Civil Service HR

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

Civil Service User Journeys Suite
Purpose and contents

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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Introducing Design Thinking

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'[1].

Evolving from …

Traditional "Inside-Out" Approach
Focusing on how HR compares to 'best practice'

Silo-ed view of people, process, and technology through functional improvements

Moving towards …

Customer-Centric "Outside-In" Approach
Moulding HR based on needs of its customers

Holistic view of people, process, and technology rooted in HR Customer Experience

Design thinking casts HR in a new role. It transforms HR from a 'process developer' to an 'experience architect'

- 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

Civil Service User Journeys Suite
Aligning User Journeys to the CSHR Global Design Principles

Civil Service HR

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.

Principle	Description
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

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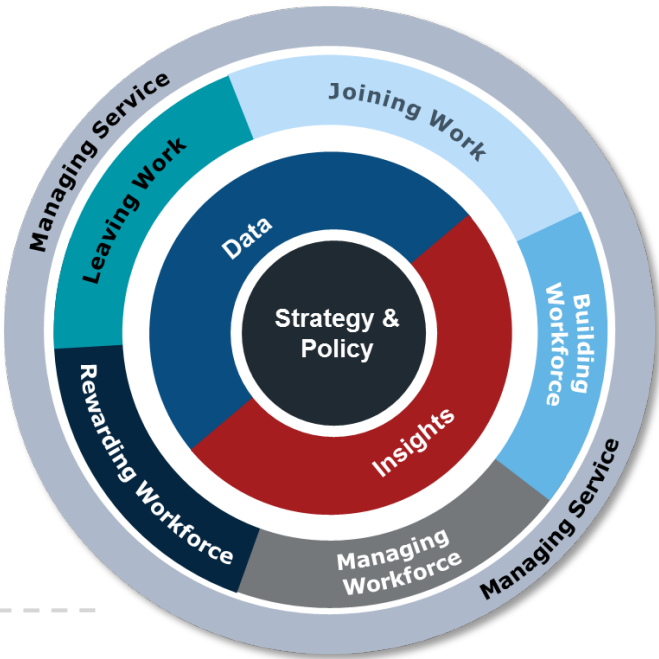
Focus Group Insights

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.

1) Agree scope and template for User Journeys, and begin development

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.

2) Gather and review existing information, pain points and conduct focus groups
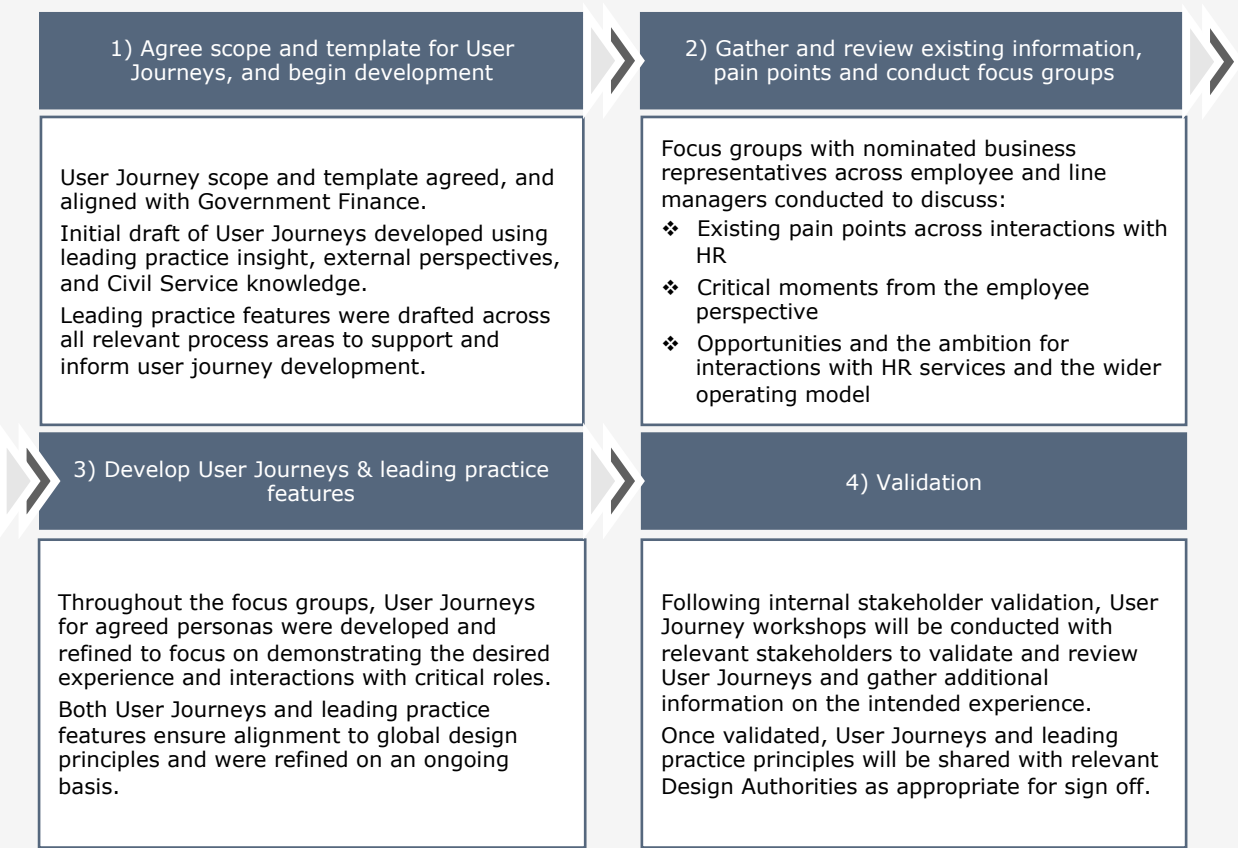
Focus groups with nominated business representatives across employee and line managers conducted to discuss:

❖ 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

3) Develop User Journeys & leading practice features

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.

4) Validation

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

Civil Service HR

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
- Consistent data across systems – single source of the truth
- Policies and other procedural documentation on the employee Portal needs consolidating, condensing, updating and located with the relevant guidance for that issue
- Employees want to be provided with a timeline for the different stages of queries with a set resolution date identified, a visual way of referring back to this on the Portal to see its progress within the system
- Short content, simple FAQs and video content on the intranet for common questions and queries, to drive self-service
- Suggested learning courses and opportunities visible on the learning system specifically tailored to department, employee role and developmental needs
- Basic advice needs to be easily accessible on the intranet, clear sign-posting would help direct the employee to the correct information
- Technology to be utilised to enable a multi-channel approach for employees to communicate with HR, depending on their preferences and the nature of their query
- With all queries a checklist should be provided to the employee to bring their attention to actions that need to be completed during the process
- Automated alerts sent to the employee after each stage is completed
- Employees need to be alerted when their query/request is closed

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
- Consistent policy guidance and application
- Interlinked policies should be aligned and consistent, i.e. probation and attendance
- Service request forms with clear category definitions and descriptions
- HR utilise data to identify areas/opportunities for improvement
- End-to-end processes defined to standardise cross-government
- Automatic error messages for employees when incorrect information/details are entered into online request forms
- Outsourced services need smoother transactions between third party services
- 'Voice of the customer' enabled across all interactions with HR
- Simple mechanisms in place to provide feedback

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

Process & Policy	Technology	People

• 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

HR1 People Strategy & Planning

HR1-02 People & Workforce

"We're consolidating our estates; I need to understand what our workforce will look like in five years"

User Journey Overview (1/3)

"I need to look at my workforce plan and take the guesswork out of people decisions by using evidence and analytical rigour to provide hard evidence"
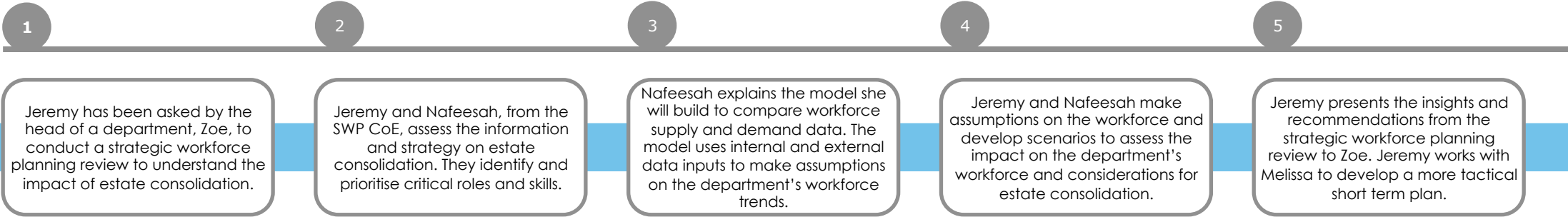
Jeremy, Civil Service Line Manager

Roles covered within the journey

Line Manager   HRBP   SWP CoE

User Journey

Civil Service Line Manager

1 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.

2 Jeremy and Nafeesah, from the SWP CoE, assess the information and strategy on estate consolidation. They identify and prioritise critical roles and skills.

3 Nafeesah explains the model she will build to compare workforce supply and demand data. The model uses internal and external data inputs to make assumptions on the department's workforce trends.

4 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.

5 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.
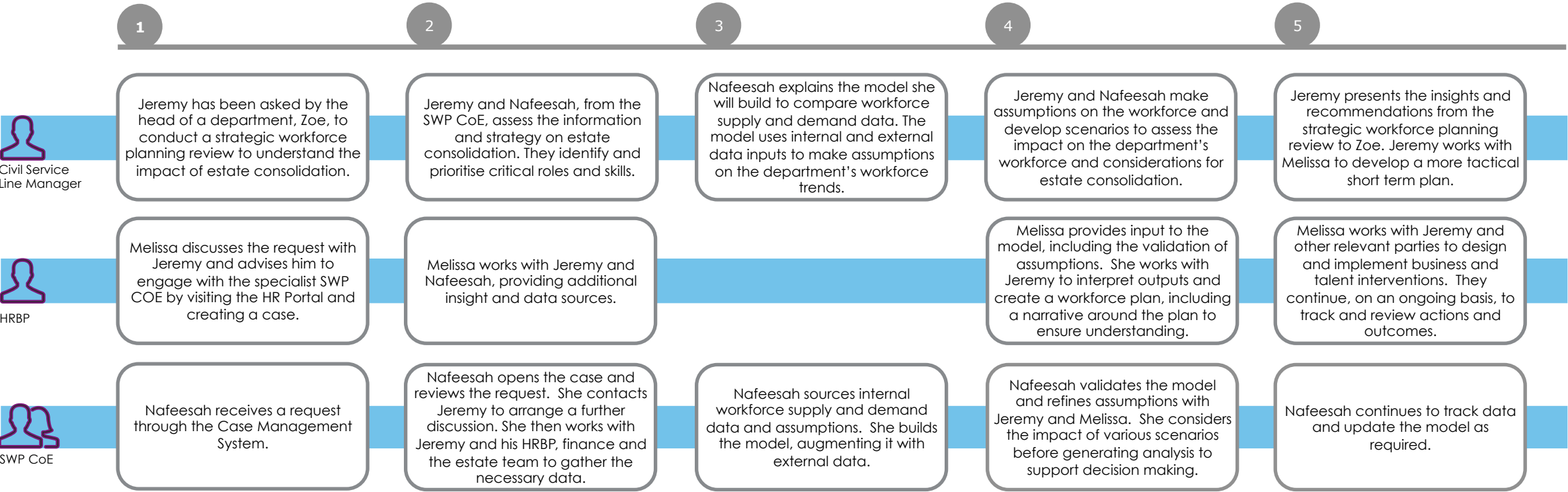
Detail

1	2	3	4	5
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 his 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 requires 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 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.	Nafeesah explains to Jeremy that they will build a model to predict workforce demand using internal workforce supply and demand data. She 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 visualise trends within the department. Jeremy consults with Melissa to provide additional input to these assumptions based on her 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 the head of his department, Zoe, who is impressed with their work. The plan sets out how the strategic objectives will be fulfilled through the workforce; identifies interventions to minimise gaps between workforce demand and supply; considers alternative scenarios depending on the outcome of interventions; and prioritises interventions and shows their impact over time. As next steps, Zoe will feed in their input to the annual business planning cycle, and continue engaging with the relevant stakeholder to navigate the political landscape. Jeremy agrees to continue to work with Nafeesah to track the data and update the model with any activities and actions that may impact the results so that they can keep informed on a rolling basis. Jeremy works with Melissa to conduct a more tactical review to support the business to deliver against demand over the medium-term (1 to 18 months) through identifying which levers can used to achieve a balance between the forecast people and skill demand and supply.

Feelings

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 is impressed with the functionality of the HCM system, especially as he realise there are a great deal of information and nuances across the department to take into account.	Jeremy is impressed that the model will bring together complex finance, accounting, employee and organisation data, as well as taking into account broader external factors.	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 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.

Enablers

• Accurate and complete data • HR Portal • Case Management System	• Job families and hierarchies on the HCM system • Accurate and complete data	• Reporting and analytics systems capability • Accurate and complete data • Case Management System	• Accurate and complete data • Reporting and analytics systems capability	• Reporting and analytics systems capability • Visualisation tools

"We're consolidating our estates; I need to understand what our workforce will look like in five years"

Additional actors and responsibilities (2/3)

	1	**2**	**3**	**4**	**5**
Civil Service Line Manager	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 and Nafeesah, from the SWP CoE, assess the information and strategy on estate consolidation. They identify and prioritise critical roles and skills.	Nafeesah explains the model she will build to compare workforce supply and demand data. The model uses internal and external data inputs to make assumptions on the department's workforce trends.	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.
HRBP	Melissa discusses the request with Jeremy and advises him to engage with the specialist SWP COE by visiting the HR Portal and creating a case.	Melissa works with Jeremy and Nafeesah, providing additional insight and data sources.		Melissa provides input to the model, including the validation of assumptions. She works with Jeremy to interpret outputs and create a workforce plan, including a narrative around the plan to ensure understanding.	Melissa works with Jeremy and other relevant parties to design and implement business and talent interventions. They continue, on an ongoing basis, to track and review actions and outcomes.
SWP CoE	Nafeesah receives a request through the Case Management System.	Nafeesah opens the case and reviews the request. She contacts Jeremy to arrange a further discussion. She then works with Jeremy and his HRBP, finance and the estate team to gather the necessary data.	Nafeesah sources internal workforce supply and demand data and assumptions. She builds the model, augmenting it with external data.	Nafeesah validates the model and refines assumptions with Jeremy and Melissa. She considers the impact of various scenarios before generating analysis to support decision making.	Nafeesah continues to track data and update the model as required.

"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)

Opportunity for providing a great experience

IDENTIFY NEED	ANALYSE	MODEL	ASSESS	BUSINESS & TALENT INTERVENTIONS
▪ 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	▪ Easy to navigate HCM system ▪ Specialist SWP capabilities	▪ Accurate data ▪ Visualisation tools ▪ Workforce segmentation ▪ Statistical relationships established to enable prediction of workforce requirements in the future	▪ 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

Interactions

▪ Line manager ▪ HRBP ▪ SWP CoE	▪ Line manager ▪ Finance ▪ HRBP ▪ Estate team ▪ SWP CoE	▪ Line manager ▪ SWP CoE	▪ Line manager ▪ HRBP ▪ SWP CoE	▪ Head of department ▪ Line manager ▪ HRBP ▪ SWP CoE

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

○ 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 toolkits	○ Insight drive organisation ● Plans are tracked, measured and adjusted in real time

Metrics

SLA*

Process-specific metrics	Service metrics		
▪ Costs associated with workforce shortages ▪ Costs associated with workforce surplus ▪ Hiring, termination and lost productivity costs (e.g. time to fill, time until productive)	▪ % 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	

* Please refer to the Glossary for further information

Policies

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

HR3 Joining Work

HR3-01 Recruitment

HR3-03 Onboarding

HR3 Moment
"I found a role online I'd like to apply for"

'I've been considering a move for a while now and when I saw this role I was so excited I decided to apply.'

Remi, Candidate

Roles covered within the journey

Candidate | Hiring Manager | HR Operations Specialist

User Journey

Candidate

1	2	3	4	5
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.	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.

Detail

1	2	3	4	5
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 autofills 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 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.	Remi is notified via the mobile app that his application has progressed through the initial application screening. As Remi has not identified as disabled, he is not automatically put through to interview stages (through the Guaranteed Interview Scheme) but is invited to complete the online psychometric tests – this is in the form of an online activity that Remi is given a specified timeframe to complete. Remi receives an automated notification confirming that he passed the psychometric tests, including a breakdown of his results available to download. Remi is next asked to complete a video interview; he prepares for the interview using the system demo where he can review best practices for video interviewing. Once he is comfortable, he completes the video interview and submits it. Following this Remi can track his application through the mobile app and can see that it is currently with the Recruiter for review.	Remi receives a notification through the mobile app congratulating him for being selected to interview. Remi clicks on the link and finds a range of dates and times offered by the Hiring Manager; Remi can select a date and time convenient for him. The reception is automatically notified of the agreed slot so they can assist Remi when he arrives on the day. Remi receives the details for his interview on the mobile app, including the profiles of his interviewers, and sees he now has 'unlocked' access to further interview hints and tips. Remi can ask a cognitive agent (AI) any questions he might have prior to the interview. Remi is greeted at reception and introduced to the Hiring Manager after presenting his ID for security check purposes. During the interview Remi is asked questions that allow him to present his strengths and behaviours linked to the role. After the interview Remi receives a short candidate satisfaction survey via the app, which he easily completes on his way home.	Shortly after the interview Remi gets a call from the Recruiter who congratulates Remi and notifies him that the Hiring Manager fed back positively and would like to offer him the role. The Recruiter outlines details of the offer and the next steps, and offers to answer any questions Remi may have. After the call Remi receives a notification on the app drawing his attention to the written offer letter, which he can access on the app. Remi carefully reads through and considers the offer.	Remi calls the Recruiter to say that he is really pleased about the offer but is not sure from the formal offer whether they have noted his caring responsibilities that Remi raised during the interview. After some discussion about the flexible working policy Remi is happy to accept the offer as he understands they are able to accommodate his requirements. Afterwards he receives a call from the Hiring Manager, who congratulates him and discusses what will happen next. Remi receives automated pre-employment check information and is able to complete and track the progress of it easily on his mobile.

Feelings

1	2	3	4	5
Remi is excited that he has found a role that he would like to apply for, and surprised at how easy it is to apply. He is encouraged to see that the application is anonymised.	Remi is surprised at how simple and convenient the process has been so far. Remi is interested in the results of his psychometric test and is surprised to receive feedback so quickly. He is nervous at the concept of a video interview but feels encouraged after watching the demo and support content on the mobile app.	Remi is relieved he can choose a convenient time for interview to work around his schedule and is impressed with the Hiring Manager - he feels like the department would be an amazing place to work.	Remi is nervous about how he did at interview and is really happy when he is offered the role.	Remi is unsure with one aspect of the offer, but is able to negotiate this point and feels supported throughout. He feels really welcomed when the Hiring Manager calls to congratulate him.

Enablers

1	2	3	4	5
• Candidate Portal optimised for mobile viewing • Mobile app • Candidate application dashboard to show stage of application • Push notifications/alerts • Civil Service careers site	• Mobile app • Candidate application dashboard to show stage of application • Online interactive tests through the mobile app	• Mobile app • Candidate dashboard • Automatic interview scheduling • Online interview feedback survey • Cognitive agent (AI)	• Phone call • Candidate dashboard	• Phone call • Mobile app • E-signature on documents • Candidate Portal optimised for mobile viewing • Automated pre-employment check notifications

"I found a role online I'd like to apply for"

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Candidate	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..	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.
Civil Service Hiring Manager		The Hiring Manager is sent a shortlist of applications from the candidates that have passed the initial application stages. The applications are sent via the recruitment portal and can be reviewed over the recruitment app.	After reviewing the applications, the Hiring Manager accepts Remi's application, which moves his application to interview stage. The Hiring Manager selects available slots for interviews. The Hiring Manager interviews Remi using the questions provided.	After the interview, the Hiring Manager uploads his feedback onto the portal and has a call with the Recruiter.	Following the conversation with the Recruiter, the Hiring Manager clicks 'accept' again on his app, this then allows Remi to receive an automated email confirming his offer. The Hiring Manager calls Remi to congratulate him.
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 though 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.

"I found a role online I'd like to apply for"

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

Opportunity for providing a great experience

NOTIFICATION ALERTS ON AVAILABLE ROLES	INTERACTIVE PSYCHOMETRIC TESTS	INTERVIEW SCHEDULING	FEEDBACK	OFFER DETAILS
• Notification alerts on relevant jobs of interest • Mobile application for easy access to application and recruitment process • Candidate application dashboard to show stage of application	• Notification of confirmation to the next stage • Online interactive tests through mobile with downloadable results available • Single contact of support - Support from Recruiter	• Pre-booked interviewer availability to ensure speedy process and ability to schedule interview based on own availability • Cognitive agent (AI) available for process questions	• Feedback via phone call • Offer of role via personalised phone call • Written confirmation of offer following the call	• Personalised call from Hiring Manager

Interactions

• Candidate • Mobile App	• Candidate • Screening team • Recruiter • Hiring Manager • Mobile App	• Candidate • Recruiter • Hiring Manager • Mobile App	• Candidate • Recruiter • Hiring Manager • Mobile App	• Candidate • Recruiter • Hiring Manager • Mobile App

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

● Recruitment process via mobile application (Gold) ● Candidate dashboard showing stage of application process (Gold) ● Notification alerts for relevant job interest (Bronze) ● Automated response to confirm receipt of application (Bronze)	● Online interactive tests through mobile app with downloadable results available (Gold) �grey Single contact of support - Support from Recruiter (Silver) ● Video interview answering set/standard questions (Bronze)	● Cognitive agent (AI) available for process questions and query resolution (Gold)	● Phone call feedback from Recruiter (Bronze)	● Mobile application for pre employment checks (Gold) ◯ Phone call from Hiring Manager (Silver)

KPIs

SLA*

Process-specific metrics		Service metrics	
• 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	• 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

Policies

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

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

Aditi, Civil Service Line Manager

'A member of my team has left the Civil Service, I need to fill their role as soon as possible as I'm worried my team will be over-stretched.'

Roles covered within the journey

- Employee / Candidate
- Line Manager
- HR Operations Specialist

User Journey

Civil Service Line Manager

1	2	3	4	5
A position has opened in Aditi's team. She gains approval from her budget holder and she opens a request to start the recruitment process.	An HR Operations Specialist contacts Aditi to find out more about the role, and set expectations for how and when it will be filled. The Recruiter posts the job through various channels.	The HR Operations Recruiter presents a shortlist of candidates for Aditi to review, and Aditi and another manager use a scoring framework to select quality candidates to interview.	Aditi and a panel conduct interviews with the candidates and provide feedback to the Recruiter. They agree which candidate will receive an offer.	Aditi receives confirmation that the candidate has accepted and information about the new hire's start date together with on-boarding logistics from the Recruiter.

Detail

1	2	3	4	5
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 request on the HR Portal to start the process. She receives acknowledgement of the request via an automated email, and is informed that a Recruiter will contact her within a specified time period.	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.	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.	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.	Aditi is kept informed as to how the offer is received, including a couple of concerns the candidate had before accepting. Aditi then receives a notification telling her the candidate has accepted. She receives information about the new hire, including their intended start date and on-boarding logistics. The candidate receives automated pre-employment check information to complete. Aditi calls the new hire to welcome them to her team, and starts to prepare on-boarding activities.

Feelings

Aditi is initially uncertain how to start the recruitment process, but is pleased that the guidance is clear and user friendly.	Aditi is reassured that the HR Operations Recruitment team knows about the market and is working to fill the position.	Aditi is impressed with the level of detail provided on the candidates and how well matched they are to the profile she requested.	Aditi was concerned because of her lack of experience in conducting interviews and found the video with tips really helpful. She feels more confident about the interview panel, scoring and selecting candidates.	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.

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	• Intuitive Portal • Dashboards/analytics to provide the Recruiter with the information on job posting • Reward analytics/insights • Push notifications/alerts • HCM system • Applicant Tracking System (ATS)	• Analytics for ranking/screening candidates • Video interviewing • Automatic interview scheduling • Automatic template population for shortlist • Recruitment system • Automatic triggers pushing next appropriate action directly to the user • CV parser	• Video with interview guidance • Phone call or email feedback • Video conference • Recruitment system • Approval notifications	• Automatic acceptance notification • Phone call • Automated pre-employment check notifications • Automated checklist of on-boarding activities

"A member of my team has left and I need to fill their role"

Additional actors and responsibilities (2/3)

User Journey

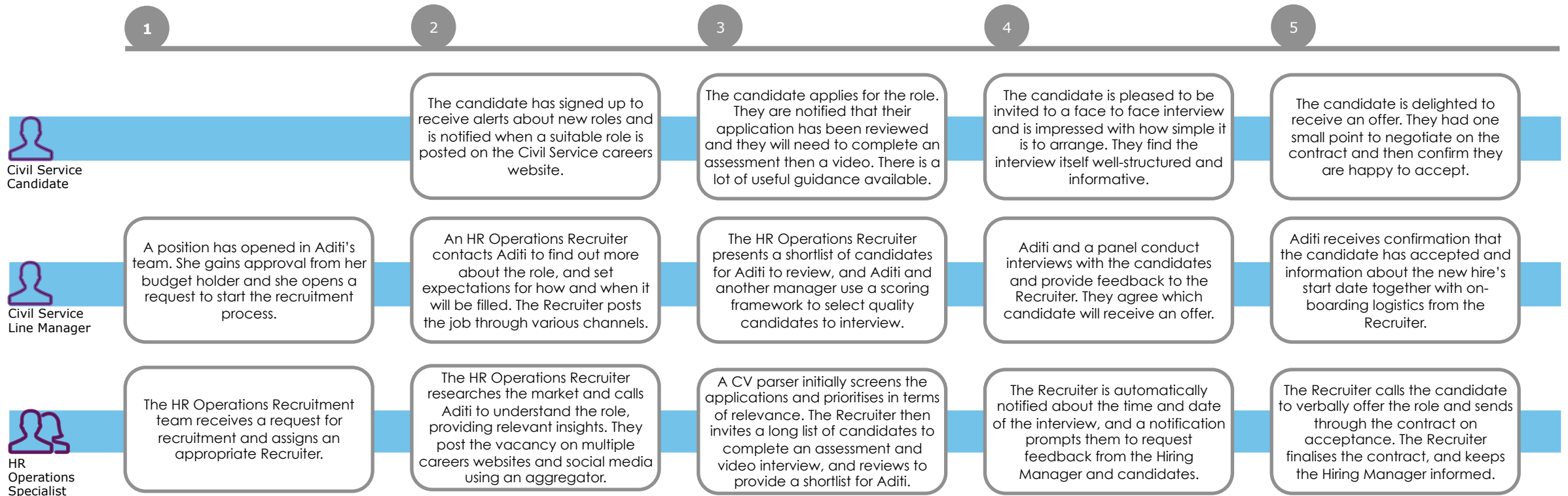|	1	2	3	4	5
Civil Service Candidate		The candidate has signed up to receive alerts about new roles and is notified when a suitable role is posted on the Civil Service careers website.	The candidate applies for the role. They are notified that their application has been reviewed and they will need to complete an assessment then a video. There is a lot of useful guidance available.	The candidate is pleased to be invited to a face to face interview and is impressed with how simple it is to arrange. They find the interview itself well-structured and informative.	The candidate is delighted to receive an offer. They had one small point to negotiate on the contract and then confirm they are happy to accept.
Civil Service Line Manager	A position has opened in Aditi's team. She gains approval from her budget holder and she opens a request to start the recruitment process.	An HR Operations Recruiter contacts Aditi to find out more about the role, and set expectations for how and when it will be filled. The Recruiter posts the job through various channels.	The HR Operations Recruiter presents a shortlist of candidates for Aditi to review, and Aditi and another manager use a scoring framework to select quality candidates to interview.	Aditi and a panel conduct interviews with the candidates and provide feedback to the Recruiter. They agree which candidate will receive an offer.	Aditi receives confirmation that the candidate has accepted and information about the new hire's start date together with on-boarding logistics from the Recruiter.
HR Operations Specialist	The HR Operations Recruitment team receives a request for recruitment and assigns an appropriate Recruiter.	The HR Operations Recruiter researches the market and calls Aditi to understand the role, providing relevant insights. They post the vacancy on multiple careers websites and social media using an aggregator.	A CV parser initially screens the applications and prioritises in terms of relevance. The Recruiter then invites a long list of candidates to complete an assessment and video interview, and reviews to provide a shortlist for Aditi.	The Recruiter is automatically notified about the time and date of the interview, and a notification prompts them to request feedback from the Hiring Manager and candidates.	The Recruiter calls the candidate to verbally offer the role and sends through the contract on acceptance. The Recruiter finalises the contract, and keeps the Hiring Manager informed.

