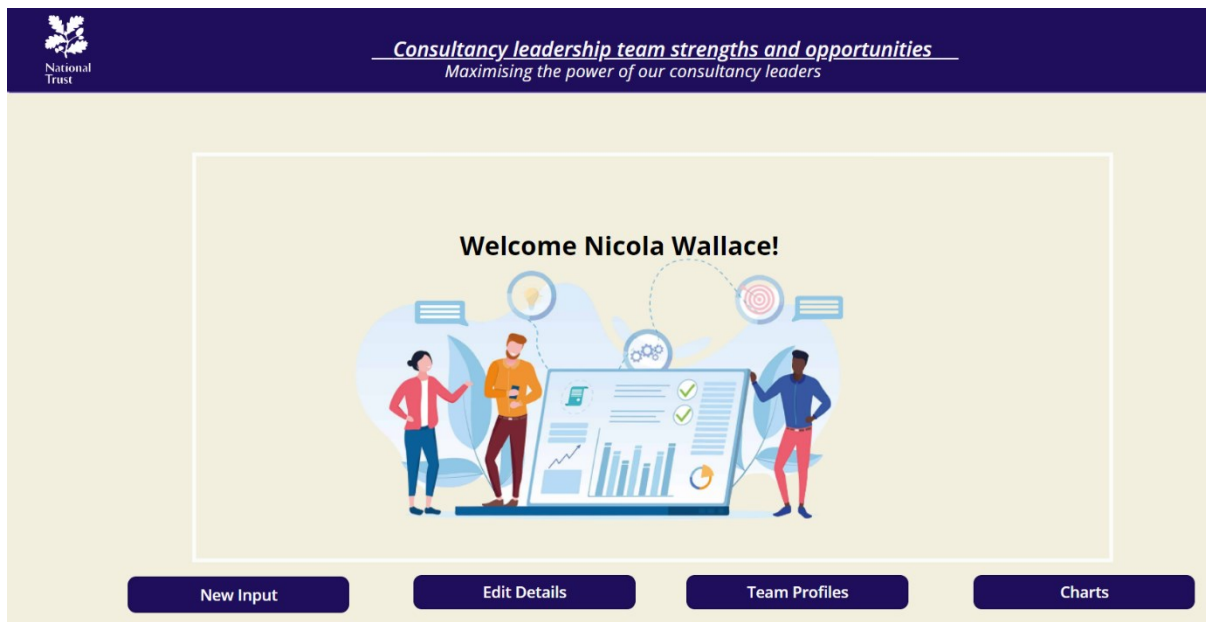


Consultancy Visibility and Capacity Toolkit User Guide



The purpose of the Consultancy Visibility and Capacity Toolkit is to provide the Consultancy leadership team an overview of their workloads and projects they are working on, whilst also giving them the opportunity to highlight their areas of expertise and areas they would like to grow in. This user guide will give a brief overview of the application and how to maximise the effectiveness of its use.

