

# CapabilityOS™

## *Framework Overview*

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Five Groups. Fifteen Components. One Talent Operating System.

Not a talent management framework. What talent management becomes when it's built as an operating system — integrated, intelligent, and designed to make the right talent decision the obvious one.

*“A talent operating system, when it's truly working, makes the right answer obvious. The right person for the right role at the right time stops being a heroic act of institutional memory or executive intuition — it becomes a natural output of a system that knows its people.”*

— Barbara Jamelli-Sefchik · Founder & Principal Consultant

### WHAT'S INSIDE

- Framework Architecture — Five groups at a glance
- All 15 Components — Purpose and positioning
- Service Details — Diagnostic · Transformation · Advisory per component
- Engagement Model — Three ways to engage

[barbara@talentdevelopmentinnovations.com](mailto:barbara@talentdevelopmentinnovations.com)  
[calendly.com/bjamelli/30-minute-conversation](https://calendly.com/bjamelli/30-minute-conversation)

## FIVE GROUPS AT A GLANCE

*CapabilityOS™ is organized into five groups. Skills intelligence is the red thread — every component connects back to it.*

### 01

#### Talent Architecture

*The structural foundation*

Before any other component can function well, the organization needs clarity on how work is structured, what capability it has, and where it needs to go. Group 1 builds that foundation.

- Skills Architecture & Management
- Job Architecture & Role Design
- Organizational Design
- Workforce Planning

### 02

#### Talent Supply & Internal Mobility

*Bringing the right people in. Moving the right people through.*

Governed by the Build / Borrow / Buy / Bot framework. Every talent supply decision runs through this lens — each path has a different cost, timeline, risk profile, and long-term implication.

- Talent Attraction & Acquisition
- Contingent & Extended Workforce Management
- Career Planning & Internal Mobility
- Succession Planning & Pipeline
- High Potential Identification & Development

### 03

#### Performance, Development & Reward

*The systems that measure, grow, and recognize capability*

Most organizations have all three of these — very few have a system where they actually talk to each other. Group 3 builds the connective tissue between them.

- Performance Intelligence
- Learning & Development
- Total Rewards Alignment

### 04

#### Change Architecture & Adoption

*The human infrastructure that makes transformation stick*

The component that governs whether everything else actually gets used. Runs alongside every implementation from day one. Also available as a standalone engagement.

- Change Management & Adoption

### 05

#### HR Tech Stack & AI Intelligence

*The intelligence layer that amplifies everything else*

Technology without strategy produces infrastructure. AI without governance produces risk. Together — built on a skills foundation — they produce intelligence. Group 5 is the intelligence layer beneath all others; CapabilityOS™ works without AI at its most foundational level and compounds in value as the intelligence layer matures.

- HR Technology & Platform Strategy
- AI-Assisted Talent Intelligence

*Group 05 is the intelligence layer beneath all others. CapabilityOS™ is designed to work without AI at its most foundational level — and to compound in value as the intelligence layer matures.*

# 01 Talent Architecture

*The structural foundation*

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## 01 Skills Architecture & Management

*The foundation on which every other CapabilityOS™ component runs — defining what skills exist in the organization, mapping them to roles, and maintaining that intelligence as work evolves. Enterprise-scale skills architecture cannot be managed by humans alone. AI is what makes a living skills intelligence system possible.*

### TIER 1 — DIAGNOSTIC

#### Skills Architecture Audit

In-person kickoff with Talent Management, Job Architecture owner, HRBPs and functional leaders, and Corporate Strategy. Document and platform review runs in parallel. Follow-on virtual interviews surface the gap between what the organization believes its skills infrastructure does and what it actually does. Two-stage findings delivery.

Timeline: 6–8 weeks

- Skills Architecture Audit Report
- Prioritized Roadmap
- Executive Presentation

### TIER 2 — TRANSFORMATION

#### Skills Intelligence System Design

Four parallel workstreams: taxonomy design and role-to-skills mapping (with pressure test); integration design — functional and technical; change management and governance running alongside the build. Goal extends beyond role definitions — capturing what employees can actually do, not just what their current role requires.

