

CHAPTER 1

# Unlocking Potential Through Strategic Workforce Planning and Analytics



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## Introduction

Every day, the correlation between business agility and competitive success grows stronger – especially with the instability brought on by the global pandemic and geopolitical uncertainty.

The gap between today's top-performing businesses and those falling behind is growing wider. Why? Because global outperformers realise that leveraging their workforce data and implementing better planning are key to increased business agility.

Most organisations cite people as their most valuable asset – the driving force behind innovation, growth and delivering on strategic business objectives. But lack of talent and critical skills can lead to added expenses, decreased productivity and potentially lost revenue. [The Great Resignation exponentially increases these risks](#). As the dynamics of workplace safety and wellbeing, inclusion and belonging, and employee engagement and productivity evolve, leaders are turning to HR to understand the unique factors that shape each of these aspects of their working environment and culture. HR is now responsible, perhaps more than ever, for helping to shape workforce strategy amidst new and constantly changing workplace demands – chiefly, enablement and engagement of employees as they work to deliver on business objectives.



## Drivers for increased workforce analytics and planning.

The circumstances of the last few years have forced HR teams to pull together the data and analysis to be able to answer critical business questions.

According to [Sapient Insights Group's 2021–2022 Annual HR Systems Research](#), almost 50% of organisations are conducting some type of enterprise-level workforce planning effort, with 36% of companies creating 12-month rolling plans. Of those companies, more than 60% of large organisations are currently using an embedded analytics package in their HR systems, and just more than 55% of organisations have adopted an additional application for the purpose of HR analytics and planning efforts. The most predominant applications beyond Microsoft® Excel continue to be those embedded in existing HRMS, payroll and time management apps with more than 55% of organisations leveraging some form of embedded HR application, specifically for the purpose of analysing HR data.

Year over year, for two consecutive years, Workday customers reported<sup>1</sup> an average of 23% increase in their use of enterprise workforce planning practices and processes. In the last year, we also saw a 30x increase in the planning scenarios<sup>2</sup> run by our customers. Many of these, however, were likely focused around reactive measures to support employees, or planning to meet operational needs in the short-term (also known as workforce optimisation). Because the world is moving so rapidly and market and business conditions can change day to day, a continued and increased need for continuous recalibration is expected. This applies across the business and is most effective when organisations break down silos so that everyone can align and pivot more quickly.

As tricky as it was to navigate the sudden shifts brought on by the pandemic, leaders are facing a new challenge: keeping up with a historic revitalisation. Can they capture the opportunity before them and emerge from recovery even stronger? Can they hire at the pace they need? This might be easier said than done. As organisations navigate constant change, they run at a higher level, operating with precision and impact.



Almost 50% of organisations are conducting some type of enterprise-level workforce planning effort.

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Scenario modelling based on a range of assumptions is a best practice that has been a boardroom-level topic during the COVID-19 crisis. By envisioning and preparing for what's ahead, organisations can be far more agile, proactive and successful.

**Doug Henschen**  
VP & Principal Analyst,  
Constellation Research, Inc.

<sup>1</sup> Sapient Insights Group, HR Systems Survey. Workday customers reported an increase in their use of enterprise workforce planning practices and processes of 27% from 2019 to 2020, and an additional increase of 19% from 2020 to 2021.

<sup>2</sup> “Modern Planning Platforms Drive Business Agility and Better Outcomes”; Constellation Research, January 2021.

The harsh truth is that most organisations struggle to keep up with change. In fact, 63% of CEOs say their processes and execution are too slow<sup>3</sup>. There's an acceleration gap between the pace of change driven by new opportunity and the ability of an organisation to capitalise on it – a strategic and growing problem with painful results.

What's more, as the pressures of market volatility and data volume grow, the gap will only get wider.

To be fair, the acceleration gap, along with many of the workforce dynamics that have surfaced as top priorities, were already emerging prior to the pandemic, but the past year tested every organisation's ability to respond. Organisations that have already undertaken digital transformation were better prepared to respond to workforce needs, to reduce costs while driving efficiency, and to take advantage of new business models or leverage innovation to generate new revenue streams. Those that hadn't yet were put on a path of digital acceleration, compressing years of digital transformation into the span of a few months in order to respond to repetitive disruption.

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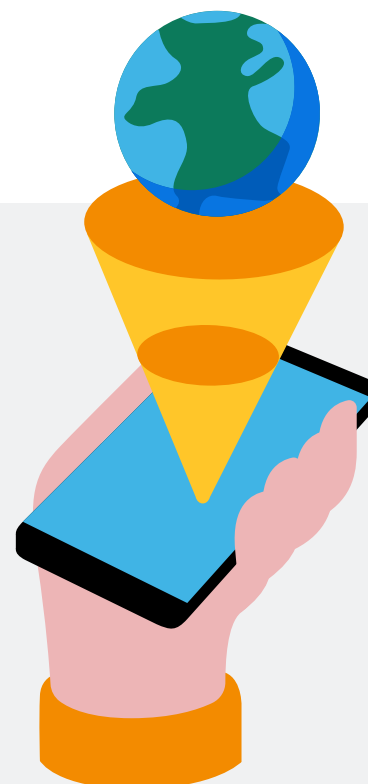
We've moved into a new era where in order for businesses to survive and thrive, digital acceleration efforts must be prioritised and viewed as an integral part of overall business strategy. For businesses that haven't embraced digital acceleration, their data is stale and sitting in siloed systems, and the processes for using it are often slow, requiring outside resources to forecast plans and update systems.

**Aneel Bhusri**

Co-Founder, Co-CEO and Chairman, Workday



63% of CEOs say their processes and execution are too slow.



