FÆTHM

Six Steps to Effective Workforce Planning

Step 1: Mobilise

Preparing your business for the **future of work**

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How to use this playbook

Each chapter of this playbook will step you through the process for the mobilisation phase.

Throughout the playbook, we highlight which charts to use on the Faethm enterprise platform for predictive data-driven insights to guide your planning.

Key steps of mobilise

- Ensure all areas of the business are consulted.
- Set up an effective internal communications process.
- Put together a core team, with additional members identified when required at different steps.
- Set in place a process for facilitating cross-functional collaboration.
- Onboard with Faethm's guided process to deliver your workforce data and start using the platform.

The purpose of mobilisation

Once a business commitment has been made to start a strategic workforce planning programme, the team can be assembled. Initially only the core team is required but as the programme progresses, future steps will include additional team members.

Getting started

It's essential that other areas of the business are consulted or included in the process to ensure everyone is clear on the benefits that can be achieved by the strategic workforce planning (SWP) approach. Once the key team members have been appointed, the communication of progress throughout the organisation can be facilitated by ongoing updates, steering committees and programme control group meetings.

A key element of the SWP process is to understand the skills and capabilities of the existing workforce. This can be a daunting task for many HR teams, particularly if this data isn't readily available. However, a Faethm customer has a head start because they will have already aligned their data to Faethm's Occupation Ontology.

Use the platform
Understand what the core skills and attributes of a job are, how transferable the skills are to future jobs and how important they are to the future of work.

Where on the platform
- Job Corridor
- Job Profile

Facilitate effective communication

The objectives, actions and timeframes of the programme must be widely and regularly communicated across your organisation. People are diverse, so the ways you connect and communicate should be diverse too.

1. Put in place effective communication channels that are a good fit with your company culture.
2. Develop a communications plan to keep stakeholders informed.
3. Set up steering committees and programme control group meetings to facilitate the flow of communication.

Best practice

Being prepared for potential challenges and risks makes it possible to quickly resolve, mitigate or avoid them.

VALUE YOUR PEOPLE

Your people are your assets, and as such, their skills development and internal mobility opportunities should be invested in.

CONSULT AND ENGAGE

Strategic workforce planning is a highly collaborative process involving the Information Technology, Finance and Human Resources functions.

ACKNOWLEDGE THE RISKS

A risk assessment is critical to strategic workforce planning but is only effective when the business is willing to acknowledge the risks and comply with risk mitigation efforts.

SHARE THE PRIORITIES

For workforce planning to deliver benefits, stakeholders must commit to prioritising the workforce planning objectives over their business unit objectives

COMMIT TO A CONTINUOUS, ITERATIVE PROCESS OVER THE LONG TERM

Strategic workforce planning is an ongoing process that requires regular evaluation and revisions. Stakeholders must commit to long-term participation.

TAKE THE TIME NEEDED, DON'T RUSH

Prior to the supply and demand step, sufficient time must be spent to ensure stakeholders understand the strategy, internal and external forces that will affect talent demand and the likely impacts of emerging technologies on the workforce.

Establish the team

Workforce planning is a management responsibility requiring the cooperative efforts of staff in many functional areas. It is best done in a team approach with members that have expertise in strategic planning, budget and financial management, human resources, and management analysis.

Team roles

It is the responsibility of the HR function to facilitate and manage the strategic workforce planning programme. This a great opportunity for many areas within HR to work together to drive real lasting value into the business and deliver significant savings in the process.

Assemble a core team with clear roles and responsibilities, with each team member bringing their unique area of expertise. The major roles in running a successful strategic workforce planning programme are:

CHRO / PEOPLE DIRECTOR

Your people are your assets, and as such, their skills development and internal mobility opportunities should be invested in. The overall sponsor of the programme should have oversight of critical milestones.

Key responsibilities:

- Provide regular updates to the executive committee of the business, ensuring the Chief Executive Officer, Chief Financial Officer and Chief Technical Officer are fully briefed on progress and any potential roadblocks.
- Help the programme lead engage the business and other senior stakeholders as required.

STRATEGIC WORKFORCE PLANNING PROGRAMME LEAD

A senior manager with significant knowledge of HR and the business in addition to having strong project management skills.

