STRATEGIC WORKFORCE PLANNING WORKBOOK

Accompaniment to the Strategic Workforce Planning Course for Nova Scotia Businesses & Organizations

Instructions

As you work through the Strategic Workforce Planning Guide for Nova Scotia Businesses & Organizations and develop a comprehensive workforce plan and forecast, this Strategic Workforce Planning Workbook is intended to help organize and record your thoughts to result in the strongest and most satisfactory plan for the future of your business or organization.

It is best to take your time and be as thorough as possible when completing activities. Some activities may require additional document and information gathering before you continue to the next stage.

You may complete this Workbook as a fillable PDF and save it to your files, or print the document and complete by pen. If you choose to print, you are encouraged to scan or type the results of the Plan to keep with your digital files as back up. Larger businesses or organizations may wish to replicate or adapt some exercises using word processing or database software like Microsoft Word and Excel.

Ultimately, it is up to you how you use this Workbook to suit your needs and those of your ever-changing workforce.

CHECK LIST

1. Introduction to Strategic Workforce Planning / Details of Your Business or Organization

Gather resources:

- Pen / Pencil
- Highlighter
- Scrap Paper
- Calculator

Gather documentation:

- Tax filings
- Business plans & strategies
- Proprietary information including process information, patents, etc.
- Funding applications
- Job descriptions
- Articles of incorporation

2. Establish Strategic Direction and Goals Based on Current Objectives

- Document review
- SWOT Analysis
- Goal development and categorization
- Meetings with key parties

3. Conduct Current Workforce Analysis and Future Requirements

- Supply Analysis
  - o Workforce Web
  - o Employee Mapping
- Demand Analysis
- Gap Analysis

4. Develop Specifications for Strategic Workforce Development

- Expected Formation
- Future Desired Formation
- Categorizing New Positions & Policies

5. Develop and Implement Action Plan

- Goals and Action Planning
- Meetings with key parties

Check In

6. Monitor, Evaluate and Revise

- Milestones
- Key Performance Indicators

FILLABLE GANTT CHART

Use the following fillable Gantt chart to apply your own timelines to the strategic workforce planning process. Ensure the timelines are realistic for yourself and the members of your team who are responsible for the planning process. You may colour the chart if you have a printed copy, or insert "x" if using a digital PDF.

Alternatively, you may replicate this chart in Microsoft Excel and add your own phases or subphases.

SUGGESTED IMPLEMENTATION PLAN													
Phase 1: Introduction to Strategic Planning													
Phase 2: Establish Strategic Direction and Goals Based on Current Objectives													
Circulate Your Plan													
Phase 3: Conduct Current Workforce Analysis and Future Requirements													
Phase 4: Develop Specifications for Strategic Workforce Development													
Phase 5: Develop and Implement Action Plan													
Strategic Workforce Planning Checklist													
Distribute Your Plan													
Business / Organization-Wide Kick Off													
Phase 6: Monitoring & Evaluation													

Step 1: Details of Your Business or Organization

Use this space to record the fundamental aspects of your business or organization.

OWNER INFORMATION

First Name: _____   Last Name: _____

Address: _____

Phone Number: _____   Email: _____

BUSINESS / ORGANIZATION INFORMATION

Business / Organization Name: _____

Business / Organization Address: _____

Phone Number: _____   Email: _____

Registered Owner(s): _____

Registered Province(s): _____

Nature of the Business / Organization: _____

Approximate Size of Workforce: _____

Step 2: Establish Strategic Direction and Goals Based on Current Objectives

DOCUMENT REVIEW

Review the documents you have collected, if any, and write down any key takeaways, aspirations or strategies you would like to carry through to the new Strategic Workforce Plan.

If you do not have any previous strategies or plans to review, continue to the SWOT Analysis.

SWOT ANALYSIS

SWOT stands for Strengths, Weaknesses, Opportunities and Threats. For this activity, you will critically analyze your business or organization and identify its unique strengths, weaknesses, opportunities and threats.

As an example, strengths may include workforce strengths such as specialized knowledge provided by yourself or your employees. It may also include competitive strengths like being distinctively differentiated in your industry or sector.

How can this be applied?

The presence of specialized knowledge may help to identify key employees who require careful consideration for retention or succession. Your competitive position may be an indicator of expected future workforce growth or a factor of workforce attraction.

There is no right or wrong answer. Consider the strengths, weaknesses, opportunities, and threats of your business or organization and include them below:

STRENGTHS	WEAKNESSES

OPPORTUNITIES	THREATS

GOALS

Take some time to consider the current direction of your business or organization and what you hope to accomplish in the next five years. Feel free to write down notes in the space provided:

Consider the opportunities and threats identified previously as well as the hopeful direction of your business or organization. Record a series of goals that will support and guide your workforce.