At Workday, our customers tell us they recognise we are in the middle of a great HR reset. It is not only a time for digital acceleration and transformation to support digital and remote work and help hybrid work thrive, but also to do so in a human way with HR bringing the data to inform the plan and leading the change.

<sup>3</sup> KPMG, 2019 U.S. CEO Outlook: <https://home.kpmg/us/en/home/campaigns/2019/05/us-ceo-outlook-2019.html>

As we partner with our customers to help them shape the future of work by increasing resiliency and agility and better managing change, it is our hope that we can provide the tools and guided processes necessary to enable remarkable employee experiences, increase productivity and help everyone realise their full potential.

With its adaptable foundation, Workday Human Capital Management (HCM) is designed to address the challenges you face today and prepare your business for whatever the future brings. With transactions and analytics in one system, you can drill into data and take action on it from anywhere within Workday HCM. Removing the separation between transactions and analytics means that you can manage your organisation in real time, with agility and full confidence in data integrity. This foundation puts you ahead of the pack, accelerating growth with analytics and planning.

Whether you just deployed Workday HCM or consider yourself an advanced Workday report builder, this eBook can give you a better understanding of how our applications and tools work together to support specific planning scenarios and workforce outcomes. We've partnered with the Sapient Insights Group to provide more context around workforce planning and analytics and offer key considerations for building a strategy at your organisation. Read on to learn key steps for creating workforce plans that keep pace with change. You can also find a general overview of each of our applications in the [appendix](#).

## Workforce analytics and planning today.

Organisations need data to respond to evolving business and workforce needs while also actively shaping more inclusive, engaging, and productive working environments and employees. And not just data – organisations also need to measure baselines, benchmarks and insights; surface leading indicators for opportunities and risks; monitor plans against actuals; and use the data and analytics to inform change, adjust strategy or course correct from early indicators.

Even under ideal conditions with minimal socio-economic disruption, the complexity of workforce analytics and planning today requires the extensive collection and manual analysis of data, alongside a robust cross-functional collaboration. But what happens when business strategy needs to change overnight, or an organisation needs to meet surging labour demands in a particular region or for a particular type of labour or skill? How do you plan for roles when the roles themselves are being rapidly redefined and reallocated, or when you don't know which new roles or skills your organisation might need in 12 to 18 months?

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Being a growth-focused company looks different in 2021 than in 2019, and there's one big differentiator: data. Companies that use data to get leading indicators and intelligent insights via machine learning are pulling ahead.

**Aneel Bhusri**  
Co-Founder, Co-CEO  
and Chairman, Workday

This is precisely why you need proactive and scalable planning and analytics capabilities that give HR business partners, line of business leaders and people leaders access to insights that better inform decisions at all levels of the business, feed planning processes and enable modelling scenarios. Additionally, consider the impact of integrated data: a single source of truth that enables efficiency across teams and reduces potential risks for errors in data storage, definitions and interpretations. When a single source of truth feeds planning processes, “integrated workforce planning at this level yields a significant competitive advantage, shifting an organisation’s response to emerging threats and opportunities across the enterprise from reactive to proactive.”<sup>4</sup>

Consider the value your people analytics and workforce planning centre of expertise (COE) can provide when they can focus on delivering insights versus spending all their time just getting data from disparate systems and into the format they need for various ad hoc reporting requests or a massive annual planning process. This is the value of having one secure data hub to house all your data. Concerns around data readiness for analysis, permissions for access, systems consolidation and data accuracy are essentially erased when data is effectively blended and secured in a reliable hub. Of particular note: the efficiencies this provides to HR analyst teams. With a single hub, teams can jump right in and deliver sustainable, proactive reporting and insight solutions to internal stakeholders rather than reacting and scrambling to assemble data into a digestible format that often results in insights that are delivered just in time – or worse, late.

### Complex and dynamic.

Most organisations have abandoned trying to create a massive, annual workforce plan that aims to put the right people in the right place at the right time. That implies that there is one, perfect plan. And even if it were perfect, it wouldn’t be perfect for long because conditions change so rapidly, and legacy planning was simply not designed to keep up with this pace of change.

Much of the workforce analytics and planning taking place today are more targeted toward answering a specific question, tackling a particular challenge or helping your organisation drive toward a specific vision or outcome – such as with diversity and inclusion. And while HR may be working on a specific strategic initiative, it also has to factor in planning for real progress with DEIB, supporting hybrid work, cultivating connection and innovation across locations, and meeting staffing needs in the interim. It is a complex, multifaceted and dynamic orchestration of variables.



The benefit of an ecosystem with Workday Adaptive Planning, Workday Prism Analytics and other Workday applications is that we can have all data in one location to look at the past and make informed decisions for the future.

#### Stacey Bell

Associate Vice President for  
Finance, Planning and Analysis,  
Florida Atlantic University

<sup>4</sup>“Break the Speed Limit: Accelerate Workforce Planning and Analytics Capabilities to Emerge Stronger in the New Economy”: <https://forms.workday.com/en-sg/reports/workforce-planning-strategy/form.html>

## Data driven.

As the world of work continues to evolve, it becomes more urgent for HR teams and the business to get answers to critical questions that inform plans and talent decisions, or provide a pulse on the organisation.