Key responsibilities:

- Run the programme, keep everyone on schedule and liaise with all stakeholders.
- Chair a steering committee on a frequent basis (weekly is ideal) and a programme control group for decision making to a defined schedule (often monthly or quarterly).
- Report back to the HR Leadership Team on a regular basis on progress and outstanding issues.

PEOPLE ANALYTICS ANALYST

Key responsibilities:

- Support the programme lead with the provision of workforce data and building of supply and demand modelling.
- Arrange for data cleansing and updating to be applied when data differs from the core HR system of record (possibly as a result of discussion with business leaders).
- Support the strategic recommendations with robust and meaningful data and ensure the measurement of implementation is built on relevant metrics and reported to the steering committee regularly.

STRATEGIC WORKFORCE PLANNING PROGRAMME OFFICER

Key responsibilities:

- Support the programme lead with collating strategic documentation such as business plans, budgets, technical implementation plans and other artifacts that will be used in the environmental scan.
- Work closely with the people analytics analyst to build accurate modelling for supply and demand.
- Help organise workshops and discussions with business leaders to recommend strategies, then monitor the efficacy of strategies implemented

TALENT ACQUISITION LEAD

Key responsibilities:

- Lead on strategies that require bringing in new talent to the organisation, whether they are temporary employees (contractors or consultants) or ongoing permanent hires.
- Manage activities such as compiling talent pools (internal and external).

TALENT MANAGEMENT LEAD

Key responsibilities:

- Lead on strategies for developing existing employees into new roles. This could include learning, redeployment, or lateral moves.
- Connect with diversity leads and other areas within HR to ensure strategies align with internal policies.

INDUSTRIAL RELATIONS LEAD

Key responsibilities:

- Provide expert advice regarding potential redundancies, or the removal of employees from specific positions due to poor performance.

Assign responsibilities

A RACI (Responsible, Accountable, Consulted, Informed) matrix is a useful method to assign core responsibilities to team members. An example RACI could look like:

Action	CHRO	Program Lead	Program Officer	Analytics Analyst	TA Lead	TM Lead	IR Lead
Program SteerCo	R	A	A	C	C	C	I
Program Control Group	R	A	A	C	C	C	I
Data Provision	I	R	C	A	C	C	I
Modelling	I	R	C	A	C	C	I
Workforce Strategy Plan	R	A	A	C	C	C	C
Recruitment	R	C	C	I	A	I	I
Redeployment	R	C	C	I	A	I	I

Team member involvement at each step

Not all team members need to be involved at every step of the workforce planning programme. For the best outcomes, we recommend the following roles at each step:

Mobilise	CHRO, Programme Lead, Programme Officer, People Analytics Analyst
Environmental Scan	Programme Lead, Programme Officer, People Analytics Analyst
Supply and Demand	Programme Lead, Programme Officer, People Analytics Analyst
Gap Analysis	Programme Lead, Programme Officer, People Analytics Analyst
Strategy Development	Programme Lead, Programme Officer, TA Lead, TM Lead
Implementation	Programme Lead, Programme Officer, People Analytics Analyst

Cross-functional collaboration

Company-wide collaboration ensures business leaders understand the benefits of workforce planning, leading to better engagement, information-sharing and support for the programme's priorities.

THE C-SUITE

Ensure the business leaders know they have a mandate to support the workforce planning programme.

THE BUSINESS LEADERS AND LINE MANAGERS

Have the in-depth knowledge needed to understand the current workforce and the likely gaps in skills and knowledge they will encounter as result of the rollout of the business strategy.

ORGANISATION DESIGN FUNCTION

Often addresses existing issues or problems identified in the past, or during a review, whereas strategic workforce planning looks into the future to identify potential risks that could happen as a result of a deliberate business plan or strategy. The OD team will have significant experience in re-organising teams and will be invaluable to provide guidance on pitfalls or rationale to past changes.

FINANCE FUNCTION

Monitors costs and sets budgets associated with business strategy and are a significant contributor to strategic workforce planning, particularly impacting the workforce demand analysis. Any costs associated with implementing technology will be included in the financial planning.

IT FUNCTION

Has responsibility for implementing technology that will impact the workforce and will be instrumental to planning timeframes and evaluating the impact to the business.

OPERATIONS FUNCTION

Likely to be affected by the outcomes of much of the strategic workforce planning work, primarily because many of teams are process-driven, with processes being a significant target for the technology implementation.

