

FOR ENTERPRISE ORGANISATIONS

TA Diagnostic & Savings Plan

The full methodology document.

Eight diagnostic dimensions, a five-level capability scoring model, seven savings categories, a four-phase delivery programme, a five-pillar future-state operating model, and a Finance-validated KPI framework — the complete methodology behind the TA Diagnostic & Savings Plan.

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01 · THE EIGHT DIAGNOSTIC DIMENSIONS

Current-state audit focus and target-state definition

The eight dimensions define the full scope of the diagnostic assessment. For each dimension, the audit identifies the current state against the scoring model and defines the specific target state the transformation programme is designed to achieve.

#	Dimension	Current-State Audit	Target State
01	Agency Spend Governance	Total agency fees by category, seniority and business unit. PSL terms, mark-up rates, tenure provisions. Direct vs agency split across all hire types.	Structured PSL with regular review cycles, tenure-based pricing and transfer provisions enforced. Agency spend < 25% of total hiring cost.
02	Direct Sourcing Infrastructure	LinkedIn Recruiter utilisation, talent pool depth, proactive pipelining capability, employee referral programme effectiveness, internal mobility usage.	60%+ of hires from direct channels. Active talent pools covering critical role families. Referral programme generating 20%+ of hires.
03	TA Technology Stack	ATS configuration and adoption rates, VMS capability, CRM maturity, analytics platform, job board licence utilisation and ROI.	ATS fully configured for analytics. Real-time dashboards for TA and hiring managers. Technology stack rationalised and cost-optimised.
04	Workforce Planning Maturity	12–24 month rolling headcount forecast capability, alignment with business planning cycles, demand modelling maturity, scenario planning capability.	Quarterly workforce planning cycle aligned to business planning. 18-month rolling forecast with < 15% variance to actual.
05	Hiring Manager Capability	Structured interview practice, scorecard usage, time-in-process accountability, decision quality, onboarding ownership and diversity commitments.	All hiring managers trained on structured interviewing. Scorecard usage > 90%. Time-to-offer from interview < 5 days average.
06	Onboarding & First-Year Retention	Onboarding programme structure, Day 1 experience quality, 30/60/90-day check-in frameworks, first-year attrition rate by level and business unit.	First-year attrition < 10% across all levels. Structured onboarding programme with measurable 90-day productivity targets.
07	Employer Brand & EVP	EVP clarity and differentiation, Glassdoor management, career site effectiveness, LinkedIn employer presence, social channel strategy.	Differentiated, research-backed EVP. Glassdoor rating > 4.0. Career site conversion rate > 12%. LinkedIn follower growth > 20% YoY.
08	Data & Reporting	Core TA metric availability (time-to-fill, cost-per-hire, quality-of-hire), executive reporting cadence, Finance-validated baseline, predictive capability.	Monthly board-ready TA performance report. Quality-of-hire measured at 90 days. Cost-per-hire calculated and benchmarked quarterly.

02 · FIVE-LEVEL CAPABILITY SCORING MODEL

Applied across all eight dimensions

Each dimension is assessed against a five-point capability scale. This enables precise identification of the highest-value improvement opportunities and provides a defensible, Finance-shareable baseline for measuring progress.

Score	Level	Definition
1	Reactive	No formal process. Ad hoc, inconsistent. Significant commercial exposure.
2	Developing	Some process defined but inconsistently applied. Awareness of gap but no structured response.
3	Established	Process defined and mostly followed. Basic metrics tracked. Some gaps in governance or capability.
4	Advanced	Consistent, well-governed process. Data-driven decision-making. Minor optimisation opportunities.
5	Best-in-Class	Industry-leading practice. Commercially aligned, proactively managed, continuously improving.

How scoring is validated

Scores are not self-assessed. Each dimension is scored through a combination of data review (spend reports, ATS data, contracts, headcount plans), structured stakeholder interviews across TA, hiring managers, Finance and HR leadership, and operational observation. The scoring is documented with supporting evidence and reviewed with the client's Finance or Procurement team before any savings are confirmed.

03 · THE SAVINGS MODEL

Seven categories. Finance-validated. Contractually accountable.

The savings model is built from the diagnostic findings and calibrated to each client's specific cost baseline. All projections are illustrative — based on benchmark data from comparable UK corporate organisations — and are validated against actual spend data before any contractual savings are confirmed.

Category	Conservative	Upside	Basis / Assumption
Agency Fee Reduction	£400K	£2M+	PSL renegotiation; 4–8% mark-up reduction on addressable spend; tenure and transfer provisions enforced
Direct Sourcing Uplift	£300K	£900K	Shifting 20–30% of agency hires to direct channels across 12–18 months
Process & Admin Efficiency	£80K	£250K	Automation, admin consolidation, ATS optimisation, duplicated activity removal
Tenure-Based Fee Reductions	£200K	£1M+	Contingent workforce: £1/hr reduction on long-tenure placements; transfer-to-perm provisions
Technology Rationalisation	£50K	£200K	Licence deduplication; consolidation of overlapping tools; renegotiated contracts
First-Year Attrition Reduction	£150K	£600K	Improved quality-of-hire and onboarding reducing 25%+ first-year attrition rates
Onboarding Cost Reduction	£50K	£150K	Streamlined onboarding reducing errors, repeat processing, time-to-productivity

04 · FOUR-PHASE DELIVERY PROGRAMME

Fourteen weeks to investment case. Measurable from day one.

The programme delivers measurable value at every stage — from the initial diagnostic through to a fully costed, board-ready investment case. No phase begins until the previous one is complete. No implementation begins until the investment case is approved.