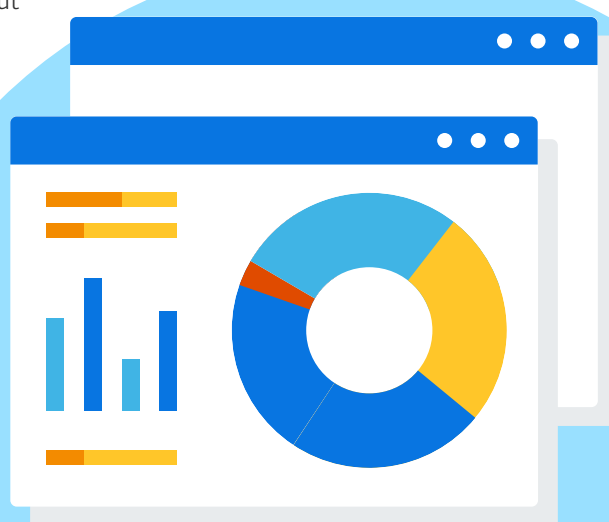
You need data at your fingertips to answer critical operational questions and build workforce plans that are intentional, focused and timely, and that also expand to include the actions you will be taking to meet the needs of your workforce. Recalibrating because you have real-time access to data indicating, for example, that if you continue down the current path, your attrition risk increases or you will not meet your hiring goals.

This is the plan-execute-analyse-recalibrate cycle. HR must be able to adjust to rapidly changing needs, monitor the impact and progress of its efforts, and recalibrate as these interconnected variables shift – requiring access to data from across the organisation and the employee lifecycle.

## Continuous.

Conventional annual employee surveys, annual or bi-annual planning cycles and siloed planning processes simply cannot support the agility required to detect changing circumstances early and adapt business and workforce plans accordingly. And because workforce data and analytics are required to fuel the planning process, access to accurate and real-time operational and workforce data, according to [a recent research study by HCI and Workday](#), “is the greatest differentiator for success in transforming workforce planning.”

As the world moves toward recovery, we also want to move away from being reactive and using analytics and planning to respond to every crisis and change. It shouldn't be a survival mechanism. Your data and insights should work for you and your planning, not the other way around. More organisations are leaning away from longer-term planning and toward a continuous plan-execute-analyse cycle, while also working on specific initiatives tied to employee engagement or culture. This is the path to helping your people and your organisation thrive again. In fact, the most successful organisations are using data as a competitive advantage to plan and take action continuously throughout the year to achieve desired business outcomes and help their people thrive.





## Democratisation of data.

Not only does HR need data at the ready, but HR business partners and other business leaders also need access to data to pivot quickly. Each organisation's plan will look unique based on its business strategy and environment. What's most important is that HR and business leaders can act fast when needed – exploring options, approving and executing plans as quickly as possible – and plan and adjust thoughtfully based on their business direction and access to data and information.

According to [RedThread Research](#), one of the characteristics of responsive organisations is distributed decision-making. Distribution of authority, as well as data to better inform decisions, drives faster responses, higher engagement and increased innovation. This is how people analytics as a function can deliver value across the organisation: by delivering scalable analytics tools that provide self-service access to insights.

At Workday, our goal is to support you in this endeavour.

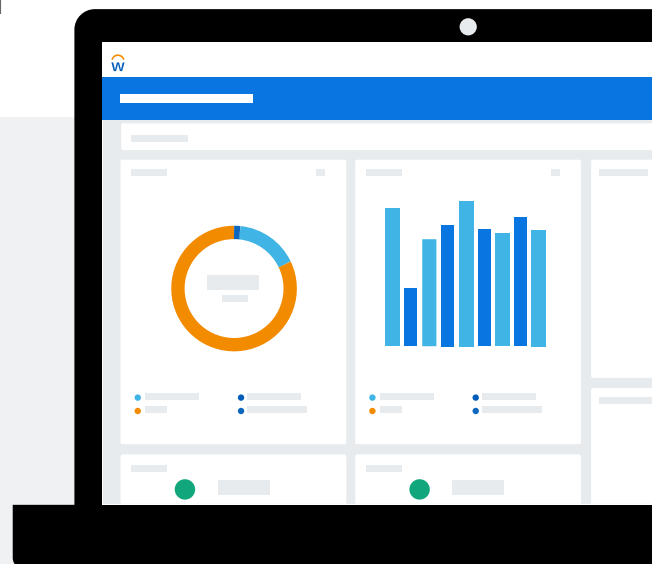
Workday helps leaders understand where they are today compared to where they want to be, plan for how they'll get to a desired end state and take action, all while keeping a continuous pulse on the state of the business and the well-being and sentiment of the workforce.

Using Workday, you can build a comprehensive picture of your workforce's health and build a strategy tailored to their specific needs. With sentiment data from Workday Peakon Employee Voice, operational or productivity data from Workday Prism Analytics, and key trends surfaced and highlighted via Workday People Analytics, you can create intentional and data-informed plans in Workday Adaptive Planning.

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There are a lot of things working well with Workday Adaptive Planning. We are pleased that users can easily go into the tool to quickly see the data and gather insights. They can run reports and have control over the ability to go in and populate the data themselves, then see it flow in there. This is probably the biggest win for us.

**Ryan Brown**  
SVP Technology, Howard Hughes



### Continuous, coordinated, cross-functional workforce planning.

Continuous recalibration – monitoring performance and making adjustments to the plan – is essential for business alignment and achieving organisational goals. But what do we mean by that, and what is coordinated, cross-functional workforce planning?

Traditional planning, which is finance-led and focused primarily on budget and headcount, can be too narrowly focused to ensure that each business unit – and its goals and talent strategy – are aligned to overarching business strategy. Effective planning unlocks the ability to continuously anticipate change and quickly operationalise a coordinated response at scale. It helps organisations stay ahead of the competition, despite radical instability and disruption. Effective workforce analytics and planning positions HR as a strategic advisor to the business by aligning workforce and key business objectives across the organisation, making integrated workforce planning a powerful tool.

### The benefits of continuous, coordinated, cross-functional workforce planning.

Organisations can leverage robust strategic workforce planning and analytics capabilities to analyse their workforce and determine the steps they must take to ensure they have the necessary talent to meet their business objectives.

