Hiring Operating Model Redesign:

From Fragmented Approvals to a Governed Workforce Planning System

Business Transformation Case Study

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Publication note

This document presents an anonymised account of an implemented transformation. Organisational names and identifying details have been generalised. Outcomes reported are based on post-implementation operational tracking and stakeholder validation. Recommended governance measures are labelled separately from reported results.

Case study at a glance

Workflow	Hiring approvals and workforce planning
Context	High-volume, multi-business-unit recruitment function
Primary constraint	No enforceable operating model or shared system of record
Key risk	Duplicate candidate mappings and offers for the same requisition
Implementation	Three months to build; two to three months adoption
Measured outcome	40% reduction in manual reconciliation effort; no duplicate offer errors observed after implementation (one-active-candidate constraint)
Strategic extension	Workforce planning and hiring analytics layer
Framework application	Approval and exception workflow — distinct from the MBR recurring reporting assessment
Evidence status	Implemented transformation. Outcomes are post-implementation results. Recommended measures are labelled separately.

My role

I led the operating-model assessment for this engagement — diagnosing the structural failures, defining the design principles, and translating business requirements into system specifications, approval logic, data requirements, and governance controls.

My work spanned the full transformation lifecycle: stakeholder alignment across hiring managers, HR business partners, business heads, finance, and technology teams; definition of the future-state operating model; support for system development; and adoption management after implementation, including working through the resistance that emerged when the structured approval process replaced email-based workflows.

Why this matters

> *The transformation did not digitise an existing process. It made the intended process enforceable for the first time. That required defining what the rules should be before any system was built to enforce them.*

Executive Summary

A high-volume hiring function managing hundreds of active requisitions across multiple business units relied on approval chains in email and Slack, with candidate tracking distributed across informal records. The absence of a shared system of record and enforceable role-to-candidate controls resulted in a recurring pattern of duplicate candidate mappings and offers, unplanned headcount commitments across multiple teams, and substantial manual reconciliation effort.

The transformation began with operating-model redesign rather than technology selection. Approval stages and owners were formalised, finance confirmation became a structured governance gate, requisitions were mapped to team headcount targets, and system constraints were defined to prevent duplicate active candidate mappings. A system was then built within the existing technology environment to enforce and sustain the model.

Implementation took three months, followed by two to three months of adoption work. Manual reconciliation effort fell by 40%. No duplicate offer errors were observed after implementation. A subsequent workforce-planning layer converted operational records into an evidence base for hiring decisions.

1. Context and business problem

The function managed recruitment across hundreds of concurrent requisitions spanning multiple levels, roles, and locations. Hiring managers, HR business partners, business heads, and finance teams were all stakeholders in every requisition. The volume and coordination demands were significant — but the operating model supporting that coordination had never been deliberately designed.

The process operated entirely on email and Slack. There was no shared system of record, no enforced approval sequence, and no mechanism to prevent two recruiters from independently advancing different candidates for the same role. The consequences were not inefficiency alone. When the same role was offered to multiple candidates simultaneously — because no system prevented it — teams became committed to unplanned headcount and had to find internal placements for candidates whose intended positions were already filled. This happened repeatedly, across multiple teams.

> **The diagnostic question**
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> *The failures were not caused by bad data, wrong tools, or inadequate staff. They were caused by an operating model that had no enforcement mechanisms. The rules — sequential approval, one active candidate per role, finance confirmation before sourcing — existed as shared expectations. They had never been designed as constraints.*

2. How the process worked before the transformation

Evidence basis: direct operational experience.

Stage	Before state	System or control gap
Requisition initiation	Hiring manager and HR discussed role and target informally	No structured record; alignment existed only in conversation
Approval chain	Sequential email forwarding: hiring manager, then business head, then finance	No shared visibility; status unknown without being on the email thread
Finance confirmation	Free-text email noting budget availability	No mandatory fields; no audit trail; inconsistently documented
Sourcing	HR began sourcing after informal confirmation of approvals	No system-enforced readiness gate; sourcing could begin without full approval
Candidate management	Candidate details tracked in email threads and individual spreadsheets	No authoritative candidate-to-requisition mapping; duplicate advancement possible
Offer and onboarding	Offer letters sent on selection; acceptance tracked informally	No system preventing simultaneous offers for the same role

The absence of a shared system of record meant that each participant in the approval chain saw only their own slice of the process. A recruiter advancing a candidate had no visibility into whether another recruiter was doing the same. A finance approver had no structured record of what they had confirmed. A business head could not see the status of a requisition without requesting an update by email.

3. Diagnosis

Evidence basis: direct operational experience.

The diagnostic assessment examined the workflow across six dimensions. The finding was consistent across all of them: this was a governance design problem, not a technology gap.