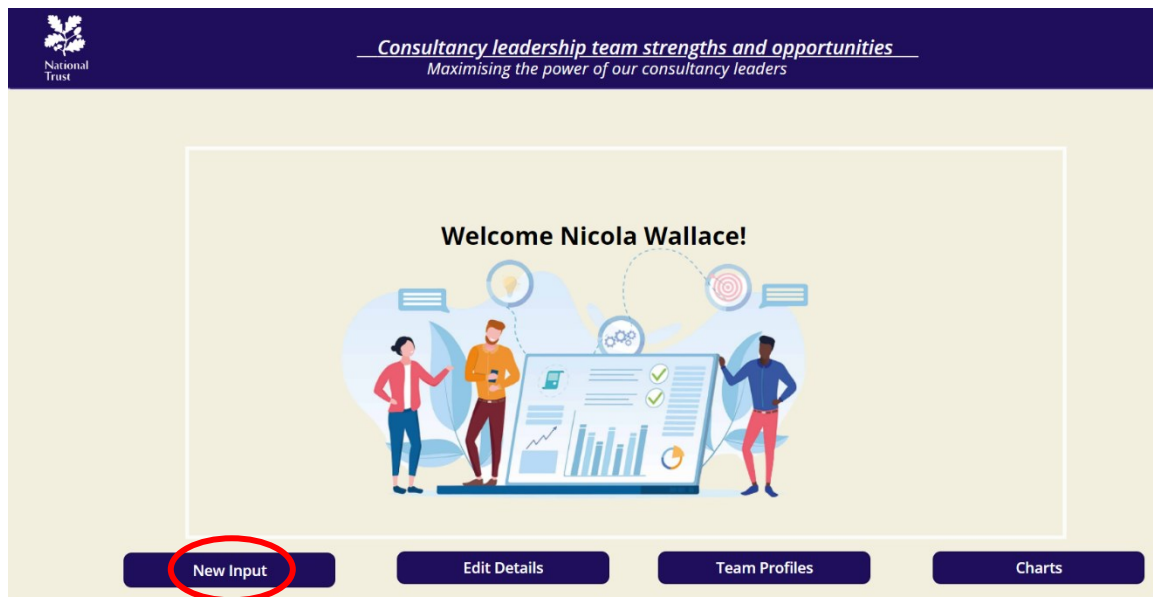
Basic functions



After clicking on a page, use the arrow in the top right corner to return to the homepage.

New Input

Navigate to the 'New Input' screen to add details of a new project you are working on, or to add your details if you are new to the Consultancy leadership team.




The initial screen is needed to add new project details. Once here, you can add the project name, type, your role within the project, and your job title. By pressing submit, this will save the project details to your profile on the app.

Please tick on the checkbox if you are new. ☐

| | |
|---|--|
| <p>* Name</p> <input type="text" value="Nicola Wallace"/> | <p>Designation</p> <input type="text" value="Please choose from dropdown options"/> |
| <p>Project Name</p> <input type="text" value="Please type the name of the project"/> | |
| <p>Project Type</p> <input type="text" value="Please choose from dropdown options"/> | <p>Role within project</p> <input type="text" value="Find items"/> |

Submit

If you are new and need to add details to your profile, check the box at the top of the screen.



Consultancy leadership team strengths and opportunities
Maximising the power of our consultancy leaders

Please tick on the checkbox if you are new. ☒

This will bring up a longer form to capture all details of your team, your areas of expertise, areas to grow, and other details.

Please tick on the checkbox if you are new. ☒

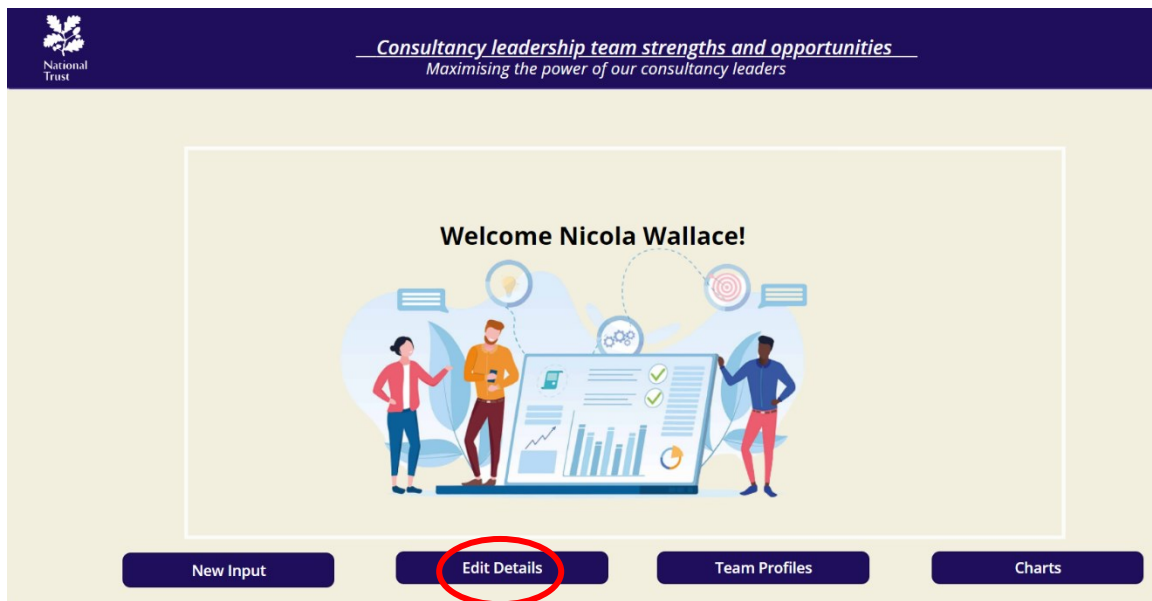
| | | |
|--|--|--|
| * Name Nicola Wallace | Designation Please choose from dropdown options | Overall Team Size Please enter a number |
| Number of Direct Reports Please enter a number | Number of Portfolios you support Please enter a number | Are you presently supporting a live investigation? Please choose from dropdown options |
| Have you supported a live investigation in the last 12 months? Please choose from dropdown options | Have you been involved in a live investigation in the last three years? Find items | Have you been involved in a sponsorship training? Find items |
| Regional Group Memberships Please list all your regional group memberships, including cluster areas, separating each by commas, for e.g. A,B,C | Are you a Regional Strategic or Delivery lead? Please choose from dropdown options | |