Deliver your workforce data

Delivering your data has never been easier, with uncomplicated, clear data requirements and a guided online process to clean and prepare your data for the Faethm enterprise platform.

Set up a data delivery team

To ensure a smooth onboarding experience with Faethm, set up a team of stakeholders from your organisation. This could be your strategic workforce planning team, or members of your workforce planning team along with team members who have experience in data analysis and validation.

Faethm's onboarding process

Faethm's guided onboarding process gives you the tools to get started fast. No specialist knowledge is required. The data cleaning and delivery process is highly intuitive, and provides real-time feedback on data quality so that you can clean and prepare for delivery to the platform quickly and efficiently.

1. **Submit data**
   Upload workforce data to our online data management system.
2. **Prepare data**
   Clean and structure data via guided online process.
3. **Map data**
   AI algorithms map workforce data to Faethm's Occupation Ontology.
4. **Assess mapping**
   Review results of data mapping and revise where needed.
5. **Deliver data**
   Deliver finalised workforce data to load to the platform.
6. **Activate account**
   Activate your Faethm account to begin using the platform.

Workforce data requirements

During the onboarding process, you'll be guided throughout the entire process via our online data delivery platform. At a high level, the key requirements for your workforce data are as follows:

- No complicated or excessively large datasets. The minimum data required is:
  - Job title
  - FTE
  - Compensation
  - Organisational level
  - Location
  - Birth year
  - Gender
- Anonymised data - Personal employee information (PII) removed
- Option to deliver additional datasets relevant to your organisation, such as tenure, education level, seniority band and employment type

Benefits of Faethm's data analysis

Faethm's AI-powered SaaS enterprise platform is your tool for evaluating the impacts of emerging technologies on your workforce over a five-to-ten-year horizon. The predictive insights surfaced by the platform deliver enormous value to your strategic workforce planning, transforming your static workforce data into dynamic scenario planning.

What's hugely valuable to your decision-making is the highly granular details that the platform reveals, right down to the skills and capabilities of each role in your organisation. When viewed from a macro level, this can reveal where:

- skills gaps lie across job families, organisational units and locations, to tailor upskilling programmes to prepare the workforce for future roles
- skills exist in the business that could be better used in other areas of the business, to guide redeployment plans
- current skills most closely align to skills that will be in demand in the future, to prepare succession plans and career pathways
- future workforce supply and demand can be anticipated - with clear, incisive insights on the technological transformation of your organisation

Learn more about your workforce

To learn more about your workforce and better inform your workforce strategy, Faethm offers two additional off-platform assessments.

Maturity assessment

Faethm's maturity assessment measures the current state of your organisation's technology maturity. After completing the assessment, your organisation will receive:

- a maturity assessment report
- data on the Faethm analytics platform that's tailored to your organisation's technology maturity
- our recommendations on how we can best assist you to achieve your short-term objectives

Your organisation is assessed across three dimensions, Strategy, People and Technology. Faethm has identified these as being necessary to achieve, maintain, and advance a successful technology adoption.

Future capabilities

Future capabilities are the innate human attributes that no robot can replace, and the digital literacies needed to succeed in an increasingly digitised and data-driven workplace. Faethm provides a capability gap analysis to inform your capability uplift efforts with data-led insights.

CAPABILITY FINDER

An interactive analytics tool to evaluate current capability strengths and weaknesses in your workforce and review the future state of capabilities needed for each role.

CAPABILITY SNAPSHOT

A summary report of capability gaps across your workforce and Faethm's recommendations on prioritising uplift for those that are critical to your strategic advantage.

Next steps

Next playbook

Contact your Client Insights Manager to receive your next playbook:

Six Steps to Effective Workforce Planning playbook, Step 2: The Internal Environmental Scan

Faethm's Six Steps to Effective Workforce Planning series

Our Six Steps to Effective Workforce Planning playbooks are designed to guide you through each stage of the workforce planning process.

Each playbook includes indicators to show you when to use the Faethm analytics platform for data-led insights to inform your workforce planning.

All playbooks in the series

- The Faethm Approach
- Step 1: Mobilise
- Step 2: The Internal Environmental Scan
- Step 3: Supply and Demand
- Step 4: Gap Analysis
- Step 5: Strategy Development
- Step 6: Implementation

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