

## Workforce Planning Template

Ensure your plan accounts for:

**Starters, current and leavers:** Starters are those people who are new to the company. Current employees are those in your workforce today. Leavers are those who have left the company or are committed to a leave date.

**All employment statuses:** Full- and part-time employees, contractors, temps, seasonal workers and interns.

**Disruptive events:** Consider the need for rapid workforce increases, sudden staff reductions, mergers & acquisitions.

**Key employee and succession planning:** If a particular person leaving would affect business continuity, how will you address that? What is the plan for senior executive retirements?

The plan should look ahead between three and five years and be reexamined quarterly or in light of events that alter human capital objectives.

### Sample Outline

- I. Business Objectives
- II. Historical Context
  - a. Workforce challenges faced
  - b. Workforce challenges overcome
- III. Current Workforce Profile
  - a. Retention challenges
  - b. Recruitment challenges
  - c. Performance management challenges
  - d. HR Information challenges
- IV. Future Workforce Profile
  - a. Retention measurement and strategies
  - b. Recruitment measurement and strategies
  - c. Desired HR analytics
  - d. Resource requests and approvals

V. Workforce Gap Analysis

- a. Turnover trends and forecasts
- b. Retention gaps and risks
- c. Recruitment gaps and risks
- d. Performance management gaps and risks
- e. Knowledge and skill gaps and risks
- f. Mentoring and succession plan gaps and risks

VI. Action Plans That Map to Business Objectives

- a. One- to two-year initiatives
- b. Three- to five-year initiatives

VII. Accountability and Communication Plan