"A member of my team has left and I need to fill their role"

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

Opportunity for providing a great experience

| HR PORTAL GUIDANCE ON RECRUITMENT PROCESS | → | UNDERSTANDING AND POSTING THE ROLE | → | SELECTING CANDIDATES | → | INTERVIEW PROCESS | → | OFFER AND ACCEPTANCE |

- **HR PORTAL GUIDANCE ON RECRUITMENT PROCESS**
  - Access to relevant information, content and guidance
  - Access to recruiting information on the HCM system
  - Online HR support

- **UNDERSTANDING AND POSTING THE ROLE**
  - Recruiter supporting the line manager
  - Recruiter to provide the line manager with strategic advice including market trends
  - Clear approvals process
  - 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

Interactions

- Line manager
- HR Operations
- Applicant Tracking System

- Recruiter
- Line manager
- Candidate
- HCM system
- Applicant Tracking System

- Recruiter
- Line manager
- Candidate
- Applicant Tracking System

- Recruiter
- Line manager
- Candidate
- Applicant Tracking System

- Recruiter
- Line manager
- Candidate
- Applicant Tracking System

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

- 🟡 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   **SLA***

Process-specific metrics
- 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

Service metrics
- Line manager satisfaction survey
- Candidate satisfaction survey
- Satisfaction of portal search returns

* Please refer to the Glossary for further information

Policies
- Civil Service Recruitment Principles
- Anonymised recruitment

- Fixed Term Appointments
- Agency Worker Regulations
- Civil Service Competency Framework

"A candidate has accepted our offer and needs to be on-boarded."

User Journey Overview (1/3)

Grace, HR Operations

"I got a notification to say that the candidate accepted, and so I need to make sure that they get everything they need to be successfully on-boarding."

Roles covered within the journey

- New Hire
- Line Manager
- HR Operations

User Journey

HR Operations

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 onboarding information. Once she receives the necessary documentation, Grace triggers the pre-employment checks and security vetting.

3 — Grace triggers Remi's access to the Onboarding 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.

Detail

1	2	3	4	5
Having clarified a couple of elements of his offer, Remi, a candidate, confirms to the HR Operations Recruiter that he would be delighted to accept his offer. He has reviewed the offer letter and accepted it on his mobile app. The HR Operations Recruiter explains the next steps to Remi, and updates the status in the Applicant Tracking System (ATS) to 'Offer accepted', which automatically triggers a notification to the line manager. It also creates a case for the HR Operations team to proceed with issuing the contract. Remi's new line manager calls to congratulate him and gives him an idea what the next steps are. Grace in the HR Operations team receives a notification to start creating Remi's contract. Most of the data fields are pulled automatically from the ATS in to the HCM system, but Grace carefully checks and fills in any missing data. Grace closes the requisition on the ATS.	Grace sends Remi his contract, which is conditional based on the outcomes of pre-employment checks and the appropriate level of vetting, along with a note of congratulations and on-boarding information. This also includes his probation period and information about his first pay date. Remi sends back his signed contract, signed using an electronic signature, which he can view on the mobile app along with any other documentation requested. Grace checks that all the information, including payroll information, in the HCM system is accurate and up to date. She then triggers all the pre-employment checks (PECs) and security vetting process. Remi's line manager receives a notification with an on-boarding checklist that they will need to complete for their new hire. The on-boarding checklist is visible on their HR portal pages until all activities are completed.	Grace triggers Remi's access to the on-boarding portal. Remi receives a notification on his app that he has unlocked a new portal, and finds more information about the Civil Service, his department, a count down to his start date and all the activities that he'll need to complete. He watches a video from one of the Ministers and his Permanent Secretary welcoming him to the Civil Service. Grace also ensures that he is invited to a community on social media so that he can touch base with other new joiners and people in his department. She adds him to the community and Remi can see the notification that he has been added on his app.	Grace liaises with different stakeholders to ensure that everything will be ready for Remi's first day. As part of the integrated on-boarding process, once Remi and his line manager receive his payroll number from HR Operations, the IT department receive an automated notification of Remi's arrival; they arrange a laptop and phone for him to use ready for his first day. Grace also reaches out to the line manager to ensure they have allocated Remi a buddy and that they are ready to meet Remi on the first day. Grace updates details on the system so Remi can see things are ready for him e.g. details of equipment, buddy being assigned and background checks and vetting being completed.	In the run up to Day 1 Grace has been on hand to answer Remi's queries. Grace has also made sure that Remi's line manager has completed all the on-boarding actions. On Day 1 Grace confirms on the HCM systems that Remi has arrived and is not a 'no show'. She ensures that all of Remi's necessary documentation is taken and recorded correctly. Relevant documents are automatically added to Remi's electronic personnel file.

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.

Enablers

• Applicant Tracking System (ATS) • HCM system • Single sign-on • Case Management System	• HCM system • Push notifications/alerts • On-boarding Portal optimised for mobile viewing • Integrations between HCM system and other systems (PECs and vetting)	• Push notifications/alerts • Mobile app • On-boarding Portal • Welcome video	• On-boarding Portal/app • Phone call • HCM system • Push notifications/alerts	• HCM system • Integration with document management solution

"A candidate has accepted our offer and needs to be on-boarded."

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service New Hire	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.	Remi receives his contract and all welcome information. He completes all required documentation and sends back to Grace to process.	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.	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.	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.
Civil Service Line Manager	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.
HR Operations Team	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.

"A candidate has accepted our offer and needs to be on-boarded."

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

Opportunity for providing a great experience

OFFER ACCEPTED TRIGGER	CONTRACT AND WELCOME PACK	ON-BOARDING PORTAL	DAY 1 READINESS	NEW JOINER SHOWS UP ON DAY 1

Interactions

▪ Hand-off between ATS and HCM system ▪ Warm hand-off between Recruiter and HR Operations team ▪ Notification of offer accepted	▪ Review and acceptance of contract by candidate ▪ System triggers allowing to easily initiate relevant actions, e.g. vetting ▪ Notifications with on-boarding checklist	▪ Access to On-boarding Portal triggered ▪ Mobile app notifications/alerts ▪ Engaging On-boarding Portal content ▪ Communities/social collaboration	▪ On-boarding checklist and activities ▪ Relevant parties/teams notified about steps requiring completion ▪ Timely completion of on-boarding actions	▪ 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
▪ HR Operations Recruiter ▪ Candidate ▪ HCM system ▪ ATS	▪ HCM system ▪ Candidate ▪ Mobile app ▪ Payroll	▪ HCM system ▪ On-boarding Portal ▪ New hire	▪ HCM system ▪ New hire ▪ Security, IT, Facilities, Vetting	▪ New hire ▪ Line manager ▪ HCM system ▪ Portal

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

○ 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	● RPA-enabled security, IT & Facilities scheduling ○ Instant flow of information from one system to another ○ Notifications 'pushed' for all roles involved in the process	○ Welcome notifications provided to employee on first day of work ○ Certification form automatically loaded to employee personnel file

Metrics

SLA*

Process-specific metrics

Service 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	

* Please refer to the Glossary for further information

Policies

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

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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)

Sam, Civil Service New Manager

'I have recently been promoted and will now lead a small team, I need some guidance on what I need to do to lead the team well'

Roles covered within the journey

New Manager   Line Manager

User Journey

Civil Service New Manager

1	2	3	4	5
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.	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.	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.	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.

Detail

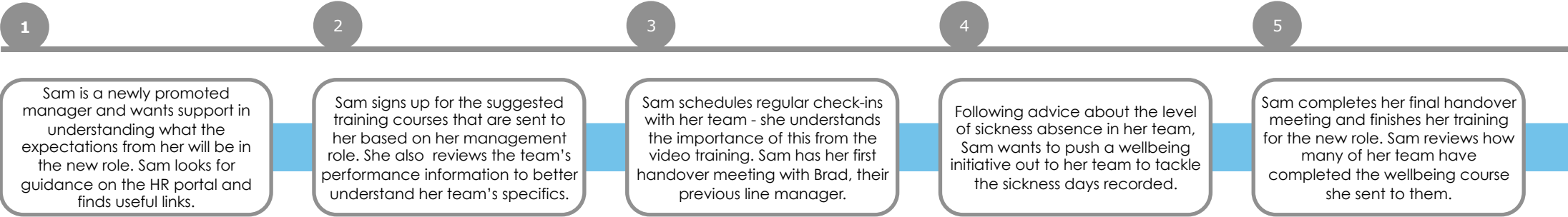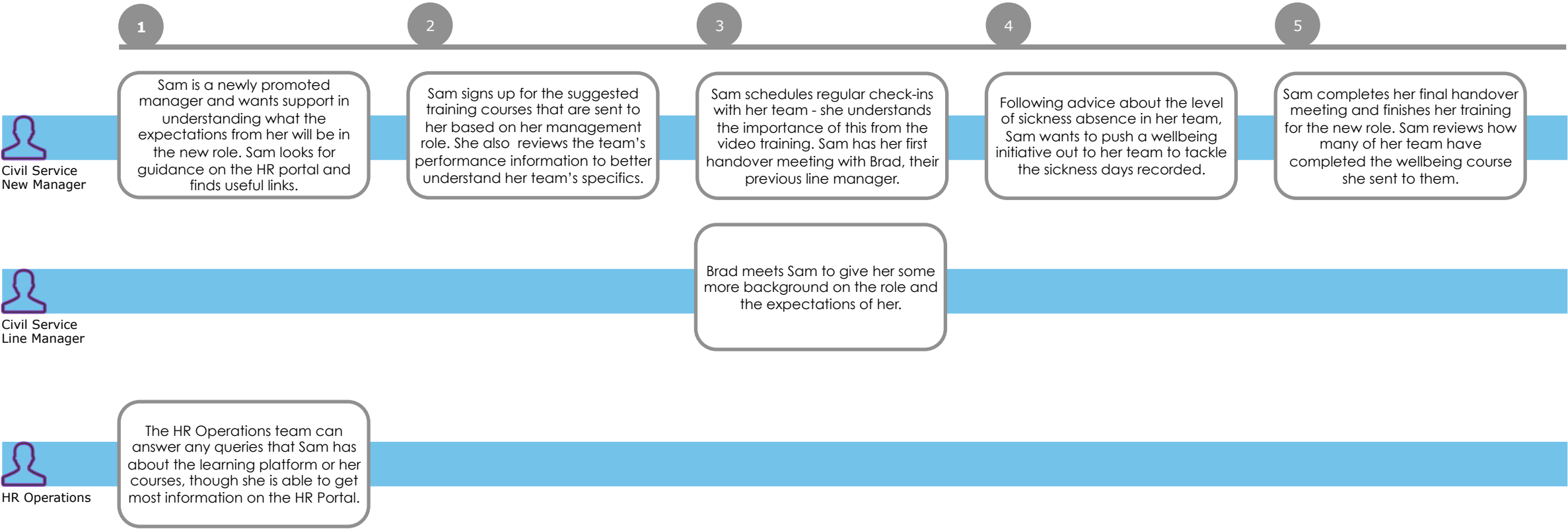| 1	2	3	4	5
Sam has recently been told that she was successful in applying for a promotion, which will be effective from next month. Sam receives notifications about relevant training and guidance she can find on the HR portal. As Sam has never managed a team before, she particularly wants to find guidance to understand what the expectations will be from her as a line manager, and how she can best lead her team. 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.	On the first day of Sam's new role she receives a pop up notification alerting her of the training she needs to complete which has to be completed within 30 days. Courses include 'Handling Difficult Situations' and 'New Manager' training. Sam receives an alert confirming that her manager access has been activated on the HCM system and HR Portal – she will now be able to view her team's performance ratings and development plans. When she accesses the HR portal, a manager dashboard appears highlighting key information about her team e.g. those on annual leave, those off with sickness and expected return dates of employees on long term sickness, maternity and career breaks.	After watching the online training videos on performance management, Sam is prompted to schedule check-ins with her team. These meetings will be scheduled every 2 weeks and will be a chance for Sam to understand and support the performance and wellbeing of her team. Sam also has a handover meeting scheduled with the previous line manager, Brad, who is now leaving. Sam is sent an alert with a suggested handover checklist to take to the meeting. During the meeting, Brad advises Sam and answers her questions on his perspective of her role and the expectations of her, which enhances what she already knows from the recruitment and on-boarding process, and what she can find on the HR portal.	Sam receives a reminder prompting her to finish her training courses before the 30 day period expires. She schedules a set time in her diary to finish them. From the meeting with Brad, Sam now has a list of activities to prioritise in her new role, including appropriately recording and managing sickness absences as there seems to be a high volume of absence reporting in the team. Sam decides that her first initiative in the team will be to address the amount of sickness absences. She discusses the initiative with the team after conducting 1:1 discussions, and identifies a wellbeing course in the learning system she would like her team to complete and enrols her team.	Sam has now completed all of her training and has her final handover meeting with Brad. She has ticked off all of the handover checklist required from her. The day before the wellbeing training completion is due, Sam gets an alert about non-completion rates from the HCM system – she sends a chaser to the relevant team members. She then sets weekly catch ups with the team to discuss priorities.

Feelings

1	2	3	4	5
Sam is satisfied with the quality and variety of guidance and tools available on the HR portal.	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.	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.	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

1	2	3	4	5
• Intuitive Portal • Video training • Self-service and online support • Suggested content and knowledge articles, based on previous activities • Cognitive agent (AI)	• 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	• Intuitive Portal • Suggested content based on user role • Push notifications/alerts • Automatic triggers pushing next appropriate action directly to the user	• Intuitive Portal • Push notifications/alerts • Video training • Learning system	• Intuitive Portal • Push notifications/alerts • Dashboards/analytics indicating completed learning

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

Additional actors and responsibilities (2/3)

1

2

3

4

5

Civil Service New Manager

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.

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.

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.

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.

Civil Service Line Manager

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

HR Operations

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.

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"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)

Opportunity for providing a great experience

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	• HR support and additional support networks available • 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

Interactions

• New Manager • HR Operations • Portal • HCM system	• New Manager • Portal • HCM system • Learning system	• New Manager • Line Manager	• New Manager • Line Manager • Learning system	• Line Manager • Portal

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

🟡 Personalised portal search 🟡 RPA enabled web chat ensuring online support 24/7 🟡 Personalised Learning Platform based on chosen career pathway 🟡 Pre-determined learning options enabled from HCM system updates 🟤 Suggested content pushed to the employee ahead of the start of promotion date 🟤 Straightforward user interface to aid action completion 🟤 Intuitive portal	🟡 Suggested content pushed to the employee ahead of the start of promotion date ⚪ Manager dashboard showing statistics of team ⚪ Pop-up notification alerts 🟤 Intuitive portal	⚪ Previous line manager support, documented handover process ⚪ Pop-up notification alerts 🟤 HR team support available 🟤 Intuitive portal	🟡 Reminder alerts for deadline approaching 🟡 HCM department data, allowing for business decisions on initiatives 🟤 HR team support available 🟤 Intuitive portal	🟡 Manager dashboard showing statistics of team 🟤 Intuitive portal

KPIs

Process-specific metrics

		Service metrics	SLA*
• 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

Policies

• Job Evaluation Policy • CS Employee Policy	• CS Code of Conduct • CS Management Code

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

User Journey Overview (1/3)

Remi,
Civil Service Employee

I have just joined the department, I want to make sure I am up to date on learning and development opportunities which will help me in my new role and for a possible promotion.

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Employee

1	2	3	4	5
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.	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.	A development plan is created to help address the gaps through informal and formal learning. Remi reviews his progress against this.	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 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.

Detail

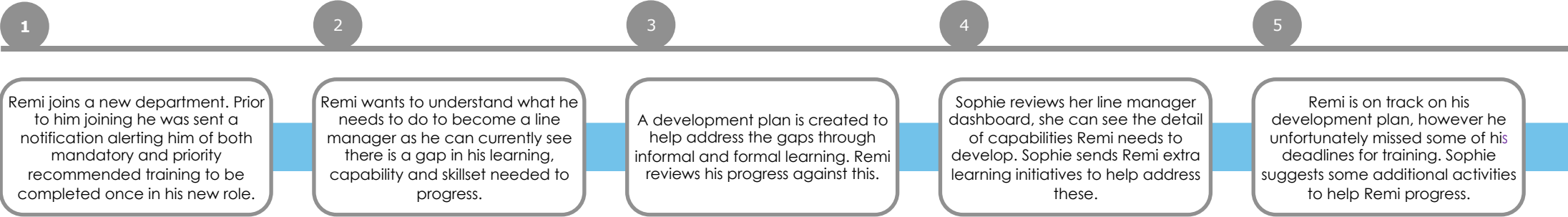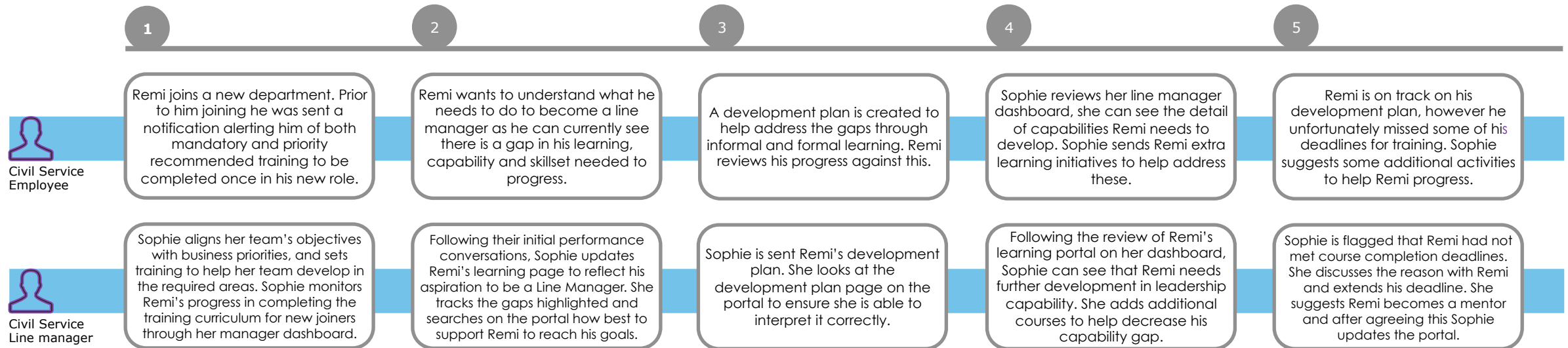| 1	2	3	4	5
Remi has recently joined a new department and wants to ensure that he is aware of all the relevant learning which could help him perform in his new role. Remi schedules a performance meeting with his new Line Manager, Sophie, and they discuss suggested learning modules on the learning portal. Prior to Remi joining the team he had been sent a notification alerting him of both mandatory and recommended training to be completed once he began his new role. There is a deadline set next to each of the mandatory training courses. Remi was auto 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.	Remi is not currently a line manager but aspires to be one in the near future. Remi reviews the options available to him on the learning portal as he wants to better understand what he can do to help him be ready for promotion. He can see that his current learning, capabilities and skillset have gaps if he were to apply for a promotion role in the near future and finds suggestions and interventions for addressing these gaps. Remi discusses this with Sophie. Following their conversation Sophie updates Remi's learning page and chooses relevant courses to help him prepare should he choose to apply for promotion. The learning opportunities take into account capabilities and skills required to become a line manager, and key courses are pre-populated.	The learning portal is also populated with feedback from Remi's previous line managers on his skillset – this is displayed on the dashboard with suggested learning to help him develop. A pre-set development plan is created based on feedback and the career pathway for promotion which incorporates Remi's development points based on the inputs into the portal, this plan is also flagged to Sophie who can review progress.	Sophie reviews her manager dashboard to access the learning her team have completed. She can see that Remi completed the most learning hours and she waits for her scheduled review meeting with Remi to discuss his progress. Sophie and Remi meet to review Remi's development. She reviews Remi's individual record and can see how he is doing compared to his development plan. On the HCM system Sophie can see that leadership skills are an area for improvement – Sophie sends Remi suggested training courses to help in this area, he is sent a notification to remind him to complete this.	After a few weeks, Remi meets with Sophie for a review meeting, and Sophie details his performance and learning feedback. Sophie informs Remi that she was sent a notification that some priority training deadlines had passed without Remi completing the courses. 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 Ed 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.

Feelings

1	2	3	4	5
Remi is glad that he was sent recommended training prior to joining, this allowed him 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.

Enablers

1	2	3	4	5
• 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

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

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Employee	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.	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.	A development plan is created to help address the gaps through informal and formal learning. Remi reviews his progress against this.	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 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.
Civil Service Line manager	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.

"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	Identifying the gap in learning, capability and skillset	Development plan created	Line Manager dashboard analytics	Additional activities to help achieve goals
• 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	• 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, based on HCM updates • User friendly dashboard • Suggested learning content pulled from HCM system updates • Line Manager pop up notifications alerts with new information	• Manager dashboard available to view team details e.g. learning hours • Suggested improvement areas based on updates to development plan • Pop up notifications alerts	• 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

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

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

🟡 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 ⚪ Pop-up notification alerts 🟤 Intuitive Portal

KPIs

Process-specific metrics
- 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

Service metrics
- 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

SLA*

* Please refer to the Glossary for further information

Policies
- Mandatory Learning Policy
- CS Employee Policy

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

User Journey Overview (1/3)

Angela, Civil Service Line manager

"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

User Journey

Civil Service Line manager

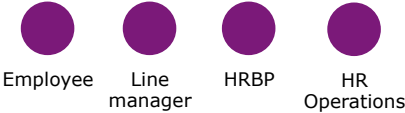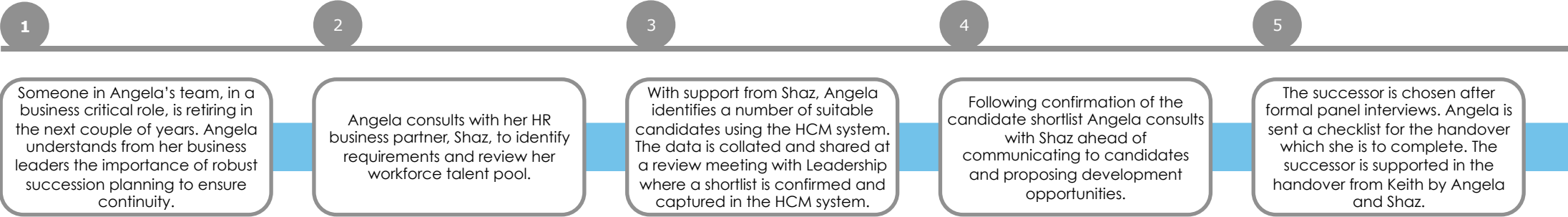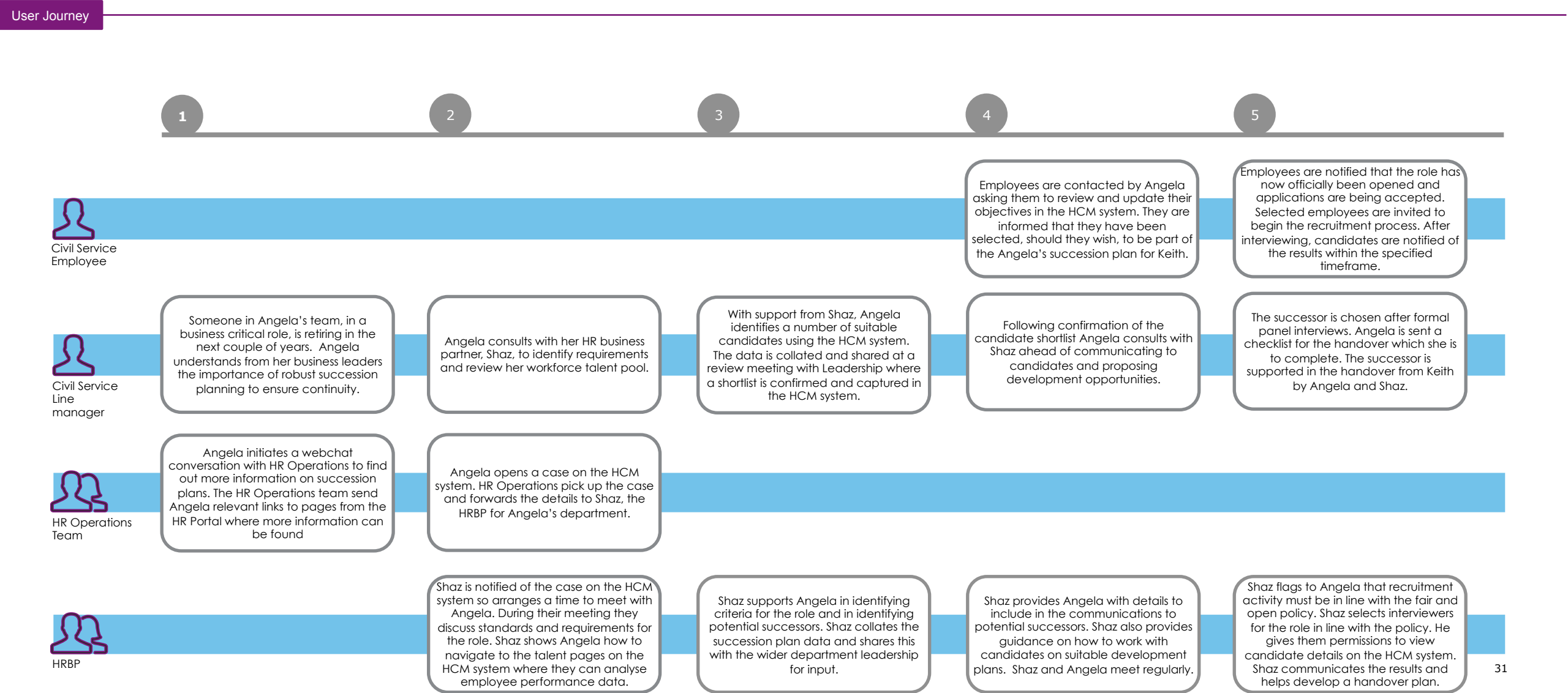| 1	2	3	4	5
Someone in Angela's team, in a business critical role, is retiring in the next couple of years. Angela understands from her business leaders the importance of robust succession planning to ensure continuity.	Angela consults with her HR business partner, Shaz, to identify requirements and review her workforce talent pool.	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.	Following confirmation of the candidate shortlist Angela consults with Shaz ahead of communicating to candidates and proposing development opportunities.	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.

Detail

1	2	3	4	5
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 when he retires. Although Angela has looked at a succession plan as part of the regular talent moderations and talent reviews, now that she is aware of Keith's change in circumstances, she would like to do an ad hoc review of the succession plan, to ensure that it is robust. She opens a webchat conversation with HR to ask where she can find relevant information and is directed with a link to the relevant HR Portal pages. Angela reviews the content available and then raises a request for a further discussion on her succession plans. HR Operations escalates the query to Angela's HRBP.	Angela's HRBP, Shaz, contacts her via email to follow up on her request and arrange a suitable time to meet. On meeting, Angela consults with Shaz on the standards and requirements for the role, such as specific skills required. They validate details against the current specification and considerations for future requirements. 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 her 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.	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 Angela may require. Angela is comfortable using the HCM system and does not feel she needs support at this stage. Whilst reviewing the talent pool on the HCM system, Angela can see that one of the potential employees is flagged as a retention risk. Angela makes a note to follow up and investigate this further. Shaz collates the succession plan data for Keith's role, including two other critical roles they have identified through their review. Shaz will share this with the wider department leadership for analysis and calibration. While meeting other department leaders, the HCM system is updated live by one of Shaz's colleagues.	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 these 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.	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 he is supported by Angela and Shaz to ensure the successor to ensure they are well equipped for the role.

Feelings

1	2	3	4	5
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.	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 feels well supported by Shaz and is confident she will be able to find and develop a successor.	Angela is confident with the decision made for her successor and believes the department will transition well into new leadership.

Enablers

1	2	3	4	5
• Intuitive Portal • Video training • Self-service and online support available	• HCM system • Intuitive Portal • Pre-populated template for succession plan	• HCM system • Push notifications/alerts	• HCM system • Integrations between HCM and other systems Dashboards/analytics indicating key team information	• HCM system • Push notifications/alerts • Approval notifications

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

Additional actors and responsibilities (2/3)

	1	**2**	**3**	**4**	**5**
Civil Service Employee				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.
Civil Service Line manager	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.	Angela consults with her HR business partner, Shaz, to identify requirements and review her workforce talent pool.	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.	Following confirmation of the candidate shortlist Angela consults with Shaz ahead of communicating to candidates and proposing development opportunities.	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	Angela opens a case on the HCM system. HR Operations pick up the case and forwards the details to Shaz, the HRBP for Angela's department.			
HRBP		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 supports Angela in identifying criteria for the role and in identifying potential successors. Shaz collates the succession plan data and shares this with the wider department leadership for input.	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.