It's clear that workforce planning and analytics activities are more critical now than ever before. Among global employers, 7 in 10 report difficulties hiring skilled workers in high-demand areas of frontline and knowledge workers within industries such as operations and logistics, and manufacturing and production, along with functional areas such as IT, sales and marketing.<sup>5</sup> And, by 2030, some estimates calculate we can expect a talent deficit of 85.2 million workers.<sup>6</sup>



With conditions in constant flux, companies need to continuously plan, execute and analyse to move forward. Our customers' ability to break down silos between HR, finance and IT – and the respective data – is essential to effectively pivot and succeed. The pandemic moved us into a mode of continuous recalibration. There was a time when companies could do an annual plan, execute and then check back at the end of the year and see how they did. That reality is long gone.

**Aneel Bhusri**  
Co-Founder, Co-CEO  
and Chairman, Workday

<sup>5</sup> Manpower Group, "Global talent shortages reach 15-year high as workforce transformation reshapes in-demand skills"; press release; June 1, 2021: <https://investor.manpowergroup.com/news-releases/news-release-details/global-talent-shortages-reach-15-year-high-workforce>

<sup>6</sup> Korn Ferry, "Future of Work: The Global Talent Crunch"; 2018: [https://www.kornferry.com/content/dam/kornferry/docs/article-migration/FOWTalentCrunchFinal\\_Spring2018.pdf](https://www.kornferry.com/content/dam/kornferry/docs/article-migration/FOWTalentCrunchFinal_Spring2018.pdf)

A sound approach to strategic workforce planning provides support for most aspects of the talent lifecycle. As an organisation is thinking through its strategy, there are a few things to keep top of mind.

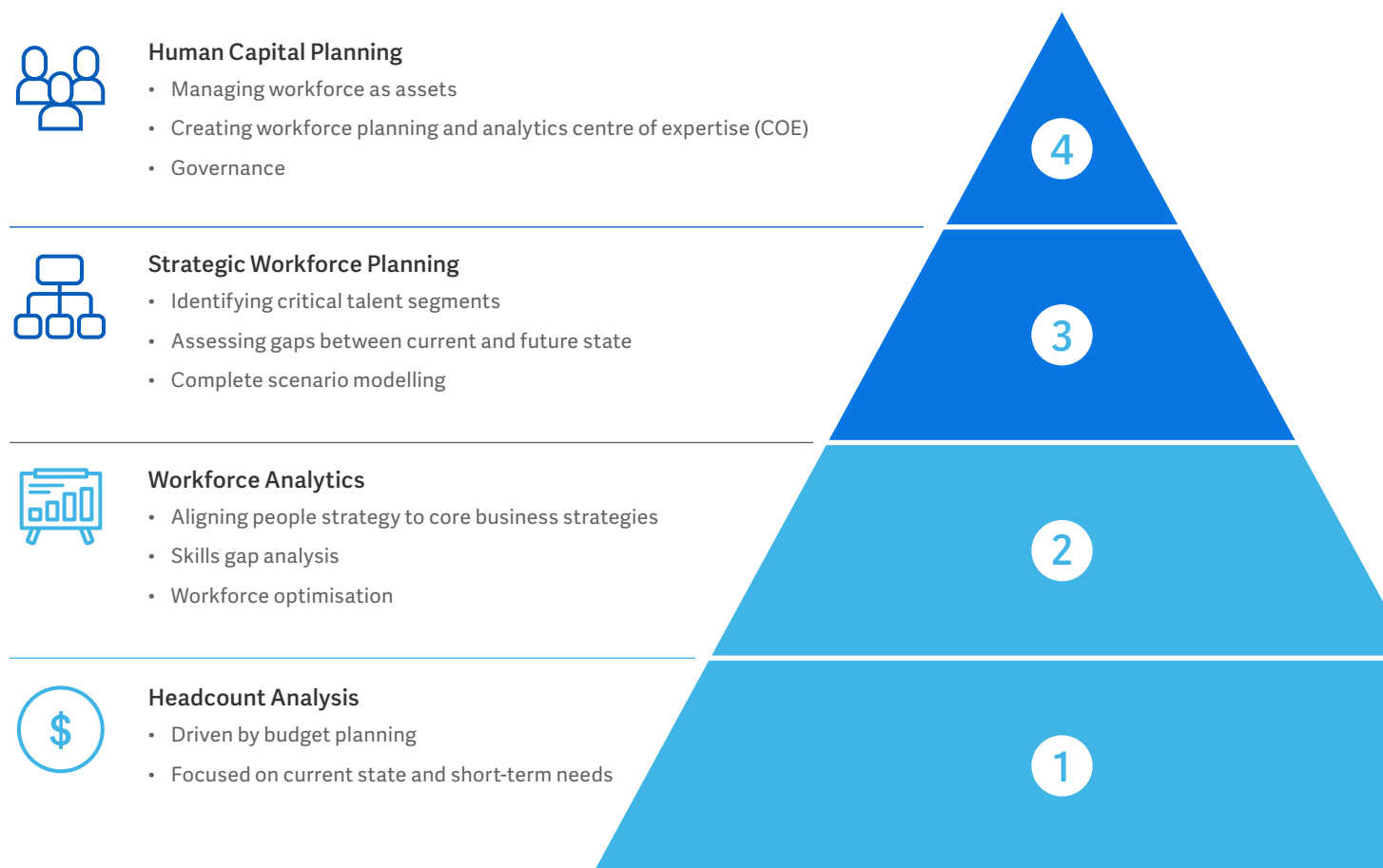
- **Model workforce dynamics on your most critical workforce segments.** Model hiring, transfers and retention plans with driver-based assumptions to see the cost impacts instantly. Factor in global or local business drivers that can affect your staffing plans.
- **Align workforce plans with business goals.** Identify ways to close skills gaps across business units and functions. Then collaborate to turn your workforce plans into talent acquisition strategies. Report on the outcomes.
- **Keep a pulse on your talent needs.** Leverage analytics, including intuitive dashboards, scorecards and reports, to monitor costs, view open positions and break down the workforce by any number of dimensions. Use these insights to address root causes of workforce issues and quickly course correct as business conditions change.

