



New Dynamics

Policies and practice

Redundancy and workforce change: a planning guide

Prepare a structured workforce-change process with alternatives, consultation planning and employee support.

Practical guidance · Worked examples · Printable worksheet

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Inside this guide

Start with the organisational need	3
Explore alternatives and preserve a real decision process	3
Design communications and support	3
Worked example: overlapping service roles	4
Planning and assurance worksheet	4
Close the process with care	4
Put the guide into practice	4
Frequently asked questions	6
Review the first cycle	6
About New Dynamics	6
Your working worksheet	8

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.

Prepare a structured workforce-change process with alternatives, consultation planning and employee support. This practical guide to redundancy planning 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.

Start with the organisational need

Workforce change can affect livelihoods and creates substantial legal and practical obligations. This guide is a planning aid for HR teams, not an executable redundancy policy. Obtain jurisdiction-specific advice before starting a process or communicating decisions.

Describe the business problem and the roles or work affected. Separate a reduced need for a role from concerns about an individual's performance. For UK context, [Acas redundancy guidance](#) explains that employers should consider alternatives and must consult workers. The applicable process depends on the circumstances.

Explore alternatives and preserve a real decision process

Record options that could address the problem, such as redeployment, changes to how work is organised or other locally appropriate measures. Assess feasibility, employee impact and the approvals required. Do not present consultation as meaningful if the outcome has already been irreversibly decided.

Work with advisers to establish relevant obligations, representation arrangements, timing and documentation. Avoid copying thresholds, notice periods or selection rules from another country or an old policy. The planning record should identify what is confirmed and what still needs advice.

Design communications and support

Prepare clear information about the proposal, the reasons and the process for feedback. Train managers to explain what is known without promising outcomes or speculating about individuals. Provide accessible communication and an appropriate route for personal questions.

Keep sensitive information controlled. Plan support for affected employees and for the remaining team. Workload, customer commitments and handover responsibilities need attention alongside the formal employment process.

Worked example: overlapping service roles

Illustrative scenario: two service teams merge and leaders identify overlapping work. Before making individual decisions, the organisation documents the proposed operating model, considers alternatives and obtains local advice on the required process.

Employees receive information through the agreed channels and can raise alternatives. Decision makers record what was considered and why. If a proposal changes, communications and planning records change with it. This example illustrates governance; it does not prescribe selection criteria or a legally sufficient process.

Planning and assurance worksheet

- **Business need:** What work is changing and what evidence supports the proposal?
- **Alternatives:** Which options have been considered and with what conclusion?
- **Local advice:** What obligations, protections and consultation steps apply?
- **Decision ownership:** Who may approve proposals and final decisions?
- **Communication:** What will people be told, by whom and through which accessible route?
- **Support:** What practical help and individual contact will be available?
- **Operational continuity:** How will remaining work and handovers be managed?

Treat this as a coordination record for the authorised team. Do not put personal cases into a widely shared planning document.

Close the process with care

Follow the approved procedure for decisions, written information, applicable payments and review or appeal routes. Verify payroll and access changes against the confirmed arrangements; timing matters and should not be improvised.

After the change, check workloads, role clarity and unanswered questions. Review what the organisation learned about planning and communication without exposing personal information. If the change does not resolve the underlying work problem, identify that openly rather than assuming that a smaller team is automatically a more effective one.

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

Use a fictional business proposal and describe the work that would change. Separate the business rationale from any assumptions about particular employees. List the information and local advice required before moving forward. The workshop should clarify preparation, not simulate a legally sufficient consultation or decide individual outcomes.

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

Compare realistic alternatives and document the reasoning. Ask what evidence supports the proposed operating model and what employees or representatives may be able to contribute. Identify which decisions remain open. Do not turn the exercise into a justification for a conclusion that leaders have already made irreversible.

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 a credible alternative raised during the process or a material change in the business assumptions. Decide who reviews it and how the proposal and communications are updated. Also test a question that a manager cannot answer. The correct route should be to obtain advice, not improvise a promise.

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

Prepare an ownership map for communication, individual support, operational continuity and specialist review. Confirm who maintains the decision record and who checks downstream payroll or access actions against the approved arrangements. Sensitive personal information should stay within the authorised process rather than the general project plan.

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

Can one redundancy policy be used everywhere?

A common planning framework can help coordination, but legal requirements and employee protections differ by jurisdiction and circumstances. Consultation, representation, selection, notice and payments need current local review. Do not copy a process from another location or rely on an old threshold. This guide helps organise questions and responsibilities; it does not establish that a proposed process is legally sufficient.

How should managers answer questions before decisions are final?

Explain what is known, what remains a proposal and where questions will be considered. Avoid speculation about individuals or promises outside the approved process. Give people an accessible route to personal advice and support. Managers should receive a clear briefing and a way to obtain answers they do not know, rather than being expected to improvise during a difficult conversation.

What should happen after the formal process ends?

Confirm that agreed communications, payments, records, access changes and support steps are completed through the approved arrangements. Then review the remaining team's workload, role clarity and unresolved concerns. Operational problems can persist after headcount changes. Learn from the planning and communication process without exposing personal cases or treating the end of formal steps as proof that the organisation is settled.

Review the first cycle

Review whether the business problem, alternatives and decisions were documented through the appropriate process. Check the quality of communication and support as well as administrative completion. Use specialist advice to address unresolved obligations, and assess whether the new operating model can deliver the remaining work sustainably.

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.

Business need: What work is changing and what evidence supports the proposal?

Alternatives: Which options have been considered and with what conclusion?

Local advice: What obligations, protections and consultation steps apply?

Decision ownership: Who may approve proposals and final decisions?

Communication: What will people be told, by whom and through which accessible route?

Support: What practical help and individual contact will be available?

Operational continuity: How will remaining work and handovers be managed?

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