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

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

WEBCHAT FOR INSTANCE RESPONSE FROM HR	REVIEW TALENT POOL	COLLATE SUCCESSION PLANNING DATA	SHORT-LIST CONFIRMATION	INTERVIEW PROCESS
▪ Access to relevant information on HR Portal ▪ Online HR support ▪ Cognitive agent available 24/7 ▪ Query escalated to appropriate team	▪ HRBP provides strategic support for Line manager ▪ Talent pages on HCM System easy to navigate ▪ Employee profiles up to date and informative	▪ HRBP provides support to Line manager ▪ Consolidated succession planning data and information	• 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	▪ Automated scheduling tool for interviews ▪ Notification updates on stage of acceptance ▪ Checklist to support handover

Interactions

▪ Line manager ▪ HR Operations	▪ Line manager ▪ HRBP	▪ Line manager ▪ HRBP	▪ Line manager ▪ HRBP ▪ Succession candidates / employees	▪ HRBP ▪ Recruiter ▪ Line manager ▪ Candidates

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

🟡 Cognitive automation-enabled webchats ensuring online support 24/7 🟡 Personalised Portal search ⚪ (Silver) 🟤 Suggested content available on the Portal with guidance 🟤 Straightforward user interface to aid action completion 🟤 Case management 🟤 Intuitive Portal	⚪ 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	🟡 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	🟡 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	🟡 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

Metrics

Process-specific metrics

		Service metrics		SLA*
▪ Retention risk / attrition risk (especially for high potentials) ▪ # successor candidates participating in leadership development programs ▪ # roles covered by succession process ▪ # critical roles by location ▪ Rate of internal vs external hires	▪ # 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		

* Please refer to the Glossary for further information

Policies

▪ SCS Indicators of Potential ▪ Civil Service Recruitment Principles ▪ Equality and Diversity Strategy	▪ Equality Act 2010 ▪ Fair and Open Policy ▪ Recruitment Policy	▪ Civil Service Competency Framework ▪ Civil Service Leadership Statement ▪ Pay and Grading Policy

HR4 Moment
"I have been asked to mentor a colleague"

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

Freya, Civil Service Mentor

Roles covered within the journey

Employee (Mentee) · Employee (Mentor) · HR CoE

User Journey Overview (1/3)

User Journey

Civil Service Mentor

1	2	3	4	5
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 imminently, 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.

Detail

1	2	3	4	5
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. 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 is recommended to update her profile with her skills and experience via a notification in her inbox.	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 receives a link to Hana's profile on the HCM system which shows her experience and career objectives, she sees that Hana hopes to apply to a scheme 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.	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 Hana and Freya 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 developmental 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.

Feelings

1	2	3	4	5
Freya is excited to be involved in this important development opportunity. She is pleased to be able to complete the course at her leisure.	Freya feels confident and comfortable meeting with Hana as she has access to useful information to support her.	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 Freya's time.	Freya feels they have struck up a strong relationship, and feels supported by the frameworks and tools she has been able to utilise.	Freya is very happy that Hana was accepted onto the scheme. She is keen to support another mentee achieve their goals.

Enablers

1	2	3	4	5
• Intuitive Portal • HCM system • Push notifications/alerts • 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

"I have been asked to mentor a colleague."

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Mentor	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 imminently, 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.
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.	Hana and Freya meet. Hana wants to build a rapport with Freya and agree what mentoring relationship they will have. After the initial meeting, Hana updates her development objectives. She discusses these with Freya and makes sure they are in line with expectations for the scheme.	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	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.
HR CoE	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.				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.

"I have been asked to mentor a colleague."

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

MENTORING SCHEME APPLICATION	MENTOR MATCHING	OBJECTIVES AND GUIDANCE	SUPPORT	ACHIEVEMENTS AND FEEDBACK
▪ Notifications / alerts on HCM system ▪ Accessible and clear guidance available on the HR Portal ▪ Online HR support ▪ HCM system integration with Learning Portal	▪ Notifications / alerts on HCM system ▪ Accessible and clear guidance available on the HR Portal ▪ Video training ▪ Mentor matching based on identified criteria	▪ Mentoring support guidance available on HR portal ▪ Notifications for check-in meetings on HCM system	▪ Mentoring support guidance available on HR portal ▪ Easy to access tools and frameworks	▪ Mentoring feedback session conducted

Interactions

▪ CoE ▪ Employees ▪ Employee (Mentor)	▪ Employee (Mentor) ▪ Employee (Mentee)	▪ Employee (Mentor) ▪ Employee (Mentee)	▪ Employee (Mentor) ▪ Employee (Mentee)	▪ Employee (Mentor) ▪ Employee (Mentee) ▪ CoE

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

● Online registration form integrated with mentor matching system (Gold) ● Suggested content pushed to employee (Gold) ○ Straightforward user interface to aid action completion (Silver) ● Intuitive Portal (Bronze) ● Automated response to confirm receipt of registration (Bronze)	● Automatic mentor matching based on identified criteria (Gold) ● Use of mobile platform for anytime / anywhere training (Gold) ● Straightforward user interface to aid action completion (Bronze) ● Intuitive Portal (Bronze)	● Pop-up notification alerts (Bronze) ● Intuitive Portal (Bronze) ● Regular check in meetings via different channels (Bronze)	○ Online tools and frameworks available on HR portal with accompanying online learning and video training, and guidance (Silver) ● Intuitive Portal (Bronze)	● Online feedback form (Gold) ● Mentoring system updated to reflect mentor relationship conclusion (Gold)

Metrics   **SLA***

Process-specific metrics
- ▪ 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

Service metrics
- ▪ 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

Policies
- ▪ Mentoring toolkit
- ▪ SCS Indicators of Potential

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

User Journey Overview (1/3)

James, HR Operations Specialist

"The talent review period has opened and I am involved in supporting the process"

Roles covered within the journey: Employee | Line Manager | HR Operations Specialist | HRBP | HR CoE

User Journey

HR Operations Specialist

1 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.

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 James works with the HRBP to prepare for the Talent Review Meeting. After the meeting, the HRBP validates the outcomes with the functions and professions.

4 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.

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.

Detail

1	2	3	4	5
James, an HR Operations Specialist, has received instruction from the Centre of Expertise (CoE) responsible for Talent to alert him that 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 HRBPs on communications, query handling and resolution, and reporting and metrics needed for the Talent Review. James is notified that the CoE has sent line managers and HR colleagues a communication informing them about the talent review, and employees are informed by their line manager to update their career profiles on the HCM system by completing a pre-defined form. James will track, progress and resolve any queries and requests that come from the business and HR during the talent review activity.	James tracks completion as employees update their profiles and submit them to their line manager who reviews the data. Line managers meet with their employees to have a talent conversation, ahead of the review meetings. They update the HCM system as required. James is notified of incomplete profiles, and sends prompts via the HCM system to the line manager to complete review meetings and add any additional details required. James is then notified about employees to be included in talent pool once the line managers complete their leadership potential assessment across their teams to identify candidates. Once the talent allocation deadline has passed James consolidates the data on the HCM system and prepares documentation for the HRBP to use in facilitation of the Review Meeting. He generates standards reports and analyses the data to provide insights for the HRBP.	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 helps prepare for the Talent Review meeting by co-ordinating and communicating logistics, producing and distributing pre-read packs as required, outlining key discussion topics and drafting the agenda. James does not join the meeting; the HRBP supports and moderates during the meeting. The HRBP provides James the outputs so he can record the strengths and development areas in the HCM system, so they can easily be summarised and used as documentation of the decisions taken in the meeting. The HRBP works with leadership to calibrate the performance v. potential ratings and identify successors for key roles as necessary. The HRBP also validates and confirms outcomes with professions and functions to ensure consistency across departments.	Following the Talent Review Meeting, the HRBP consults with the CoE and leadership to confirm decisions made. James updates the HCM system after the meeting accordingly. James then works with the HRBP to communicate the outcomes to leadership and line managers, via the Case Management System (CMS), providing links to additional useful information. He updates the career profiles of those included in the talent pool where required. James outlines the specific learning areas that were discussed based on the output from the employee profiles and areas flagged as needing improvement. He is also able to identify recommendations for workforce planning including recruiting for growing areas with a specialist skills which are currently lacking within the talent pool.	James sends out a notification to remind Line Managers to inform their employees of the outcome of the talent review. James schedules meetings with other talent areas including the learning and recruiting teams to provide data, give an overview of identified gaps and recommend actions from the Talent Review Meetings. He provides updates as required to the relevant stakeholders. James is notified when new recruitment and learning initiatives are finalised and sent for approval by business leaders and line managers.

Feelings

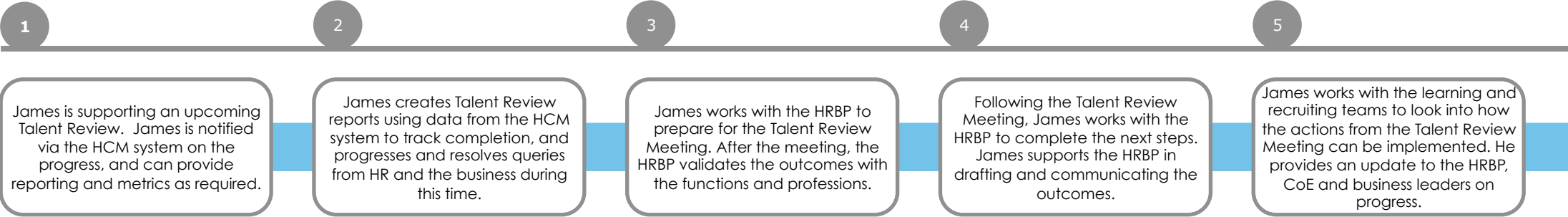|				
James is excited about the Talent Review and is keen to use his specialist knowledge to support the process and add value.	James is keen to be able to provide as much useful data as he can to the HRBP. He understands that the more data available the more informative decisions making can be.	James is glad to be able to provide insight based on reviews made from the reports.	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 keen to see how the new initiates progress. He is satisfied that the implementation and looks forward to sharing with results.

Enablers

• Case Management System (CMS) • HCM system • Push notifications/alerts	• 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

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

Additional actors and responsibilities (2/3)

User Journey

Civil Service Employee

1 Employees are sent an email asking them to update their career profiles on the HCM system by completing a pre-defined form. The email also has links to guidance on the HR Portal to get more information on how best to populate this.

2 In addition to their performance conversations, employees have regular talent conversations with their line managers where they discuss strengths and development areas.

5 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.

HR CoE

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.

4 The CoE is informed of decisions made during the Talent Review meeting by the HRBP. They discuss what's this means in terms of next steps and progression of initiatives.

HRBP

3 James provides the HRBP reports with identified areas that require further attention. The HRBP supports and moderates during the meeting, and then works with leadership to calibrate the talent review and identify successors.

4 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.

HR Operations Specialist

1 James is supporting the Talent CoE and HRBPs in conducting a talent review. James is notified via the HCM system on the progress, and can provide reporting and metrics as required.

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 James works with the HRBP to prepare for the Talent Review meeting.

4 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.

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.

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"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

TALENT REVIEW STARTS	COMPLETION TRACKED	TALENT REVIEW	OUTCOMES COMMUNICATED	TALENT INITIATIVES
▪ Notifications / alerts on HCM system ▪ Manager and employee self service on HCM systems ▪ Managers supported in talent conversations with their teams	▪ Notifications / alerts on HCM system ▪ Manager dashboard with team information ▪ Talent review tracking with pre-defined reports on HCM system	▪ Warm hand offs between HR Operations and HRBPs ▪ Consolidated Talent Review data and information	• Relevant parties/teams notified about outcomes of Talent Review Meeting • Guidance and frameworks for Talent Review communications	▪ Notifications / alerts on HCM system ▪ Talent Review outcome communicated to employees ▪ Feedback mechanism available

Interactions

▪ HR Operations Specialist ▪ CoEs ▪ Line managers ▪ Employees	▪ HR Operations Specialist ▪ Line Manager ▪ HRBP	▪ HR Operations Specialist ▪ HRBP	▪ HR Operations Specialist ▪ HRBP	▪ HR Operations Specialist

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

🟡 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

Metrics

SLA*

Process-specific metrics		Service metrics	
▪ % 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	

* Please refer to the Glossary for further information

Policies

▪ SCS Indicators of Potential ▪ Civil Service Recruitment Principles ▪ Equality and Diversity Strategy	▪ Equality Act 2010 ▪ Fair and Open Policy ▪ Recruitment Policy	▪ Civil Service Competency Framework ▪ Civil Service Leadership Statement ▪ Pay and Grading Policy	

HR5 Managing the Workforce

HR5-01 Manage Performance

HR5-02 Absence, Health & Wellbeing

HR5-03 Employee Changes

HR5-08 Conduct & Discipline

"I am participating in an on-going performance review"
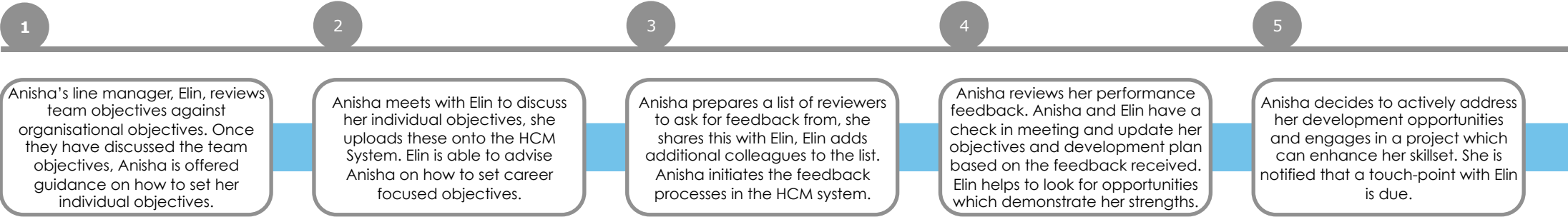
'I want to be clear on my objectives, understand where I need to develop and have the opportunity to grow as an individual.'

Anisha, Civil Service Employee

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Employee

1	2	3	4	5
Anisha'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.

Detail

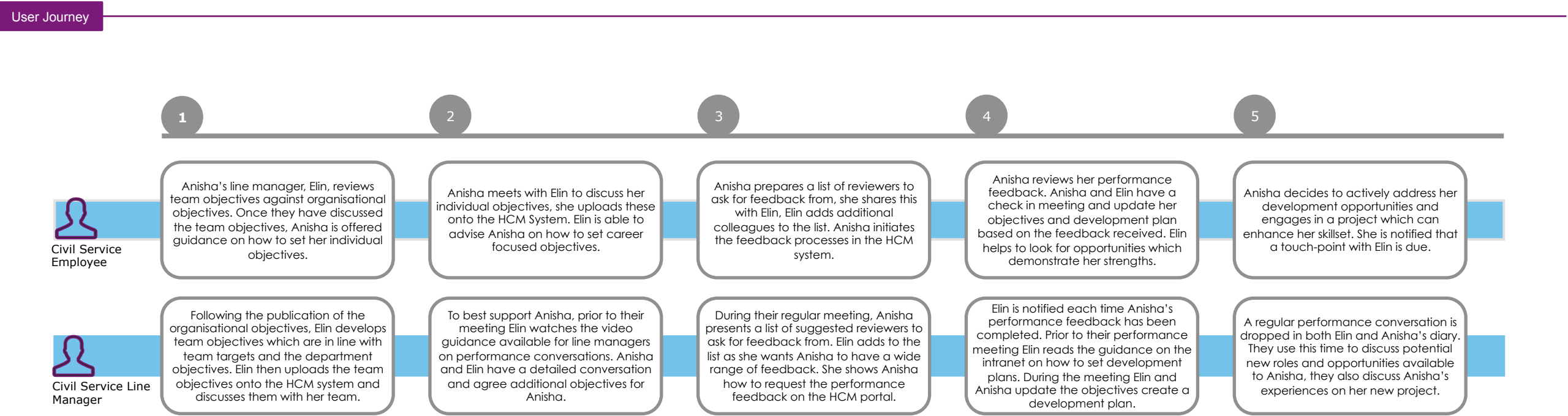| 1	2	3	4	5
Elin, Anisha's line manager, periodically reviews team objectives against organisational objectives to support the delivery of flexible objective setting with departmental leadership. She cascades these to her direct reports. Anisha receives an email notification in her inbox, where she finds an embedded link which takes her to the revised team objectives in the HCM system. On entering the system, she gets a notification with suggested guidance on objective setting.	Reviewing the guidance and team objectives Anisha considers her individual objectives and determines to refresh them. She enters them into her performance plan. On receiving a system notification, Anisha's line manager Elin follows up with her to arrange a meeting. Elin is also reminded of the 'refresher training' material available online, focusing on her line manager role in performance management. Prior to meeting with Elin, Anisha meets with her mentor to seek advice and to discuss her refreshing her objectives. They spend some time reviewing related content and guidance on the HR Portal. Anisha and Elin have a detailed conversation about Anisha's career aspirations and performance. They agree some additions to her objectives in order to support her ambitions and career goals, which she updates in the HCM system.	Prompted by her conversation with Elin and her newly refreshed objectives, Anisha decides to initiate some feedback. She prepares a list of reviewers and shares it with Elin. Elin suggests a couple of additional colleagues Anisha has worked with. Agreeing with this recommendation from her manager Anisha initiates the feedback processes in the HCM system – sending a request to reviewers to complete some feedback. Anisha's colleagues automatically receive a notification via the HCM system with Anisha's request for them to complete a short feedback 'pulse' survey, along with a deadline date for the feedback to be submitted by.	Anisha reviews her performance feedback completed by colleagues in the HCM system, including aggregated feedback data. Elin and Anisha have regular performance discussions ('touch-points'). They use this time to jointly review the feedback and aggregated data. Anisha takes her laptop to the meeting and they review the feedback through Anisha's HCM system. During their discussion they adjust some of Anisha's long term objectives and development plan, identifying some areas to focus on. Elin and Anisha have previously discussed a role move and Elin is keen to support her to achieve this career goal. Together they review roles associated with the particular skills Anisha demonstrates most strongly and is most interested in leveraging. Anisha also has ongoing coaching catch ups with her mentor, some of which they complete via video call.	Based on her amended development plan, Anisha can see additional suggested opportunities and projects which match her development needs – she can view these as a widget icon on her HR Portal dashboard. Anisha decides to actively address her development opportunities and joins a new project which can enhance her skillset. A regular touch-point meeting notification drops into Elin and Anisha's diaries. Anisha is excited to discuss the opportunities and experience she is having on the new project.

Feelings

Anisha feels well informed on what the organisation's and team's 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 her 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.

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	• 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

"I am participating in an on-going performance review"

Additional actors and responsibilities (2/3)

1 | **2** | **3** | **4** | **5**

Civil Service Employee

1. Anisha'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.

2. 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.

3. 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.

4. 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.

5. 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.

Civil Service Line Manager

1. Following the publication of the organisational objectives, Elin develops team objectives which are in line with team targets and the department objectives. Elin then uploads the team objectives onto the HCM system and discusses them with her team.

2. To best support Anisha, prior to their meeting Elin watches the video guidance available for line managers on performance conversations. Anisha and Elin have a detailed conversation and agree additional objectives for Anisha.

3. During their regular meeting, Anisha presents a list of suggested reviewers to ask for feedback from. Elin adds to the list as she wants Anisha to have a wide range of feedback. She shows Anisha how to request the performance feedback on the HCM portal.

4. Elin is notified each time Anisha's performance feedback has been completed. Prior to their performance meeting Elin reads the guidance on the intranet on how to set development plans. During the meeting Elin and Anisha update the objectives create a development plan.

5. A regular performance conversation is dropped in both Elin and Anisha's diary. They use this time to discuss potential new roles and opportunities available to Anisha, they also discuss Anisha's experiences on her new project.

"I am participating in an on-going performance review"

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

Opportunity for providing a great experience

OBJECTIVES COMMUNICATED	MANAGER TOUCH POINT	FEEDBACK REQUESTED	DEVELOPMENT REVIEW AND CHECK IN	FUTURE DEVELOPMENT OPPORTUNITIES HIGHLIGHTED
• Team targets and objectives communicated to line managers • Department objectives cascaded across the department via the HR portal • Objective setting guidance provided to employees	• Confirmation of employee objectives • Pop-up window reminders for employee manager touch points • Recommended 'refresher' video training for line managers	• Check in and agreement of feedback requests for employee with manager • Feedback mechanism available – short pulse survey • Feedback request notifications sent to colleagues	• Performance feedback provided in the HCM system • Online dashboard which show performance feedback available for employees to review • Continuous check in points arranged between manager and employee	• Recommendations on how to improve development areas • Development opportunities communicated to employee • HR portal shows widget of development plan
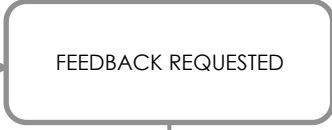
Interactions

• Line manager • Portal • HCM system	• Line manager • Portal • HCM system • Mentor	• Line manager • Colleagues • Portal • HCM system	• Line manager • Portal – dashboard enabled • HCM system	• Line manager • Portal

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

🟡 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

KPIs

SLA*

Process-specific metrics		Service metrics	
• Number of employee objectives submitted on time per department • Performance competencies where employees are falling short • Measures in place to address performance issues	• 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	

* Please refer to the Glossary for further information

Policies

• Performance Management
• Managing Poor Performance

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

User Journey Overview (1/3)

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

Civil Service Line Manager

1	2	3	4	5
Peter has identified Sana as an employee who is performing below expectations, so he seeks guidance on how best to approach the situation.	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.	Peter prepares a performance improvement plan with guidance from the HR portal. He also consults with HR Operations who are able to advise him.	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.

Detail

1	2	3	4	5
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. 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.	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. During the meeting Peter clearly sets out why Sana's work outputs are falling short on expectations set out in her objectives. He also draws on some additional feedback he has gathered as a reference point. Sana understands the situation due to their previous conversations, so they discuss potential solutions, including a performance improvement plan and the support available.	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 timeframes 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.	Peter meets Sana to go through the plan, and then schedules regular performance check-ins over the coming weeks to review her progress against the performance improvement plan. Peter shares the plan with Sana via email so that they both have a copy. After a few weeks Peter has seen many positive improvements in Sana's work – particularly how she prioritises her activities, her attendance and her attention to detail. Peter is also notified that Sana has completed the suggested training available to her.	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.

Feelings

1	2	3	4	5
Peter finds the guidance available on the HR Portal very informative, and finds the training useful and relevant to the situation. The guidance is clear and he can easily find and follow the correct procedure.	Peter is confident 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.	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.	Peter is pleased to see Sana's work outputs improving and finds the regular touch points very useful to help steer and support her.	Peter is glad that Sana has improved sufficiently and that she has addressed her performance issues.

Enablers

1	2	3	4	5
• Intuitive Portal • Video training • Self-service and online support • Push notifications/alerts	• Intuitive Portal • Automatic triggers pushing next appropriate action directly to the user • Embedded (deep) links from guidance directly through to HR actions • Case Management System	• Intuitive Portal • Learning system • Push notifications/alerts • Self-service and online support via webchat • Case Management System	• Intuitive Portal • Self-service and online support • Case Management System	• Self-service and online support • Case Management System

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

Additional actors and responsibilities (2/3)

1   **2**   **3**   **4**   **5**

Civil Service Line Manager

1	2	3	4	5
Peter has identified Sana as an employee who is performing below expectations, so he seeks guidance on how best to approach the situation.	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.	Peter prepares a performance improvement plan with guidance from the HR portal. He also consults with HR Operations who are able to advise him.	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.

Civil Service Employee

1	2	4	5
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.	Sana understands the seriousness of this performance meeting from the written invitation she received. Peter was clear on expectations and they agree next steps.	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.

HR Operations

3	4
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.

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

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

IDENTIFICATION OF PERFORMANCE ISSUE	PERFORMANCE DISCUSSION	SETTING PERFORMANCE IMPROVEMENT PLAN / SEEKING HR SUPPORT	ONGOING TOUCHPOINTS	FINAL REVIEW MEETING
• Access to relevant information, content and guidance • Access to performance feedback on the HCM system • Online HR support	• Performance improvement conversation • Access to relevant information, content and guidance • Performance feedback and analytics in one place	• Manager access to HCM system and analytics • Online HR support • Line manager support on conversations and next steps by HR Specialist	• Access to relevant information, content and guidance • Timely communication between line manager and employee • Additional HR support if needed	• Ongoing support from the line manager to monitor employee's performance • Clear objectives and timeframes for achieving them • Regular performance review touchpoints

Interactions

• Employee • HR Operations • Portal • HCM system	• Employee • HR Operations • Portal • HCM system	• Line manager • HR Operations	• Line manager • Portal • HCM system	• Line manager • Portal • Workplace adjustments team (as required)

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

● (Gold) Personalised portal search ◐ (Silver) Performance analytics/dashboards enabling early intervention ◐ (Silver) Suggested role-based content to support performance improvement discussions ● (Bronze) Intuitive Portal	◐ (Silver) Notifications 'pushed' for all roles involved in the process ◐ (Silver) Performance analytics/dashboards enabling early intervention ● (Bronze) Pre-loaded templates to support performance improvement conversations ● (Bronze) Intuitive Portal	● (Gold) RPA enabled webchats ensuring online support 24/7 ◐ (Silver) Human enabled webchat ◐ (Silver) Pre-determined selection options to enabled routing of queries to specialist teams as required ● (Bronze) HR team support available	● (Gold) Prompts/alerts sent to employee and line manager with action completion ● (Bronze) Pre-loaded templates to support performance improvement conversations ● (Bronze) Online support available (*both for employee and line manager*)	● (Gold) Suggested learning courses and interventions based on aggregated performance feedback data ● (Bronze) Supplementary information available to the employee to support their development ● (Bronze) HR team support available

Metrics

SLA*

Process-specific metrics:

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

* Please refer to the Glossary for further information

Policies

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

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"My employee doesn't seem on target to pass their probation, what are the next steps?"

User Journey Overview (1/3)

Talha, Civil Service Line Manager

'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.'

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Line Manager

1	2	3	4	5
Talha has not been satisfied with David's performance throughout his probation period and he wants to understand his options in relation to the situation.	Talha 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.

Detail

1	2	3	4	5
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. After David's mid-probation review they had put a performance development plan in place to support David and track his progression. 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 the options are to proceed, so he seeks support from HR by initiating a webchat session on the HR portal.	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). 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 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 invites David to the final probationary period review meeting. Talha, HR (including a note taker) and David meet to notify David that his employment with the Civil Service organisation has come to an end. The HR Operations Specialist updates the case details with notes about the discussion and shares a notification with the dismissal letter template via CMS. Talha drafts the letter and attaches it to the CMS for HR Operations to review.	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 team 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.

Feelings

1	2	3	4	5
Talha is unsure on how to manage the process appropriately – he feels that he supported David during his probation period but his performance has not improved sufficiently.	Talha is impressed with how easy it was to contact HR and be transferred to the right person who can support him through managing David's probation.	Talha feels well informed on how best to approach the conversation with David. He appreciates the support received from the HR Operations Specialist.	Talha feels disappointed that it did not work out with David, but is confident in his decision.	Talha felt that he managed the situation well. He feels all information was appropriately recorded and tracked in the Case Management System.

Enablers

1	2	3	4	5
• Intuitive Portal • HCM system • Push notifications/alerts • Webchat	• Self-service and online support • Cognitive agent (AI) • Webchat • Case Management System	• Phone call • Intuitive Portal • Case Management System • Push notifications/alerts • Self-service and online support • Video training	• Case Management System • Template letters pre-loaded in Case Management System • Push notifications/alerts	• Push notifications/alerts • Case Management System • HCM system • Integration between HCM and other systems (payroll, IT and security)

"My employee doesn't seem on target to pass their probation, what are the next steps?"

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Employee	David is concerned that he is coming to the end of his probation period and doesn't think he has been meeting his objectives despite having measures put in place following his mid-probation review.			David attends his final probationary period review meeting with Talha and HR. David is notified that his employment with the Civil Service organisation will not continue.	David receives the dismissal letter; the letter further explains the reasons David did not pass his probation. David returns his security pass and IT equipment.
Civil Service Line Manager	Talha has not been satisfied with David's performance throughout his probation period and he wants to understand options available in relation to this.	Talha 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 dismissal information, notifying relevant HR Operations teams.
HR Operations Specialist Team		An HR Operations Specialist enters the webchat session with Talha. They arrange a time to discuss the situation in more detail. HR Operations and Talha discuss the information gathered and reasons for David failing his probation period.	The HR Operations Specialist advises Talha on next steps, sharing additional information and resources on how to handle difficult conversations and offers their support throughout this period.	HR Operations Specialist updates the case details with notes about the discussion, sets a case reminder for the day of the meeting and shares the notification with the template for the dismissal letter. HR representation is present in the final review meeting.	The HR Operations Specialist updates the HCM system with dismissal actions in the system, automatically notifying payroll and other HR Operations teams to finalise pay balances and other relevant leaver information.

