

Workforce Planning

*The glue that ties Engagement, Development,
Career Planning, Org Design, and Strategy together*

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Forward Thinking

**At the close of this session,
you will be able to:**

- State what workforce planning plan is and how it relates to business growth.
- Explain why it is important to have a workforce plan.
- List and explain the steps involved in developing a workforce plan.
- Discuss how the plan will be kept current and communicated.



Match the definition to the term

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- a) A series of actions
- b) A cohesive set of actions
- c) A cohesive set of actions that results in an advantage
- d) Movement towards an agreed vision (what) while on mission (why)
- e) The outcome of being stretched and learning something new
- f) Planning an individual's career options and steps
- g) Building out the career path options available within an organization
- h) Defining the roles, skills, competencies and structure of teams necessary to fulfill future business objectives
- i) Modeling plausible combinations of available talent and assumed development rate assumptions to meet future team structures
- 1) Workforce Planning
- 2) Strategic Plan
- 3) Not Idle / Busyness
- 4) Plan
- 5) Engagement
- 6) Career Planning
- 7) Career-Pathing
- 8) Development
- 9) Organizational Design



A-Co. - Case Context

A-Co. is an economically-cyclical service business. In Year 2000, its revenues are \$50M. It has good unit managers but no executive team; it faces high turnover in its operations and low turnover for administration and infrastructure functions. It is structured as an S-Corp and a single individual has majority ownership and is a silent owner. It is a G1, started by the entrepreneur-owner who is 52 years of age and appears to be in excellent health.

What is the most important thing for A-Co. to do?



A-Co. - Case Problem

1. 2000: Writes new business plan and gets excited.
2. 2001: \$60M business expands to \$68M but makes less Profit.
3. 2001: Defines process standards for profitability. Key: identify significant talent constraint.

Vision + Mission
in Motion



Services Covered

Recruiting, Retention & Development

- Retained Sourcing & Search
- VPHR and CHRO Coaching
- Training & Learning Management
- Recruiting Planning
- Total Rewards Planning
- On-Boarding & Integration
- Comp. Analysis
- LEAN HR & Best Practice Design
- Performance Feedback Systems
- Corrective Action & Counseling

HR Services

- Risk Management & Compliance
- Policy & SOPs
- Handbooks
- Payroll
- Safety & Security
- File Management
- PEO & ASO Evaluation

HC Technology

- HCM Selection & Implementation
- Software Provisioning & De-provisioning
- BA/BI & Predictive Analytics
- HR Data Blueprints, Routing & Integrations
- AI Preparation
- Decision Automation & Machine Learning
- HR APIs
- Decision Products
- Development Systems & Products

Transformation

- Organizational Design
- Strategy Design & Implementation
- Workforce Planning
- Culture Change Management
- Organizational Assessments
- Transformation Architecture & PMO
- Governance Modeling
- Communication Systems
- Organizational Leadership & Workforce Development



The Glue



The Glue – The Cause



- Do we have the right people on board who are passionate about our cause?
- Affects healthy turnover.

The Glue – Strategic Plan



- BD and M&A activity could require expansion or contraction of team to accomplish goals.
- Initiative buy-in by influencers.
- Change leadership opportunities for developing leaders.
- Greatest factor in assumed hiring and promotions.



The Glue – Process



- Technology and efficiencies may enable lean teams that reduce in size.
- Quality enhancement or development of service line may require expansion of teams.

The Glue – Org Design



- Structures that maximize leverage, development and competencies win in competitive environments and affect the workforce plan.
- Designs that clarify career paths enable more effective development.



The Glue – Learning and Development



- Learning systems maximized for future needs will result in an engaged workforce who more likely to be retained.
- On-demand learning can accelerate learning, increasing service and retaining more customers.
- Management and executive training opens up P&L options more readily available to the business.