Organisations, and in some cases, business units within an organisation, have different levels of capabilities, resources and technology to complete their strategic workforce planning activities. Using a maturity model approach is helpful for companies to see how they rank against different levels of planning, what actions they should consider completing at each level and what it takes to progress to a higher level of maturity.

Not every company will need to start at level 1 (see maturity model on the following page), and each organisation should evaluate its process and determine what steps are needed to evolve its workforce planning maturity.

Having robust technology solutions helps organisations improve productivity and save time – not only the time it takes to get up to speed with developing a process, but also with the time involved in moving up the maturity curve.

## A typical maturity model for strategic workforce planning.<sup>7</sup>



### Operational workforce planning:

**Level 1:** Headcount analysis is budget driven and focused on the current-state organisation and short-term planning. Operationally this means providing centralised human capital data and reports, leveraging HRIS and spreadsheet templates.

**Level 2:** Workforce analytics are embedded in the strategic planning process, expanding the definition of workforce optimisation to include the ability to rapidly react to changes in the business environment. Organisations at this level typically have hired a few key resources; built out processes, tools and templates; and are leveraging specialised technology solutions.

### Strategic workforce planning:

**Level 3:** Strategic workforce planning activities include taking operational inputs to identify critical talent segments, running what-if scenarios to determine possible future states, assessing gaps between the desired future and current states, continuously monitoring progress in closing the gaps and moving from point-in-time monitoring to more agile approaches to updating models. At this level, organisations refine their processes and templates, hire resources for advanced analytics skills and capabilities, implement more robust technology solutions, and provide interactive dashboards and planning tools with continually refreshed data.

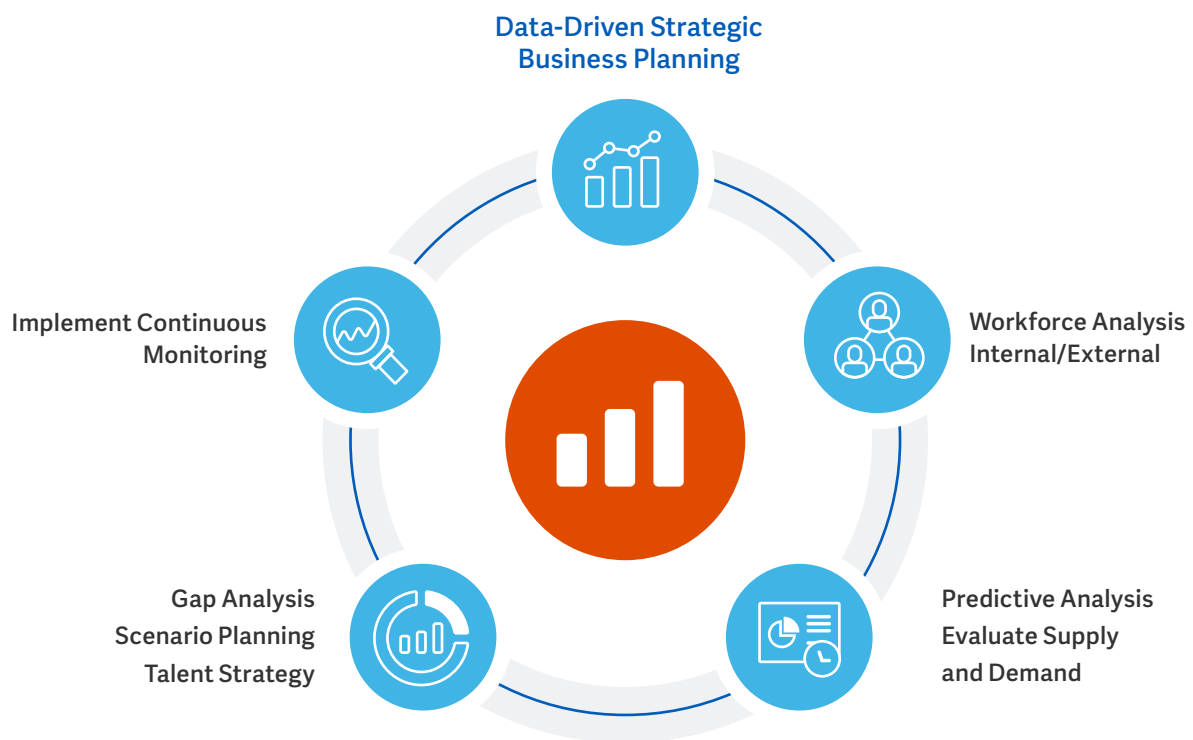
**Level 4:** Human capital planning includes recognising and managing the workforce as an asset, implementing company-wide governance of the strategic workforce planning process, managing risks and optimising performance across the company's workforce. Organisations at this stage of maturity may be creating a COE to facilitate and monitor planning outcomes and the alignment of the people strategy to core business strategies. Also, level 4 organisations are continuously refining their workforce planning processes and sharing analytics and planning output in real time, and have implemented robust technology solutions for the COE and business leaders.

<sup>7</sup> This is a Sapient Insights maturity model, based on its research and client insights.

## What it takes to execute the workforce planning process.

When done effectively, workforce planning is a continuous feedback loop – leveraging internal and external metrics identified to assess and inform plan adjustments and feed the next round of strategic planning.