"My employee doesn't seem on target to pass their probation, what are the next steps?"

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

CONCERNS OVER PERFORMANCE OF EMPLOYEE ON PROBATION	SEEKING SUPPORT	CONSULTATION WITH THE HR OPERATIONS SPECIALIST TEAM	FINAL PROBATIONARY REVIEW MEETING	FINAL OUTCOMES AND ACTIONS
▪ Access to previous performance information ▪ Accessible and clear guidance available on the HR portal ▪ Awareness of probation end date approaching	▪ Cognitive agent available 24/7 ▪ Query assignment to the HR Operations Specialist team ▪ Single point of contact dealing with query	▪ Single point of contact dealing with the query ▪ Interaction between HR Operations Specialist and line manager ▪ Agreement/communication of next steps	▪ Interaction between the line manager and the employee ▪ Access to templates and resources ▪ Communication of the decision and next steps to employee	▪ Case Management System alerts reminding to complete actions ▪ Automatic notifications to relevant stakeholders ▪ Access to case information on CMS

Interactions

▪ Portal ▪ HCM system	▪ Portal ▪ Cognitive agent ▪ HR Operations Specialist	▪ Portal ▪ HR Operations Specialist	▪ HR Operations ▪ HR Operations Specialist	▪ HR Operations ▪ Portal

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

● (Gold) Personalised portal search ○ (Silver) System triggers to consider probation end review ○ (Silver) Suggested role-based content to support probation management ● (Bronze) Intuitive portal	● (Gold) RPA enabled webchats ensuring online support 24/7 ○ (Silver) Ability to initiate a webchat with few clicks on the Portal ● (Bronze) Friendly and supportive agent to deliver help and advice	○ (Silver) Personalised portal content ● (Bronze) Friendly and supportive agent to deliver help and advice ● (Bronze) Seamless Case Management System is updated with all relevant actions taken	● (Gold) Prompts/alerts sent to line manager about actions to be taken ● (Bronze) Template letters pre-loaded in Case Management System and available via alerts	○ (Silver) Integration between HCM system and payroll ● (Bronze) Role based access rights to HCM system provided to HR Specialist ● (Bronze) Case reminders applied to ensure SLAs are achieved ● (Bronze) Seamless Case Management System is updated with all relevant actions taken

Metrics

SLA*

Process-specific metrics
- 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

Service metrics
- 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

* Please refer to the Glossary for further information

Policies
- Performance management
- Managing poor performance
- Discipline and grievance

HR5 Moment
"I'm ill and not well enough to work"

Helen, Civil Service Employee

'I have been feeling unwell recently and I need to take some time off due to sickness.'

Roles covered within the journey

Employee   Line Manager   HR Operations

User Journey

Civil Service Employee

1	2	3	4	5
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.

Detail

1	2	3	4	5
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 content relevant to Helen's query. The policy includes a link that directs her to the absence reporting page.	Helen emails her proxy manager as she does not have their phone number to hand. Helen can also report her absence on the system directly. As soon as Helen has logged her sickness, the notification is triggered to her proxy line manager and the HR Operations team, so that they can be kept up to date on the progress of her absence. After submitting her absence Helen receives a message reminding her of the keep in touch responsibilities. She can view all notifications on her phone via HCM app.	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. Helen's manager returns; due to being a new manager he hasn't dealt with sickness absence before. He refers to the absence pages and consults the video guidance on the HR Portal, which are both 'pushed' to him when Helen logged the sickness absence on the HCM system. For any other queries specific to Helen's case he can contact the HR Operations team to ask for some tips on how to support Helen appropriately.	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 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).	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

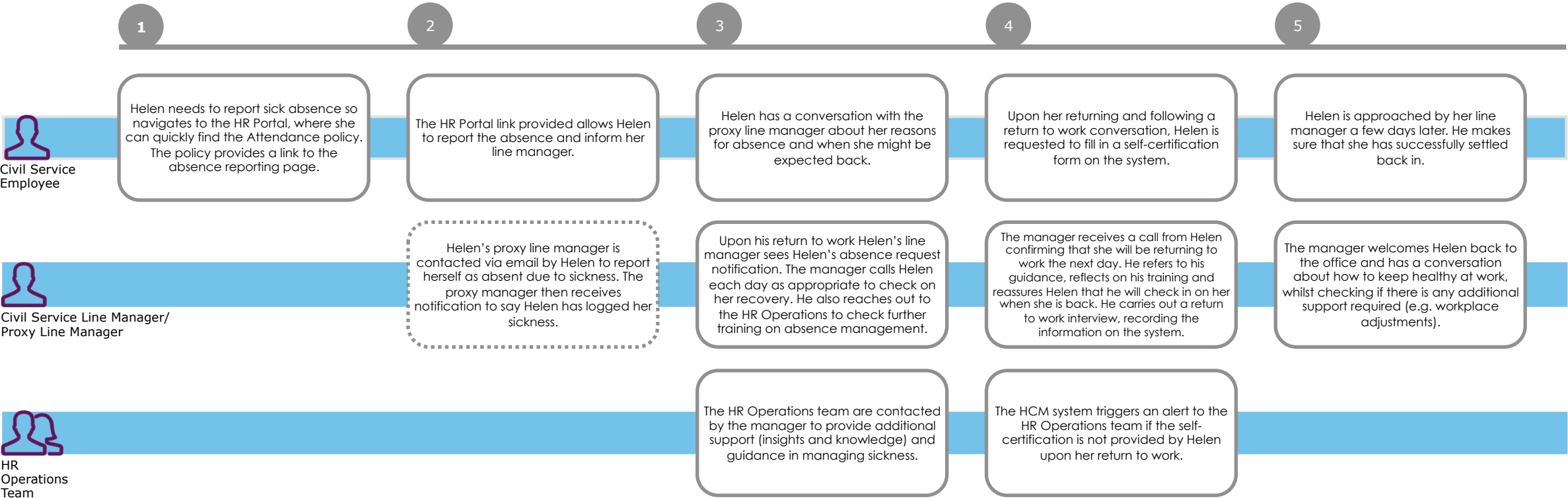| 1	2	3	4	5
• Helen is quite anxious about potentially getting a warning. She feels reassured by the clarity of information, level of support and clear contact options available to her on the HR Portal.	Helen feels content that it is very easy to keep people informed about being off work, and can concentrate 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

1	2	3	4	5
• Intuitive Portal • Suggested content based on user role • Dashboards/analytics indicating absence history • Embedded (deep) links from guidance directly through to HR actions	• Intuitive Portal • Embedded (deep) links from guidance directly through to HR actions • Single sign-on (incl. mobile) • Push notifications/alerts incl. delegated actions/ responsibilities	• 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

"I'm ill and not well enough to work"

Additional actors and responsibilities (2/3)

	1	**2**	**3**	**4**	**5**
Civil Service Employee	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.
Civil Service Line Manager/ Proxy Line Manager		Helen's proxy line manager is contacted via email by Helen to report herself as absent due to sickness. The proxy manager then receives notification to say Helen has logged her sickness.	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.	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 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).
HR Operations Team			The HR Operations team are contacted by the manager to provide additional support (insights and knowledge) and guidance in managing sickness.	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.	

"I'm ill and not well enough to work"

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

SICKNESS AND ATTENDANCE RECORD QUERY SUPPORT	ABSENCE NOTIFICATION	ONGOING COMMUNICATION	RETURN CONFIRMATION	RETURN FOLLOW UP
• Access to relevant information • Clarity on how and who to report the absence to • Online HR support	• Reporting sickness in a user-friendly, straightforward way • Entering relevant details • Keeping the right people updated	• Contact between employee and line manager during absence • Further support available from HR Operations if needed	• Support actions from line manager • Completion of return to work actions • Return to work conversation between line manager and employee	• Ongoing wellbeing support and activity aimed at preventing avoidable sickness absence

Interactions

• Line manager • HR Operations • Portal • HCM system	• Line manager • HR Operations • Portal • HCM system	• Line manager • HR Operations	• Line manager • Portal • HCM system	• Line manager • Portal • Workplace adjustments team (as required)

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

🟡 Personalised Portal search 🟡 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 🟤 Friendly and supportive agent to deliver the help and advice	🟡 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)	🟡 Prompts/alerts sent to line manager about suggested next actions to manage absence effectively 🟤 Online support 24/7 (*both for employee and line manager*)	🟡 Prompts/alerts sent to employee with return to work action completion ⚪ Certification form automatically loaded to employee personnel file 🟤 Straightforward user interface to aid action completion	🟡 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

Metrics   **SLA***

Process-specific metrics		Service metrics		
• 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		

* Please refer to the Glossary for further information

Policies

• Attendance management
• Discipline
• Grievance

HR5 Moment

"My long-term illness means I'm not well enough to work." (Employee perspective).

User Journey Overview (1/4)

Philip, Civil Service Employee

'I have been diagnosed with a serious health condition and will have to be off work for a long period of time.'

Roles covered within the journey

Employee | Line Manager | HR Operations | Occupational Health

User Journey

Civil Service Employee

1	2	3	4	5
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 guidance and link to the absence reporting page.	Philip 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.	Philip is contacted by Lucy to check on his circumstances and keep him informed on the progress of the introduction of his workplace adjustments.	Philip keeps in touch with Lucy via phone and he informs her that in addition to the current adjustments he may also need support in transitioning back to full-time work.	Philip attends a meeting with Lucy upon his return to work to discuss flexible working arrangements and an adjusted absence trigger point.

Detail

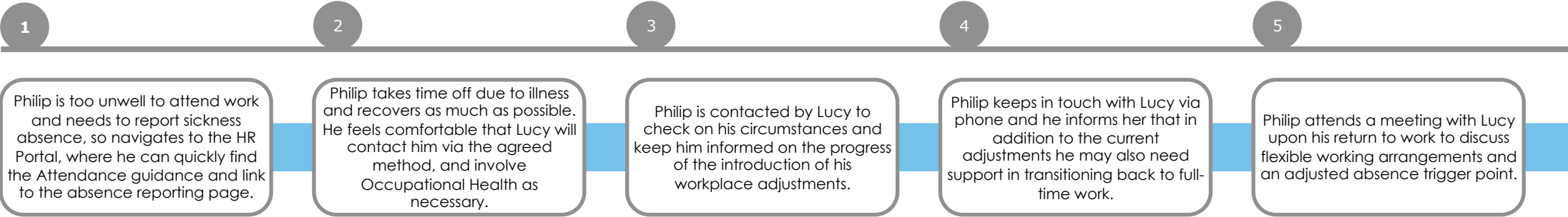| 1	2	3	4	5
Following prolonged ill health and a diagnosis, Philip notifies his manager, Lucy, that he will be off work for an extended period of time due to a particularly bad spell of illness. Lucy reports his long term absence to the HR Operations team, having located the contact number on the HR Portal. A new case is opened on the Case Management System (CMS) to ensure the HR Operations team can effectively track Philip's situation. He is sent reminders as necessary about actions he may need to complete, for example touchpoints with Lucy. Philip can easily view them on his mobile app. Philip is sent a notification asking him to upload his fit notes onto the CMS system, after he has completed this Lucy receives a notification.	Lucy considers options for a Occupational Health Referral and decides to raise it on the OH Portal. Lucy also tracks when Philip's absence is approaching the review stage (and potential involvement from the HR Operations team). If Lucy does not reach out to the HR Operations team she will be contacted by HR once the absence exceeds 14 days. The HR Operations Specialist* contacts Lucy to discuss the upcoming review meetings and discuss the Occupational Health Referral, in order to appropriately support Philip and Lucy throughout this period. Philip is kept fully informed via keep in touch conversations and via the HCM app. Philip and Lucy agree that they will continue to involve OHS as appropriate in order to get professional advice on better supporting Philip at work.	Lucy and the HR Operations Specialist discuss the details of Philip's absence. The HR Specialist ensures Lucy feels empowered to discuss Philip's sick leave, associated entitlements, suggested methods to keep in touch and agree any next steps, like pay. Lucy understands that she can find policy information in the attendance management policy. Lucy also reviews the impact of Philip's absence on the team and actions as necessary. Lucy reaches out to Philip via the earlier agreed method of contact to check on him and discuss his circumstances.	Throughout the period of Philip's absence he keeps in touch with Lucy about his health circumstances. Lucy accesses the open case for Philip's absence and adds a note which automatically informs the HR Operations Specialist, that Philip may require support in transitioning back to work due to the severity of his illness. HR Operations suggest arranging an Attendance Review Meeting with Philip to see what support may be needed in managing Philip's return to work. Philip's sickness absence period comes to an end and a notification prompts Lucy and HR Operations, asking that they review the absence details. Lucy discusses the case with the HR Operations Specialist and both parties agree on how to proceed.	In Philip's return to work discussion, Lucy discusses flexible working arrangements to support him through the transition back to work and adjusting his absence trigger point to account for his condition. Lucy updates the case notes with the information and initiates the working pattern change in the system. She then closes the case so that relevant information is stored in the system. HR can view the detailed report on absences across the Department to identify patterns and interventions required.

Feelings

1	2	3	4	5
Philip feels anxious about his illness and the affect it may have on his ability to work. He will require a lot of support.	Philip feels content that his line manager is fully notified about his absence.	Philip feels that Lucy cares about the situation and is understanding of his circumstances. Lucy feels reassured that she is doing the right thing.	Philip is overwhelmed with the level of support received from his manager to support his flexible working arrangements. Lucy feels comfortable in managing future sickness absences effectively.	Philip feels engaged and appreciates the level of support provided to him to adjust back to being at work.

Enablers

1	2	3	4	5
• Email (where applicable) • Intuitive Portal • HCM mobile app • Push notifications/alerts	• Push notifications/alerts • HCM system • Automated triggers • Self-service • Case Management System	• Self-service • Case Management System • Push notifications/alerts	• Automatic triggers pushing next appropriate action directly to the user • Self-service • Case Management System • Push notifications/alerts • Embedded (deep) links from guidance directly through to HR actions	• Self-service • Case Management System • HCM system • Suggested content and knowledge articles, based on previous activities

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"

Lucy, Civil Service Employee

'My employee's previous illness has got a lot worse and I need to know how to support him in returning to work.'

Roles covered within the journey

- Employee
- Line Manager
- HR Operations
- Occupational Health

User Journey

Civil Service Line Manager

1	2	3	4	5
After having a conversation with Philip about his need for extended sickness absence, Lucy informs the HR Operations Team.	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.	The HR Operations specialist provides Lucy with the information she needs such as occupational sick pay policy.	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.	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.

Detail

1	2	3	4	5
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.	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 OHS 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.	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 reaches out to Philip via the earlier agreed method of contact to check up on him and discuss his circumstances.	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 CMS 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.	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.

Feelings

Lucy finds it easy to keep HR informed of developments and search for further learning opportunities.	Lucy is impressed with the prompt support and contact received from HR Operations – she needed further re-assurance about managing the process appropriately.	Lucy feels reassured she is doing the right thing and has access to a wealth of support materials to help her make decisions.	Lucy feels comfortable in managing future sickness absences effectively.	Lucy feels that she was able to leverage the support provided by HR to fulfil her duty of care for Philip throughout the sickness.

Enablers

• Email (where applicable) • Intuitive Portal • HCM mobile app • Push notifications/alerts • Case Management System	• Push notifications /alerts • HCM system • Automated triggers • Self-service and online support available • Case Management System	• Self-service • Case Management System • Push notifications/alerts • 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	• Self-service • Case Management System • HCM system • Suggested content and knowledge articles, based on previous activities

*For ER/sensitive cases it is assumed that the HR Operations Specialist will manage the case from start to finish.

"My long-term illness means I'm not well enough to work"

Additional actors and responsibilities (3/4)

	1	2	3	4	5
Civil Service Employee	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.	Philip 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 where necessary.	Philip is contacted by Lucy to check on his circumstances and keep him informed on the progress of the introduction of his workplace adjustments.	Philip keeps in touch with Lucy via phone and he informs her that in addition to the current adjustments he may also need support in transitioning back to full-time work.	Philip attends a meeting with Lucy upon his return to work to discuss flexible working arrangements and an adjusted absence trigger point.
Civil Service Line Manager	After having a conversation with Philip about his need for extended sickness absence, Lucy informs the HR Operations Team.	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.	The HR Operations specialist provides Lucy with the information she needs such as occupational sick pay policy.	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.	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.
HR Operations Team	The HR Operations team are informed of Philip's extended sickness absence via CMS by Lucy.	Once the absence has exceeded 14 days the HR Specialist team contact Lucy to discuss if she needs any additional support from their side.	The HR Operations Specialist supporting Lucy provides Lucy with information she needs such as occupational sick pay policy as well any additional support and options available.	The HR Operations Specialist suggests that Lucy organises Attendance Review Meeting with Philip to discuss the next steps.	The HR Operations Specialist closes the case following a discussion with Lucy.
Occupational Health Service		The Occupational Health Service provides advice and guidance on Philip's condition to Lucy and HR Operations.			

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"My long-term illness means I'm not well enough to work"

Journey interactions, opportunities and enablers (4/4)

Opportunity for providing a great experience

INITIAL SICKNESS NOTIFICATION	ABSENCE SUPPORT REQUEST	SUPPORT SOUGHT AND CONSIDERATIONS MADE	KEEPING IN TOUCH	RETURN TO WORK AND WORKPLACE SUPPORT
• Sickness extension • Clarity on how and who to notify about long term absence • Keeping in touch with the manager about circumstances	• Notification and support available to line manager • Clarity on required actions/next steps to manage sickness appropriately	• Ongoing support available to line manager to manage sickness • Keeping in touch with the employee	• Keeping in touch with the manager about circumstances and any changes • Communication and agreement on best actions to proceed	• Return to work conversation between line manager and employee • Additional support and monitoring of the absence if needed

Interactions

• Line manager • Portal	• HR Operations Specialist • HCM system • Portal • Case Management System	• Line manager • HR Operations Specialist • Self-service • Occupational Health	• Line manager • Portal • HR Operations Specialist • Self-service • Case management	• Line manager • Portal • HR Operations Specialist • Self-service • Occupational Health

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

● Easy access to person/ department relevant information on Portal (manager and employee) ● Ongoing support from the line manager	○ Notifications 'pushed' for all roles involved in the process ○ System triggers to consider absence review meeting ○ Suggested role-based content to support absence management ● Intuitive HR Portal ● HR team support available ● Self-service/Case Management System access	○ Suggested actions easily viewable on the Portal (i.e. checklist) [Gold] ○ Prompts/alerts sent to line manager about suggested next actions to manage absence effectively ○ Mobile app accessibility ● Timely updates and contact between the employee and line manager	○ Prompts/alerts sent to manager to suggest next best action to proceed ● Regular contact between Manager and employee ● HR team support available	● Suggested content 'pushed' to the employee upon return to work [Gold] ● Suggested content 'pushed' to the manager to support employee appropriately [Gold] ● HR team support available ● Online support 24/7

Metrics

SLA*

Process-specific metrics:
• Cost of sickness absenteeism per Dept. • Average percentage of employees on long term sick leave p/a • Average working days lost • Number of long term sickness absences	• Number of referrals to Occupational Health providers/ support • Attendance process as a percentage of cost	Service metrics: • Manager satisfaction with the sickness absence management process • Number of sickness absence queries raised to HR Operations • Time to resolve the initial query submitted by employee

* Please refer to the Glossary for further information

Policies

• Attendance Management • Discipline and Grievance	• Specialist Leave • Workplace Adjustments	• Flexible Working • Remote Working

HR5 Moment
"We're having a baby"

Peter, Civil Service Employee

"I'm thinking of applying for shared parental leave but I want to work out what options and resources are available to me."

Roles covered within the journey

Employee Line Manager HR Operations

User Journey

Civil Service Employee

1	2	3	4	5
Peter discusses the situation and options available to him with his manager and seeks guidance on the HR Portal.	Peter submits a Shared Parental Leave notification form, which is approved by his manager and notification is received by the HR Operations team.	The HR Operations representative outlines next steps to Peter, including employee assistance programmes and any coaching available.	Peter agrees communication methods with his line manager and preferred method of contact with HR before he goes on leave.	During his leave Peter maintains contact with the line manager. Before his return, he is sent some actions requiring completion.

Detail

1	2	3	4	5
Peter is considering taking shared parental leave and consults the HR Portal for guidance on the parental leave policy. The search returns with content to the guidance with the most relevant link at the top. The Shared Parental Leave (SPL) policy is shared with him via the webchat, where he can speak to the HR Operations team. 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.	Peter calculates his paternity leave entitlements based on the guidance provided on the Portal before submitting a request on the HCM system. Peter adds the details of how the leave and pay will be allocated between him and his partner and includes a start and end date. He also attaches a signed declaration form from his partner. A notification alerts Peter that he has a limited period to make any adjustments to the request. This triggers an approval request to the line manager. Following approval, the HR Operations team receive all relevant information via notification 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.	The HR Operations representative reaches out to discuss Peter's circumstances via phone, and outlines the support available such as coaching and employee assistance. They also provide information on the entitlements. All is attached to the case, which can be viewed by Peter. Relevant documents are also pushed to Peter on the HR Portal based on SPL application being recorded in the system, with a suggested reading list, as well as an interactive checklist of actions and next steps that he needs to complete.	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. As his shared leave approaches, triggered notifications are sent to Peter via the HR Portal informing him of outstanding actions/tasks. Peter's manager reaches out to him to discuss 'keep in touch' arrangements and communication methods. Peter also selects a preferred method of contact with HR by ticking the box on his HR Portal page.	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 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.

Feelings

Peter feels that HR and his line manager have been supportive in advising him how to start the process.	Peter finds the submission easy and quick to complete.	Peter feels that the HR team were quick to respond to his notification and answer any questions/concerns he has.	Peter feels like he is still being included in the team throughout his period away from work.	Peter feels that keeping his manager notified of his situation has been easy and is looking forward to returning to work.

Enablers

1	2	3	4	5
• Phone call • Email • Intuitive Portal • Portal optimised for mobile viewing • Push notifications/alerts	• 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	• Phone call • Self-service • Case Management System • Push notifications/alerts • Intuitive Portal	• Automatic triggers pushing next appropriate action directly to the user • Self-service • Case Management System • Push notifications/alerts	• Self-service • Case Management System • Push notifications/alerts • HCM mobile app

"We're having a baby"

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Employee	Peter discusses the situation and options available to him with his manager and seeks guidance on the HR Portal.	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 outlines next steps to Peter, including employee assistance programmes and any coaching available.	Peter agrees communication methods with his line manager and preferred method of contact with HR before he goes on leave.	During his leave Peter maintains contact with the line manager. Before his return, he is sent some actions requiring completion.
Civil Service Line Manager	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 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 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.	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.
HR Operations Team*		The HR Operations team receive the notification of Peter's request and activate it for processing.	The HR Operations representative discusses the detail with Peter, including support available, his entitlements and next steps.	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.

*Where HR Operations need to collect, validate or produce documentation before processing the request, they will act as the 'approver' in the HCM system

"We're having a baby"

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

INITIAL SHARED PARENTAL LEAVE CONVERSATION	SHARED PARENTAL LEAVE NOTICE	DOCUMENTATION AND ELIGIBILITY CONVERSATIONS	COMMUNICATION PREFERENCES	NEXT STEPS AND RETURN TO WORK
• Conversation between the employee and line manager • Searching for relevant policy information on HR Portal	• Completion of the notification form • Support available from HR	• Completion of relevant documents • Suggested next steps • Support available from the HR team • Method of communication agreement • HR support available	• Keeping in touch with the Manager about circumstances and any changes • Communication and agreement on best actions to proceed	• Reminder of next steps • Completion of activities • Support available upon return to work • Return to work conversation held

Interactions

• Line manager • RPA chatbot • HR Operations team	• HR Operations team • Line manager	• HR Operations team • Line manager • Self-service	• HR Operations team • Line manager • Self-service	• HR Operations team • Line manager • Self-service

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

● Personalised content relevant to the department and employee ● Online support 24/7 ● Cognitive agent ○ Single sign-on ● HR team support available ● Online support 24/7	● Suggested content 'pushed' out to employee ○ Video guidance and learning on applying for SPL linked to policy ○ Notifications of actions, next steps and timelines. ● Form is simple and is easy to quickly fill in	○ Timelines for activity easily viewable on Portal ○ All information is tracked and accessible via case tool management ● Updates on approval pushed to the employee ● Checklist of next steps easily viewable for employee ● Employee is kept up to date on the progress of their query	● Mobile optimisation to view alerts ● HCM app sends prompts to line manager and employee to ensure check ins are completed ○ Option to opt out/in of frequency of comms and newsletters ● HR team support available	● Next steps and associated reminders *(Line manager, employee and HR)* ● HR app accessibility ● Welcome back notifications provided to employee ● Suggested content displayed to support return to work from maternity/ paternity leave ● Support made easily available upon return to work

Metrics

SLA*

Process-specific metrics
- • Number of Shared Paternity Leave requests across the departments
- • Volume of rejection of applications for SPL
- • Number of amendments made to application
- • Number of discontinued leave applications rejected

Service metrics
- • Employee satisfaction with the Shared Parental Leave process
- • Number of queries raised to HR Operations
- • Time to resolve the initial query submitted by employee

* Please refer to the Glossary for further information

Policies

- • Attendance management
- • Shared parental leave
- • Childcare support
- • Career breaks
- • Flexible working

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"I've just announced my pregnancy to my team and need to sort out my maternity leave"

User Journey Overview (1/3)

Marta, Civil Service Employee

'We have found out I am pregnant and I would like to arrange my maternity leave.'

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Line Manager

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.

Detail

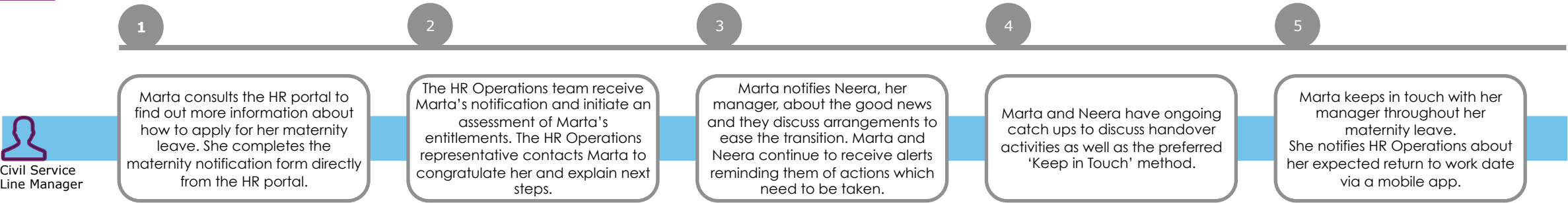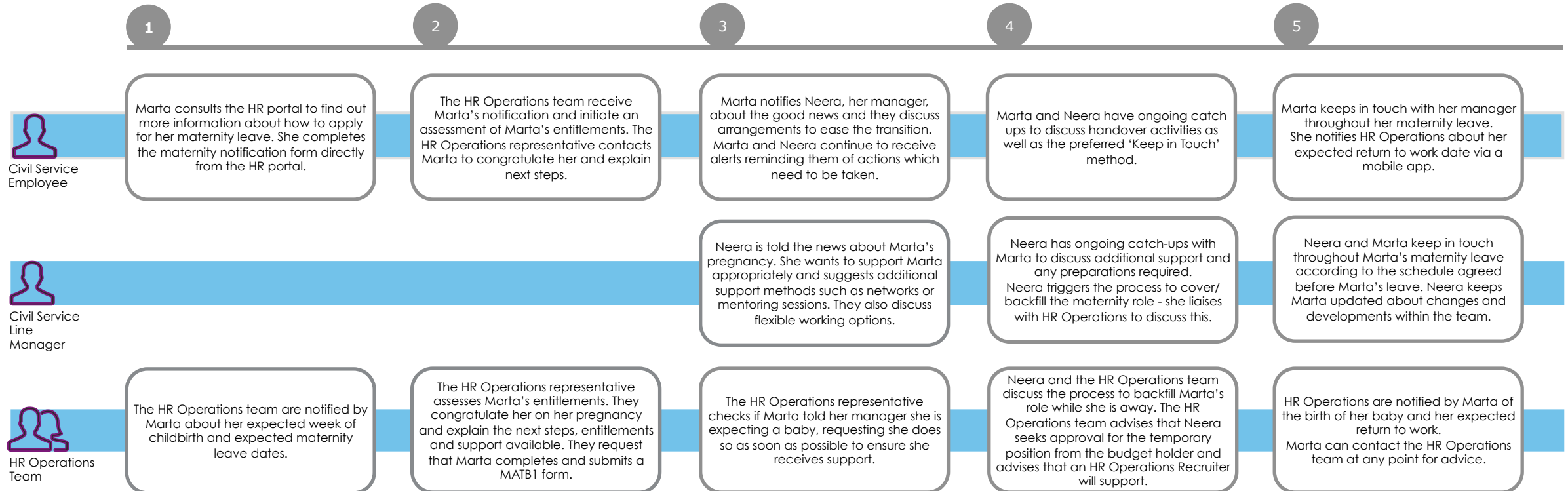| 1	2	3	4	5
Marta has found out that she is pregnant and she would like to arrange her maternity leave. She consults the HR portal page for the maternity policy and guidance on her work mobile phone. The HR portal page highlights all relevant resources, policy and guidance in relation to maternity. Marta 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).	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.	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.	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.	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.