Phase 01 · Diagnostic · Weeks 1–4

- › Structured data collection — spend reports, agency contracts, ATS reports, headcount plans
- › Stakeholder interviews — TA team, hiring managers, Finance, HR leadership (8–12 interviews)
- › Diagnostic scorecard completed across all eight dimensions with supporting evidence
- › Savings opportunities identified, sized and prioritised by impact and effort
- › Baseline report produced and validated with Finance team

Phase 02 · Design · Weeks 5–10

- › Target operating model designed — structure, governance, sourcing strategy, technology
- › Change management approach defined — communications plan, stakeholder mapping
- › Implementation workstreams identified — people, process, technology, commercial
- › Risk and dependency register produced and reviewed
- › Commercial savings commitments drafted for Finance validation

Phase 03 · Investment Case · Weeks 11–14

- › Sensitivity-tested financial model — conservative, base and upside scenarios
- › Board-ready investment case produced — executive summary, financials, roadmap
- › Governance and benefits assurance framework agreed with CFO and CHRO
- › Programme approved — implementation mobilisation begins
- › Performance fee structure confirmed against validated savings baseline

Phase 04 · Implementation · Months 5–12

- › Workstream delivery — PSL renegotiation, operating model, technology, people capability
- › Monthly milestone reviews with executive sponsor and governance board
- › Savings tracking against validated baseline — quarterly Finance sign-off required
- › Benefits realisation reporting — cumulative savings reported to Board
- › Transition to self-sufficient client operating model

05 · FUTURE-STATE OPERATING MODEL

Five interlocking pillars.

The diagnostic findings inform the design of a target operating model structured around five interlocking pillars. The model is built against the specific commercial context, workforce strategy and organisational structure of the client.

01 · Strategic Alignment

TA should sit as a strategic partner to the business — not an operational back-office function. This means embedding TA into business planning cycles, aligning hiring capacity to 12–24 month workforce forecasts, and ensuring TA leadership has a direct line to the C-suite on workforce strategy.

- › Quarterly hiring steering committee with SLT representation
- › Annual TA OKRs linked directly to business KPIs
- › TA briefed on strategy before headcount plans are finalised
- › Workforce planning integrated with Finance and People Analytics

02 · Sourcing Architecture

The shift from agency-first to direct-first sourcing is the single most impactful commercial lever available to most organisations. Building direct sourcing infrastructure takes time but delivers compounding returns.

- › Target: 60%+ of hires from direct channels within 18 months
- › Structured PSL with tiered agency use for specialist roles only
- › Internal mobility prioritised and tracked as a core sourcing channel
- › Alumni networks and talent community activation for repeat hire profiles

03 · Technology & Data

Technology should enable the TA function — not constrain it. The optimal stack is lean, well-configured and actively used for data-driven decision-making rather than compliance administration alone.

- › ATS configured for full-funnel tracking with clean data governance
- › Real-time dashboards for TA leadership and hiring managers
- › Predictive workforce planning — 35% improvement in forecast accuracy is achievable
- › Technology rationalisation — licence deduplication and vendor consolidation

04 · People & Governance

A high-performing TA function requires the right people in the right roles, with clear accountability, capability and commercial acumen. Governance must be robust enough to prevent cost leakage while remaining agile enough to support business velocity.

- › TA team capability audit — skills gaps identified and upskilling plan agreed
- › Hiring manager training programme — structured interviewing and consistent scoring
- › Clear escalation governance for off-PSL agency use
- › DE&I embedded as a hiring principle — structured panels, diverse shortlists

05 - Employer Brand & Candidate Experience

Candidates who feel genuinely understood deliver better outcomes for themselves and their employers. A well-defined EVP, consistently delivered across every candidate touchpoint, reduces offer declines, accelerates decision-making and strengthens retention.

- › EVP validation sessions every six months using employee focus groups and exit data
- › Career site, social channels and offer communications reviewed quarterly
- › Candidate experience measured at every stage — application, interview, offer, Day 1
- › Glassdoor managed proactively — response rate > 90%, rating target > 4.0

06 · KPI & PERFORMANCE FRAMEWORK

Finance-validated. Board-reportable. Day one.

The KPI framework provides a comprehensive measurement architecture covering cost, quality, speed and experience. Every KPI is Finance-validated and Board-reportable from Day 1 of implementation.

KPI	Definition	Target	Measurement	Frequency
Agency Dependency Rate	% hires via agency	< 15%	ATS / sourcing data	Quarterly audit
Cost per Hire	Total TA cost / hires	-20% YoY	Finance-validated	Quarterly
Time to Fill	Req open → offer accept	< 30 days avg	ATS data	Monthly
Quality of Hire	Manager score at 90 days	> 4.0 / 5.0	Post-hire survey	Rolling
Direct Sourcing Rate	% hires via direct channels	> 60%	ATS / sourcing data	Monthly
Hiring Manager Satisfaction	Survey score	> 80% positive	Quarterly pulse	Quarterly
TA Cost as % of Payroll	Total TA opex / payroll	< 2%	Finance benchmark	Annually
Offer Acceptance Rate	Offers accepted / extended	> 85%	ATS data	Monthly

Reporting cadence

Weekly	Hiring pipeline dashboard — open roles, pipeline volume, time in stage
Monthly	TA performance report — all KPIs, savings tracking, agency usage
Quarterly	Executive review — strategic alignment, benefits realisation, model adjustments
Annually	Full TA audit — capability reassessment, benchmarking, forward planning

NEXT STEP

From conversation to delivery in 2–3 weeks.

Mobilisation can begin within 2–3 weeks of approval. No extensive procurement cycle is required — the engagement is designed for speed of value, not administrative process.

To discuss how this methodology applies to your organisation:

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