Goals may include growing your workforce to support expansion efforts, increasing overall job satisfaction by reviewing benefits and policies or enhancing productivity through the introduction of innovative technologies.

Ensure your goals are S.M.A.R.T. – Specific, Measurable, Achievable, Realistic and Timely. Consider *how* you will carry these goals out through your workforce planning.

Categorize your goals according to the objective they achieve. Categories may include recruitment, retention, productivity enhancement, expense reduction, innovation or others as they apply to your business or organization.

Space follows for up to 10 goals. You are not required to list 10 goals nor are you limited by the space provided.

GOAL	CATEGORY

THOUGHTS FROM ASSOCIATES

In this space, record any thoughts or considerations that arise as a result of initial conversations regarding your goals and anticipated direction for your business or organization.

As a preliminary activity for these meetings, you may ask your trusted parties to develop their own list of goals for comparison and consideration.

Step 3: Conduct Current Workforce Analysis and Future Requirements
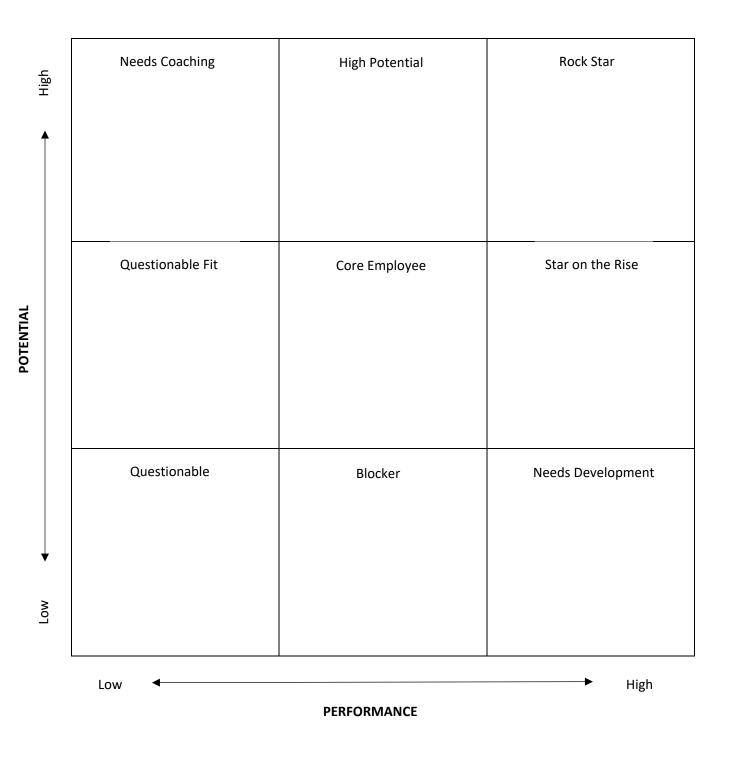
SUPPLY ANALYSIS

WORKFORCE WEB

If utilizing a printed Workbook, design your workforce web below. If using the digital PDF, a table is presented underneath. Input departments and key individuals or positions. Include the current number of employees in each position.

EMPLOYEE MAPPING

Needs Coaching	High Potential	Rock Star
Questionable Fit	Core Employee	Star on the Rise
Questionable	Blocker	Needs Development

POTENTIAL — High / Low

PERFORMANCE — Low ←→ High

DEMAND ANALYSIS

Compare the workforce you mapped out during the supply analysis against your revenues and production levels. This information can be found in the financial statements and other documentation you gathered in the beginning of this process.

Do you expect your level of production or service delivery to grow over the next five years? _____   By how much? _____

> When quantifying this growth, you may use a metric that makes the most sense for your business or organization. This may be profit, revenue, level of production, clients serviced, projects completed or another metric as determined by you.

If so, can your current workforce sustain this growth? _____

If not, consider the positions included in the activities above and anticipate how many total positions may be required to achieve this growth at the end of five years.

List the departments and positions used above, but include new five-year projections for each position. At this stage, you will only include positions that already exist within your business or organization.

GAP ANALYSIS

Identify the most critical positions and list them first on the table below. Input the numbers from the supply and demand analysis above, indicating the gap.