Feelings

Marta is excited about becoming a mum. She is happy that she can see all information required to apply for her maternity leave in one place.	Marta is a bit daunted and really appreciates the time the HR Operations representative takes to support her.	Marta feels that Neera really wants to help her prepare for her maternity leave appropriately. She likes the reminders and checklist which allow her to complete activities within the specified timeframe.	Marta is excited to go on maternity leave and she has chosen a KIT option which allows her to stay up-to-date with recent developments within her team.	Marta finds the transition back to work easier than she originally thought – she is really excited to be back.

Enablers

• Intuitive Portal • Suggested content and knowledge articles, based on previous activities • Embedded (deep) links from the guidance directly through to HCM actions • Mobile app	• Intuitive Portal • Single sign-on (incl. mobile) • Embedded (deep) links from guidance directly through to HR actions • Push notifications/alerts • Self service / case management	• Push notifications/alerts • Self-service and online support • Suggested content and knowledge articles, based on previous activities • Interactive checklist, visible on the Portal at all times	• Automatic triggers pushing next appropriate action directly to the user • Single sign-on (incl. mobile) • Push notifications/alerts • Mobile app • Text (SMS)	• Automatic triggers pushing next appropriate action directly to the user • Push notifications/alerts • Mobile app • Video calling • Text (SMS)

"I've just announced my pregnancy to my team and need to sort out my maternity leave"

Additional actors and responsibilities (2/3)

User Journey

	1	2	3	4	5
Civil Service Employee	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.	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.	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.	Marta and Neera have ongoing catch ups to discuss handover activities as well as the preferred 'Keep in Touch' method.	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.
Civil Service Line Manager			Neera is told the news about Marta's pregnancy. She wants to support Marta appropriately and suggests additional support methods such as networks or mentoring sessions. They also discuss flexible working options.	Neera has ongoing catch-ups with Marta to discuss additional support and any preparations required. Neera triggers the process to cover/ backfill the maternity role - she liaises with HR Operations to discuss this.	Neera and Marta keep in touch throughout Marta's maternity leave according to the schedule agreed before Marta's leave. Neera keeps Marta updated about changes and developments within the team.
HR Operations Team	The HR Operations team are notified by Marta about her expected week of childbirth and expected maternity leave dates.	The HR Operations representative assesses Marta's entitlements. They congratulate her on her pregnancy and explain the next steps, entitlements and support available. They request that Marta completes and submits a MATB1 form.	The HR Operations representative checks if Marta told her manager she is expecting a baby, requesting she does so as soon as possible to ensure she receives support.	Neera and the HR Operations team discuss the process to backfill Marta's role while she is away. The HR Operations team advises that Neera seeks approval for the temporary position from the budget holder and advises that an HR Operations Recruiter will support.	HR Operations are notified by Marta of the birth of her baby and her expected return to work. Marta can contact the HR Operations team at any point for advice.

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"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

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
▪ Access to HR portal information ▪ Clarity on how and who to notify about the maternity leave ▪ Entering relevant details to submit notification	▪ 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	▪ Interaction between the line manager and the employee ▪ Access to templates and resources ▪ Reminder of agreed KIT and next steps to employee	▪ HCM system alert reminders to complete actions ▪ KIT communication and check-ins ▪ HR support and additional support networks available

Interactions

▪ Portal ▪ Case Management System ▪ HR Operations	▪ Portal ▪ HR Operations	▪ Line Manager ▪ Portal ▪ Case management	▪ Line Manager ▪ HR Operations ▪ Portal	▪ Line Manager ▪ HR Operations ▪ Portal

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

● (Gold) Personalised portal search ● (Gold) Maternity leave reporting in a few clicks (deep links) ○ (Silver) Pre-determined selection options to enable routing of forms to relevant teams as required ● (Bronze) Straightforward user interface to aid action completion ● (Bronze) Intuitive portal	● (Bronze) Seamless Case Management System is updated with all relevant actions taken ● (Bronze) Friendly and supportive agent to deliver the help and advice ● (Bronze) Multi-channel contact	● (Gold) Prompts/alerts sent to the employee about suggested next actions to manage maternity preparations ○ (Silver) Suggested content pushed to the employee ahead of the start of maternity leave	● (Gold) Prompts/alerts sent to the employee about suggested next actions to manage maternity preparations ● (Bronze) Seamless Case Management System is updated with all relevant actions taken	● (Gold) Suggested content pushed to the employee upon return to work, incl. support networks ● (Bronze) Seamless Case Management System is updated with all relevant actions taken ● (Bronze) Supplementary information available to the employee to support them in return to work ● (Bronze) HR team support available

Metrics

SLA*

Process-specific metrics		Service 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		

* Please refer to the Glossary for further information

Policies

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

"I'm changing roles internally"

User Journey Overview (1/3)

'My internal move has been agreed verbally with my team's management.'

Helen, Civil Service Employee

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Employee

1 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.

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

3 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.

4 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.

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

Detail

1	2	3	4	5
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. 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. 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. The HR Operations team receive a case and are able to see what request has been initiated and what changes are associated. The HCM system has also triggered a notification to the receiving manager and Helen about the move, they can both view the notification on the HR Portal and via email. The new manager can start preparing for welcoming Helen into the team.	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. 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. The HCM system creates an alert to Helen on the HR Portal with a request to review the detail of her new T&Cs. She clicks on the alert, which takes her directly to the HCM system page with her T&Cs and start date information. She can accept them online using e-signature which is pre-loaded into her employee record. She e-signs the document, which is automatically added to her electronic personnel file. Upon Helen accepting her new T&Cs, the HR Operations team, Paul and new manager all receive a notification that she has signed the letter. As the HCM system is integrated with all relevant payroll and benefits systems, Helen's details are automatically updated and the parties are notified. Prior to Helen's first day, Helen is sent an automated plan which list the skills relevant for her new role, this is accompanied with a list of courses to help develop these skills, she is invited to sign up to the course prior to joining.	Helen's HR Portal page now shows a message with the counter of days left until she starts her new role. Prior to leaving her old team Helen is prompted by the alert on the HR Portal to discuss her performance with Paul. This will allow her to continue effective performance conversations in her new role. Before transferring, Paul provides Helen with feedback on her performance. Paul can also view an automated checklist of offboarding activities which need to be completed before Helen moves roles. Both Helen and Paul can review the status of each activity and can update once activities are completed. Helen's performance forms completed on the HCM system will transfer with her automatically.	Helen has access to all relevant systems on the first day in her new role; prepared beforehand as her move was future dated. On the first day in her new role, the HR Portal welcomes Helen with a message congratulating her on her move. Her team objectives are automatically shown on the system so that she can start thinking about her individual objectives. The HR Portal provides suggested resources and training materials that Helen will need in her new role. From here, she can also view relevant mandatory training courses and 'refresher' courses and videos which are suggested to her based on her role. There is also a list of the courses Helen had signed up to prior to moving. The HR Portal reminder prompts her to complete her mandatory training which is due to be completed on her first day.	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.

Feelings

Helen feels excited about the new opportunity.	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.

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

"I'm changing roles internally"

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Employee	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.	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 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.
Civil Service Line Manager	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.	Paul and Helen's new line manager receive notifications informing them when Helen has signed and agreed her new contract.	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.		
HR Operations Team	The HR Operations team receive a notification of a new change request and review the details. They validate and action the request.	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.			Information gathered from Helen's survey is sent to the HR Operations team for analysis and actionable insight.

"I'm changing roles internally"

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

| ROLE CHANGE INITIATION | CONFIRMATION LETTER RECEIVED AND T&Cs ACCEPTED | OFF BOARDING AND NEW DEPARTMENT ROLE MOVE | DAY ONE IN A NEW ROLE | FEEDBACK AND CONTINUOUS IMPROVEMENT |

- Conversation between the employee and current line manager
- Initiation of role change in the system
- Ability of 'move' actions to be future dated

- Support available from HR (if needed)
- Easy access to T&Cs information
- Mobile app accessibility to view and accept T&Cs

- Support available from the HR team
- Conversation between the employee and their line manager including off boarding activity
- New joiner conversation held with new line manager

- Automated suggested training for new role
- Useful resources and information for new role made available on Day 1 on HR Portal

- Satisfaction survey shared to provide feedback

Interactions

- Sending line manager
- Receiving line manager
- HR Operations team
- HCM system/self-service
- Portal

- Sending line manager
- Receiving line manager
- HR Operations team
- HCM system
- Case Management System

- Sending line manager
- HCM system
- Portal

- Receiving line manager
- HR Operations team
- Portal
- HCM system and learning system

- Portal
- HR Operations team

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

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

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

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

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

- (Gold) Omnipresent feedback button
- (Gold) Analytics are available for the HR Operations team
- (Silver) Customer satisfaction survey is simple and encourages feedback on the experience

Metrics

SLA*

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

* Please refer to the Glossary for further information

Policies

- Fixed Term Appointments
- Recruitment Principles

HR5 Moment
"An employee has been promoted by moving into my team."

"Fantastic news! Petra, who applied for the opening in my team, will be promoted by making this move."

Kamil, Civil Service Line Manager

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Line Manager

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 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 actions this.

Detail

1	2	3	4	5
Kamil has a position open in his team. The position requires a fairly specialist skillset and he has spoken to the HR Operations Specialist recruitment team to discuss the options. They prepare a job description based on a 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. The HR Operations Specialist team keep Kamil updated on progress and provides him with a shortlist of candidates following the initial sift. Kamil notices that 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.	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. 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.	Kamil and HR Operations receive a notification of approval in the HCM system. Kamil's notification includes a reminder for him to schedule a conversation with Petra. This will include confirmation of Petra's new role, promotion, salary, additional benefits and allowances she is entitled to as part of her new role, as well as feedback information from Petra's current line manager and the interview process. Before the meeting Kamil reviews the HR Portal pages and guidance, and accesses videos, hints and tips and useful articles to prepare himself for the conversation. He also accesses additional information which provides some suggestions on how to support future career conversations.	Kamil and Petra meet. Kamil congratulates Petra on being offered the role and on her promotion. He outlines her new salary and allowances she is entitled to. They discuss highlights of Petra's performance, strengths and suggestions for development in her new role. Kamil ensures they schedule another conversation to discuss role expectations and Petra's career aspirations as soon as her role move is effective. Kamil outlines the next steps until Petra joins, explaining that the HR Operations will be in touch with her confirmation letter. HR Operations send Petra an alert with an offer letter. By clicking on the alert, Petra can review and accept the letter directly in the HCM system using her mobile app. There are contact details attached to the alert in case Petra has any questions or concerns. On acceptance, HR Operations receive an alert so that a representative can modify the position in the HCM system, tentative details previously submitted are checked and modified to confirmed details. As her promotion effective date is fast approaching, Petra gets a welcome message on the Portal as well as some suggested readings which can set her for success in her new role. She has also automatically been enrolled into some learning and development initiatives, based on her availability. Petra can also reschedule the training dates in the system if she needs to.	Kamil and Petra meet and discuss role expectations and any support Petra may need to settle well. Kamil suggests that Petra may want to change her mentor for someone who can support her according to the new role expectations. They discuss available options and Petra can request her new mentor directly from the Portal page. Throughout her first month in the new role, Petra continues to receive additional information and knowledge bites/ suggested readings which help her settle in her new role. She can also see any upcoming trainings and development opportunities she may want to consider.

Feelings

Kamil has been concerned about filling the role due to its specialist nature, and is really pleased that he has three strong CVs to consider.	Kamil feels he has all relevant information at hand to be able to be able to make an informed decision, and is really pleased that he will be able to promote someone in filling this role.	Kamil feels empowered post review of refresher information on how to manage promotion conversations effectively. He likes the personalised content which showed up as he needed it.	Kamil feels that he was able provide Petra with detailed feedback and is really pleased that Petra is really happy with the decision.	Kamil is happy that Petra is set for success in her new role. He feels he has done everything to help her settle well.

Enablers

• Intuitive Portal • HCM system • Automated workflows and approvals within the HCM system • Dashboards/analytics	• Intuitive Portal • Push notifications/alerts • Deep links directly to transaction completion and content	• Intuitive Portal • Push notifications/alerts • Suggested content and knowledge articles, based on previous activities	• Automatic triggers pushing next appropriate action directly to the user • Push notifications/alerts • Mobile app	• Intuitive Portal • Suggested content based on the user role • Push notifications/alerts • Learning system

"An employee has been promoted by moving into my team."

Additional actors and responsibilities (2/3)

1 **2** **3** **4** **5**

Civil Service Line Manager

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 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 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 actions this.

Civil Service Budget holder

2 — 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

1 — 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.

2 — 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.

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

4 — 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.

5 — 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

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

2 — 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.

3 — 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.

"An employee has been promoted by moving into my team."

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

ROLE ARISES	PROMOTION APPROVAL	PROMOTION COMMUNICATION PREPARATION	COMMUNICATING PROMOTION	SETTLING IN THE NEW ROLE
▪ 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

Interactions

▪ Portal ▪ HCM system ▪ HR Operations	▪ Line Manager ▪ Portal ▪ HCM system ▪ HR Operations	▪ Employee ▪ Portal ▪ HR Operations	▪ Employee ▪ Portal ▪ HCM system ▪ HR Operations	▪ Employee ▪ Portal

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

🟡 Pre-determined selection options to enabled routing of approvals to relevant users as required (in line with approval matrix) ⚪ Straightforward user interface to aid action 🟤 Intuitive Portal	🟡 Suggested content available on the portal to prepare for manager-employee conversations 🟤 Intuitive Portal	🟡 Suggested content available on the portal to prepare for manager-employee conversations 🟤 Access to videos, hints and tips and useful articles 🟤 Timely completion of transactions by HR Operations	🟡 Learning opportunities catalogue tailored to the learner profile, department, new role requirements and skills ⚪ Welcome message congratulating employee on promotion	🟡 Suggested content pushed to the employee upon start of their role 🟡 Skills/match based buddy selection completed by manager in few clicks ⚪ Priority Day 1 information displayed on the Portal

Note: CSF's are indicative and will require validation

Metrics

SLA*

Process-specific metrics	*Service 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

* Please refer to the Glossary for further information

Policies

▪ Civil Service Commission Recruitment Principles
▪ Pay frameworks

HR5 Moment
"I have a sensitive issue and I want to raise a grievance"

"I have a sensitive issue concerning my colleague and I want to know my options before raising a grievance against them."

Nadun, Civil Service Employee

Roles covered within the journey

Employee | Line Manager | Investigating Manager | HR Operations

User Journey

Civil Service Employee

1	2	3	4	5	6
Nadun wants to report a sensitive issue and decides to speak to someone from HR. He initiates a webchat with HR.	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.	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.	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.	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.	As Nadun decided he did not want to appeal against the decision, the case is closed. Stephanie receives the notification about the case closure.

Detail

1	2	3	4	5	6
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. Due to the nature of the query, the HR representative arranges a suitable time to call him directly. They gather initial information, record it on the Case Management System (CMS) and advise Nadun on the potential procedural activity, suggesting he should speak to his manager first. They also refer him to the relevant support numbers if he would like to consult EAP (Employee Assistance Programmes). Nadun explains he has tried to resolve the issue himself and does not feel he was successful so he wants to raise it formally.	Nadun follows the guidance he's provided with and decides to address the issue formally with Stephanie, his line manager, arranging a meeting. Before speaking to Nadun, Stephanie reviews the guidance and policy available on her HR Portal pages to help her understand the relevant processes and protocols. At any point she can contact HR for support, but at this stage this is not mandatory. Nadun and Stephanie meet.	Stephanie and Nadun discuss the situation and possible resolution. Nadun decides however that he is not happy with the proposed solution. Stephanie documents the discussion in the Case Management System (CMS) and submits it to HR to make them aware of the situation. On receiving the case, the HR Operations Specialist team contact Stephanie directly. They discuss the next steps in dealing with the grievance. HR Operations Specialist runs a report of available investigating managers and shares with Stephanie via CMS, pointing her at additional Portal guidance. Stephanie consults the HR Portal pages to review guidance on appointing an investigating manager. Stephanie informs Nadun in writing that an investigating manager will be appointed, and will be in touch within a specified timeframe. She also advises Nadun he can seek advice and support from a work colleague or trade union representative.	Stephanie who will be the decision manager, allocates an independent investigating manager, Paul. She updates the case with this details which triggers an automatic notification to her senior leader and HR. HR Operations Specialist adds Paul as an alternate contact to the case. Paul invites relevant parties to investigation meetings, including representation from trade union/colleague where appropriate. He updates the case with details of discussions and associated actions. Paul reviews the evidence and next steps and provides written documentation on the outcome of his investigation to Stephanie. He attaches the documentation to the case. Stephanie reviews the outcome - Paul's investigations determine that the case against the employee should not be upheld. Paul is removed from CMS by HR Operations.	Stephanie makes a decision that the case is not upheld. She invites Nadun to the meeting to discuss this fact. Following the meeting Nadun receives a hard copy outcome letter to his home address. He decides not to appeal against the decision. The case is automatically closed within a specified timeframe as Nadun has not appealed the decision.	Stephanie receives the notification that the case has been closed as there was no appeal raised.

Feelings

1	2	3	4	5	6
Nadun feels upset about the issue and wants it to be resolved quickly.	Nadun feels that his line manager is taking his issue seriously and is focused on resolving the matter.	Nadun feels that appropriate procedures are in place to review his issue.	Nadun is awaiting the outcome of the investigation.	Nadun feels that the outcome rationale has been clearly communicated.	Nadun feels that his concerns have been appropriately addressed.

Enablers

1	2	3	4	5	6
• Intuitive Portal • Webchat • Phone call • Case Management System • Knowledge base	• Intuitive Portal • Personalised Portal content based on user role • Case Management System	• Phone call • Case Management System	• Phone call • Case Management System	• Case Management System • Phone call	• Case Management System

"I have a sensitive issue and I want to raise a grievance"

Additional actors and responsibilities (2/3)

	1	2	3	4	5	6
Civil Service Employee	Nadun wants to report a sensitive issue and decides to speak to someone from HR. He initiates a webchat with HR.	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.	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.		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.	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 Line Manager (Decision Manager)		Stephanie is contacted by Nadun who wishes to discuss a sensitive issue with her. Stephanie reviews the policy online to ensure she is knowledgeable on the subject. She meets with Nadun to discuss the issue.	Stephanie discusses a potential resolution option with Nadun, which he declines. She documents the discussion on CMS. She also informs Nadun in writing that an investigating manager will be appointed.	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 his findings with Stephanie.	Stephanie makes a decision that the case is not upheld. She informs Nadun about the outcome in a meeting.	Stephanie receives the notification about the case closure as no appeal was raised and the case was automatically closed.
HR Operations Team	The HR Operations team receive a webchat from Nadun, who wants to discuss the sensitive issue. Due to the nature of the issue they arrange a time to call him to discuss.		The case documented by Stephanie is received by the HR Operations Specialist team who assign a Specialist team member. The Specialist discusses the grievance details with Stephanie.	The HR Operations Specialist adds Paul, an investigating manager as an alternate contact to the case so he can review details.	The HR Operations Specialist removes Paul from the case after he completes the investigation.	
Investigating Manager				Paull is allocated to investigate the case. He conducts an investigation, recording all information on the case and shares his findings with Stephanie.	After sharing his findings, Paul is removed from the case.	

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"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

SEEKING SUPPORT	CONSULTATION WITH THE HR OPERATIONS SPECIALIST TEAM	CASE ESCALATION	ROLE ASSIGNMENTS	GRIEVANCE CASE HANDLING ACTIVITY	FINAL OUTCOMES AND ACTIONS
• Grievance policy available online • Procedure and relevant contact details available online (incl. EAP)	• Conversation between employee and line manager • Line manager support on conversations and action plan by HR Specialist	• Case opened by HR Operations Specialist team • Communication between employee and line manager	• Notification sent to the investigating manager to inform him of assignment to the case and next steps • Notification to the employee about next steps	• 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

• Line manager • Portal • Webchat • HR Operations	• Line manager • HR Operations Specialist team • Case Management System	• HR Operations Specialist • Line manager • Case Management System	• HR Operations Specialist • Investigating manager • Trade Union/workplace representative	• HR Operations Specialist team • Investigating manager • Trade Union representative	• HR Operations Specialist team • Line manager

Critical Success Factors to enhance the experience

🟤 Intuitive HR Portal 🟤 Relevant support lines highlighted on the system 🟤 Clear information on how to seek support and Union representation where appropriate	⚪ Notifications of actions, next steps and timelines 🟤 Employee kept informed of the status of their case by regular communication	🟤 All information is added and recorded on case detail in the Case Management System 🟤 Prompt assignment of investigating manager and information of next steps	🟤 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	🟤 All information is added and recorded on case detail in the Case Management System 🟤 Involved parties receive hard copies of documentation	🟤 Methods of raising appeals clearly communicated 🟤 Auto case closure when no appeal raised within the specified timeframe

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

Metrics   **SLA***

Process-specific 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

Service metrics
• 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

Policies
• Whistleblowing
• Discipline and Grievance
• Performance management
• Managing poor performance (should an investigation continue under a different process)
• Settlement Agreements
• Redundancy Policy
• Redeployment Policy

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HR6 Rewarding the Workforce

HR6-01 Manage Compensation

HR6-02 Manage Benefits

"I'm not sure my team is graded correctly following a department re-organisation"

User Journey Overview (1/3)

Hamish, Civil Service line manager

"I've never been through the JEGS process so want to make sure I get it right"

Roles covered within the journey

Employees | Line Manager | HR Ops Specialist | Job Evaluator

User Journey

1	2	3	4	5
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 their outcomes to the Panel.	Once the relevant approvals are obtained, Hamish communicates the results to his team. One of his teams' grades is changing, and Hamish meets with them to discuss the implications. Marianne updates their record in the system.

Civil Service Line Manager

Detail

1	2	3	4	5
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. 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 guidance relevant to him.	Hamish raises a request through the case management portal to undertake a job evaluation process. Due to the nature of his request, Hamish receives an automated response to say that he will be contacted from someone in the HR Operations Specialist Reward team. Shortly afterwards, Hamish receives a phone call from Marianne, an HR Operations Specialist to understand the nature of the Job Evaluation Grading process required due to the department redesign. Marianne advises that they will have to go through a full evaluation due to the nature of the change, as job assurance procedure will not be appropriate for this level of change. She outlines the process, and recommends that they inform relevant trade unions in case they need to ensure any representatives are part of the job evaluation panels.	Marianne sends Hamish a link to an online form, which his team members, the 'post holders', must complete. The form is based on JEGS evaluation criteria. Hamish uses a communications template provided to ensure that his team fully understand the process and the respective roles of those who will take part. The team are advised that the nature of the task, qualities and experience required are being assessed, not the individual's contribution. Once his team members complete their job profiles, Hamish reviews the forms online using the JEGS guidance. He makes a couple of small amendments and submits his approved job profiles to Marianne.	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. 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.

Feelings

Hamish understands how important job grading is to some of his team members and wants to make sure he gets it right.	Hamish is pleasantly surprised at how easily and efficiently he has been able to get the support he requires from HR.	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 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.

Enablers

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

"I'm not sure my team is graded correctly following a department re-organisation"

Additional actors and responsibilities (2/3)

User Journey

1 **2** **3** **4** **5**

Civil Service Employees

3 Hamish's team receive communication to let them know that they will be involved with a JEGS process. They fill out the JEGS online forms as requested and send them back to Hamish for review.

4 Hamish's team have individual interviews with Marianne to provide additional evidence about their roles, based on the evaluation criteria.

5 Hamish's team are told the results of the job grading. One individual, whose job will be regraded to a higher grade, has a meeting with Hamish to understand the implications of this, including the application process aligned to the Fair and Open Policy.

Civil Service Line Manager

1 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.

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

3 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.

4 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 their outcomes to the Panel.

5 Once the relevant approvals are obtained, Hamish communicates the results to his team. One of his teams' grades is changing, and Hamish meets with them to discuss the implications. Marianne updates their record in the system.

HR Operations Specialist Team

2 Marianne, from an HR Operations Specialist team, receives Hamish's query about Job Evaluation Grading (JEGS), and calls Hamish to understand the context in more detail. She outlines the process and recommends they inform any relevant Trade Union representatives.

3 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.

4 Marianne supports Hamish by interviewing the individuals in his team. She writes up the evidence in a form and uploads it to the HCM system for Hamish's review and sign off. Marianne can then see on her dashboard as the process progresses with the evaluators.

5 Once the results of the job grading process comes through, Marianne supports Hamish in telling his team. She also updates the records in the HCM system.

Job Evaluator

3 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 agrees the outcomes.

5 A Job Evaluation Manager, who was not available for the Panel, is sent the recommended job grades for approval.

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"I'm not sure my team is graded correctly following a department re-organisation"

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

HR PORTAL GUIDANCE	JOB EVALUATION GRADING PROCESS INITIATED	POST-HOLDERS' EVALUATION	POSTS ARE EVALUATED	OUTCOMES COMMUNICATED
▪ Manager self service ▪ Access to HR Portal information	▪ Cognitive agent available 24/7 ▪ Online HR support ▪ Query escalated to appropriate team	▪ Guidance for Line manager on communication on JEGS process	▪ Evaluation review and approvals on HCM system	▪ 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 ▪ HR Operations Specialist	▪ Line manager ▪ HR Operations Specialist ▪ Employees	▪ Line manager ▪ HR Operations Specialist ▪ Employees ▪ Job evaluator	▪ Line manager ▪ HR Operations Specialist ▪ Employees ▪ Job evaluator

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

● Personalised Portal search ● Access to videos, guidance and policies ● Straightforward user interface to aid action completion ● Intuitive Portal ● Quick reference guide available on the HR Portal	● Seamless Case Management System is updated with all relevant actions taken ● Effective case escalation to relevant HR Operations Specialist team ● Single contact support	● Integrated online forms ● HCM system utilised to track job grading process ● Intuitive portal ● Effective communication of process	● All information is added and recorded on case detail in the Case Management System ● Timely evaluation process ● Integrated evaluation tool	● Payroll interface enables automatic flow of information for re-graded employee ● Suggested content pushed to the employee upon start of their role ● Effective communication of outcomes

Metrics

SLA*

Process-specific metrics:
- ▪ Number of jobs re-graded
- ▪ Number of jobs re-graded up or down
- ▪ Number of jobs re-graded by level
- ▪ Profile criteria reasons for jobs re-graded
- ▪ Number of 'Full' JEGS processes conducted
- ▪ Number of JEGS processes requiring Trade Union input

Service metrics:
- ▪ Line manager satisfaction with JEGS process
- ▪ Employee Satisfaction with JEGS process
- ▪ Number of JEGS process outcomes contested

* Please refer to the Glossary for further information

Policies

- ▪ CS Employee Policy
- ▪ Job Evaluation Policy
- ▪ Pay and Grading Policy
- ▪ Job Evaluation Grading Guidance
- ▪ Civil Service Recruitment Principles
- ▪ Civil Service Competency Framework
- ▪ Civil Service/Department Pay Policy

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"I will be retiring in a few years and want to know what my pension options will be"

User Journey Overview (1/3)

Henry, 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."

Roles covered within the journey

Employee

HR Operations Specialist

User Journey

Civil Service Employee

1	2	3	4	5
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.	Henry wants further clarification from information he found on the portal. He starts a webchat with HR Operations, who refers Henry directly to a representative at the CS pensions provider.	Riz, from the provider and Henry talk through his options. As Henry is below the NPA (normal pension age) he does not yet qualify for a pension return, but he is given information on the different options available.	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.	As Henry approaches his National Pension Age he confirms with his HR Specialist that he still intends to take full retirement. Three months before Henry plans to retire he informs his line manager, Henry updates his HCM system.