| | | |
|---|--|--|
| Project Name Please type the name of the project | Areas of expertise, skills and knowledge Please mention your areas of interest, skills and relevant knowledge here, separating each by commas. For eg: A,B,C | |
| Areas to develop or grow Please describe areas that you are interested in developing or being involved with, separating each by commas. For eg: A,B,C | National Group Memberships incl. Broker lead Please list all your national group memberships, including cluster areas, separating each by commas, for e.g. A,B,C | National Workstream Delivery Please list all national workstreams that you are involved with, separating each by commas, for e.g. A,B,C and keep blank if not involved in any. |
| Project Type Please choose from dropdown options | Role within project Find items | |

Submit

Again, pressing submit will add these details to your profile on the app. Click the return arrow in the top right corner to return to the main 'Welcome' page.

Edit Details



Navigate to the 'Edit Details' screen to update the details of the projects you are working on.

Choose the first project from the left-hand side and expand the 'Details' section by selecting the down arrow next to the title.

The screenshot shows the 'Edit Details' screen for Mahfuza Rifat, Business Services Co-ordinator. The top header is dark blue with the National Trust logo on the left, the user's name and title in the center, and a refresh icon on the right. Below the header, there is a red instruction: "To edit your details, please select the first entry". Below this, there is a search bar labeled "Search Project by name". To the left of the main content area, there is a list of projects. The first project is "PROJECT 1" with details: Project Type: Regional Project, Role within Project: Client, Status: Completed. The second project is "cvct" with details: Project Type: National Project, Role within Project: Project Manager, Status: Completed. To the right of the project list, there are two dark blue buttons: "Details" and "Project Information", both with down arrows. At the bottom center, there is a dark blue "Submit" button.

This will reveal all the information inputted against the original form. For all other projects, the 'Details' screen will contain no information. Therefore, to edit any details, always click on the first project on the left-hand side and update the information where required.

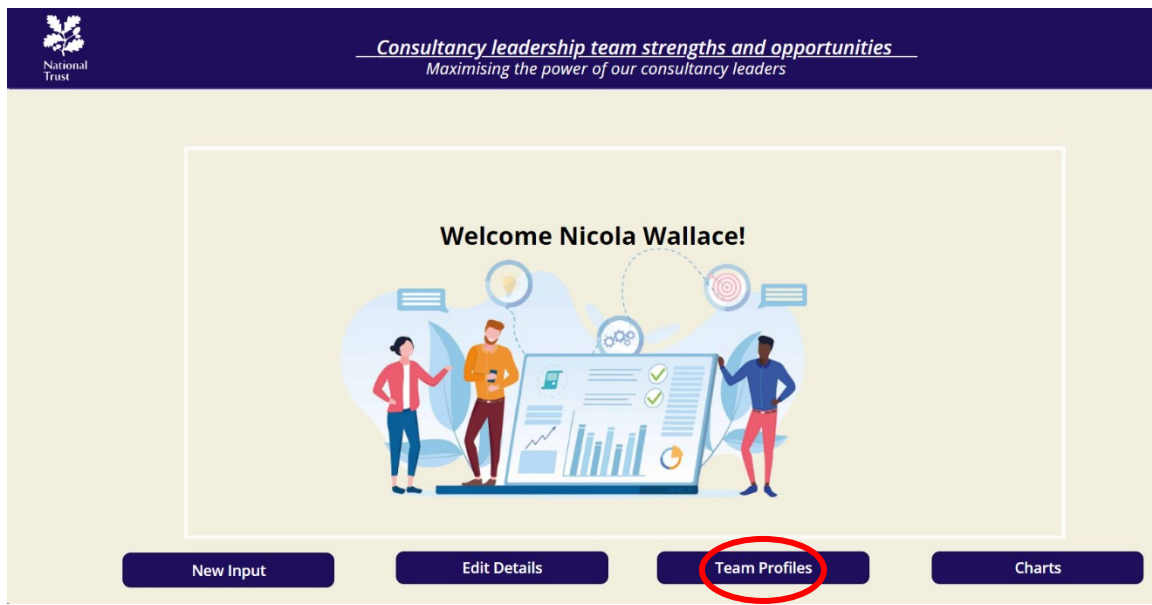
The screenshot shows the Mahfuza Rifat Business Services Co-ordinator interface. The header includes the National Trust logo and the user's name and title. A red message states: "To edit your details, please select the first entry". Below this is a search bar labeled "Search Project by name". The main content area is divided into two sections: "Details" and "Project Information". The "Details" section is currently active, showing a form for two projects. The first project, "PROJECT 1", has a status of "Completed" and is a "Regional Project" with the role of "Client". The second project, "cvct", has a status of "Completed" and is a "National Project" with the role of "Project Manager". The form includes various input fields for project details, such as "Areas of expertise, skills and knowledge", "Areas to develop or grow", "National Group Memberships incl. Broker lead", "Regional Group Memberships", "Overall Team Size", "Number of Direct Reports", "Number of Portfolios you support", "Are you presently supporting a live investigation?", "Have you supported a live investigation in the last 12 months?", "National Workstream Delivery", and "Are you a Regional Strategic or Delivery lead?". A "Submit" button is located at the bottom right of the form.