The Glue – Feedback



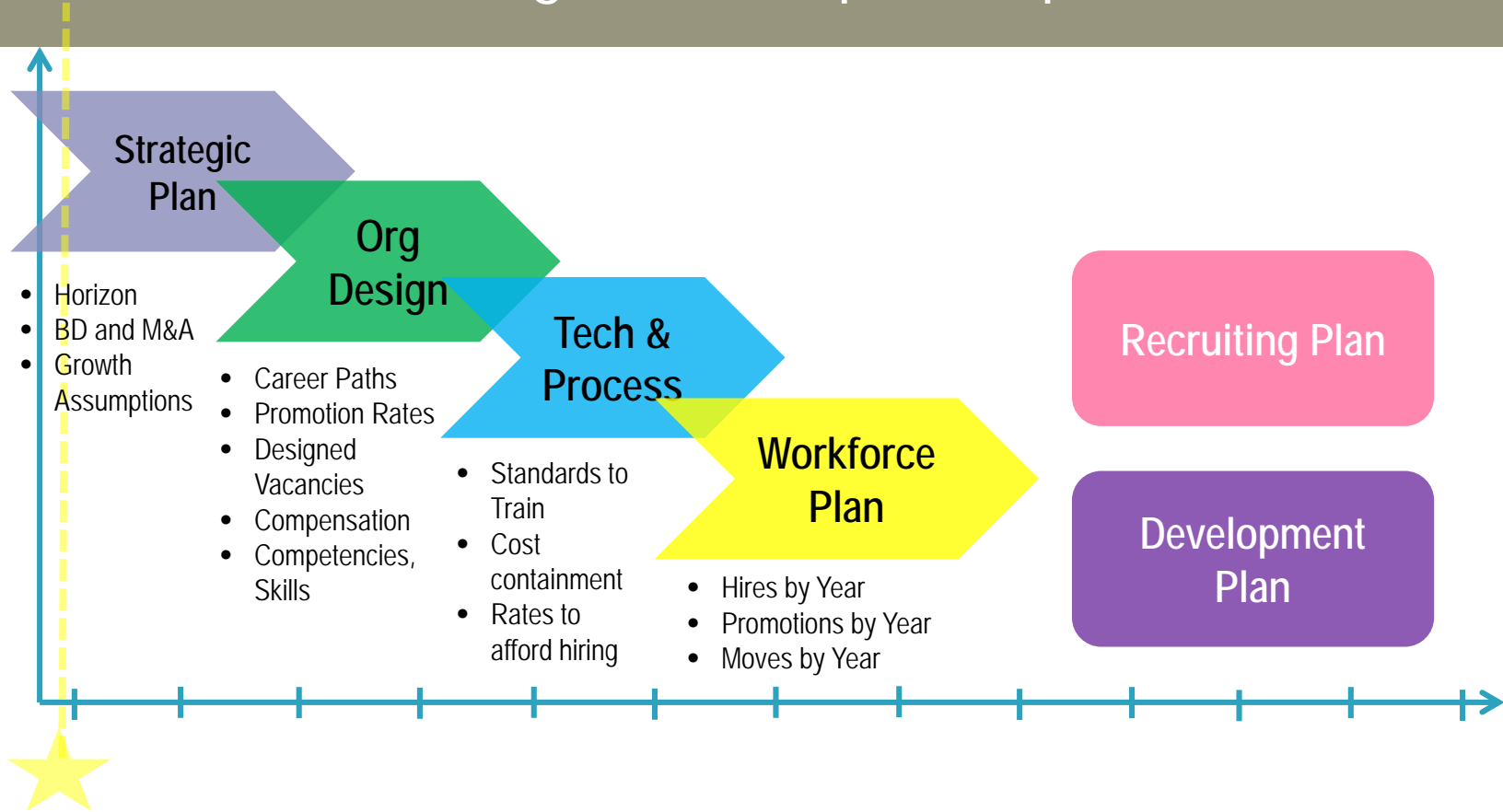
- Retain top talent and correcting course of less productive behaviors
- Increases quality of team outputs
- Informs promotion decisions and assumptions

A-Co. - Case Solution

1. 2002: Management team with golden handcuffs; 3 cities.
2. 2002: Workforce planning modeled underscoring significant recruiting and development needs.
3. 2002 – 2007 Recruiting and development plans implemented and perfected.
4. 2011-2015 Significant organic growth; 14 cities.
5. 2016 Cash sale for \$220M.



Workforce Modeling Workshop - Simple



Modeling, Rendering and Forecasting

Variables

1. Horizon
2. BD and M&A
3. Technology & Efficiency
4. Attrition Rates
5. Designed Vacancies
6. Desired Competencies & Skills
7. Rates of Development & Promotion
8. Recruiting Effectiveness

Outcomes

1. Recruiting Plan
2. Development Plan



Secret Glue Explained

1. Workforce planning models numerous variables and constraints on talent which is not liquid like cash.
2. These are primarily gathered from the following: strategic plan, org design and technology plan.
3. Disciplined mini-workshops are doable for business to effectively plan from \$\$ to \$\$\$,\$\$\$,\$\$\$.



Summary of Points

1. People development, engagement, career planning, organizational design and strategy work together and most clearly show in the Workforce Plan.
2. Hiring based on your long-term goals.
3. Ensuring your development plan supports your strategic plan.



Call to Action

- 1. Talk with your leadership team** about the relevance and effectiveness of your plans to have the people you need when you arrive at 2020. Be honest in your **Assessment** of how well your organization is modeling its workforce needs over the next 3 years.
- 2. Facilitate** your leadership team in mini-workshops to update or advance your workforce plan.



Questions?



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