

body { font-family: 'ArialUnicode'; font-size: 11pt; line-height: 1.35; } h1 { color: #0B3558; font-size: 20pt; margin-bottom: 6pt; } h2 { color: #0B3558; font-size: 14pt; margin-top: 12pt; } h3 { color: #0B3558; font-size: 12pt; margin-top: 10pt; } p { margin: 4pt 0; } ul { margin: 0 0 6pt 18pt; } ol { margin: 0 0 6pt 20pt; } table { width: 100%; border-collapse: collapse; margin-bottom: 8pt; } th { background: #F0F4F8; font-weight: bold; } th, td { border: 0.5pt solid #D3DADF; padding: 4pt; } blockquote { border-left: 3pt solid #0B3558; padding-left: 6pt; color: #333; }

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

## State 1 – Team Selection (≤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.

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## State 2 – Assignment Confirmation (≤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.