Timeline: 4–8 months, scoped post-diagnostic

- Skills taxonomy and role mapping
- Platform integration design
- Governance framework and playbook
- Enablement materials

### TIER 3 — ADVISORY

#### Skills Intelligence Advisory

Structured handoff model with a clear trajectory toward organizational independence. 90-day check-in is the highest-risk window — adoption either takes hold or quietly erodes. Semi-annual health checks cover taxonomy currency, adoption depth, data integrity, and strategic alignment.

Timeline: 90-day check-in; semi-annual thereafter

- 90-day post-implementation check-in
- Semi-annual system health review
- On-call for M&A, restructuring, strategic pivots

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2 Job Architecture & Role Design

*The structural blueprint — roles, levels, families, and accountability clarity. Job architecture and skills architecture are complementary components that sharpen each other. When job architecture drifts, titles misalign, levels multiply without logic, and compensation falls out of alignment.*

TIER 1 — DIAGNOSTIC

**Job Architecture Audit**

In-person kickoff with Talent Management, Job Architecture owner, HRBPs, functional leaders, Total Rewards, and Legal. For global organizations, co-determination obligations are identified as a design constraint from the start. Document review typically surfaces the gap between the architecture that was designed and the one that has actually evolved.

Timeline: 4–6 weeks

- Job Architecture Audit Report
- Prioritized Redesign Roadmap
- Executive Presentation with legal/compliance flags

TIER 2 — TRANSFORMATION

**Job Architecture & Role Design**

Starts from what exists and rationalizes rather than rebuilding from scratch. Four workstreams: current-state rationalization; leveling framework design; skills-integrated role profile development; governance and rollout design including Works Council consultation where applicable.

Timeline: 3–6 months, scoped post-diagnostic

- Job architecture framework documentation
- Leveling framework
- Skills-integrated role profiles
- Governance model and communication framework

TIER 3 — ADVISORY

**Job Architecture Advisory**

90-day check-in assesses whether the architecture is being used consistently and where workarounds have appeared. Bi-annual reviews catch drift before it compounds. On-call access for M&A, restructuring, and co-determination events.

Timeline: 90-day check-in; bi-annual thereafter if needed

- 90-day adoption and consistency review
- Bi-annual architecture currency check
- On-call for structural triggers

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3 Organizational Design

*How the enterprise structures its people, work, and decision-making to execute its strategy. Reorganizations are often commissioned hastily. TDI brings intentionality to a process that typically moves fast and leaves consequences behind.*

TIER 1 — DIAGNOSTIC

**Organizational Design Assessment**

Before any structural analysis begins, TDI surfaces risks and flags them in writing with senior leadership — ensuring a genuine go/no-go decision with full visibility. Kickoff with the most senior leader commissioning the work, Corporate Strategy, and Legal where workforce implications exist.

Timeline: 4–6 weeks

- Risk and concern summary (pre-analysis)
- Organizational Design Assessment Report
- Options with trade-off analysis
- Executive Presentation

TIER 2 — TRANSFORMATION

**Organizational Design & Restructuring**

Five workstreams: design principles; structural design (two to three options, not a single prescription); role clarity and decision rights; capability mapping and transition planning; change management and communication. Co-determination obligations designed in from the start, not accommodated at the end.

Timeline: 3–5 months, scoped post-diagnostic

- Design principles documentation
- Structural options with trade-off analysis
- Role clarity and decision rights framework
- Capability gap assessment and transition plan
- Change management and communication plan

TIER 3 — ADVISORY

**Organizational Design Advisory**

Most restructurings look fine at launch. The 90-day session goes below the surface — assessing whether the operating model has actually changed, whether decisions are being made at the right levels, and whether the capability requirements of the new structure are being met.

