

body { font-family: 'Arial Unicode'; font-size: 11pt; line-height: 1.55; color: #000000; } h1, h2, h3, h4 { font-weight: bold; color: #000000; } h1 { font-size: 20pt; margin-bottom: 8pt; } h2 { font-size: 15pt; margin-top: 14pt; } h3 { font-size: 12pt; margin-top: 12pt; } p { margin: 6pt 0; } ul, ol { margin: 0 0 8pt 18pt; } li { margin-bottom: 4pt; } table { width: 100%; border-collapse: collapse; margin: 8pt 0; } th, td { border: 1pt solid #000000; padding: 6pt; } th { font-weight: bold; } blockquote { border-left: 3pt solid #000000; padding-left: 8pt; margin: 8pt 0; }

Workflow Playbook – Allocate Delivery Resources

Goal: Convert a validated resource request into an assigned and onboarded delivery team within 5 business days, without triggering new hiring.

1. Quick Reference

- Trigger: Delivery Scenario or Delivery Team definition approved.
- Exit: Team assigned, onboarded, and locked in staffing board.
- Primary Owner: Staffing / Capacity Manager.
- Supporting Roles: Project/Product Lead (PPL), Tech Lead, HR Ops (for tooling access).
- Toolstack: Staffing board (Notion), Availability spreadsheet, Slack #staffing, HRIS, Onboarding checklist template.

2. Entry Checklist

Tick every item before opening State 0. - [] Validated request with roles, seniority, tech stack, allocation %. - [] Start window ≤ 2 weeks away (or explicit approval for longer). - [] Delivery documentation + project brief accessible. - [] PM + Tech Lead identified and available for reviews.

If any box unchecked → send request back to requester. No partial starts.

3. Roles & RACI

| Activity | PPL | Tech Lead | Staffing / Capacity | HR Ops |
|-------------------------------|-----|-----------|---------------------|--------|
| Validate request completeness | C | C | A/R | I |
| Assess availability | C | I | A/R | I |
| Validate technical fit | C | A/R | C | I |
| Communicate assignments | I | I | A/R | C |
| Onboard + accesses | A/R | C | C | R |
| Lock staffing board | I | I | A/R | C |

4. Execution Flow

State 0 – Availability Assessment (≤1 day)

Owner: Staffing / Capacity Manager

Checklist - [] Translate request into explicit criteria (role, seniority, skills, %FTE, duration, time zone). - [] Update bench sheet with latest availability + planned vacations. - [] Consult hiring pipeline (read-only) for near-start candidates. - [] Produce a single availability table (Available / Under Consideration / Not Available) with rationale.

Artifacts - Availability table (Google Sheet tab, versioned). - Decision note: "Available" or "Unavailable" with supporting evidence.

Go / No-Go - Go if \geq 90% of requested capacity can start within window. - No-Go if not; escalate to Delivery Owner with summary + options.

State 1 – Team Selection (\leq 2 days)

Owner: Staffing / Capacity Manager

Checklist - [] Draft concrete allocation (names, roles, % allocation, start date, overlap period, risk notes). - [] Run 30-min review with Tech Lead → confirm stack coverage, previous project fit, language/availability constraints. - [] Document validation outcome (Accepted / Rejected + reasons). - [] If rejected, iterate within 24h; after two rejections escalate to Delivery Owner.

Artifacts - Team proposal deck/table (slide or Notion) with per-role justification. - Tech validation log (date, reviewer, verdict).

Go / No-Go - Go only with explicit Tech Lead signoff captured in writing.

State 2 – Assignment Confirmation (\leq 2 days)

Owner: Staffing / Capacity Manager

Checklist - [] Send assignment pack to each developer (template includes project summary, role expectations, start date, cadence, escalation path). Capture written acknowledgment. - [] PPL runs onboarding call + grants accesses within 48h. - [] HR Ops updates HRIS + payroll allocations. - [] Staffing board + Availability sheet updated to "Locked" status. - [] Notify Finance if billing rates change.

Artifacts - Assignment communication log. - Onboarding checklist per dev (stored in project workspace). - Updated staffing board screenshot or export.

Exit Criteria - 100% of roles acknowledged and onboarded. - Staffing board shows LOCKED status with workflow ID.

5. Operational Controls

- SLA: 5 business days end-to-end; daily reminder until closed.
- KPIs:
- Fill rate (% workflows ending with full staffing) \geq 95%.
- Cycle time (State 0 → State 2) median \leq 4 days.
- Escalations: If availability gap >2 weeks, inform Delivery Owner + Sales to renegotiate scenario.

6. Templates & Links

- Assignment email template.
- Onboarding checklist template.
- Staffing board URL.
- Availability sheet URL.

7. Post-Completion

- Schedule a 2-week staffing health check with PPL.
- Feed learnings (capacity gaps, repeated skills shortages) to Recruitment Planning deck.