It all starts with data-driven, strategic business planning: the process of setting an organisation's goals, strategy and future actions with the purpose of increasing its ability to grow, increase financial outcomes, meet its mission and/or increase future sustainability. Strategic business planning is an analysis of investment and risk in relation to the possibility of positive outcomes.



A planning process generally consists of these steps:

### **1. Identify the problems, opportunities or outcomes you are trying to achieve and determine how much usable data already exists within the organisation.**

This stage is critical to successfully completing the remaining steps of the process so that the organisation isn't wasting time addressing a problem that won't bring about significant outcomes. This first step requires an honest, objective and thoughtful look at what's happening in a business and how workforce planning can assist in meeting the outcomes the organisation is looking to achieve and identifying opportunities to improve specific situations using data and insights.

Once the problems, opportunities or potential outcomes have been identified, a gap analysis can be completed to identify where usable, trusted sources of data already exist within the organisation to be used in the remaining analysis. For example, [core HR reporting in Workday](#) delivers secure self-service access to analytics and reporting, enabling a user to perform analysis in the same system where transactions occur and giving them unique insights and agility.

Unlike two decades ago, when diversity efforts were often part-time and data was scarce, diversity, equity, inclusion and belonging programmes today align around robust data from sophisticated people analytics capabilities.

An organisation's plan for DEIB often begins with the data, and because leaders can't manage what they can't measure, they are seeking to apply the same rigorous, data-driven processes that drive the rest of their business operations.<sup>8</sup>

### **2. Take inventory and forecast the current market (environmental) conditions.**

It's important to complete an analysis of both the macro and micro environmental elements that will affect your workforce strategy. A macro analysis should look at the pandemic and its ongoing repercussions on talent supply and demand, along with economic and social trends and virtual recruiting techniques. This should be matched with a micro-analysis that includes competitor intelligence, future business plans, skills gaps and internal talent pools, as well as diversity, equity and inclusion considerations. Interpreting and analysing this data creates the market intelligence you need to inform your workforce planning process. [Workday People Analytics](#), which includes augmented analytics to focus attention and cut through the clutter, ensures organisations don't miss hot spots, opportunities and risks while developing a plan.

<sup>8</sup> Best Practices: Optimising Analytics for Diversity, Equity, Inclusion and Belonging:  
<https://blog.workday.com/en-us/2022/best-practices-optimizing-analytics-diversity-equity-inclusion-belonging.html>

### 3. Formulate multiple approaches to address the needs or achieve the outcomes.

Scenario planning allows organisations to evaluate multiple approaches to meeting future workforce requirements. These scenarios typically include looking at options for external recruiting, reskilling and upskilling current employees, contingent staffing and outsourcing. For example, you might consider external recruiting to address future workforce gaps. But you have to factor in forecasted supply and demand, the type of workers you need, diversity-related considerations, cost and time, and more. No matter how efficient the talent acquisition process, it most often takes longer to source, hire and develop new people than to reskill or upskill current employees. And if the organisation's future is projected to be highly dynamic, contingent staffing or outsourcing may provide more flexibility.

Creating scenarios and standardising workforce plans across complex and diverse business units with [Workday Adaptive Planning](#) allows you to manage a single strategic workforce model across the entire enterprise while building specific business and revenue models for individual business units. With driver-based, what-if scenarios of the workforce mix and timing, organisations can better align their people with their corporate plan through top-down or bottom-up workforce planning processes, or both.

### 4. Leverage analytics to find impactful adjustments to your workforce plan.

Gaining insight into the entire employee lifecycle is one of the biggest opportunities for HR and workforce planning experts to be more agile in their workforce planning efforts. Using analytics in this way allows you to surface information about employee turnover, tenure and hiring to obtain a holistic understanding of the current state and how it may affect your workforce plans in the future. This means:

- Knowing which skill sets deliver business results and how that compares to the skill sets of your current workforce
- Identifying patterns and anomalies to spot talent gaps
- Linking increased labour demand to specific times of the year, season changes and calendar events, and incorporating these analytics into workforce planning to avoid labour shortages and prevent employee burnout

With [Workday Prism Analytics](#), finance and HR have a data hub built right into the system of record, bringing together the data they need while maintaining integrity, providing access to decision-makers without compromising security, and supplying intuitive tools that make insights from disparate data sources easier to generate and consume.

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I'm pleased that we can pull in the freshest, most live data from Workday into Workday Adaptive Planning seamlessly. I love how all the data is located in one system versus multiple Excel spreadsheets. And, I love how Workday and Workday Adaptive Planning are both really connected via just a click of a button.

**Niaz Khan**

Vice President, HR Technology  
Consultation and Development,  
Commerce Bank

Additionally, [Workday Peakon Employee Voice](#) enables continuous listening across the entire employee lifecycle, with real-time visibility into employee engagement, sentiment and productivity. This gives you insight into multiple feedback channels and enables you to see what matters to your people, capture sentiment, immediately analyse the data and create prescriptive action plans. This way, you can deliver meaningful employee experiences where all employee voices are heard and answered.

## **5. Evaluate the risks and benefits of various approaches to select the best plan(s) and set milestones and measurement for success.**

Identify and rate the risks identified in your model. The process of determining the significance of estimated risk, as compared to the benefits, can never be a completely scientific process. But using data to measure risk and the trade-off between perceived risks and benefits is key.

Using data can help you choose the best plan of action to mitigate risk. This can be in the form of professional judgment, using historical precedent or formal analysis of a modelling problem and calculating the impact of the best decision.