Timeline: 90-day check-in; bi-annual thereafter if needed

- 90-day operating model and decision rights review
- Bi-annual strategic alignment and span/layer review
- On-call for M&A, leadership changes, strategic shifts

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4 Workforce Planning

*Anticipating what talent the organization will need and building the strategy to close the gap. Without skills intelligence, workforce planning is headcount planning. With it, the organization can see what its people can do, what's adjacent, and where gaps require different strategies.*

**TIER 1 — DIAGNOSTIC**

**Workforce Planning Assessment**

Kickoff structured around functions: business leader or delegate, HRBP, learning partner, Finance, Talent Management, and Corporate Strategy. Two parallel tracks: process audit and data quality assessment. Many organizations discover in this diagnostic that the data problem is the planning problem.

Timeline: 4–6 weeks

- Workforce Planning Assessment Report
- Gap Analysis and Prioritized Roadmap
- Executive Presentation (including Finance)

**TIER 2 — TRANSFORMATION**

**Workforce Planning System Design**

Five workstreams: planning process architecture; skills-based workforce analysis; Build/Borrow/Buy/Bot decision framework with governance guidelines; scenario modeling (two to three future-state scenarios); governance design. The long-term vision: succession at scale.

Timeline: 3–6 months, scoped post-diagnostic

- Planning process documentation and decision framework
- Skills-based workforce analysis
- Build/Borrow/Buy/Bot framework
- Scenario modeling tools
- Governance model and playbook

**TIER 3 — ADVISORY**

**Workforce Planning Advisory**

Quarterly in year one — synchronized with the planning cycle to pressure-test inputs before planning runs and review outputs before decisions are made. As skills intelligence matures, advisory steps back. The long-term goal is succession at scale: continuous AI-assisted visibility into capability, readiness, and supply.

Timeline: 90-day check-in; quarterly year one; annual thereafter

- 90-day adoption and output quality review
- Quarterly planning cycle sessions (year one)
- Annual planning quality and strategic alignment review
- On-call for strategic shifts, M&A, talent disruption

## 02 Talent Supply & Internal Mobility

*Bringing the right people in. Moving the right people through.*

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### 05 Talent Attraction & Acquisition

*The talent strategy layer above recruiting — skills-based hiring, employer brand, and selection that identifies genuine capability. Before an external search begins, the organization should have genuinely assessed whether the capability already exists inside.*

#### TIER 1 — DIAGNOSTIC

##### Talent Acquisition Strategy Assessment

Assessment of the current talent acquisition function — evaluating how hiring decisions are made, how skills intelligence is used in sourcing and selection, and where the gaps are. Includes assessment of internal mobility infrastructure and whether external search is being triggered prematurely.

Timeline: 4–6 weeks

- Talent Acquisition Assessment Report
- Skills-Based Hiring Readiness Scorecard
- Prioritized Roadmap
- Executive Presentation

#### TIER 2 — TRANSFORMATION

##### Skills-Based Acquisition Transformation

Five workstreams: skills-based job design; sourcing strategy redesign; selection process redesign (structured interview frameworks, skills assessment design, bias audit); internal mobility integration; employer brand and candidate experience alignment. Skills-based hiring starts with a current, role-specific skills profile grounded in what the work actually demands.

Timeline: 3–6 months, scoped post-diagnostic

- Skills-based job profile templates
- Sourcing strategy documentation
- Structured selection framework
- Internal mobility integration design
- Employer brand recommendations

#### TIER 3 — ADVISORY

##### Talent Acquisition Advisory

90-day review of whether skills-based hiring is being used consistently — not just for the roles it was piloted on, but across the enterprise. Quarterly sessions in year one assess adoption depth, sourcing performance, and internal mobility utilization.

Timeline: 90-day check-in; quarterly year one; annual thereafter

- 90-day skills-based hiring adoption review
- Quarterly sourcing and selection quality review
- Annual talent acquisition strategy alignment

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6 **Contingent & Extended Workforce Management**

*Contractors, freelancers, SOW arrangements, staffing placements — managed with the same strategic discipline as permanent talent. In many organizations this population is significant in size and critical in function, yet managed with less visibility than permanent employees.*

**TIER 1 — DIAGNOSTIC**

**Extended Workforce Assessment**

Assessment of how the extended workforce is currently managed — sourcing, onboarding, skill capture, compliance, and offboarding. Most organizations discover their contingent workforce is larger, more strategically critical, and less well-governed than they believed.