The 'Project Information' section will contain the information relating only to projects. On the left-hand side, you can click on each of the projects to update their statuses to 'Ongoing' or 'Completed' in the 'Project Information' section.

The screenshot shows the Mahfuza Rifat Business Services Co-ordinator interface, specifically the "Project Information" section. The header and search bar are the same as in the previous screenshot. The "Project Information" section is active, showing a form for two projects. The first project, "PROJECT 1", has a status of "Completed" and is a "Regional Project" with the role of "Client". The second project, "cvct", has a status of "Completed" and is a "National Project" with the role of "Project Manager". The form includes input fields for "Project Name", "Project Type", "Role within project", and "Status". A "Submit" button is located at the bottom right of the form.

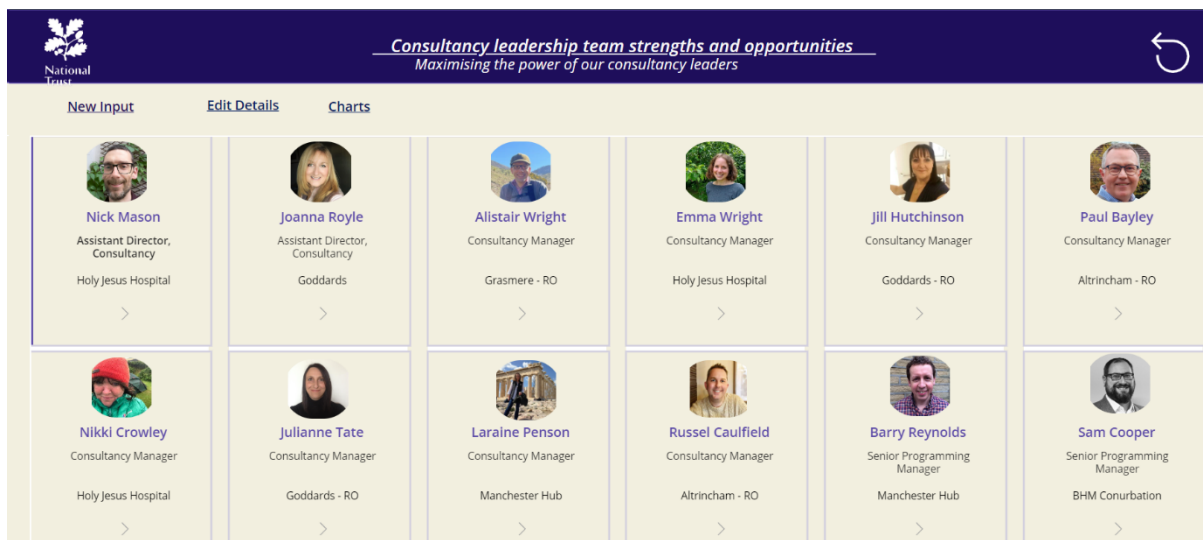
Click the return arrow in the top right corner to return to the main 'Welcome' page.