POSITION	CURRENT SUPPLY	ANTICIPATED NEED	GAP

Step 4: Develop Specifications for Strategic Workforce Development
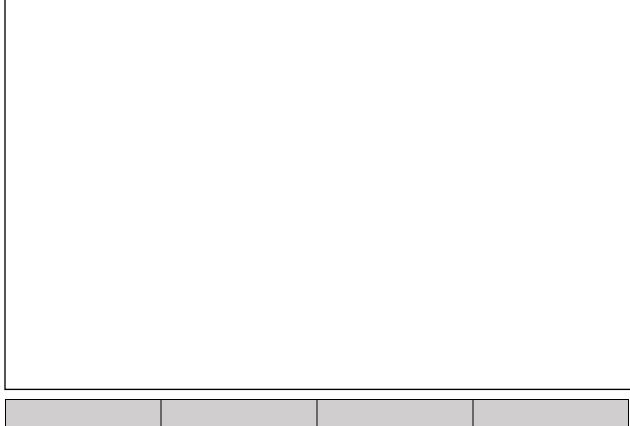
EXPECTED FORMATION

Copy your workforce web from the Supply Analysis in Step 3. You may do this by photocopying page 14 or by re-creating your web in the space provided. Alternatively, you may use a different colour pen or pencil to mark over your web on page 14. You will repeat this exercise again on the next page.

Observe the current rate of workforce growth and anticipate your future workforce, including additions of new and existing positions, without a workforce strategy.

FUTURE DESIRED FORMATION

Repeat the instructions from the EXPECTED FORMATION exercise to create another copy of your workforce web.

This time, consider the workforce numbers you need to meet your projected demand. Consider the gaps identified in Step 3, as well as any new positions that may be required to achieve and sustain the anticipated growth.

CATEGORIZING NEW POSITIONS & POLICIES

You may use this table for future workforce planning, recruitment and policy creation.

Indicate the titles and associated departments of the new jobs you've identified in the workforce web. Include the number of positions that will be needed to fulfill five year goals, as well as the job site(s) where these positions will be required. You may skip this column if you only have one job site.

Re-create this table in Microsoft Excel or another spreadsheet service to keep a flexible list of needed positions.

You may add columns in your own version that may assist in the hiring process, such as names of potential candidates or duties to include in job postings.

JOB TITLE	DEPARTMENT	NUMBER NEEDED	LOCATION

Step 5: Develop & Implement Action Plan

ACTION PLAN

Space is provided below for 10 goals, with space for five associated action items and the assigned resource. The assigned resource may be a position (i.e., H.R. Manager) or an individual (i.e., Sally Smith, H.R. Manager).

GOAL #1:	
1.	
2.	
3.	
4.	
5.	

GOAL #2:	
1.	
2.	
3.	
4.	
5.	

GOAL #3:	
1.	
2.	
3.	
4.	
5.	

GOAL #4:	
1.	
2.	
3.	
4.	
5.	

GOAL #5:	
1.	
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4.	
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GOAL #6:	
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GOAL #7:	
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GOAL #8:	
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2.	
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5.	

GOAL #9:	
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GOAL #10:	
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THOUGHTS FROM ASSOCIATES

In this space, record any thoughts or considerations that arise as a result of your next round of conversations with colleagues, employees or volunteers regarding your goals, action items and assigned task holders.

CHECK IN

STOP!

Review the following checklist and ensure you have taken the actions described.

Have you located and compiled your up-to-date planning and financial documents?	
Have you chosen 5-10 concrete, achievable goals as your plan's foundation?	
Have you built a roadmap to completion for these goals using the action planning activities within this module?	
Have you identified your key stakeholders and employees?	
Is there a job description written for each employee group or position? Is it up to date?	
Are there backup processes in place to ensure knowledge transfer and contingency planning for employees in the case of an emergency or absence?	
Have you asked your employees for feedback and ideas for retention, training, or other items?	
Do you have any previously established training or development programs that may be revitalized or reworked?	
Have you ever received feedback from past employees on their employment with your business or organization? Do you have a mechanism in place to receive this information?	
Do you have a communications plan to engage employees in this process?	

Step 6: Monitor, Evaluate & Revise

MILESTONES

List the goals from your action plan. Assign an expected timeframe within which you plan to accomplish each goal.

GOAL	TIMEFRAME
1.	
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9.	
10.	

KEY PERFORMANCE INDICATORS (KPIs)

For each listed goal, input associated KPIs. Space is provided for up to five KPIs per goal. Each KPI is not required to be associated with a specific action from the Action Plan.

GOAL #1:
1.
2.
3.
4.
5.

GOAL #2:

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4.	
5.	

GOAL #3:

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GOAL #4:

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GOAL #5:

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GOAL #6:
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GOAL #7:
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GOAL #8:
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GOAL #9:
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GOAL #10:
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Additional space is provided below for notes.