Timeline: 4–6 weeks

- Extended Workforce Assessment Report
- Risk and Compliance Inventory
- Prioritized Roadmap
- Executive Presentation

**TIER 2 — TRANSFORMATION**

**Extended Workforce Management Design**

Four workstreams: governance framework (classification, sourcing, onboarding, offboarding); skills capture design (integrating contingent skills into the organization’s full capability picture); compliance management; workforce analytics integration. When contingent skills are captured alongside permanent employee skills, the organization sees its full capability picture for the first time.

Timeline: 3–5 months, scoped post-diagnostic

- Extended workforce governance framework
- Skills capture and integration design
- Compliance management playbook
- Workforce analytics integration plan

**TIER 3 — ADVISORY**

**Extended Workforce Advisory**

Quarterly reviews in year one focus on governance compliance, skills data currency, and whether the extended workforce is being deployed strategically rather than reactively. Annual review assesses whether the Build/Borrow/Buy/Bot framework is informing extended workforce decisions.

Timeline: 90-day check-in; quarterly year one; annual thereafter

- 90-day governance and compliance review
- Quarterly skills data and strategic deployment review
- Annual Build/Borrow/Buy/Bot alignment assessment

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7 **Career Planning & Internal Mobility**

*Helping people identify where they can take their careers next and making it real for the organization to move talent where it’s needed most. Skills adjacency data reveals non-obvious paths that a title-and-level career ladder would never surface.*

**TIER 1 — DIAGNOSTIC**

**Career & Mobility Infrastructure Assessment**

Assessment of the current career development infrastructure — how clearly pathways are defined, how well internal mobility is working in practice, and where the gap is between the careers conversation employees are having and the one the organization needs them to have. Includes HRBP, manager, and employee perspective capture.

Timeline: 4–6 weeks

- Career & Mobility Assessment Report
- Internal Mobility Friction Map
- Prioritized Roadmap
- Executive Presentation

**TIER 2 — TRANSFORMATION**

**Career Architecture & Mobility System**

Four workstreams: career pathway design (leveraging skills adjacency data to build non-obvious, realistic paths); internal mobility process design (making it as easy to move internally as it is to hire externally); manager enablement (the quality of career conversations is a direct function of manager capability); platform configuration and communication design.

Timeline: 3–6 months, scoped post-diagnostic

- Career pathway architecture
- Internal mobility process documentation
- Manager enablement toolkit
- Platform configuration recommendations
- Communication and launch plan

**TIER 3 — ADVISORY**

**Career & Mobility Advisory**

Quarterly reviews in year one assess internal mobility utilization, career conversation quality, and retention correlation. The most important early signal: are managers actually having the career conversations the system was designed to enable, or are they routing around it?

Timeline: 90-day check-in; quarterly year one; semi-annual thereafter

- 90-day adoption and manager engagement review
- Quarterly mobility utilization and retention analysis
- Semi-annual career architecture currency check

## 08 Succession Planning & Pipeline

*Building and maintaining genuine readiness for critical roles — not just names on a slate, but people who are objectively prepared for what the role demands. Skills-based succession surfaces the best successor wherever they sit, including laterally across functions.*

### TIER 1 — DIAGNOSTIC

#### Succession Planning Assessment

Assessment of the current succession process — how critical roles are identified, how successors are nominated and assessed, and whether the pipeline reflects genuine readiness or organizational visibility. Critical roles are assessed across the enterprise, not just at the top.

Timeline: 4–6 weeks

- Succession Planning Assessment Report
- Critical Role Inventory
- Pipeline Readiness Gap Analysis
- Executive Presentation

### TIER 2 — TRANSFORMATION

#### Succession Planning System Design

Four workstreams: critical role definition (criteria, scope, and governance); skills-based readiness assessment framework; pipeline development design (structured development plans, stretch assignments, targeted L&D); succession review process design. The output is a succession process that surfaces the best successor wherever they sit — not the one most visible to the decision-makers.