Detail

1	2	3	4	5
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 this any time on the HCM system. 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.	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. 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. 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. The representative from HR Operations also sends him a link to his pensions portal.	During the call with the pensions provider specialist, Riz, talks Henry through his current contribution and what that means for his entitlement. He already has some information such as details of salary changes, which are automatically pushed from the HCM system each month. Riz confirms that as Henry is still below the NPA (Normal Pension Age) he has to wait until he reaches the NPA age before being entitled to claim for his pension in full. Henry understands that if he wants to partially retire his monthly pension income will reduce due to the lower contribution that would incur. Henry is sent a link to the video available on the HR Portal which outlines this in further detail. Henry follows the link and watches the video. Henry is told to arrange a follow up conversation with Riz should he wish to seek more information or clarification.	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. 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. Riz informed Henry that should he wish to retire at his Normal Pension Age, he should inform his employer 3 months before.	Later on, Henry is approaching his NPA and reviews his notes from his previous conversation with Riz. Henry uses the Pension Calculator again to recalculate his new pension entitlement, which would have changed from his previous calculations as he continued to contribute. Henry contacts Riz to confirm here have been no changes in policy regarding pension, since their initial conversation there have been none. Three months before his NPA Henry discusses his retirement options with his line manager, Henry officially hands in his notice and updates the HCM system with his intent to take a full retirement package.

Feelings

Henry feels overwhelmed by the pension process as there seems to be a lot of options available to him.	Henry is satisfied with the instant response via webchat, he feels that this has saved him time.	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.	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.	Henry understands that the pension policy has not changes and believes that the he is making the best choice for him and his family.

Enablers

• Intuitive Portal • Self-service and online support available • HCM system	• Intuitive Portal • Self-service and online support available • Webchat • HCM system • Single sign on • Pensions portal	• Intuitive Portal • Self-service and online support available • Video training • Information automatically pushed from HCM system to pension provider	• Intuitive Portal • Self-service and online support available • Pension calculator • HCM system • Push notifications/alerts	• Intuitive Portal • Pension calculator • HCM system

"I will be retiring in a few years and want to know what my pension options will be"

Additional actors and responsibilities (2/3)

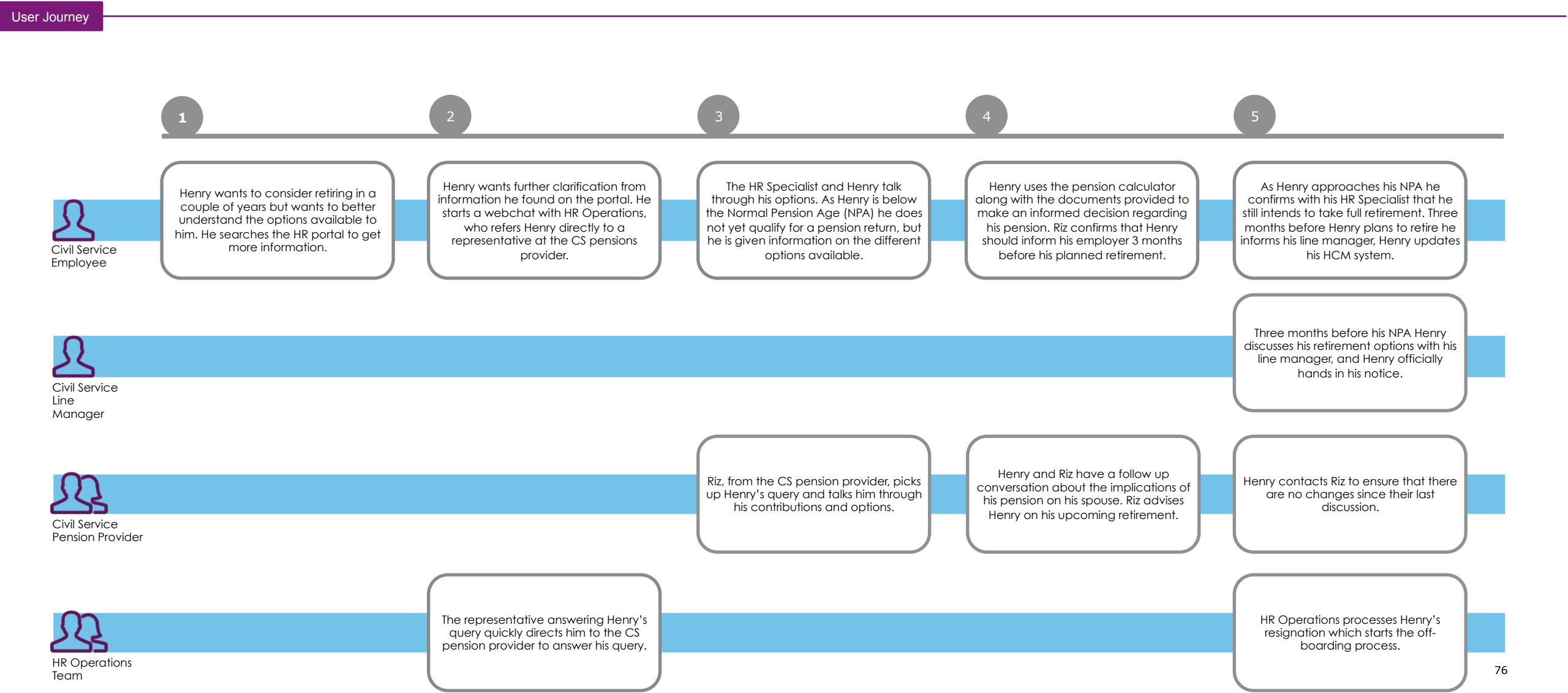|	1	2	3	4	5
Civil Service Employee	Henry wants to consider retiring in a couple of years but wants to better understand the options available to him. He searches the HR portal to get more information.	Henry wants further clarification from information he found on the portal. He starts a webchat with HR Operations, who refers Henry directly to a representative at the CS pensions provider.	The HR Specialist and Henry talk through his options. As Henry is below the Normal Pension Age (NPA) he does not yet qualify for a pension return, but he is given information on the different options available.	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.	As Henry approaches his NPA he confirms with his HR Specialist that he still intends to take full retirement. Three months before Henry plans to retire he informs his line manager, Henry updates his HCM system.
Civil Service Line Manager					Three months before his NPA Henry discusses his retirement options with his line manager, and Henry officially hands in his notice.
Civil Service Pension Provider			Riz, from the CS pension provider, picks up Henry's query and talks him through his contributions and options.	Henry and Riz have a follow up conversation about the implications of his pension on his spouse. Riz advises Henry on his upcoming retirement.	Henry contacts Riz to ensure that there are no changes since their last discussion.
HR Operations Team		The representative answering Henry's query quickly directs him to the CS pension provider to answer his query.			HR Operations processes Henry's resignation which starts the off-boarding process.

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"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

INFORMATION ON PENSION SCHEME	ESLCALATION TO PENSIONS PROVIDER	DISCUSS PENSIONS OPTIONS	CALCULATE PROJECTED INCOME	RETIREMENT
▪ 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	▪ Supportive advisor from the Pensions Provider

Interactions

▪ Employee	▪ Employee ▪ HR Operations	▪ Employee ▪ CS Pension Provider	▪ Employee ▪ CS Pension Provider	▪ Employee ▪ Line Manager ▪ CS Pension Provider ▪ HR Operations

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

● 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

Metrics

SLA*

Process-specific metrics

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

Service metrics

- ▪ Customer satisfaction score for pension related queries

* Please refer to the Glossary for further information

Policies

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

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HR7 Leaving Work

HR7-01 Exiting

"I am handing in my resignation"

Lizzy, Civil Service Employee

"I have decided to make a career change. I've accepted a new role and am handing in my resignation"

Roles covered within the journey

- Employee
- Line Manager
- HR Operations

User Journey

Civil Service Employee

1	2	3	4	5
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.

Detail

1	2	3	4	5
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 works through elements of her checklist. Lizzy is contacted by her pension scheme for more information, which she is able to provide. She then completes the Leavers Survey on her mobile during her commute – whilst personal information is requested it is made clear that her responses will only be viewed by HR and that leadership will only be informed of key themes. Lizzy is given the option of also taking part in an Exit Interview with a member of HR – she is keen to share her thoughts and opts in through the Leavers' Checklist. HR Operations receive a notification of this request and contact Lizzy through the CMS to arrange a suitable time and date, and chooses for the interview to take place via video conference. Lizzy receives notification of her final payment entitlements after Ian has validated her unpaid leave and her pension. She views this information in the HCM system, and is comfortable that they are accurate.	Lizzy completes the final Leavers Form on the HCM system. 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.

Feelings

1	2	3	4	5
Lizzy is confident that she will find all the information she needs to in order to leave the Civil Service on the HR	Lizzy has a lot to do in preparing for her new job and to ensure she completes and hands 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 is 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.	Lizzy is sad to be leaving the Civil Services but was impressed with how efficient and streamlined the process has been, giving her time to focus on other tings in her final weeks. She has felt informed and organised throughout.

Enablers

1	2	3	4	5
• 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	• Push notifications/alerts • HCM system • Embedded (deep) links from guidance directly through to HR actions

"I am handing in my resignation"

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Employee	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.
Civil Service Line Manager		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)			Ian follows up with Lizzy to complete a couple of final tasks. He receives a notification that Lizzy has complete her final Leavers Form and collects her Civil Service assets.
HR Operations Team		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.	HR Operations action items on their Off-Boarding Checklist and track progress of Lizzy's tasks.	HE Operations send Lizzy the Leavers' Survey and liaises with her following her request for a Exit Interview.	

"I am handing in my resignation"

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

| HR PORTAL SEARCH | → | SEPERATION IN HCM SYSTEM | → | COMPLETION OF TASKS & INTEGRATION BETWEEN TEAMS | → | LEAVERS SURVEY & EXIT INTERVIEW | → | FINAL DAY |

- 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

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

- Integrations between HCM system and other systems (IT and Security)

- Leavers survey suggested based on HCM update
- Access to networks available

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

Interactions

HR PORTAL SEARCH	SEPERATION IN HCM SYSTEM	COMPLETION OF TASKS & INTEGRATION	LEAVERS SURVEY & EXIT INTERVIEW	FINAL DAY
▪ HCM system ▪ HR Portal ▪ Employee	▪ HCM system ▪ Employee ▪ Line manager ▪ HR Operations	▪ HCM system ▪ HR Portal ▪ Employee ▪ HR Operations	▪ HCM system ▪ HR Portal ▪ Employee ▪ HR Operations	▪ HCM system ▪ Employee ▪ Line manager

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

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

- ⚪ Pop up notification alerts
- 🟤 Seamless Case Management System is updated with all relevant actions taken
- 🟤 Friendly and supportive agent to deliver

- 🟡 Prompts/alerts sent to the employee about outstanding tasks and deadlines
- 🟤 Friendly and supportive agent to deliver any help and advice
- 🟤 Multi-channel contact

- 🟡 Prompts/alerts sent to the employee about outstanding tasks and deadlines
- 🟡 Suggested content pushed to the employee ahead of leaving the Civil Service
- ⚪ Mobile enabled Exit Survey
- 🟤 Opportunity to complete an Exit Survey and Interview

- 🟡 Prompts/alerts sent to the employee about outstanding tasks and deadlines

Metrics

SLA*

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

- Time period employee has resigned after a promotion
- Time between resignation and leaving
- Average notice period worked
- Tenure of employee

Service metrics
- Customer satisfaction scores across resignation query resolution

* Please refer to the Glossary for further information

Policies

- The Business Appointment Rules for Civil Servants

- CS Employee Pension Guide
- Civil Service Management Code

"My employee's health has deteriorated and she is eligible for Ill Health Retirement"

User Journey Overview (1/3)

Bea, Civil Service Line manager

"Nadia has been suffering for many years but unfortunately her condition is getting worse – I want to best support her in any decision she makes regarding her work"

Roles covered within the journey

Employee | Line manager | HR Operations | OHA

User Journey

Civil Service Line manager

1	2	3	4	5
Bea's employee, Nadia, has had a condition which has severely deteriorated over the last year, leaving her unable to work.	Nadia explains to Bea that her health is at a point where she can no longer work. Bea contacts the HR Operations team to get further advice on how to support Nadia.	Nadia contacts her pensions provider to apply for Ill Health Retirement (IHR), who initiate an assessment. Bea is informed that Nadia will be undergoing an IHR assessment. Bea will be sent the outcome report decision.	Following confirmation that Nadia qualifies for ill health retirement, Bea speaks to Nadia to offer support. Nadia's end date is discussed based on recommendations from her doctor and the OHA.	Bea is notified of Nadia's end date and is sent the Line manager off-boarding checklist. Bea completes the activities. Following approval to start filling Nadia's role, Bea initiates recruitment activities.

Detail

1	2	3	4	5
Bea's employee, Nadia, has had a condition which has severely deteriorated over the last year. Nadia has been dealing with Occupational Health since her illness began, and Bea has been fully informed of her situation as Nadia has had workplace adjustments made, which have been documented on her Workplace Adjustment Passport. Over the years Nadia has been signed off work due to illness on multiple occasions for long periods at a time, but at this point she is no longer able to work. Bea has been supported by her case worker throughout this period. Her case worker has flagged a considerable increase in sickness absences over the last couple of years, with shorter gaps occurring between each time her illness is signed off.	Bea understands that Nadia has been advised by doctors that she will no longer be able to work in any role, and that Ill Health Retirement (IHR) may be the last resort before dismissal. Bea contacts the HR Operations team to get further advice on how to support Nadia as she has never managed a case like this before. The HR Operations team provides Bea with the contact details for the Occupational Health Advisor (OHA) who specialises in this area, and Bea is provided with useful guidance to support Nadia, including that she should continue to follow the attendance management process. Bea understands from Nadia that she has initiated an application for IHR, as she meets the set criteria and OHA has confirmed that she is likely to be eligible from their recent OHA report. Nadia understands she must undergo a full assessment, undertaken by the Pension Provider, to see if she qualifies for IHR.	Nadia contacts her pensions provider, who initiates an IHR assessment, to be conducted by an independent scheme medical advisor. As Nadia's line manager, Bea is updated on key meetings or touch points via alerts on the HCM system so that she can provide Nadia with the right level of support. Due to the sensitivity of the case, details will not be shared with Bea. Bea and Nadia liaise regularly to discuss any support Nadia needs during this time. Bea is alerted that Nadia has completed the assessment and that the report will be shared with Nadia within a specified timeframe via the HCM system. Bea will be sent a separate report with the outcome.	Bea is sent a notification on the HCM system and can see the outcome decision. Bea understands that Nadia can review her report on the document management system (DMS) and has been sent a hard copy for her records. The outcome report decision confirms that Nadia qualifies for ill health retirement, and includes a quote on her potential final pension. Bea is contacted by the HR Operations Specialist team to arrange a time to talk through the outcome and next steps. Bea understands that the case is being looked after by the OHA and that Nadia's earliest possible end date will be discussed and relayed back to her based on recommendations from her doctor and the OHA, and taking into account Nadia's notice period. The HR Operations team confirms her final salary, which includes her compensation in lieu of notice, and her end date. Bea and Nadia meet to talk through the outcome via phone call, as Nadia is not able to come into the office.	Bea is notified of Nadia's end date and she is sent the Line manager off-boarding checklist, which includes considerations such as whether the role will be backfilled and knowledge transfer. Bea reaches out to her line manager to get approval to start filling Nadia's role. Bea initiates recruitment activities to fill the role, she is also notified that necessary arrangements have been made for Nadia's pension that Nadia has approved. Nadia attends the exit interview arranged by HR Operations, which she chooses to do over the phone, and notes from the interview are documented on the DMS. Only HR have security access to review this, and will share the relevant information with leadership. On Nadia's last day Bea is notified on the HCM system that the case has now been closed.

Feelings

1	2	3	4	5
Bea can see that Nadia is struggling with working so ensures she gives her consistent support.	Bea feels well informed by the HR Operations team, she understands that this case would need a specialist to look after it.	Due to the easily accessible information from the manager dashboard, Bea is able to quickly run the relevant reports needed to assist the advisor.	Bea is satisfied that she was contacted within the set specified timeframe originally given.	Bea is clear what off-boarding activities need to take place before Nadia leaves. She is glad to be informed that Nadia's pension and final pay check have been sorted.

Enablers

1	2	3	4	5
• Intuitive Portal • Self-service and access to online support • Workplace Adjustments	• Intuitive Portal • Self-service and online support available • Push notifications/alerts • HCM system	• Intuitive Portal • Self-service and online support available • Push notifications/alerts • HCM system • Dashboards/analytics indicating key team information	• Intuitive Portal • HCM system • Video call • Document management system	• Intuitive Portal • Push notifications/alerts • HCM system • Embedded (deep) links from guidance directly through to HR actions • Automated manager checklist of off-boarding activities • Exit survey (online) and exit interview

"My employee's health has deteriorated and she is eligible for Ill Health Retirement"

Additional actors and responsibilities (2/3)

User Journey

	1	**2**	**3**	**4**	**5**
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.	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.	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.	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.	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.
Civil Service Line manager	Bea's employee, Nadia, has had a condition which has severely deteriorated over the last year, leaving her unable to work.	Nadia explains to Bea that her health is at a point where she can no longer work. Bea contacts the HR Operations team to get further advice on how to support Nadia.	Nadia contacts her pensions provider to apply for Ill Health Retirement (IHR), who initiate an assessment. Bea is informed that Nadia will be undergoing an IHR assessment. Bea will be sent the outcome report decision.	Following confirmation that Nadia qualifies for ill health 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.	Bea is notified of Nadia's end date and is sent the Line manager off-boarding checklist. Bea completes the activities. Following approval to start filling Nadia's role, Bea initiates recruitment activities.
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.	Due to the sensitivity of the case the HR Operations team edit the permissions on the HCM system to ensure that only Nadia and the OHA can view the report and details. They track the status of the assessment to ensure the outcome is within SLA.	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 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.
• Occupational Health Advisor • Independent Scheme Medical Advisor	Nadia's case worker has supported her throughout her ill health.	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. .	The OHA provides some support and input on discussions about Bea's end date.	

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"My employee's health has deteriorated and she is eligible for Ill Health Retirement"

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

ILL HEALTH RETIREMENT SUPPORT IN THE HR PORTAL	SEEKING OCCUPATIONAL HEALTH SUPPORT	ILL HEALTH ASSESSMENT	OUTCOME AND END DATE	EXIT INTERVIEW
▪ 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	▪ Approval for absences ▪ Automatic notifications to relevant stakeholders ▪ Accessible and clear guidance available on the HR Portal

Interactions

▪ HR Portal ▪ Employee ▪ Civil Service Workplace Adjustment Team	▪ Line manager ▪ HR Operations Specialist ▪ Employee ▪ Occupational Health Advisor	▪ Employee ▪ HR Operations Specialist ▪ Occupational Health Advisor	▪ Line manager ▪ HR Operations Specialist ▪ Employee ▪ Occupational Health Advisor	▪ Line manager ▪ HR Operations Specialist ▪ Employee

Critical Success Factors to enhance the experience

● Straightforward user interface to aid action ● Intuitive Portal ● Timely completion of transactions by HR Operations ● Supplementary information available to the employee to support their development	◌ Suggested content available on the Portal to prepare for manager-employee conversations ● Thoroughness and timeliness of initial OHA Assessment	● Timely and effective completion of transactions by the pensions provider ● Straightforward user interface to aid action	◌ Simple document management solution to electronically store report ◌ Self service for employee for off-boarding ● Securities configured to ensure appropriate stakeholders have visibility of relevant information ● Seamless case management system is updated with all relevant actions taken	◌ Notification strategy ◌ Approval strategy ● Intuitive Portal ● Timely completion of transactions by HR Operations

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   **SLA***

Process-specific 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

Service metrics
- Customer satisfaction scores across ill health resolution
- Customer satisfaction scores assessment report outcome
- Timings between assessments and integration

* Please refer to the Glossary for further information

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

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"My department has just launched a Voluntary Exit Scheme and I am thinking about leaving"

User Journey Overview (1/3)

Tom, Civil Service employee

'*"I am wondering whether it would make sense to take a voluntary exit"*

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Employee, Tom

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.

Detail

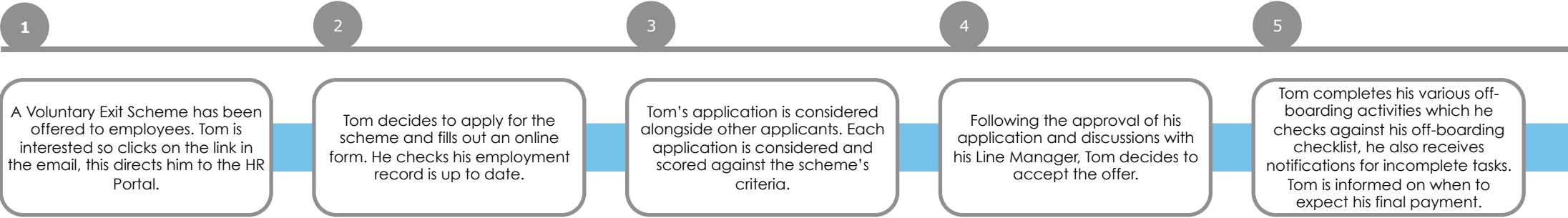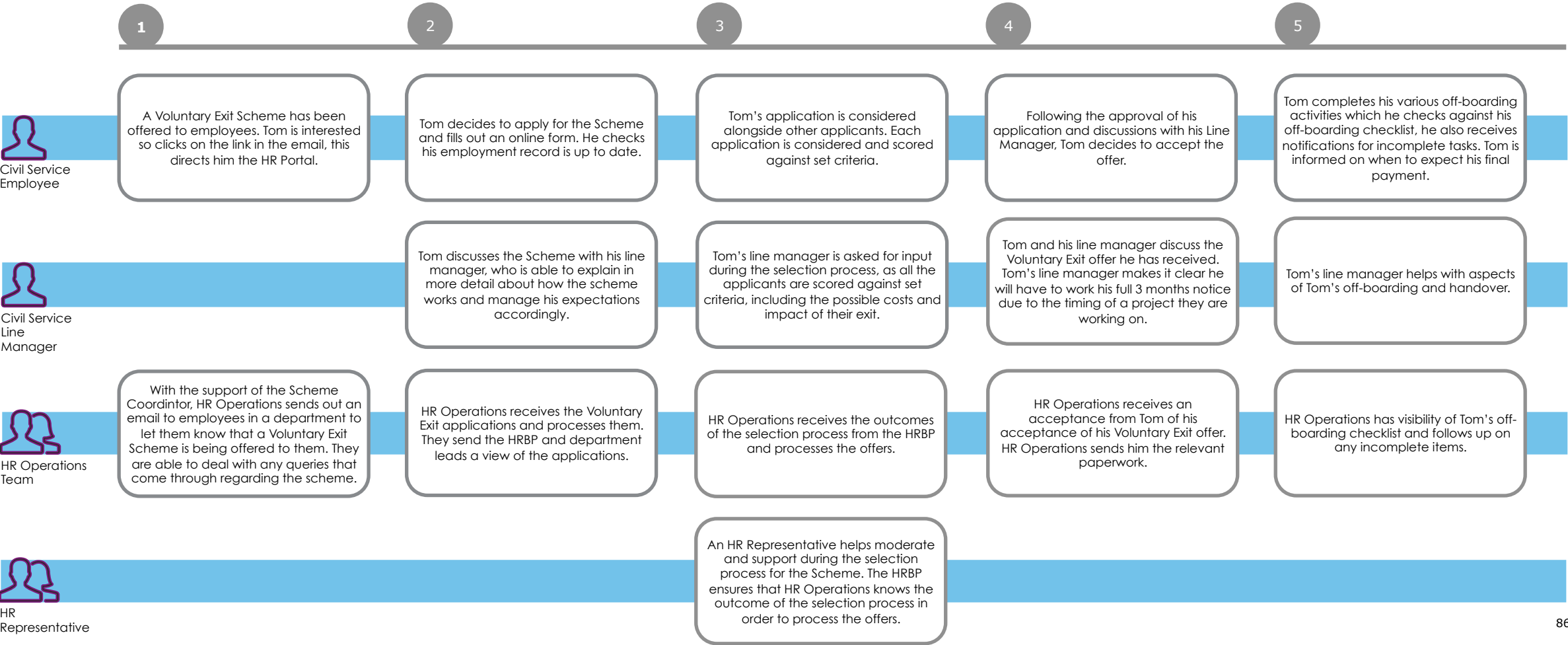| 1	2	3	4	5
There are some structural changes happening in Tom's department as hub locations are being introduced. Employees have been advised that they will be offered voluntary exits through a Voluntary Exit Scheme, and trade unions have already been informed. They have made it clear only Voluntary 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 receives 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. Tom watches a video to understand what the process is for applying to the Voluntary Exit Scheme.	Tom talks to his line manager. Tom's line manager received an information pack with details of the scheme, and is able to explain the process further. He manages Tom's expectations on how this Voluntary Exit Scheme will work, and reiterates the tight timeframes for the process, which are Tom's responsibility to comply with. Tom decides to apply, and is asked to fill out an online form, which the HR Operations Specialist team processes. Tom checks that his employment record is up to date on the payroll system, which is integrated with the HR system. He submits further information through the HR System including Pension information so he can get an automated quote estimate.	Tom's details are considered alongside the other applicants. The applicants go through a selection process to ensure that all applications are fair, reasonable and non-discriminatory. This is conducted by the relevant department leads and HR representative. The HR representative then sends the outcomes to the HR Operations Specialist team to process. The scoring includes criteria specific to the scheme, such as what impact that their departure would have on the department. Tom is kept up to date by notifications on the timings, and knows when he expects to hear the outcome of this selection process.	Tom is sent the outcome of the selection process and is made an offer to leave the Civil Service. His offer includes a quote to take his pension early. Tom knows there is no compulsion to accept the offer, and understands that there will be no opportunity for him to revisit the decision if he changes his mind, but he thinks that it is the right thing for him. After further discussions with his Line Manager Tom decides to accept the offer to take Voluntary Exit. Tom confirms this with the HR Operations Specialist he has been working with and is sent the relevant paperwork. He is supported by HR Operations and his Line Manager through the process. Due to the timings of a project he is working on Tom's line manager makes it clear he will be required to work his full notice period. During this time he decides not to be kept up to date with redeployment opportunities.	Tom's acceptance of the offer and agreed end date is recorded in the HCM System. This triggers an interactive off-boarding checklist being sent to him at the appropriate time. Tom completes the various tasks on his off-boarding checklist. This includes clear guidance on how to hand over his work. In his final week Tom is sent an automated notification to remind him of the final items on his checklist, including removing personal items and signing up to the alumni network. Tom also conducts an exit interview, which is recorded in the HCM system. Tom then receives another notification on his last day to return his computer, phone and ID card. When Tom leaves the Civil Service he is very clear on when his final payment will be made, and that if he comes back within a certain time that he may be liable to pay it back.

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 HCM system, he is also pleased with the information his manager is able to give him on the scheme.	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	• Self-service and online support available • Approval notifications	• Push notifications/alerts • HCM System • Automated checklist of off-boarding activities • Automatic triggers pushing next appropriate action directly to the user

"My department has just launched a Voluntary Exit Scheme and I am thinking about leaving"

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Employee	A Voluntary Exit Scheme has been offered to employees. Tom is interested so clicks on the link in the email, this directs him the HR Portal.	Tom decides to apply for the Scheme and fills out an online form. He checks his employment record is up to date.	Tom's application is considered alongside other applicants. Each application is considered and scored against set criteria.	Following the approval of his application and discussions with his Line Manager, Tom decides to accept the offer.	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.	Tom's line manager is asked for input during the selection process, as all the applicants are scored against set criteria, including the possible costs and impact of their exit.	Tom and his line manager discuss the Voluntary Exit offer he has received. Tom's line manager makes it clear he will have to work his full 3 months notice due to the timing of a project they are working on.	Tom's line manager helps with aspects of Tom's off-boarding and handover.
HR Operations Team	With the support of the Scheme Coordintor, 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 receives the Voluntary Exit applications and processes them. They send the HRBP and department leads a view of the applications.	HR Operations receives the outcomes of the selection process from the HRBP and processes the offers.	HR Operations receives an acceptance from Tom of his acceptance of his Voluntary Exit offer. HR Operations sends him the relevant paperwork.	HR Operations has visibility of Tom's off-boarding checklist and follows up on any incomplete items.
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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"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	APPLICATION	SELECTION	OFFER ACCEPTANCE	OFF-BOARDING
▪ Access to HR portal information ▪ Clear communications with process and timelines	▪ Support available from line manager	▪ Timely completion of transactions by HR Operations ▪ Application review and approvals on HCM system	▪ Support available from line manager ▪ Clear offer guidance	▪ Access to leavers checklist ▪ Communication to employees about outcomes of process

Interactions

▪ Employee ▪ HR Operations	▪ Employee ▪ Line manager ▪ HR Operations	▪ Employee ▪ Line manager ▪ HRBP ▪ HR Operations	▪ Employee ▪ Line manager ▪ HR Operations	▪ Employee ▪ Line manager ▪ HR Operations

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

○ Embedded (deep) links to guidance ○ Online support 24/7 ● Straightforward user interface to aid action ● Intuitive Portal ● Access to videos, guidance and useful articles	○ Integrated online application form ● Suggested content available on the Portal to prepare for manager-employee conversations ● Timely and effective completion of transactions by HR Operations	○ Manager dashboard to provide team information ● Thoroughness and timeliness of the selection process	○ Integration between HCM system and payroll ● Timely and effective completion of transactions by the pensions provider ● Timely completion of transactions by HR Operations	● 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

Metrics

SLA*

Process-specific metrics:
- ▪ Voluntary Exit applications by reason / grade / Diversity group
- ▪ Frequency of Voluntary Exit Schemes
- ▪ Number of Voluntary Exit applications per offer
- ▪ Voluntary Exit turnover rate

- • 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

Service metrics:
- ▪ Customer satisfaction of Voluntary Exit process
- ▪ Leavers' satisfaction
- ▪ Line manager satisfaction for Voluntary Exit support

* Please refer to the Glossary for further information

Policies

- ▪ Voluntary Exits and Redundancy Guidance
- ▪ End to End Exit Process Aide Memoir
- ▪ Redeployment Policy

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"I am dismissing someone in my team for gross misconduct."

