New Dynamics

HR operations

Human resources management: the operating guide

Map the employee lifecycle, clarify HR ownership and build a manageable service plan.

Practical guidance · Worked examples · Printable worksheet

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Published 15 September 2026

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Inside this guide

Read in order for the full approach, or use the linked contents to find a section. The final worksheet gives you space to record decisions and next steps.

Map the employee lifecycle, clarify HR ownership and build a manageable service plan. This practical guide to human resources management brings together a step-by-step approach, illustrative examples, a reusable worksheet and answers to common questions. Start with the section closest to your current challenge, then use the working session to turn the guidance into a clear next action.

Build HR around the employee journey

Human resources management connects the organisation's people needs with the processes employees experience: joining, working, developing, changing roles and leaving. Start by mapping those moments. A policy inventory alone will not reveal where a new starter has no equipment or a manager cannot find help.

For each stage, describe the employee's question, the manager's responsibility and the HR service required. Include contractors or other worker groups only where the process actually applies to them. Employment arrangements and local requirements differ.

Clarify who owns each decision

Separate service delivery from approval. HR may prepare a role-change letter while a business leader approves the budget and a local specialist checks the terms. Write down the decision owner, the person doing the work and the people who need to be informed.

Give employees a clear entry point for routine requests and a separate confidential route for sensitive issues. Publish expected response windows that the team can sustain. Explain how urgent situations are triaged rather than placing every request in the same queue.

Keep records useful and controlled

Identify the authoritative system for identity, role, reporting line and employment status. Repeated copying across spreadsheets creates conflicting versions. Record which team can change a field, how changes are checked and where errors are reported.

Limit access according to purpose. Payroll information, health information and investigation records should not become general manager notes. Agree retention and deletion with the relevant specialists. The ICO employment information guidance is a UK reference for evaluating worker-information practices.

Worked example: role changes

Illustrative scenario: an employee moves teams but their reporting line, system access and review owner update on different dates. HR creates a single change request containing the effective date, incoming manager and approved role details.

The HR operations owner coordinates payroll, IT and the two managers. Each confirms completion against the same request. A check after the move verifies access and ownership of ongoing goals. The control is a coordinated event with clear responsibility, not another standalone spreadsheet.

Service-design worksheet

- **Employee moment:** What is the person trying to do?
- **Request route:** Where do they begin, and is it accessible?
- **Required information:** What is necessary to complete the request?
- **Decision owner:** Who can approve, reject or resolve an exception?
- **Delivery steps:** Which teams must act, in what order?
- **Completion evidence:** What confirms the employee’s need was met?
- **Escalation:** Who handles delays or sensitive issues?

Test the worksheet with one recent case. Follow it from request to resolution and note where work waits for information or an unclear decision.

Choose a small improvement backlog

Prioritise recurring problems by employee impact, frequency and effort. Begin with a process that has an owner and a measurable problem, such as incomplete starter access or repeated payroll corrections. Measure elapsed time and rework alongside satisfaction.

Review the backlog monthly with managers and service partners. Retire forms and duplicate approvals when they no longer serve a purpose. Use the HRIS guide when tooling is the constraint, after the responsibilities and data definitions are clear.

Put the guide into practice

Set aside a working session with the people who own this process and one or two people who experience it. Use a fictional or appropriately authorised case, so the discussion can be specific without sharing unnecessary personal information. The purpose is to leave with a usable decision or document, not just agreement that the topic matters.

Prepare the case

Select one employee event that crosses several teams, such as a transfer or return from leave. Map the request, the decisions and the systems that change. Ask the employee-facing team where people become confused and the delivery teams where information is missing. Include waiting time as well as active work.

Write the starting assumptions down before discussing solutions. If the group disagrees on what happened, identify the information needed to resolve that difference rather than building a plan on an untested story.

Work through the decision

Assign one owner for coordinating the event and distinguish that role from the people who approve individual decisions. Identify which record is authoritative for the effective date and which teams need confirmation. Remove duplicated data entry where it has no clear purpose, but retain checks that protect payroll accuracy or access.

Ask each participant to explain the proposed decision in their own words. Differences in interpretation often reveal an unclear criterion, a missing responsibility or an instruction that will be difficult to follow.

Test an exception

Introduce an incomplete request or a change after approval. Decide who contacts the employee, who can amend the record and which downstream teams need an update. Check that the process can correct a mistake without creating two competing versions or asking the employee to repeat sensitive information to several people.

Record what changes in this situation and what remains the same. An exception should lead to a clear next step, with an owner, rather than an informal workaround that nobody can explain later.

Agree the handoff

Define a completion message that tells the employee what happened and where to raise a remaining issue. Confirm that internal task completion corresponds to the employee’s actual need. A ticket should not close merely because it was forwarded to another team whose response is still outstanding.

Finish by confirming the owner, the next action and the date when the result will be reviewed. Give the person receiving the work enough context to continue without repeating the whole discussion.

Frequently asked questions

What should a small HR team prioritise first?

Begin with reliable core services and clear routes for help. Hiring administration, accurate records, payroll handoffs, essential policies and support for managers often need attention before a complex new programme. Prioritise using the organisation’s actual risks and employee pain points. A simple service with an accountable owner is more useful than an ambitious model nobody has capacity to operate.

How do HR policies and processes differ?

A policy sets principles, scope and rules. A process explains how a particular task moves from request to completion. Employees often need both: the policy explains the relevant requirement, while the process tells them what to do next. Maintain a clear link between them and assign owners so a policy change is reflected in forms, systems and manager instructions.

Which HR service measures are useful?

Use measures that reveal employee outcomes and delivery problems: elapsed time, repeated corrections, unresolved requests and whether people received a usable answer. Volume and closure counts can help with workload planning but may reward premature closure if used alone. Define the measure consistently, explain exclusions and review examples behind the numbers before deciding what to change.

Review the first cycle

Sample a completed request from the employee’s perspective. Check whether they knew where to begin, received consistent information and understood the outcome. Review whether any team carried hidden manual work that the formal process omitted. Update the service map and ownership record when the actual workflow changes.

Keep a brief record of what was tried, what participants found useful and what needs to change. Compare the result with the original problem rather than judging success only by completion. If the process created extra work without improving clarity, quality or support, simplify it and test again. Share the agreed change with the people who will use it, and name the person responsible for keeping the guidance current.

About New Dynamics

New Dynamics connects goals, feedback, recognition and reviews around the way organisations work. This guide is published by the New Dynamics Editorial Team as part of our practical library for HR leaders, managers and People teams.

Use the examples and worksheets to structure your own discussions and adapt them to your organisation. Illustrative scenarios are not customer case studies. Policy and employment guidance needs appropriate local review before adoption.

For questions about this guide, corrections or a conversation about your performance management process, email contact@new-dynamics.com. Explore the complete guide library for related resources.

Your working worksheet

Use the prompts from this guide to prepare one real conversation or decision. Keep personal or sensitive information in your organisation’s approved records. This page is for your own working notes.

Employee moment: What is the person trying to do?

Request route: Where do they begin, and is it accessible?

Required information: What is necessary to complete the request?

Decision owner: Who can approve, reject or resolve an exception?

Delivery steps: Which teams must act, in what order?

Completion evidence: What confirms the employee’s need was met?

Escalation: Who handles delays or sensitive issues?

Discuss your next step with New Dynamics: contact@new-dynamics.com