Timeline: 3–6 months, scoped post-diagnostic

- Critical role definition framework
- Skills-based readiness assessment toolkit
- Pipeline development design
- Succession review process documentation
- Governance model

### TIER 3 — ADVISORY

#### Succession Advisory

Annual succession review cycle support — reviewing the process, the pipeline, and the quality of development plans before each cycle runs. Quarterly on-call access for unexpected leadership departures, M&A, and structural changes that affect critical roles.

Timeline: Annual cycle support; quarterly on-call

- Annual succession cycle preparation and review
- Pipeline readiness assessment
- On-call for leadership departures, M&A, structural change

## 09 High Potential Identification & Development

*The organizational capability to identify people who have the capacity to grow significantly beyond their current role and to accelerate their development deliberately. High potential is not the same as high performance. Skills intelligence reframes identification from a nomination process to an evidence-based assessment.*

### TIER 1 — DIAGNOSTIC

#### HiPo Program Assessment

Assessment of the current high potential identification and development program — how HiPos are identified, whether the identification criteria are consistent, how development is structured, and whether the program is producing the pipeline it was designed to produce.

Timeline: 4–6 weeks

- HiPo Program Assessment Report
- Identification Criteria and Bias Audit
- Development Effectiveness Review
- Executive Presentation

### TIER 2 — TRANSFORMATION

#### HiPo Identification & Development Design

Four workstreams: identification framework redesign (evidence-based criteria, skills-grounded assessment, bias reduction); development program design (targeted experiences, structured feedback, sponsor assignment); governance and review cadence; measurement design. The goal is a program that produces the pipeline it promises — without the visibility and sponsorship bias that undermines most programs.

Timeline: 3–5 months, scoped post-diagnostic

- HiPo identification framework
- Development program design
- Governance and review cadence
- Measurement framework

### TIER 3 — ADVISORY

#### HiPo Program Advisory

Annual program review assesses whether the identification framework is producing a diverse, skills-grounded pipeline. Quarterly access for cohort design questions, development plan reviews, and governance decisions between annual cycles.

Timeline: Annual program review; quarterly on-call

- Annual program quality and pipeline review
- Identification criteria currency check
- On-call for cohort and governance decisions

## 03 Performance, Development & Reward

*The systems that measure, grow, and recognize capability*

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### 10 Performance Intelligence

*A continuous, forward-looking intelligence layer connecting contribution, capability development, and compensation. What someone is capable of, where they are growing, and what they should be doing next. When performance data and reward decisions are connected, the system reinforces the behaviors and capabilities the organization most needs.*

#### TIER 1 — DIAGNOSTIC

##### Performance Management Assessment

Assessment of the current performance management process — how performance is defined, measured, and linked to compensation and development. Includes manager and employee perspective capture. Most organizations discover their performance process is generating compliance rather than intelligence.

Timeline: 4–6 weeks

- Performance Management Assessment Report
- Manager and Employee Experience Analysis
- Prioritized Roadmap
- Executive Presentation

#### TIER 2 — TRANSFORMATION

##### Performance Intelligence System Design

Four workstreams: performance framework redesign (goals, competencies, behaviors, skills); feedback architecture (frequency, format, who gives feedback); manager enablement (the quality of performance conversations determines the value of the entire system); skills integration (connecting performance data to the skills architecture so development priorities emerge from performance intelligence, not just manager intuition).

Timeline: 3–6 months, scoped post-diagnostic

- Performance framework documentation
- Feedback architecture design
- Manager enablement toolkit
- Skills integration design
- Governance model

#### TIER 3 — ADVISORY

##### Performance Intelligence Advisory

Annual cycle preparation and review — ensuring the performance process is producing intelligence, not just completing compliance requirements. Quarterly access for calibration design, manager coaching, and mid-cycle course corrections.