User Journey Overview (1/3)

"After a thorough investigation I am dismissing my employee for selling his old Civil Service laptop online, due to the seriousness of the case it is imperative I follow all the procedures correctly"

San, Civil Service Line manager

Roles covered within the journey

Employee | Line manager | HR Operations Specialist

User Journey

Civil Service Line manager

1	2	3	4	5
San has caught his employee, Jason, committing a serious offence. San tells Jason he is suspended from work.	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.	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.	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.

Detail

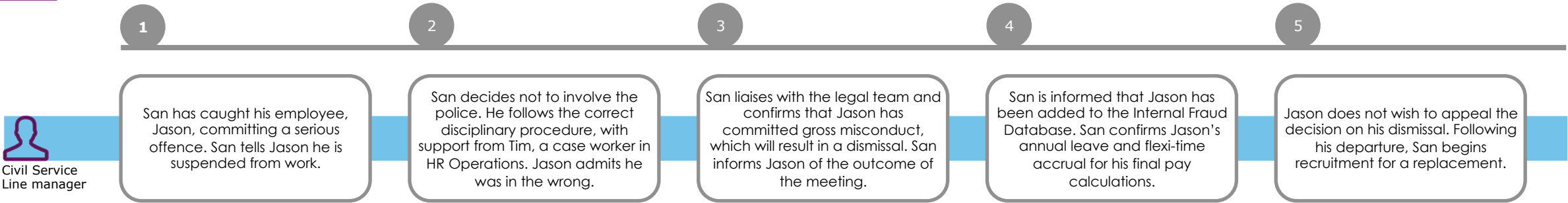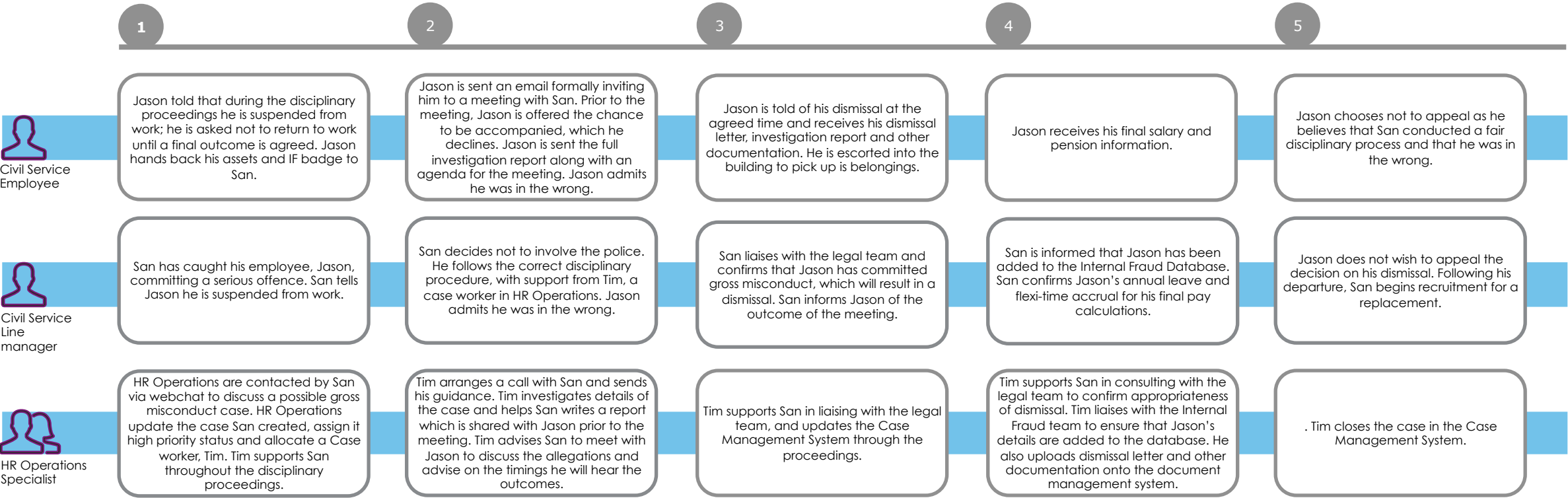| 1	2	3	4	5
San caught his employee, Jason, trying to sell his old Civil Service (CS) laptop online which Jason still had possession of due to a management oversight. San searches on the HR portal for advice, and concludes that due to the seriousness of the incident, the actions are likely to amount 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 discusses with Tim whether they should involve the police due to nature of the incident, but they decide to deal with the issue internally. San reviews the relevant policies and with Tim's support, he follows the correct disciplinary procedures according 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 is sent his final pay and his pension information.	Jason decides 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 and employee conduct compliance training. Following Jason's departure, San gains approval for replacement headcount. He starts a webchat with HR to initiate the recruitment process.

Feelings

1	2	3	4	5
San is shocked that one of his employees has committed such an offence, and feels well supported by the case worker throughout the disciplinary procedure.	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 security breach, the potential risk to the Civil Service and lack of mitigation, San feels like there is no other option but to dismiss Jason.	San feels that they have done what they can to prevent an incident like this happening in the future.	San is glad that HR has explained what the next steps would be in the event of an appeal.

Enablers

1	2	3	4	5
• Intuitive Portal • Self-service and access to online support • Webchat • Case Management System • Embedded (deep) links with guidance	• Self-service and access to online support • HCM system	• Case Management System • HCM system • Integrations between HCM and other systems • Pre-populated HR templates • Document management system	• Intuitive Portal • HCM system • Push notifications/alerts • Integrations between HCM and other systems • Dashboards/analytics indicating key team information	• Intuitive Portal • Push notifications/alerts • HCM system • Webchat • LMS • Manager dashboard

"I am dismissing someone in my team for gross misconduct."

Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Employee	Jason told that during the disciplinary proceedings he is suspended from work; he is asked not to return to work until a final outcome is agreed. Jason hands back his assets and IF badge to San.	Jason is sent an email formally inviting him to a meeting with San. Prior to the meeting, Jason is offered the chance to be accompanied, which he declines. Jason is sent the full investigation report along with an agenda for the meeting. Jason admits he was in the wrong.	Jason is told of his dismissal at the agreed time and receives his dismissal letter, investigation report and other documentation. He is escorted into the building to pick up is belongings.	Jason receives his final salary and pension information.	Jason chooses not to appeal as he believes that San conducted a fair disciplinary process and that he was in the wrong.
Civil Service Line manager	San has caught his employee, Jason, committing a serious offence. San tells Jason he is suspended from work.	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.	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.	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.
HR Operations Specialist	HR Operations are contacted by San via webchat to discuss a possible gross misconduct case. HR Operations update the case San created, assign it high priority status and allocate a Case worker, Tim. Tim supports San throughout the disciplinary proceedings.	Tim arranges a call with San and sends his guidance. Tim investigates details of the case and helps San writes a report which is shared with Jason prior to the meeting. Tim advises San to meet with Jason to discuss the allegations and advise on the timings he will hear the outcomes.	Tim supports San in liaising with the legal team, and updates the Case Management System through the proceedings.	Tim supports San in consulting with the legal team to confirm appropriateness of dismissal. Tim liaises with the Internal Fraud team to ensure that Jason's details are added to the database. He also uploads dismissal letter and other documentation onto the document management system.	. Tim closes the case in the Case Management System.

"I am dismissing someone in my team for gross misconduct."

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

SUSPENSION	DISCIPLINARY PROCEEDINGS	DISMISSAL	FINAL CALCULATIONS	NEXT STEPS
▪ Cognitive agent available 24/7 ▪ Case worker response set by priority ▪ Support and guidance for line manager	▪ Support and guidance for line manager ▪ Access to HR portal information	▪ Communication of the decision and next steps to employee ▪ Access to templates and resources ▪ HCM system integration with IT and Security team	• HCM system integration with Payroll • Manager dashboard available to view team details	▪ HR support and additional support networks available ▪ Query escalated to the HR Operations Specialist recruitment team

Interactions

▪ Employee ▪ Line manager ▪ HR Operations	▪ Employee ▪ Line manager ▪ HR Operations	▪ Employee ▪ Line manager ▪ HR Operations ▪ Legal team	▪ Employee ▪ Line manager ▪ HR Operations	▪ Employee ▪ Line manager ▪ HR Operations

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

🟡 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	🟤 Friendly and supportive case worker to deliver help and advice 🟤 Intuitive Portal	🟤 Intuitive Portal 🟤 Seamless Case Management System is updated	⚪ Integration between HCM system and payroll ⚪ Manager dashboard showing statistics of team ⚪ Pop up notifications ⚪ Seamless Case Management System is updated 🟤 Intuitive Portal	⚪ Manager dashboard ⚪ Seamless Case Management System is updated with all relevant actions taken 🟤 Intuitive Portal

Metrics   **SLA***

Process-specific 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

- Discipline cases (minor/senior/gross)
- Discipline cases (minor/senior/gross) where a penalty is imposed
- Discipline cases resulting in dismissal
- # of suspensions resulting in dismissal
- Appeals (upheld/held)

Service metrics
- Line manager satisfaction scores for dismissal support
- Amount of time taken to escalate webchat queries to a live HR representative

* Please refer to the Glossary for further information

Policies

- Civil Service Employer Pension Guide
- Standards of Behaviour Policy

- CS Management Code
- Responsible for Information Policy

HR7 Moment

"Someone on my team has passed away."

"Sadly someone in my team has passed away, and it's a really difficult time"

Karolina, Civil Service Line manager

Roles covered within the journey

Line manager · HR Operations · HRBP

User Journey

Civil Service Line manager

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 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.

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.

Detail

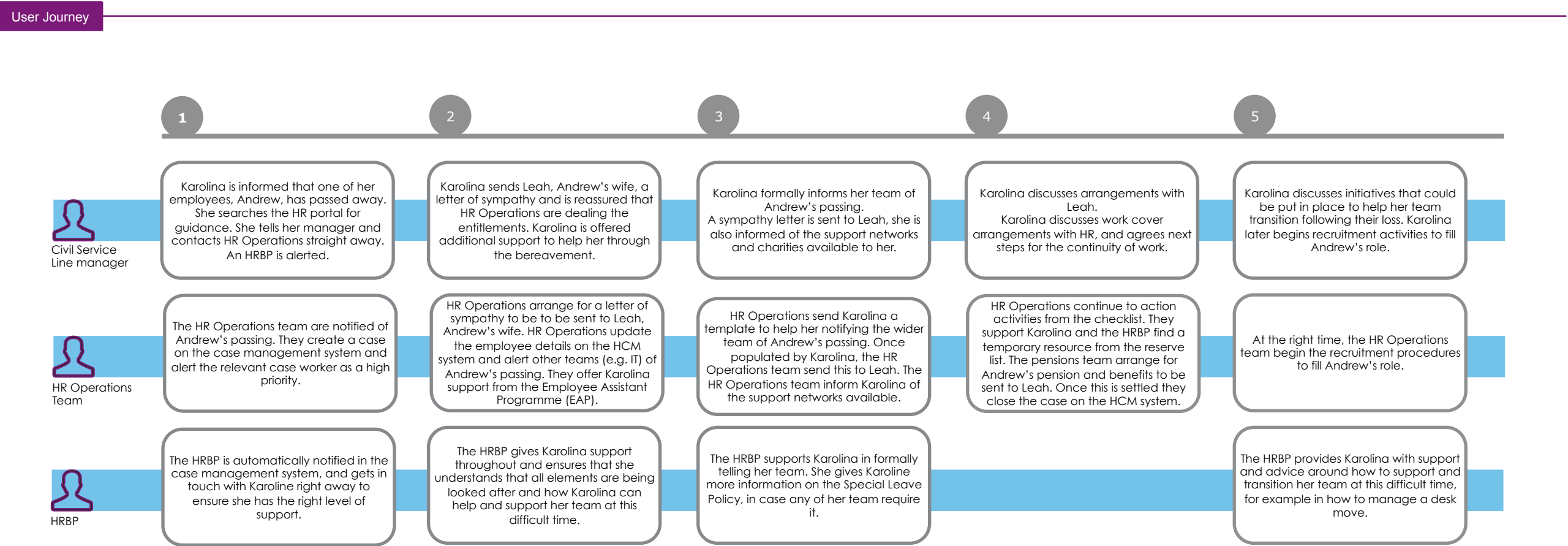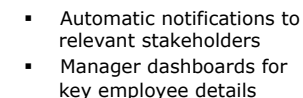| 1	2	3	4	5
Karolina receives a call from Leah, the wife of Andrew, a member of her team. Leah informs Karolina of a tragic accident which occurred over the weekend causing her husband's death. Karolina offers her deepest sympathy and offers her support. She reassures Leah that she will take the necessary actions. 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). Karolina contacts HR Operations, and informs her line manager of Andrew's passing. A case is created on the case management system and an HRBP is notified to support Karolina, due to the impact on the department in this case. Karolina is also given a named contact in HR Operations in case she needs anything through the process.	HR Operations update the employee details on the HCM system so that no contact is made that might disturb Leah during this sensitive time. They provide Karolina with a template to help her write a personal letter of sympathy, which she sends directly to Leah. Karolina is supported by the HRBP. She is also reassured that HR are dealing with Leah's entitlements, as she was identified by Andrew as his nominated 'death in service' beneficiary. The Payroll team calculate the final salary along with any other entitlements, including pension. They ask Karolina for input to the calculations on Andrew's untaken leave and flexitime. The calculations are shared with an Employee Assistant, who contacts Leah. Karolina can see the HR Operations checklist for death in service on the HCM system, and sees that IT and security are flagged with notifications of changes made, they update their records so that access arrangements for systems and buildings can be updated. The HR Operations team also offer Karolina support from the Employee Assistant Programme (EAP) to deal with the loss.	Karolina arranges a time for her and the HRBP to formally inform Andrew's colleagues. HR Operations send Karolina a template to help her draft a communication to send to the wider department on Andrew's passing. Karolina populates this with kind words about his contribution, and a copy of this letter is sent to Leah's home address. Employees are offered support from The Charity for Civil Servants and EAP if they need help or support in dealing with the passing. Karolina is also able to offer discretionary special leave to any of her team if required.	Karolina contacts Leah to arrange an appropriate time for Andrew's belongings to either be picked up or delivered, and she also must retrieve Andrew's CS assets such as laptop and phone. Karolina also ensures that Civil Service funeral representation has been agreed and that support networks have been offered to Leah. They confirm the next steps for these arrangements. Karolina discusses with the HRBP and agrees interim work cover arrangements for continuity of work, with approval being sent to the budget holder. Karolina is sent a notification informing her that settlements with Andrew's family have been made.	Karolina discusses with her HRBP what initiatives could be put in place to help her team transition after their loss, both in terms of clients and work that needs picking up and in terms of desk moves. Karolina tracks the wellbeing and performance of her team and can view relevant statistics on a dashboard. She wants to ensure her team have support if required. At the right time, Karolina starts to consider permanent backfill for the team, and she liaises with HR Operations to discuss recruitment, and how to handle this sensitively. Karolina receives an approval notification from her Line manager to begin the recruitment process.

Feelings

1	2	3	4	5
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 is grateful for the arrangements being made by the different teams and the support and guidance she is getting from HR.	Karolina is mindful that her employees are shocked by the news and wants to ensure they are aware of all the support available to those affected.	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

1	2	3	4	5
• Intuitive Portal • Self-service and access to online support • Phone call • Case management system	• Intuitive Portal • Self-service and access to online support • Push notifications/alerts • HCM system • Automated checklist for death in service activities • Integrations between HCM and other systems • Embedded (deep) links from guidance through to HR actions	• Intuitive Portal • Phone call • Templates for communications	• Intuitive Portal • HCM system • Dashboards/analytics indicating key team information • Push notifications/alerts • Phone call	• Intuitive Portal • Push notifications/alerts • HCM system • Approval notifications • Dashboard

"Someone on my team has passed away."

Additional actors and responsibilities (2/3)

	1	2	3	4	5
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.	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.
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.	HR Operations arrange for a letter of sympathy to be 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).	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.	HR Operations continue to action activities from the checklist. They support Karolina and the HRBP find a temporary resource from the reserve list. The pensions team arrange for Andrew's pension and benefits to be sent to Leah. Once this is settled they close the case on the HCM system.	At the right time, the HR Operations team begin the recruitment procedures to fill Andrew's role.
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.	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.		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.

"Someone on my team has passed away."

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

LINE MANAGER INFORMED OF DEATH IN SERVICE	INFORM HR OPERATIONS	SUPPORT OFFERED TO TEAMS	TEMPORARY WORK ARRANGEMENTS DISCUSSED	PERMANENT FILLING OF POSITION APPROVED
▪ Single point of contact dealing with query for family of deceased ▪ Access to HR Portal information ▪ HR support and additional support networks available	▪ Integrated systems ▪ Access to 'death in service' checklist reminding about next steps ▪ Entering relevant details to submit notification ▪ Automatic notifications to relevant stakeholders	▪ Access to templates and resources ▪ HR support and support networks available	▪ Interim work cover arrangements for continuity of work ▪ Approval / reject capability shown in the HCM system by pop up notifications ▪ Automatic notifications to relevant stakeholders	▪ Automatic notifications to relevant stakeholders ▪ Manager dashboards for key employee details

Interactions

▪ Line manager ▪ Employee Next of Kin	▪ HRBP ▪ Line manager	▪ HR Operations ▪ Line manager ▪ Employee Next of Kin	▪ HRBP ▪ Line manager	▪ Line manager

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

🟡 Personalised Portal search ⚪ Suggested content available on the Portal ⚪ Straightforward user interface to aid action completion ⚪ Case management prioritisation 🟤 Intuitive Portal	🟡 Prompts/alerts sent to the Line manager about suggested next actions ⚪ Pop-up notification alerts ⚪ Integration between HCM system and payroll ⚪ Straightforward user interface to aid action completion 🟤 Intuitive Portal	⚪ Pop-up notification alerts ⚪ Straightforward user interface to aid action completion 🟤 Intuitive Portal	⚪ Pop-up notification alerts ⚪ Integration between HCM system and payroll ⚪ Straightforward user interface to aid action completion 🟤 Intuitive Portal	🟡 Manager dashboard showing statistics of team ⚪ Pop-up notification alerts ⚪ Approval notifications ⚪ Straightforward user interface to aid action completion 🟤 Intuitive Portal

Metrics   SLA*

Process-specific metrics
- ▪ Number of employee death in service cases
- ▪ Reason if relating to workplace e.g. stress
- ▪ Number of days until case closure e.g. pensions

- ▪ Gender of passed employee
- ▪ Ease of contact with next of kin e.g. easily assessable details on the HCM system
- ▪ Referrals to Employee Assistance Programme

Service metrics
- ▪ Customer satisfaction scores for Line manager on case support

* Please refer to the Glossary for further information

Policies
- ▪ Death in Service Procedure
- ▪ Civil Service Employer Pension Guide
- ▪ Special Leave Policy and Procedure

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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"

Louise, Civil Service Employee

'I want to make a complaint about HR about the level of service I received. I think making the complaint will help improve the level of service from HR for the future.'
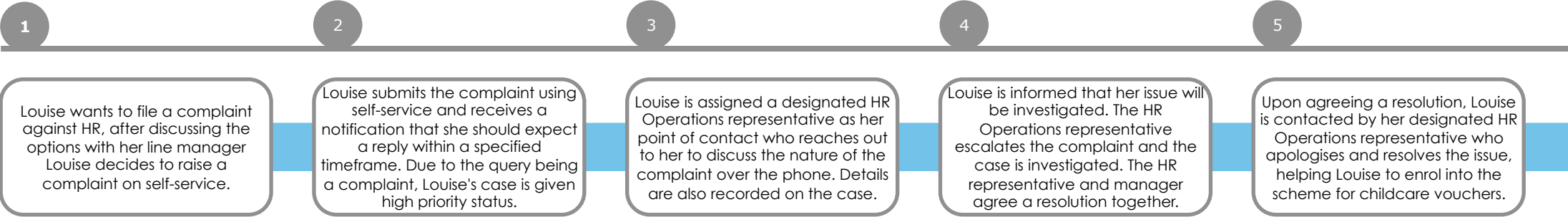
User Journey Overview (1/3)

Roles covered within the journey: Employee, Line Manager, HR Operations

User Journey

Civil Service Employee

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.
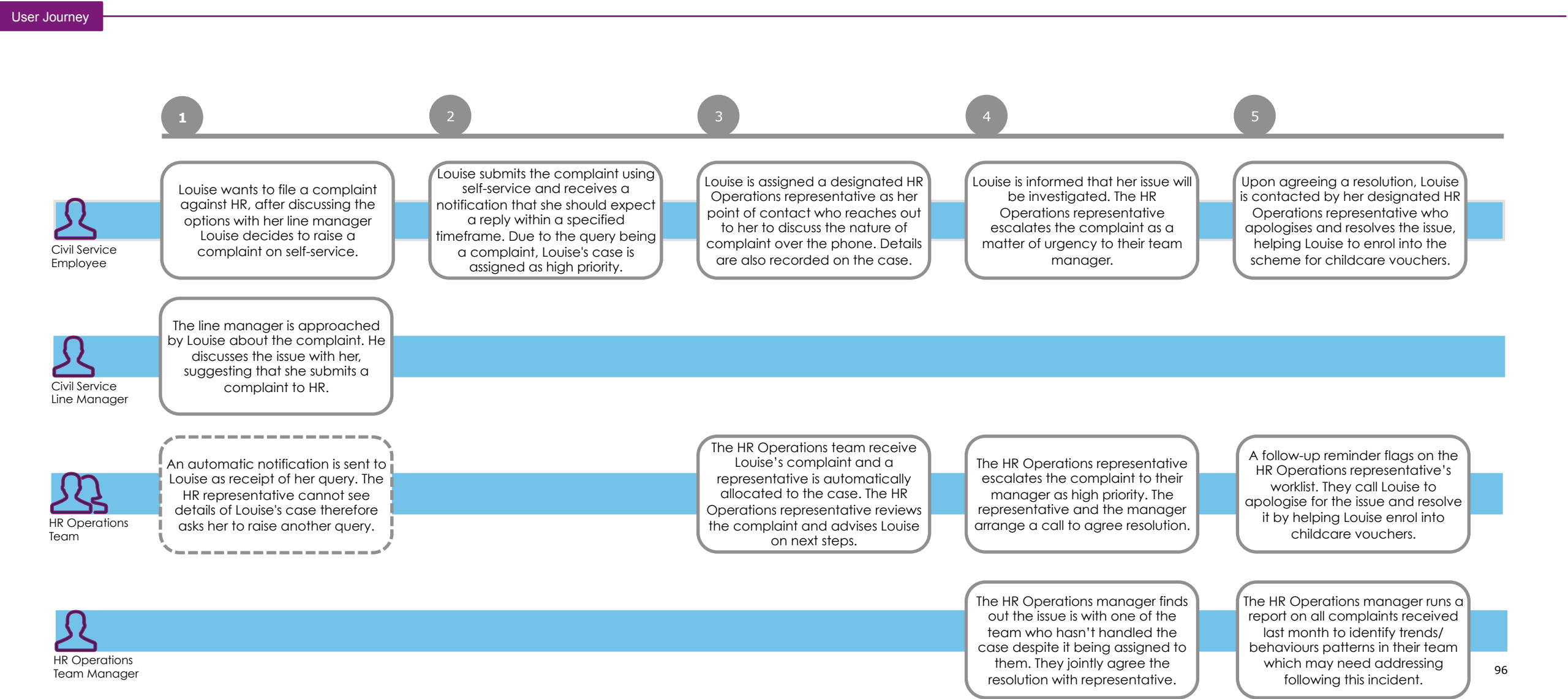
Detail

1	2	3	4	5
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.	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.	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.	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.	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.

Feelings

Louise feels HR should be informed of areas which need improvement.	Louise feels that she has done the right thing to complain but she is still sceptical about whether her complaint will be addressed appropriately.	Louise feels content that that her complaint is being handled and that she can check the details of the complaint via self service.	Louise is expecting an update to be provided to her shortly about the status of her complaint.	Louise is satisfied with the resolution and is impressed by the professionalism of the HR Operations representative.

Enablers

• Intuitive Portal • Case Management System	• Case Management System • Push notifications/alerts • Portal analytics	• 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	• Case Management System • Push notifications/alerts • Integration between case management and HCM system • Dashboards/analytics with aggregated case data

"I received poor service from HR and want to make a complaint"

Additional actors and responsibilities (2/3)

User Journey

	1	2	3	4	5
Civil Service Employee	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.	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.	Louise is assigned a designated HR Operations representative as her point of contact who reaches out to her to discuss the nature of complaint over the phone. Details are also recorded on the case.	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.	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.
Civil Service Line Manager	The line manager is approached by Louise about the complaint. He discusses the issue with her, suggesting that she submits a complaint to HR.				
HR Operations Team	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.
HR Operations Team Manager				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.

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"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	FORMAL COMPLAINT	GATHERING FURTHER DETAIL ABOUT COMPLAINT	ESCALATED TO EXPERT MANAGER	RESOLUTION COMMUNICATION
▪ Contact between HR and employee regarding the query submitted ▪ Clear complaints procedure made available to the employee and visible on the HR Portal	▪ User-friendly and straightforward complaint initiation ▪ Multiple channels available to raise a complaint ▪ Higher priority for complaint cases	▪ Single point of contact dealing with query ▪ Employee-HR interaction and tone of the conversation ▪ Agreement/communication of next steps	▪ Complaint tracked on Case Management System ▪ Single point of contact maintained ▪ Resolution	▪ Single point of contact providing resolution ▪ Root cause of the complaint identified and addressed ▪ Review of unresolved complaints

Interactions

▪ Portal ▪ Line Manager ▪ HR Operations	▪ Portal ▪ Case Management System ▪ HR Operations	▪ HR Operations	▪ Case Management System ▪ HR Operations	▪ HR Operations ▪ Case Management System

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

● HR dashboards with requests overdue or unassigned	○ Ability to raise a complaint following simple steps and few clicks on the Portal	○ Skilled, customer-service trained HR Operations representative	○ Case management escalation and linked cases functionality available on the Case Management System	● CRM analytics to identify similar patterns
○ Prompts/alerts to HR on outstanding/overdue requests tracked in the Case Management System	○ Notifications 'pushed' to all parties involved in the process	● Complaint recorded within Case Management System and detail visible to the employee	● Resolution agreed within the timeframe communicated to employee	● Details of resolution recorded on Case Management System and available to the employee
● HR contact details clearly signposted and easily accessible on the Portal	● Complaint acknowledgement with response timeframes communicated to employee	● Single point of contact for complaint resolution	● Resolution agreed and communicated to the complaint initiator by single point of contact	● Complaint closure only after acceptable resolution
● Acknowledgement of queries with receipt for the employee	● Consistent complaints handling process	● Personal contact with the employee to clarify complaint details and provide reassurance of complaint importance		● Resolution directly communicated to the employee by the case owner/single point of contact

Metrics

SLA*

▪ 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 ▪ First-time resolution rates as percentage of overall complaint queries		

Process-specific metrics

Service metrics

* Please refer to the Glossary for further information

Policies

- N/A

NB: Standard complaints procedure should be in place

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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, Civil Service Line Manager

"Simon is joining my team shortly and I want to prepare for his first day in the new role."