[Workday Adaptive Planning](#) provides the framework, shared data and workflow needed for greater collaboration as you're building dynamic, flexible workforce plans. It also provides a bridge between finance and HR data, linking workforce plans to financial models with up-to-date headcount plans and related costs.

## **6. Assess the progress made toward the plan on a continuous basis and adjust as needed.**

Reviewing and adjusting workforce planning and analytics processes isn't a one-step action. Continuous evaluations provide a methodology for improvement at any point in time to optimise results.

Analytics solutions from Workday enable you to complete an ongoing assessment of workforce planning and analytics that encompasses current processes, sources of data and technology used in the activities. It also supports determining efficiency and effectiveness of strategic workforce planning and whether progress is being made against expected results. These tools include:

- **Delivered dashboards and standard reports:** robust, prebuilt, configurable, and build-it-yourself dashboards and reports to visualise and understand workforce data
- **Discovery boards:** ad hoc, real-time analysis to visualise trends
- **Benchmarking:** anonymised data for peer comparisons to see areas of strength and opportunities relative to similar companies





### Shared accountability gets the work done.

Strategic workforce planning happens in multiple areas within the organisation – most commonly within finance, HR and the business unit. Best practices show that workforce planning and analytics should be a shared responsibility across multiple groups: business or people leaders, HR business partners (HRBPs) and a centre of expertise (COE).

### Here's a look at how you might think about divvying up these shared responsibilities.

#### Business/people leaders.

- Give strategic guidance and context
- Provide business scenarios and related workforce solutions
- Manage implementation and communication

#### Line of business/HR business partners.

- Identify critical workforce segments, gaps and “what-if” scenarios
- Close gaps by executing on workforce strategies

#### Head of analytics and planning/centre of expertise.

- Define workforce planning and analytics processes and provide guidance and templates
- Provide an objective single source of data in workforce planning
- Ensure communication and training of all stakeholders (HR and business)

Organisations operating at the highest level of workforce planning maturity may have established a workforce planning and analytics COE, streamlining their ability to optimise processes, assemble subject matter experts and build out technology infrastructure. Building out a COE also reinforces that the organisation has an evidence-based, data-driven culture that embraces testing hypotheses to address workforce priorities.



## A robust COE typically has many different roles.



**The COE leader/head of analytics and planning:** This role sets the strategy for the COE, and is responsible for coordination, project management and communication to key stakeholders of the process. The COE leader partners with HR, finance and business units to determine requirements for the COE, and partners with other COE leaders in HR; for example, talent management, rewards and so on to ensure integration of services where appropriate. This role works with the business to finalise unit-level plans, integrating them with budgeting, capital expenditure and other planning cycles. The COE leader is also responsible for governance, including tracking and reporting on success measures.



**Workforce analytics and planning specialist:** The resources collect and analyse HR data, develop dashboard templates, provide regular reporting, offer actionable analysis and collaborate with HR business partners (HRBPs) on requirements for the business units they support.



**Data integration specialist:** The role of this resource is to develop and maintain a data acquisition strategy, methodology and key processes. They develop data models, provide support for resolving data issues, are responsible for ensuring overall integrity of the data, assist in building out dashboards and support continuous process improvement.



**Technical resource:** These team members assist with data extraction from the various systems leveraged in the process, support the technology infrastructure and provide database administration or other technical support as needed for the functional team.

Underpinning all strategic workforce planning and analytics activities is technology. Applications and tools should support analytics and planning efforts to help organisations capture, store, govern, analyse, report and share past, present and future workforce information. These apps may also provide statistical analysis and proprietary algorithms that can deliver insights, recommendations, predictions, scenarios and forecasts to be used for decision-making and workforce planning purposes.

These tools and resources are critical components required to support the organisation's vision, achieving strategic outcomes and enabling you to:

- Build powerful workforce models to handle complexity
- Create multidimensional models that map everything from financial goals and strategic initiatives to how you run your business
- Plan for internal and external organisational change
- Prepare your organisation to meet future demand and deliver on strategic goals, including scenarios for one-time events, such as restructures or mergers and acquisitions
- Link operational workforce plans to strategy
- Collaborate with your recruiting team and HR business partners to hire or develop the talent you need
- Weigh bottom-up business operations input against corporate initiatives and top-down plans
- Democratise the data so that multiple users can access it
- Build a unified, trusted data source
- Provide reports and configurable dashboards to gain the data-driven insights you need to build a more engaged, diverse and resilient workforce – while measuring your progress along the way

### **Workforce planning in action.**

See how Workday customers are leveraging our broader suite of applications to achieve better workforce planning outcomes in this [video playlist](#).

For a more in-depth exploration of workforce analytics, check out [The Ultimate Guide to Workforce Analytics](#).



## Appendix: How Workday enables strategic workforce planning and analytics.

We know that as an HR or people analytics leader or workforce planning lead you need to be able to quickly understand how your workforce is performing, how they are feeling, what they need and where talent needs for the business are shifting. It's clear that the most successful organisations are using data to bounce back faster from disruption to ensure the business and their people thrive.

Workday delivers a full spectrum of workforce planning, reporting and analytics solutions to help you do just that. With Workday, you can tackle what is top of mind with timely and secure insights that can inform targeted, strategic plans. In this overview, discover how our tools work together to give you a more complete picture of your workforce and empower people leaders and HR business partners to deliver on a talent strategy that balances current needs with longer-term strategic objectives.

We strive to support our customers in this complex and demanding time by helping you uncover insights and develop your plans with a single platform so your data directly informs how you plan for and tackle workforce challenges, including performance, sentiment, changing needs and talent gaps.