Timeline: Annual cycle support; quarterly on-call

- Annual performance cycle preparation and calibration
- Quarterly manager coaching and process check
- On-call for calibration design, compensation linkage

## 11 Learning & Development

*The organizational practice of building capabilities — not just awareness or knowledge. L&D is the mechanism through which skills gaps identified across every other component get closed. Learning that changes behavior is different from learning that transfers knowledge — and that distinction defines whether an L&D function delivers value or simply delivers content.*

### TIER 1 — DIAGNOSTIC

#### Learning Infrastructure Assessment

Assessment of the current L&D function — strategy, infrastructure, content, technology, measurement, and the degree to which learning is connected to the skills architecture and business outcomes. The presenting problem is almost never what surfaces in the assessment.

Timeline: 4–8 weeks

- Learning Infrastructure Assessment Report
- Skills Gap and Learning Portfolio Analysis
- Prioritized Roadmap
- Executive Presentation

### TIER 2 — TRANSFORMATION

#### Learning Operating System Design

Five workstreams: learning strategy design (connected to skills architecture and business outcomes); portfolio rationalization; learning architecture (70/20/10, formal, social, experiential — in the right proportions for what the organization actually needs to build); technology strategy; measurement design (behavioral outcomes, skills gap closure, business impact). Learning designed to drive adoption and embed behavior, not just transfer knowledge.

Timeline: 4–8 months, scoped post-diagnostic

- Learning strategy documentation
- Portfolio rationalization recommendations
- Learning architecture design
- Technology strategy
- Measurement framework

### TIER 3 — ADVISORY

#### Learning Advisory

Quarterly reviews in year one assess whether the learning architecture is closing the skills gaps it was designed to close, and whether behavioral change is measurable in the business. Annual strategy review ensures the portfolio remains aligned to the skills needs surfaced by the broader CapabilityOS™ system.

Timeline: Quarterly year one; annual cadence thereafter

- Quarterly skills gap closure and behavioral outcome review
- Annual learning portfolio and strategy alignment
- On-call for AI-driven skills disruption, workforce shifts

## 12 Total Rewards Alignment

*Ensuring that compensation, recognition, and the employment value proposition are coherent with the talent strategy the organization is trying to execute. Skills intelligence gives total rewards a precision it cannot achieve without data — including the ability to respond to market dynamics before a retention crisis surfaces.*

### TIER 1 — DIAGNOSTIC

#### Total Rewards Alignment Assessment

Assessment of current compensation, recognition, and EVP structures — evaluating internal equity, market competitiveness for critical skills, and the degree to which rewards reinforce the capabilities and behaviors the organization most needs. Includes hot skills premium analysis where relevant.

Timeline: 4–6 weeks

- Total Rewards Assessment Report
- Market Competitiveness Analysis (critical skills)
- Internal Equity Review
- Prioritized Roadmap

### TIER 2 — TRANSFORMATION

#### Total Rewards Alignment Design

Three workstreams: compensation architecture alignment (connecting pay structures to skills architecture and job architecture); hot skills strategy (identifying which skills carry market premiums and designing compensation responses that don't wait for annual surveys); recognition program redesign (ensuring recognition reinforces skills development and the behaviors the organization is trying to build).

Timeline: 2–4 months, scoped post-diagnostic

- Compensation architecture alignment documentation
- Hot skills premium framework
- Recognition program design
- EVP refresh recommendations

### TIER 3 — ADVISORY

#### Total Rewards Advisory

Annual compensation cycle preparation — reviewing market data, skills premium dynamics, and internal equity before decisions are made rather than after. Quarterly access for off-cycle retention decisions, M&A implications, and skills-driven compensation questions.

Timeline: Annual cycle support; quarterly on-call

- Annual compensation cycle preparation
- Skills premium market analysis
- On-call for retention decisions and M&A

## 04 Change Architecture & Adoption

*The human infrastructure that makes transformation stick*

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### 13 Change Management & Adoption

*The component that governs whether everything else actually gets used. A skills architecture that no one uses, a performance system that managers work around, a succession process that reverts to the old way — these are adoption failures, not technology or design failures. Change Architecture & Adoption is the discipline that prevents them.*

#### TIER 1 — DIAGNOSTIC

##### Change & Adoption Diagnostic

Assessment of the organization’s current change capability and adoption track record. Most organizations have change management activity — far fewer have a change architecture. This diagnostic distinguishes between the two and identifies where the gap is widest. Can be run standalone or scoped alongside any CapabilityOS™ implementation diagnostic.