Roles covered within the journey

Employee | Line Manager | HR Operations
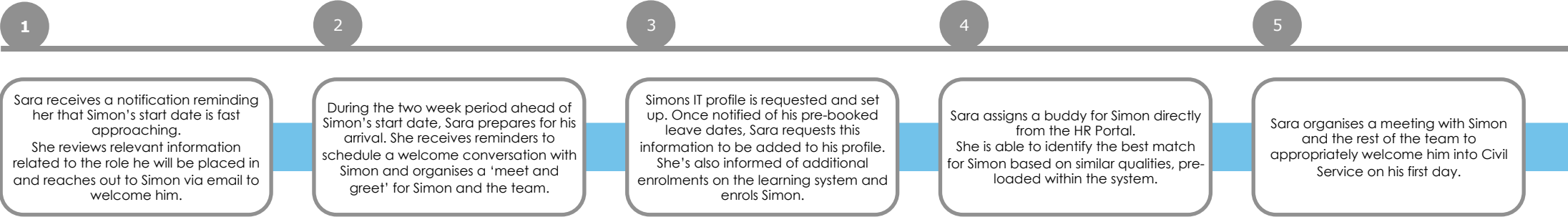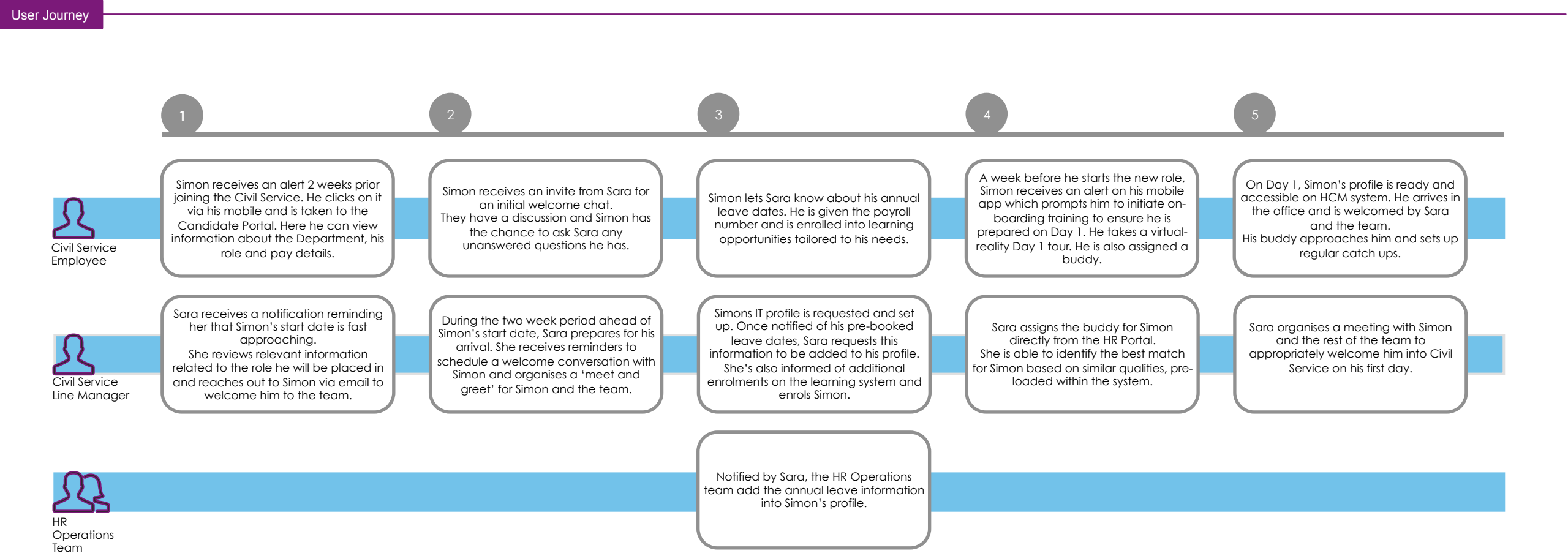

User Journey

Civil Service Line Manager

1	2	3	4	5
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.	Simons 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 enrols Simon.	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.	Sara organises a meeting with Simon and the rest of the team to appropriately welcome him into Civil Service on his first day.

Detail

1	2	3	4	5
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 to her team. Attached to the notification is a link to Simon's latest CV, role description and a report highlighting his strengths and key areas for continued development. Meanwhile Simon receives an alert in his inbox reminding him that in two weeks he will be joining the Civil Service. He clicks on the link within the notification and is taken to the Candidate Portal, where he can view information about the department, his role and salary breakdown. He is also interested in seeing who he will be working with – the Portal provides the links to Linkedin profiles of peers from Simon's future team.	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 on 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.	Simon has provided Sara with the details of his previously mentioned holiday – she submits a request to the HR Operations team to add them into Simon's profile and Simon receives a notification informing him of this update. He is also provided with his payroll number and can view information on next pay cut off upon clicking on the Portal link. As part of the integrated onboarding process and of Simon receiving his payroll number, IT receive an automated notification of Simon's arrival, they arrange a laptop for him to use ready for his first day. Following the conversation with Simon, Sara identifies additional learning opportunities for Simon, which he should enrol into over the first few months in the role. She accesses the catalogue of learning opportunities on the learning system and filters the opportunities already tailored to her team by skill. As a manager, she can also enrol her team members into learning opportunities. She selects Simon's name from the list and he's auto-enrolled into the initial course. The learning system recognises a conflict due to Simon's annual leave and suggests an alternative date. Simon is now enrolled into learning opportunities tailored to his needs.	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. RPA adds Simon's name to the reception list, triggers an alert and informs security to provide the building pass for him. Simon is 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. Sara receives a HR Portal alert to assign a buddy for Simon. From there she can see a list of potential suggestions within her team, broken down by skillset. Sara selects a buddy, who receives an alert of being assigned to Simon and reaches out to welcome him.	On Day 1, Simon's profile is ready and accessible on HCM system. He arrives in the office and is welcomed by Sara and the team. Sara has a catch up with Simon on his first day – he feels he is aware of what he needs to do. He logs into the Portal and from there he can see a pop up with suggested actions and activities for him to complete within his first week. He is also approached by his buddy who makes sure they are available in case Simon has any questions. The buddy puts regular catch ups with Simon so that they can discuss how his first few weeks go.

Feelings

1	2	3	4	5
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.	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.	Sara finds it easy to identify and suggest development opportunities to her new team member and feels that Simon will really enjoy his new role. Simon feels confident that the next step alerts indicate that the onboarding process is running smoothly.	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.	Sara feels she has done everything to support Simon appropriately to prepare him for Day 1 on the job.

Enablers

1	2	3	4	5
• Portal • Push notifications/alerts • Candidate Portal optimised for mobile viewing • Access to content prior to joining	• Intuitive Portal • Push notifications/alerts • RPA-enabled diary and room scheduling	• Integrated HCM and learning systems • Suggested learning content based on user role, department and skills selected • 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	• HCM system • Suggested content based on user role, personalised profile and previous completed activities

"I need to support a new joiner to be successful on their first day in the new role"

Additional actors and responsibilities (2/3)

User Journey

	1	2	3	4	5
Civil Service Employee	Simon receives an alert 2 weeks prior 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.	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.	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.	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.	On Day 1, Simon's profile is ready and accessible on 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.
Civil Service Line Manager	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.	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.	Simons 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 enrols Simon.	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.	Sara organises a meeting with Simon and the rest of the team to appropriately welcome him into Civil Service on his first day.
HR Operations Team			Notified by Sara, the HR Operations team add the annual leave information into Simon's profile.		

"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	ONBOARDING PREPARATION 1st MANAGER/NEW JOINER CONTACT	ADVANCE INFORMATION PROVISION	ONBOARDING COMPLETION AND BUDDY ASSIGNMENT	EMPLOYEE'S FIRST DAY
▪ Prompts and reminders about new joiner starting the new role ▪ New joiner notification with role and Department information	▪ Prompts and reminders about actions requiring completion by manager ▪ Dates for 1st contact/call scheduled in the diary ▪ 1st new joiner and manager conversation	▪ Ability to load up information to new joiner's profile ▪ Enrolment into learning opportunities ▪ Support available from HR when needed	▪ Prompts and reminders about actions requiring completion by manager ▪ Interactive onboarding activities ▪ Buddy/mentor selection	▪ 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	▪ Portal ▪ Phone/face to face conversation	▪ Portal ▪ HR Operations ▪ Learning system	▪ Candidate Portal/App ▪ Portal ▪ Security, IT & Facilities	▪ Team members ▪ Portal

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

🟡 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　　　　　　　　　　　　　　　　　　　　　　**SLA***

Process-specific 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			

Service metrics

		▪ Customer satisfaction score on hiring process reported by applicants/managers ▪ Employee's self-reported "Day 1 readiness" score prior to first day		

* Please refer to the Glossary for further information

Policies

▪ Recruitment Principles
▪ Agency Worker Regulations

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HR8 Moment
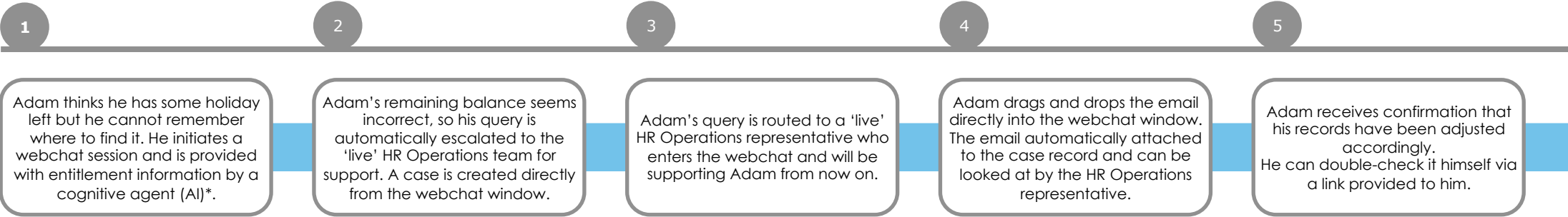# "I have a query about my remaining holiday allowance"

Adam, Civil Service Employee

"I think I have some holiday days left, but I am not sure how many days allowance I can still take."

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Employee

1 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 Adam's remaining balance seems incorrect, so his query is automatically escalated to the 'live' HR Operations team for support. A case is created directly from the webchat window.

3 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 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 Adam receives confirmation that his records have been adjusted accordingly. He can double-check it himself via a link provided to him.

*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.
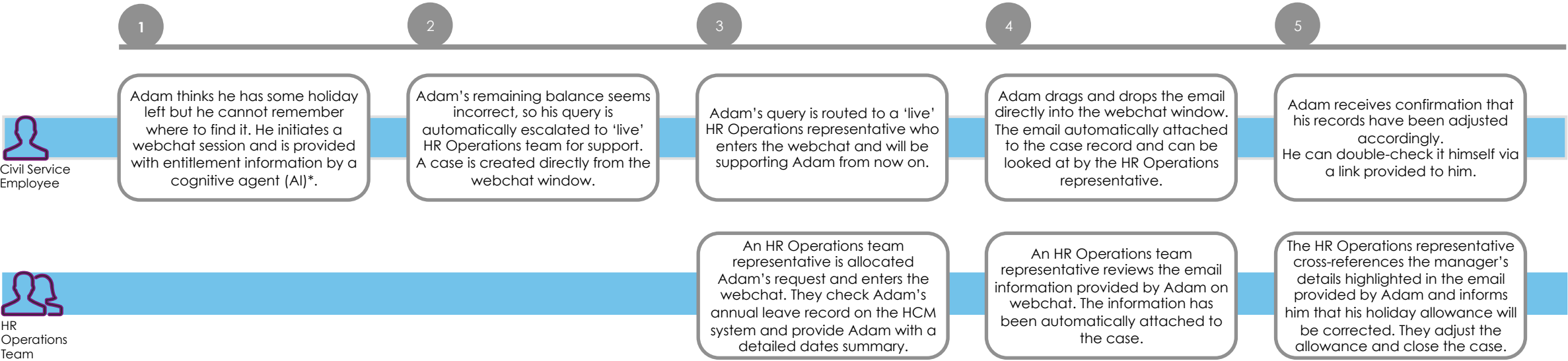
Detail

1	2	3	4	5
Adam suspects he has some holiday left but he can't remember where to go 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 this, 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.	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.	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 remembers that he had submitted a carry-over leave request before 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.

Feelings

Adam knows where to find HR related information. He is pleased with how intuitive the HR Portal is and how easy it is to initiate the webchat session and get support.	Adam is surprised that his balance is showing as incorrect - he wants to speak to someone directly to clarify this. He likes the fact that his query is tracked and that he can view the progress and status of his query at all times via self-service.	Adam appreciates the fact that he has been quickly assigned to a competent and knowledgeable representative who can support him. He also doesn't have to explain the situation from the beginning which saves him time when seeking help.	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.

Enablers

• Intuitive Portal • Cognitive agent (AI) • Webchat • Single sign-on • HCM system	• Webchat • Cognitive agent (AI) • HCM system • Case Management System • Auto-case creation and auto-routing of cases	• Webchat • Seamless webchat and case management integration • Integration between HCM and Case Management System with role-based access • Single-sign on • Knowledge base	• 'Drag and drop' webchat functionality • Attachments automatically added to the case information	• Integration between HCM and Case Management System with role-based access • Case Management System • Online Voice of Customer survey • Request history viewable on self-service • Push notifications/alerts

"I have a query about my remaining holiday allowance"

Additional actors and responsibilities (2/3)

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

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

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 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

Adam receives confirmation that his records have been adjusted accordingly.
He can double-check it himself via a link provided to him.

HR Operations Team

(Step 3) 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.

(Step 4) An HR Operations team representative reviews the email information provided by Adam on webchat. The information has been automatically attached to the case.

(Step 5) 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.

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"I have a query about my remaining holiday allowance"

Journey interactions, opportunities and enablers (3/3)

Opportunity for providing a great experience

QUERY INITIATION	QUERY COMMUNICATION	ESCALATION AND HUMAN TOUCH POINT	SUPPORTING EVIDENCE PROVIDED	COMPLETION AND SELF SERVE
▪ Accessible and clear guidance available on the HR Portal ▪ Online HR support with contact details clearly signposted ▪ Cognitive Agent (AI)	▪ Interaction between cognitive agent and employee ▪ Case creation and receipt notification	▪ Transition from cognitive agent to 'live' support ▪ Access to case information	▪ Submission of additional information ▪ Interaction between employee and HR Operations	▪ Query resolution ▪ Feedback mechanism available

Interactions

▪ Portal ▪ Cognitive agent	▪ Cognitive agent ▪ Portal ▪ Webchat	▪ Cognitive agent ▪ Webchat ▪ Portal ▪ HR Operations	▪ HR Operations	▪ Portal ▪ Webchat ▪ 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

🟡 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	⚪ Easy method of uploading necessary information within webchat window – 'drag and drop' ability to add attachments 🟤 Attached information automatically added to the case and viewable by HR Operations	🟡 Omnipresent feedback button available to access 🟡 Positive/negative sentiment tracking 🟤 Opportunity to provide feedback with few clicks

Metrics   **SLA***

Process-specific 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

Service metrics:
- ▪ 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

* Please refer to the Glossary for further information

Policies

- ▪ Attendance management

NB: Standard complaints procedure should be in place

"I am trying to understand my bonus and changes to my compensation"

User Journey Overview (1/3)

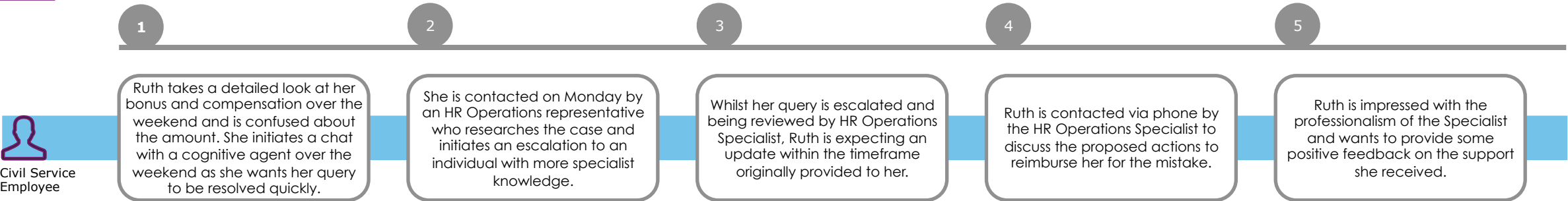*"Over the weekend I have been looking at my bonus that I recently received and I want to understand changes to my compensation."*

Ruth, Civil Service Employee

Roles covered within the journey

Employee | Line Manager | HR Operations

User Journey

Civil Service Employee

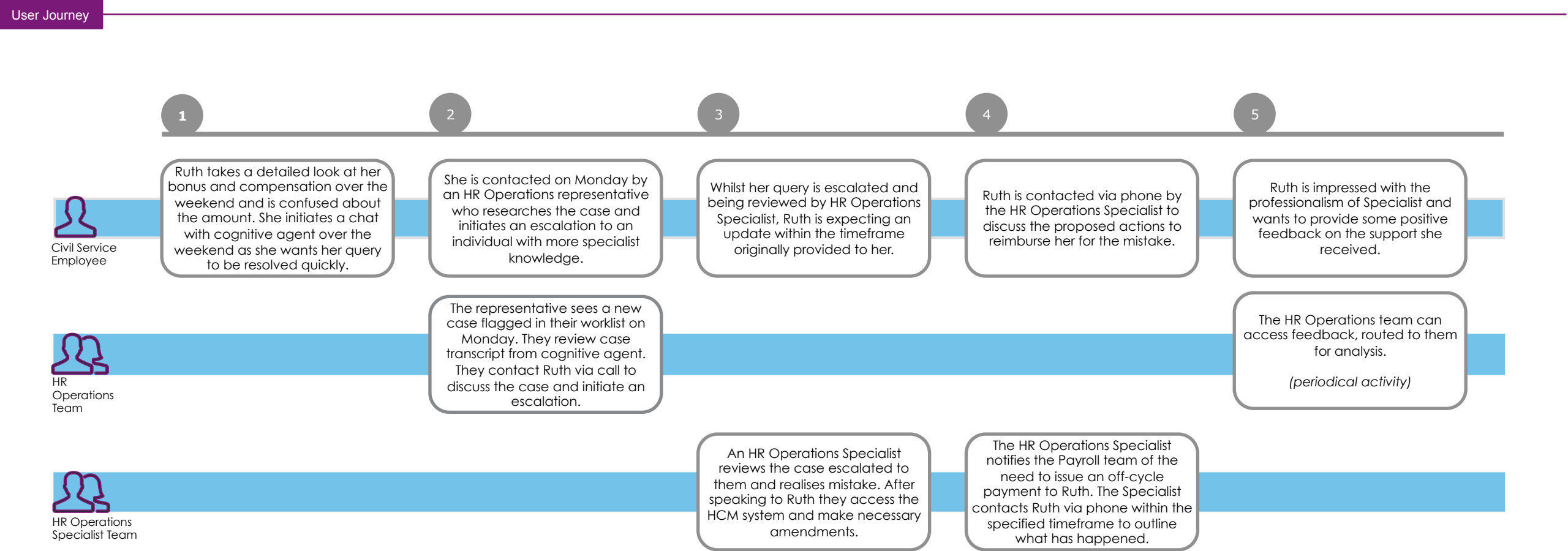| 1	2	3	4	5
Ruth takes a detailed look at her bonus and compensation over the weekend and is confused about the amount. She initiates a chat with a cognitive agent over the weekend as she wants her query to be resolved quickly.	She is contacted on Monday by an HR Operations representative who researches 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 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.

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.

Detail

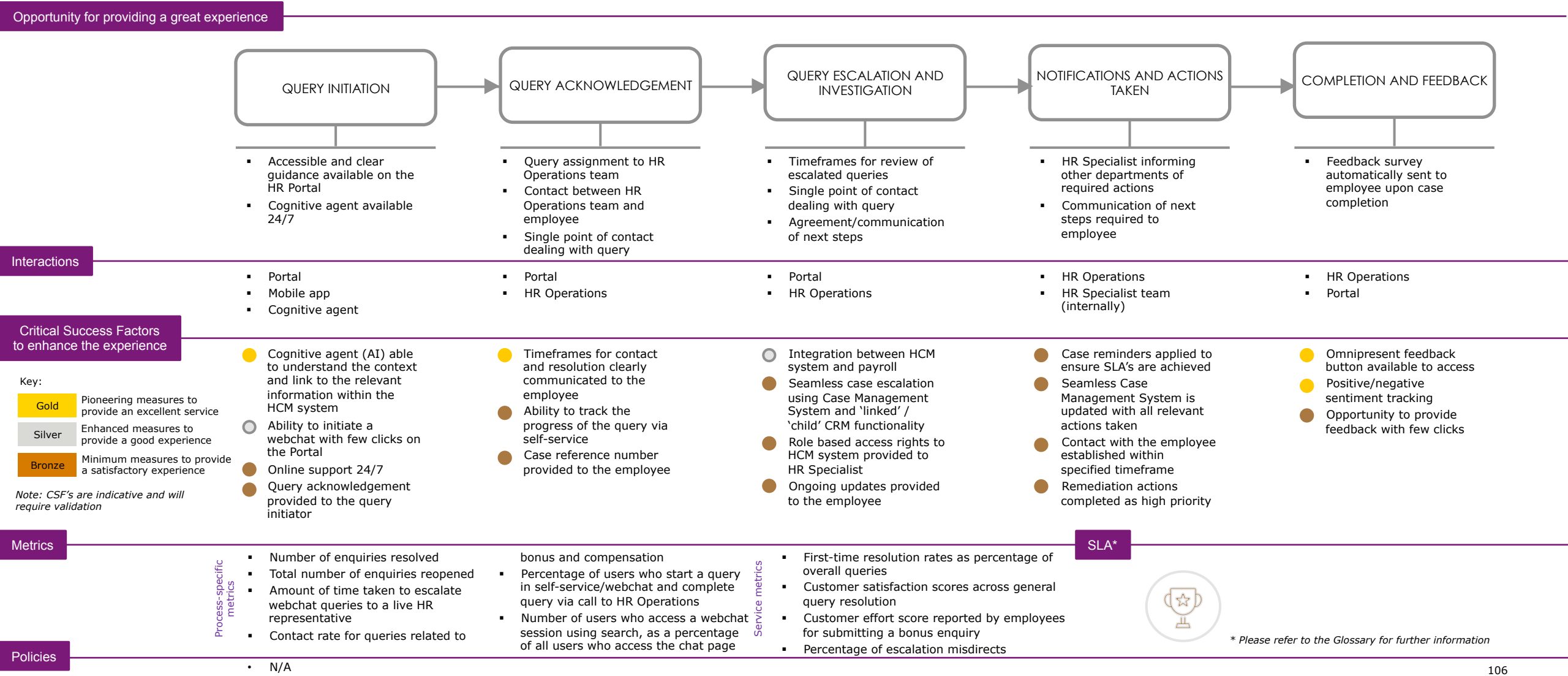| 1	2	3	4	5
Ruth is looking at details of her compensation and bonus over the weekend and she is quite confused as she thinks she may have received short pay. She wants to understand the detail as soon as possible. She accesses the HR Portal on her phone on Sunday. From here, she is able to initiate a webchat session with the cognitive agent (AI). 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 and has been sent to HR for action. Ruth is provided with a reference number for her case. The cognitive agent also asks for best time and preferred phone number to reach her on. Ruth can view the status of her query on her mobile.	The case is automatically routed to an HR Operations representative's worklist. The representative arrives on Monday and sees a new case flagging 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. The nature of the case means that the HR Operations representative needs to contact Ruth. Whilst the representative has access to knowledge and guidance, they determine during the call that the case needs to be escalated due to its complexity – they inform Ruth that a more specialist colleague from HR will be in touch within a specified timeframe. They escalate the query, after adding details, via the Case Management System (CMS) to the Specialist team for help with the resolution. Ruth can view the status of her query on self-service.	An HR Operations Specialist sees a new case alert in their worklist. They click on it and are taken directly to the case, where all the case details and history are visible. 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 team arrange a call with Ruth to confirm it and further discuss details of the case. Given that they have relevant access rights to correct the mistake themselves, they access the HCM system and make the amendment. The information feeds directly to Payroll which will update her salary for the next pay period.	The HR Operations Specialist notifies the Payroll team via case functionality of the need to issue an off-cycle payment to Ruth within her next pay period to correct the error, assigning priority as urgent. The HR Operations Specialist sets a case reminder to follow up with Payroll within a specified timeframe and check this has been done. Due to the impact on Ruth's pay, the Specialist contacts Ruth via phone within the specified timeframe to outline what happened and reassure her that the relevant actions are being taken to ensure her pay is accurate. All details of actions taken a being recorded by the HR Specialist within internal case notes for audit purposes. On resolution Ruth receives notification that the query has been closed.	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.

Feelings

1	2	3	4	5
Ruth is confused about her salary changes and wants to understand them as soon as possible.	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 expecting an update within the specified timeframe, she can view the status of her query in self-service.	Ruth appreciates the fact she is contacted by HR directly and is kept informed about actions that are being taken.	Ruth is impressed by how well her query was dealt with and wants to provide feedback.

Enablers

1	2	3	4	5
• Intuitive Portal optimised for mobile viewing • Contact channels optimised for mobile viewing • Cognitive agent (AI) • Case Management System • Single sign-on	• Knowledge base • Case Management System • Push notifications/alerts • Seamless case management and telephony integration • Auto-routing of cases	• Case Management System • Push notifications/alerts • Role-based HCM system access • Integration with payroll	• Case Management System • Push notifications/alerts • Seamless case management and telephony integration	• Case Management System • Single feedback tool • Dashboards/case analytics

"I am trying to understand my bonus and changes to my compensation"
Additional actors and responsibilities (2/3)

	1	2	3	4	5
Civil Service Employee	Ruth takes a detailed look at her bonus and compensation over the weekend and is confused about the amount. She initiates a chat with 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 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 Specialist and wants to provide some positive feedback on the support she received.
HR Operations Team		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.			The HR Operations team can access feedback, routed to them for analysis. *(periodical activity)*
HR Operations Specialist Team			An HR Operations Specialist reviews the case escalated to them and realises mistake. After speaking to Ruth they access the HCM system and make necessary amendments.	The HR Operations Specialist notifies the Payroll team of the need to issue an off-cycle payment to Ruth. The Specialist contacts Ruth via phone within the specified timeframe to outline what has happened.	

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"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

QUERY INITIATION	QUERY ACKNOWLEDGEMENT	QUERY ESCALATION AND INVESTIGATION	NOTIFICATIONS AND ACTIONS TAKEN	COMPLETION AND FEEDBACK
▪ Accessible and clear guidance available on the HR Portal ▪ Cognitive agent available 24/7	▪ Query assignment to HR Operations team ▪ Contact between HR Operations team and employee ▪ Single point of contact dealing with query	▪ Timeframes for review of escalated queries ▪ Single point of contact dealing with query ▪ Agreement/communication of next steps	▪ HR Specialist informing other departments of required actions ▪ Communication of next steps required to employee	▪ Feedback survey automatically sent to employee upon case completion

Interactions

▪ Portal ▪ Mobile app ▪ Cognitive agent	▪ Portal ▪ HR Operations	▪ Portal ▪ HR Operations	▪ HR Operations ▪ HR Specialist team (internally)	▪ HR Operations ▪ Portal

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

● (Gold) Cognitive agent (AI) able to understand the context and link to the relevant information within the HCM system ○ (Silver) Ability to initiate a webchat with few clicks on the Portal ● (Bronze) Online support 24/7 ● (Bronze) Query acknowledgement provided to the query initiator	● (Gold) Timeframes for contact and resolution clearly communicated to the employee ● (Bronze) Ability to track the progress of the query via self-service ● (Bronze) Case reference number provided to the employee	○ (Silver) Integration between HCM system and payroll ● (Bronze) Seamless case escalation using Case Management System and 'linked' / 'child' CRM functionality ● (Bronze) Role based access rights to HCM system provided to HR Specialist ● (Bronze) Ongoing updates provided to the employee	● (Bronze) Case reminders applied to ensure SLA's are achieved ● (Bronze) Seamless Case Management System is updated with all relevant actions taken ● (Bronze) Contact with the employee established within specified timeframe ● (Bronze) Remediation actions completed as high priority	● (Gold) Omnipresent feedback button available to access ● (Gold) Positive/negative sentiment tracking ● (Bronze) Opportunity to provide feedback with few clicks

Metrics

SLA*

Process-specific 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 bonus and compensation

Service metrics:
- ▪ 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
- ▪ 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

* Please refer to the Glossary for further information

Policies

- • N/A

NB: Standard complaints procedure should be in place