### Workday core reporting and analytics: the analysis toolkit.

**The suite of included analytics capabilities enables you to visualise as you splice and dice and dig into data.**

Workday Human Capital Management (HCM) core reporting comes standard with powerful [reporting and analytics](#) features, including delivered dashboards and standard reports, discovery boards and benchmarking. These secure, self-service tools give users the ability to report, analyse and visualise any data that sits within Workday HCM – enabling the discovery of critical insights to help solve business challenges in real time.

With our reporting and analytics capabilities leveraging the single architecture and common object and security model, everyone can easily access the analytics they need and act on what they see. With analytics and transactions in one place, you can see what's working, what's not, and take action then and there. With a consistent data model across the Workday suite, everyone is working from the same set of data and your organisation is well positioned to leverage data for planning and better informed decisions at every level of the organisation.

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Our ultimate vision is to unify plan, transactional and operational data, live, in a single interface, for HR and finance leaders to drive better decisions and move their organisations forward.

**Pete Schlampp**  
Chief Strategy Officer,  
Workday

### **Workday Prism Analytics: the data hub.**

**A dynamic platform to combine non-Workday data with Workday data.**

[Workday Prism Analytics](#) is your data hub to ingest and transform non-Workday data, giving you one powerful and unified view of your workforce. Workday Prism Analytics allows data from any source to “co-exist” within Workday for unparalleled access to decision-making.

It can also serve as the data and reporting hub to support your workforce planning and analytics activity, enabling you to ingest and blend non-Workday (operational or third-party benchmark) data with transactional data stored in Workday. Presented through core Workday dashboards and reports, this capability makes Workday Prism Analytics a powerful platform that gives you a more complete view of your workforce, unlocking a new level of insight and providing the context you need to make better plans and decisions.

### **Workday People Analytics: the HR guide.**

**A delivered augmented analytics application that does the work for you, highlighting where to focus your efforts.**

[Workday People Analytics](#) is an augmented analytics tool that has been described as “an extra team of digital analysts” that adds immediate capacity to an HR analyst team. Augmented analytics digs through your data to find key insights and opportunities and identifies key drivers of those trends, wrapping them in an easy-to-understand story. This saves leaders time and effort, highlighting where to focus and thereby enabling better and faster people decisions.

You can think of Workday People Analytics as a guide for HR leaders. The HR analytics function is usually short on people and time, but not on requests. With key insights at their fingertips, leaders can be confident they are spending their time on what needs their attention most, from a risk or challenge that needs to be addressed, to a positive trend that can be scaled across the business. Workday People Analytics immediately adds value, identifying trends that you may have missed or might not have even known to look for, while freeing up your analysts for more strategic analysis and initiatives.

### **Workday Peakon Employee Voice: the listener.**

**A powerful tool to continuously capture employee sentiment with intelligent listening.**

[Workday Peakon Employee Voice](#) brings the voice of the employee into your data. It delivers the “why” to complement the “what” of your workforce data, helping you to better uncover real-time employee engagement, belonging and sentiment insights.

Workday Peakon Employee Voice unlocks sentiment data in a new and game-changing way. It's a powerful employee listening technology that allows you to capture the voice of the employee with in-the-moment pulse surveys and real-time sentiment analysis. When you can truly understand your people, you can act faster and take the most appropriate action to ensure they feel heard and valued. It not only brings their voice to the decision-making table, but it also gives managers and employees direct agency, empowering them with information and transparency through benchmarks of their team experiences and suggested actions, and greater visibility into leadership's responses to feedback.

### **Workday Adaptive Planning for the workforce: the scenario builder.**

**A robust planning platform that will help your workforce flex with the future.**

With [Workday Adaptive Planning](#) software for workforce planning, you can bring HR, finance and operations together to create workforce plans that keep pace with change. Workday streamlines workforce planning so you can model, forecast and budget your workforce all from the same unified data core. Our platform is designed to deliver actionable insights that can help you make better decisions, meet your business goals and build smarter plans more efficiently, whether you are modelling your workforce dynamics, aligning your workforce plans with your business goals or keeping a pulse on your talent needs.

Workday Adaptive Planning for the workforce takes all the data and insights from across Workday and enables HR and business leaders to bridge the divide from where they are today, compared to where they want to be based on their business strategy and objectives. In order to realise their goals, leaders need to make good decisions about how to optimise talent. Workforce planning allows them to plan among key stakeholders in the business and with finance in order to do just that. By modelling and forecasting different plan options, you can determine the best approach to ensure you have the right talent in the right place, and that both short-term and long-term objectives are being met.

- This could span planning how you'll achieve belonging and diversity goals over the next year through recruiting initiatives or learning programmes to planning how you'll grow, acquire or borrow talent over the next five years to address any anticipated skills gaps in your future workforce based on your business direction and market trends.
- Once a planning process/modelling process is complete and a plan is approved, monitoring efficient execution against that plan, as well as continuous adjustments over time as new information comes in, are essential to a continuous planning model where you recalibrate to inform the next plan cycle or scenario.

- Workday Adaptive Planning for the workforce provides robust multidimensional modelling and scenario planning capabilities that scale to address the workforce planning needs and complexities of your organisation, regardless of size or industry.

### Workforce optimisation: the navigator.

**With our workforce optimisation solution, your organisation can better navigate disruption and the pace of change – both the changing needs of your business and the changing expectations of a diverse, hybrid workforce.**

The [Workday workforce optimisation solution](#) empowers you to unlock the true value of your people so you can respond to and thrive through change. It's about continuously recalibrating and figuring out how to best optimise the time, talent and energy of your entire workforce – making sure that every worker counts and feels valued. By combining the efficiency of an automated workforce management platform with the flexibility of an agile, skills-based talent approach, your business can adapt in unpredictable times, pivot your workforce to support change and new opportunities, and deploy the right people with the right skills to the right place at the right time.





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