Process: the approval chain existed as a shared understanding, not an enforced sequence. Each approver operated in isolation, with no authoritative view of the requisition's status or history. The chain stalled when an email was missed and nobody knew it had stalled.

Data: candidate information was distributed across individual email threads and informal spreadsheets. There was no single record of which candidates were in process for which roles — the direct cause of duplicate offer errors. Two recruiters advancing different candidates for the same role had no mechanism to detect the conflict.

Technology: the existing tool stack — email, Slack, spreadsheets — was capable of supporting informal coordination but incapable of enforcing constraints. Email cannot enforce sequential approval. A shared spreadsheet cannot prevent two people from creating conflicting states. The constraint was not the technology itself; it was the absence of a system designed around the operating model.

People: hundreds of stakeholders across multiple functions and levels. When approvals were delayed, the reason was invisible — a missed email, a stakeholder unavailable, a chain that had stalled without anyone knowing. Coordination overhead sat entirely with the recruitment team.

Governance: there was no audit trail. Approval decisions existed in email threads that were not systematically archived or accessible to all parties. Finance confirmation was undocumented beyond the email itself. If a requisition's approval history was disputed, there was no authoritative record to reference.

Capacity and organisational context: the business consequence extended beyond coordination overhead. When multiple offers were extended for the same role, the function was committed to candidates who could not be placed as intended. Teams absorbed unplanned headcount and carried the cost — in time, budget, and team capacity — of finding internal placements. The trigger for this project was that pattern of concrete harm, not a desire to modernise.

> **The central finding**
> *The operating model had no enforcement mechanisms. The correct intervention was to define what the rules needed to be — as designed constraints, not shared expectations — and then build a system to enforce them.*

4. Operating model redesign

The transformation began with the operating model, not the system. Before any technology decisions were made, four design principles were established. These principles defined what needed to be true — structurally, not just procedurally — before any system was built to enforce them.

> **Transformation thesis**
> *The transformation did not digitise an existing process. It made the intended process enforceable for the first time.*

One requisition, one active candidate mapping

The core enforcement mechanism. Each requisition receives a unique system identifier at creation. Only one candidate can be actively mapped to it at any point in the process. Multiple candidates may be evaluated, but only one can progress to offer stage for a given requisition. If that candidate declines, the system records the outcome and permits a new candidate to be mapped — the full history preserved. The requisition closes only when a candidate joins. This architectural constraint is what prevented the duplicate offer pattern: the system cannot produce a state where two candidates are simultaneously mapped to the same open requisition.

Parallel visibility, sequential approval

All stakeholders gain visibility into a requisition's existence and status at the point of creation — not when it reaches their step in the chain. Approval remains sequential: each approver's action is required before the next step unlocks. No one is surprised by a requisition's existence, and the governance chain remains intact.

Structured finance confirmation

Finance confirmation converted from a free-text email to a structured approval gate with required fields: budget confirmation, headcount code, and approval timestamp. Finance approval cannot be completed without these fields. The confirmation becomes part of the requisition's permanent record.

Requisitions mapped to team headcount targets

Each requisition is mapped at creation to the team and level being hired for, and automatically counted against that team's approved headcount target. Any scope change triggers a new approval chain — changes cannot bypass the governance model that governed the original requisition.

5. Intervention assessment

Evidence basis: implemented transformation.

Component	Failure mode	Design response	Decision	Control created
Requisition creation	No required fields; informal verbal alignment	Mandatory fields at creation: role, level, location, team, budget code	Standardise	Complete record before approval begins
Approval chain	Status visible only through forwarded email; chain stalled silently	System-enforced sequential stages with automated notifications and shared visibility	Redesign + Automate	Named owner, status, timestamp at every stage
Finance confirmation	Free-text email; inconsistently recorded; no audit trail	Required finance fields: budget confirmation, headcount code, timestamp	Standardise	Structured budget and headcount gate; permanently recorded
Candidate tracking	No shared record; two recruiters could independently advance different candidates	One active candidate mapping per requisition; full lifecycle recorded through offer, acceptance, and join	Redesign + Automate	Duplicate offer prevention; complete candidate history
Headcount reconciliation	Manual consolidation across spreadsheets; error-prone and time-consuming	Requisition-to-target mapping at creation; running approved-versus-actual count	Automate	Real-time headcount position without manual effort
Approval history and audit	Existed only in email threads; not systematically accessible	Full approval chain recorded in the system as a by-product of normal operation	Automate	Audit trail without separate compliance activity
Informal email coordination	Compensating mechanism for absent system of record	Removed once the system provides the visibility it was substituting for	Remove	Effort redirected; no replacement needed

6. Implementation and adoption

The system was built inside the organisation's existing technology infrastructure over three months. Development was preceded by the operating model design: the rules, enforcement mechanisms, and outcomes were defined before a line of code was written. My role was to sit between business stakeholders and the technology team — translating operating model requirements into system specifications, and translating technical constraints back into design decisions.

