within the journey

- Employee
- Line Manager
- HR Operations

Dashboards/case analytics

* A cognitive agent is an artificial intelligence digital assistant which can connect directly with applications, is able to ‘understand’ context and apply logic to conversations. Alternatives to cognitive agent include basic chatbot functionality or webchat with a live person support.
HR8 Moment

“I am trying to understand my bonus and changes to my compensation”

Additional actors and responsibilities (2/3)

1. Ruth takes a detailed look at her bonus and compensation over the weekend and is confused about the amount. She initiates a chat with a cognitive agent over the weekend as she wants her query to be resolved quickly.

2. The representative sees a new case flagged in their worklist on Monday. They review case transcript from cognitive agent. They contact Ruth via call to discuss the case and initiate an escalation.

3. Ruth is contacted on Monday by an HR Operations representative who researches the case and initiates an escalation to an individual with more specialist knowledge.

4. Whilst her query is escalated and being reviewed by an HR Operations Specialist, Ruth is expecting an update within the timeframe originally provided to her.

5. Ruth is contacted via phone by the HR Operations Specialist to discuss the proposed actions to reimburse her for the mistake.

Ruth is impressed with the professionalism of the Specialist and wants to provide some positive feedback on the support she received.

The HR Operations team can access feedback, routed to them for analysis.

(periodical activity)
HR8 Moment

“I am trying to understand my bonus and changes to my compensation”

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

Interactions

Critical Success Factors to enhance the experience

Key:
- Gold: Pioneering measures to provide an excellent service
- Silver: Enhanced measures to provide a good experience
- Bronze: Minimum measures to provide a satisfactory experience

Note: CSF's are indicative and will require validation

Metrics

Policies

**SLA**

- First-time resolution rates as percentage of overall queries
- Customer satisfaction scores across general query resolution
- Customer effort score reported by employees for submitting a bonus enquiry
- Percentage of escalation misdirects

Opportunities for providing a great experience

- Number of enquiries resolved
- Total number of enquiries reopened
- Amount of time taken to escalate webchat queries to a live HR representative
- Contact rate for queries related to bonus and compensation
- Percentage of users who start a query in self-service/webchat and complete query via call to HR Operations
- Number of users who access a webchat session using search, as a percentage of all users who access the chat page

Ongoing updates provided to the employee

- Case reminders applied to ensure SLA’s are achieved
- Seamless Case Management System is updated with all relevant actions taken
- Case records are updated with the employee’s feedback at the end of the process

- HR Operations
- HR Specialist team (internally)

- Online support 24/7
- Ability to initiate a webchat with few clicks on the Portal

- Omnivent feedback button available to access
- Positive/negative sentiment tracking
- Opportunity to provide feedback with few clicks

Notations:
- ^\text{NB: Standard complaints procedure should be in place}^