



## START A CONVERSATION

DISCOVER  
YOUR  
ESR

Empower  
&  
Retain

### Evaluate...

#### Explore how much you empower your managers to be effective:

1. Using ESR Portal and/or BI, do we understand our current Workforce Profile (e.g. Headcount, Age Profile, Staff Group/Roles)?
2. Are our Workforce Policies inclusive and efficient, (e.g. Recruitment Process, Learning & Development Policy, Flexible Working, Staff Benefits)?
3. Do we use Self Service to empower/enable our staff and managers to access personal data, professional data, learning and development records etc. easily and efficiently (e.g. 24/7, on mobile devices, and over the internet)?
4. Using Self Service, do we empower/enable our staff and managers to undertake the day to day transactions required in their role with streamlined, efficient, and paperless processes (e.g. hires, end employment, assignment changes, Appraisals/PDPs etc.)?

### Consider...

#### What other factors come into play that could help or hinder our Workforce Strategy?

1. What are our organisational constraints that could impact on future changes/developments?
2. What do we consider to be the potential barriers to Self Service, and have we discussed these with the NHS ESR team?
3. Do we have local subject matter experts within our Workforce functions who can support our workforce development?
4. What other organisational strategies outside of my portfolio are being considered that will impact on our workforce?
5. Is there a Streamlining programme in our region, and are we involved in the work streams?

To assist you in formulating your next steps, we recommend that you contact your NHS ESR Account Manager or Functional Advisor who can undertake your **Annual ESR Assessment** with you. This will give you, your leadership teams and operational leads a detailed ESR Annual Statement, which provides an in depth analysis of how you are utilising ESR, including usage statistics across the full solution; and what is the potential for expanding your use of ESR functionality to support you in meeting your organisational needs.



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### Take Action...

To help you formulate a clear plan of action that supports your workforce strategy and planning, we recommend you initiate the following:



**Arrange a meeting with your Workforce/HR Lead, Learning and Development Manager, Payroll, Finance and Internal Audit Leads and Senior Representatives from your Directorates/Business Units**

Key questions:

1. What ESR information is available to our employees? How does it get updated?
2. Are our current processes for managing staff data in ESR effective, can we improve upon them?
3. What ESR information is available to our managers? Is it sufficient? What do managers need? Can this be provided through ESR?
4. What back office resources do we provide to support our employees and managers? Can ESR help with reducing administrative tasks?
5. Who would undertake transactions in Self Service? (This will form the basis of the supervisor hierarchy (as set up in ESR) and which URPs would be used).
6. How can we ensure we maximise on the transactional functions available to employees and managers?
7. Have we looked at rolling out full Self Service or Self Service limited access?



**Arrange a meeting with your regional NHS ESR Account Manager/Functional Advisor to discuss and explore the ESR functionality.**

Key questions:

1. How can employees and managers access ESR Self Service?
2. What actions can be completed within ESR based on role?
3. How can we transition from a third party system to ESR?
4. How can we process map our existing process to ESR?
5. Who can support from the ESR Team?
6. Who can I liaise with in the region to 'learn from'?

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