Timeline: 3–5 weeks

- Change Capability Assessment Report
- Adoption Risk and Barrier Inventory
- Prioritized Roadmap
- Executive Presentation

#### TIER 2 — TRANSFORMATION

##### Change Architecture & Adoption System

Five workstreams: change architecture design (sponsor model, steering committee governance, change agent network); manager enablement (the manager layer is where most implementations succeed or fail); communication strategy; adoption measurement framework (behavioral, utilization, and business outcome metrics — not just training completion); course correction protocols. Runs alongside every CapabilityOS™ implementation. Also available as a standalone engagement when an existing implementation isn’t achieving the adoption the investment requires.

Timeline: Scoped to implementation; typically concurrent

- Change architecture documentation
- Steering committee governance design
- Manager enablement toolkit
- Communication and engagement strategy
- Adoption measurement framework

#### TIER 3 — ADVISORY

##### Change & Adoption Advisory

Post-implementation monitoring of adoption depth and sustainability — identifying whether the changes are holding or quietly eroding. Quarterly sessions in year one review adoption metrics, manager engagement, and leading indicators of reversion. The goal is organizational self-sufficiency in change management — not permanent external dependency.

Timeline: Quarterly year one; semi-annual year two

- Quarterly adoption depth and sustainability review
- Manager engagement and coaching sessions
- Annual change capability maturity assessment

## 05 HR Tech Stack & AI Intelligence

*The intelligence layer that amplifies everything else*

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### 14 HR Technology & Platform Strategy

*The organizational capability to select, implement, and sustain the technology infrastructure the talent operating system runs on — making those decisions as expressions of talent strategy rather than reactions to vendor relationships. Platform-agnostic. TDI understands the full landscape, including the distinction between AI-augmented and AI-native platforms.*

#### TIER 1 — DIAGNOSTIC

##### HR Technology Assessment

Platform-agnostic assessment of the current HR technology stack — evaluating fit for purpose, integration architecture, skills intelligence capability, and AI-readiness. Most organizations discover they are underutilizing what they have before they need to consider what they should buy. Includes vendor landscape briefing positioned to the organization’s specific strategic context.

Timeline: 4–6 weeks

- HR Technology Assessment Report
- Platform Utilization and Fit Analysis
- Vendor Landscape Briefing
- Prioritized Roadmap

#### TIER 2 — TRANSFORMATION

##### HR Technology Strategy & Selection

Four workstreams: requirements definition (from the talent strategy down, not from the feature list up); vendor evaluation and selection support (RFP design, evaluation framework, demo facilitation, reference checking); implementation design (governance, change management, integration architecture); adoption planning. A platform selected without a skills architecture underneath it is infrastructure without intelligence.

Timeline: 3–6 months, scoped post-diagnostic

- Requirements documentation
- Vendor evaluation framework and scorecard
- Selection recommendation
- Implementation design and governance model
- Adoption and change management plan

#### TIER 3 — ADVISORY

##### HR Technology Advisory

Post-selection and post-implementation support — ensuring the platform is being used as designed and that the intelligence layer is maturing as the skills foundation develops. Quarterly reviews in year one assess adoption depth, integration health, and emerging AI capability that should be incorporated into the platform strategy.

Timeline: Quarterly year one; semi-annual thereafter

- Quarterly platform adoption and integration review
- AI capability incorporation assessment
- Annual technology strategy alignment review

## 15 AI-Assisted Talent Intelligence

*Strategic AI governance and operational AI capability — built deliberately as an organizational asset, not accumulated reactively. It operates at two levels: strategic (where AI belongs in talent processes, where human judgment must remain primary, how AI use is governed) and operational (how that capability expresses through tools and platforms). The gap between AI potential and AI reality is a strategy and governance problem, not a technology problem.*

### TIER 1 — DIAGNOSTIC

#### AI Workforce Readiness Assessment

Five-dimension assessment of the organization's current AI readiness across: skills infrastructure, data governance, platform capability, leader readiness, and change management architecture. Produces a clear picture of where the organization is, where the critical gaps are, and a sequenced roadmap. This is the most common Tier 1 entry point for new TDI engagements.