A further two to three months addressed adoption. The most significant challenge was predictable: stakeholders who had operated informally found the structured approach more cumbersome than email. The specific objection was that email approval was faster — a requisition could be sent and responded to without the overhead of creating a system record with all required fields.

The response was not to make the system more convenient. It was to make the cost of the informal model visible. Email was faster only because it skipped the fields that prevented duplicate offers, lost approvals, and untracked headcount. The overhead was not bureaucracy — it was the enforcement of rules the organisation already had but had never operationalised. Once that framing was established, adoption followed a more straightforward path.

7. Phase two — workforce planning layer

Once the operational system was stable, a second phase extended its capability from transaction management to planning support. The same data generated operationally became the foundation for workforce planning decisions.

- Historical hiring trends accessible by designation, level, team, and location — enabling analysis of performance against targets across planning cycles
- Approved headcount versus actual hires tracked in a single view by business unit and level, replacing manual reconciliation across multiple spreadsheets
- Wage data comparable across levels, regions, and business functions — supporting budget planning and compensation analysis
- An evidence base for planning conversations: a team unable to fill a role in a previous cycle could use historical data to support retaining that headcount in the current plan

The planning layer was only meaningful because the operational layer had already enforced data quality: every requisition recorded, every candidate mapped, every approval documented. Planning analytics built on fragmented source data inherits the fragmentation. The sequence — fix the operating model, enforce it with a system, then build analytics on the resulting data — was not arbitrary. It was the prerequisite structure that made the planning layer trustworthy.

> **The 40% reduction in manual reconciliation effort was not a consequence of better analytics**
>
> *It was a consequence of the operational model generating clean, consistent data as a by-product of doing its primary job correctly.*

8. Outcomes

Evidence basis: post-implementation operational tracking and stakeholder validation.

Area	Before	After
Duplicate candidate mappings and offers	Recurring pattern across multiple teams	No duplicate offer errors observed after implementation; the system's one-active-candidate constraint prevents simultaneous active mappings
Approval chain visibility	Visible only to parties on the email thread	All stakeholders view requisition status from creation; full approval history auditable
Finance confirmation quality	Free-text email; inconsistently documented	Structured gate with required fields; permanently recorded against the requisition
Manual reconciliation effort	Significant — headcount tracking required consolidating across multiple informal sources	Reduced by 40%; system generates authoritative count automatically
Workforce planning evidence base	Absent — planning conversations relied on memory and informal records	Historical data accessible by level, team, and location; approved versus actual tracked

9. Governance

Governance was designed into the operating model from the start rather than appended at handover. A design that depends on the practitioner's continued presence to function correctly has not been properly designed.

Exception ownership

Governance point	Owner	Escalation
Requisition completeness	Hiring manager or HR partner	Returned before approval chain opens
Approval delay	Current approver	Escalated after defined threshold
Finance confirmation	Finance approver	Finance manager
Scope change	Requisition owner	Re-approval triggered automatically
Duplicate mapping attempt	Recruiting operations	Hiring and HR leadership
Headcount variance	Workforce planning and finance	Business head

Review cadence

- Weekly operational review during active hiring cycles — requisition status, approval delays, exceptions
- Monthly headcount reconciliation — approved versus actual, variance analysis, planning assumptions

- Quarterly review of approval rules, exception rates, and workforce planning assumptions

Recommended adoption measures

These are recommended measures. Unless noted, they were not formally tracked post-implementation.

Measure	What it tracks
Requisitions created through the system	Percentage of approved requisitions entered via the system rather than informal channels
First-submission completeness	Percentage with all required fields complete on creation
Average approval time by stage	Time from submission to approval at each stage; signals bottlenecks
Approvals within SLA	Percentage completed within the defined window
Scope changes triggering reapproval	Percentage of requisition edits that trigger the re-approval chain
Duplicate mapping attempts blocked	Count of system-prevented duplicate active mappings
Off-system approvals	Count of approval decisions made outside the system

Conclusion

The hiring function did not need a system because email was inconvenient. It needed an operating model that made agreed rules enforceable at scale.

The transformation began by defining the constraints that needed to be true: one approved requisition mapped to one active candidate at a time, sequential approvals with shared visibility, structured finance confirmation, and direct linkage to workforce targets. Technology was then used to enforce those decisions — not to invent them.

Once the operational model generated clean, consistent data, the same records became a reliable foundation for workforce planning. The 40% reduction in reconciliation effort was a consequence of the model producing trustworthy data by design, not of analytics capability alone.

This case demonstrates the same principle as the Monthly Business Review assessment in a different workflow category: understand the constraint, design the operating model, then use technology to sustain it. In the MBR, the constraint was upstream information quality. Here, it was the absence of enforceable decision rights and controls.

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