Team Profiles



Navigate to the 'Team Profiles' page to see all North Consultancy team members, their job titles, and their work location.

The other screens can also be navigated to using the buttons at the top of the screen ('New input', 'Charts' & 'Edit Details').



By clicking on a team member's profile, it will bring up the information that they inputted against the initial form, as well as information on projects they are working on and the statuses of these.

Nicholas Mason
Assistant Director, Consultancy

Project Name: Quarry Bank heat/hydro
Project Type: Regional Project
Role within Project: Sponsor
Status: Ongoing

Project Name: Urban Nature North
Project Type: Regional Project
Role within Project: Sponsor
Status: Ongoing

Project Name: Great North Bog West
Project Type: Regional Project
Role within Project: Sponsor
Status: Ongoing

Areas of expertise, skills and knowledge:
Climate Action, Nature Recovery, Collaboration and Partnership.

Areas to develop or grow:
National workstream formulation, external partnership development

Regional Group Memberships:

National Group Memberships incl. Broker lead:
Built Asset Leadership Group

Overall Team Size: 55

Number of Portfolios you support: 0

Number of Direct Reports: 5

Are you presently supporting a live investigation? No

Have you supported a live investigation in the last 12 months? No

National Delivery: National Specialist Craft Centre implementation sponsor

Workstream: Strategic

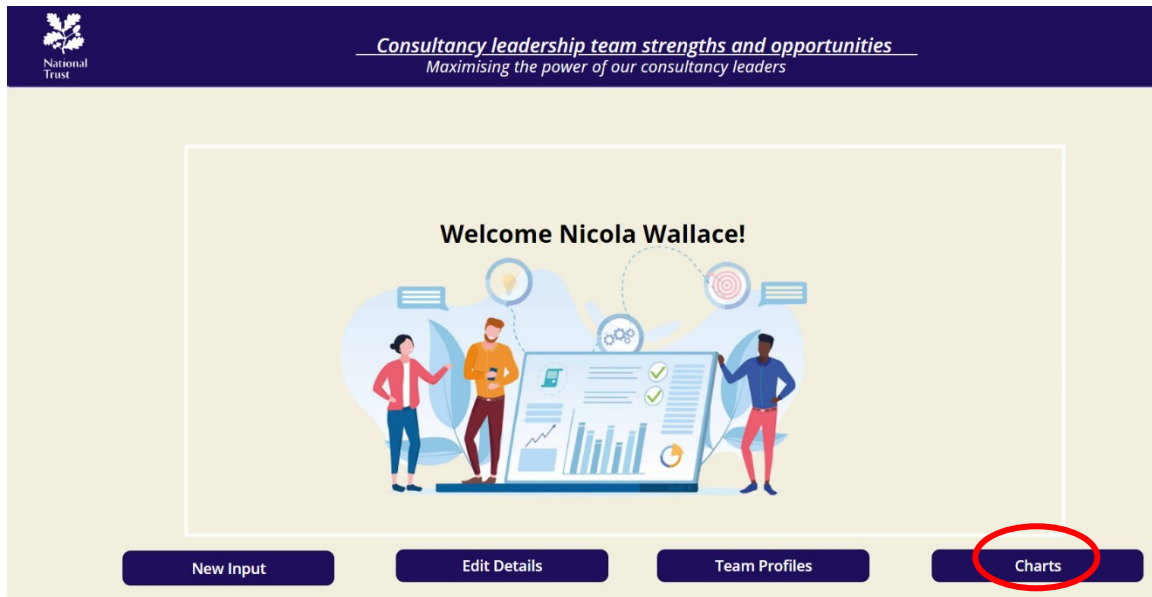
Are you a Regional Strategic or Delivery lead? Strategic

Name of strategy area for strategic lead: Climate Action

Have you been involved...

Click the return arrow in the top right corner to return to the main 'Welcome' page.

Charts



To see team data at a glance and in more detail, navigate to the 'Charts' page. This will take you to Power BI (a Power BI license is required to access these charts, a separate how to guide has been created with the information on request access). From here, you will be able to see the overall headlines for each member of the North Consultancy leadership team, as well as delve into more detail on specific queries.