Timeline: 6–8 weeks

- AI Workforce Readiness Assessment Report
- Five-Dimension Maturity Scorecard
- Prioritized Roadmap
- Executive Presentation

### TIER 2 — TRANSFORMATION

#### AI Talent Intelligence Transformation

Five workstreams: AI governance framework design (where AI belongs in talent decisions, where it doesn't, how it's audited); skills intelligence foundation (prerequisite for most AI talent applications); platform AI capability activation; manager and employee AI literacy; measurement framework. Most organizations are accumulating AI capabilities faster than they are developing the strategic framework to use them well.

Timeline: 4–8 months, scoped post-diagnostic

- AI governance framework
- Skills foundation design (if not in place)
- Platform AI activation roadmap
- AI literacy program design
- Measurement and audit framework

### TIER 3 — ADVISORY

#### AI Intelligence Advisory

Ongoing strategic counsel on AI in talent — monitoring capability evolution, governance effectiveness, and the emerging regulatory landscape. Quarterly sessions in year one review AI utilization patterns, governance compliance, and the strategic implications of new AI capabilities becoming available in the platform landscape.

Timeline: Quarterly year one; semi-annual thereafter

- Quarterly AI governance and utilization review
- Regulatory landscape monitoring
- Annual AI talent strategy alignment review

## HOW TO ENGAGE

*Every TDI engagement begins the same way — regardless of scope. The diagnostic delivers immediate, standalone value and tells you exactly where to go next. No Tier 2 transformation is proposed without a Tier 1 diagnostic establishing the baseline.*

### 01

#### Discovery Conversation

30 minutes. No sales deck. A genuine conversation about where the organization is, what the presenting problem is, and whether TDI is the right fit. If it isn't, Barbara will say so.

### 02

#### CapabilityOS™ Diagnostic

An evidence-based assessment scoped to the components that matter most. Produces a clear picture of current-state maturity, AI readiness within each domain, and a prioritized roadmap. Delivers standalone value regardless of what follows.

### 03

#### Transformation or Advisory

Scope, timeline, and investment determined by the diagnostic findings. The work is always designed to build toward a system the organization can sustain — not a deliverable that ends when the engagement does.

## THREE ENGAGEMENT PATHS

#### ONE AND DONE

One component. One problem solved.

A single CapabilityOS™ component — diagnosed and addressed. Delivers standalone value with a clear beginning and end. No obligation to go further. If the work surfaces a natural next step, you'll see it. Whether you take it is entirely your call.

#### START AND EXPAND

Begin with one. Build if it makes sense.

Start with the component where the gap is most acute. If the work delivers — and it should — the next natural step surfaces on its own. The logic of the system makes the connections visible. You decide what to act on and when.

#### FULL ENGAGEMENT

Multiple components. Built as a system.

Come in ready to build across multiple components or the full CapabilityOS™ system. The diagnostic scopes it. The roadmap sequences it. The work compounds — each component stronger because the others are working alongside it.

## INVESTMENT REFERENCE

#### Tier 1 — Diagnostic

**\$25,000 — \$45,000**

Entry-point assessments. Evidence-based baseline and prioritized roadmap. Designed to deliver immediate standalone value and surface the full system gap. Scope and investment vary by component and organizational complexity.

#### Tier 2 — Transformation

**\$75,000 — \$175,000**

End-to-end design and implementation. Scope is determined post-diagnostic and varies significantly by component, organizational size, and system complexity. Never proposed without a Tier 1 diagnostic establishing the baseline.

#### Tier 3 — Advisory Retainer

**\$10,000 — \$20,000 / month**

Ongoing strategic counsel structured to what the engagement actually needs. An intentionally small roster — each relationship receives dedicated focus. Cadence and format determined during discovery.

*Ready to find your entry point?*

barbara@talentdevelopmentinnovations.com · calendly.com/bjamelli/30-minute-conversation · talentdevelopmentinnovations.com