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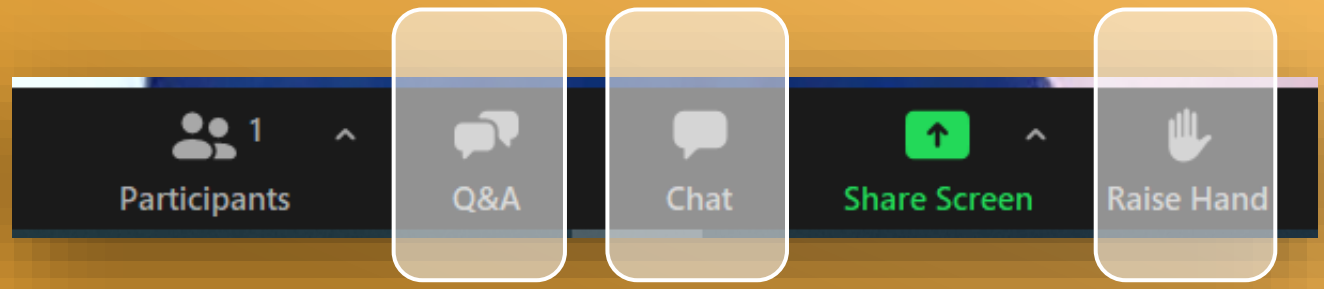
QUICK TIPS

Zoom Webinars



Ask Questions in Q&A Box

- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

Chat

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message

Raise Your Hand

- Click the Raise Hand button at any time to indicate to the host know that you have a question or need assistance

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Poll

- What Workday products does your organization own?
  - Workday Adaptive Planning
  - Workday HCM
  - We have both products
  - We don’t have either

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WELCOME

Today's Presenter

Gabe Macis

Armanino

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LET'S TALK WORKDAY

Today's Agenda

- Understanding the broad term "Workforce Planning"
- Demo of different Workforce Planning situations
- Q&A

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Co-Pilot AI Definition

Workforce planning is a strategic process that organizations use to ensure they have the right people in the right roles at the right time. It involves analyzing current workforce capabilities, predicting future needs, and creating strategies to bridge gaps. The goal is to align human resources with business objectives, improving efficiency, productivity, and adaptability.

Key aspects of workforce planning include:

- **Workforce analysis**: Assessing current employee skills, demographics, and performance.
- **Forecasting demand**: Predicting future staffing needs based on business growth, market trends, and technological changes.
- **Identifying gaps**: Recognizing shortages or surpluses in skills or personnel.
- **Talent acquisition & retention**: Developing hiring strategies, succession planning, and employee development programs.
- **Budget considerations**: Ensuring staffing plans fit within financial constraints.

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Simplified View:

Headcount Recon Typical Workflow *(no connection between HCM and Planning)*

Plan

FP&A puts together a headcount plan, and sends it to HR

Execute

HR executes on the plan. But circumstances change, and actuals deviate from plan (ex: hiring pushed up/ out, compensation changed, location of hire changed)

Actuals

HR then sends actuals to FP&A, which now differ from what FP&A had in their original headcount plan

Reconcile

FP&A must manually reconcile the two - what they planned for, versus what actually happened. *The following quarter, this back and forth starts all over again*

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HCM & Planning – Addressing Business Needs

Business Need	Unique Differentiator
Business Planner — I want to plan for the right talent, at the right cost to achieve my strategic objectives.	**Bottom-Up User Interface:** Provides users with a familiar Workday HCM experience enabling them to contribute to the HC plan directly from Workday HCM and efficiently collaborating with HR partners.
Finance Partner — I spend a lot of time reconciling actuals data with plan data for efficient forecasting.	**Position Level New Hire Recon:** Allows for auto-reconciliation saving time.
Talent Acquisition Partner — I don't have easy access to HC plan data to plan for our hiring capacity, and sometimes the data is mismatched with what my business has.	**Unified HCM and Planning data:** Gives access to one source of truth data to all stakeholders, and it is also integrated with TA capacity to plan for capacity proactively.
People Partner — There are a lot of barriers in our current planning processes, draining HR resources and compromising sensitive data	**Plan to Publish:** Take the results of the plan and publish them to HCM, the one core system of record. A consolidated Workday HCM & Planning ERP offering provides a synchronized planning process with robust data governance via Workday's security models.

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Company-wide Workforce Planning Maturity

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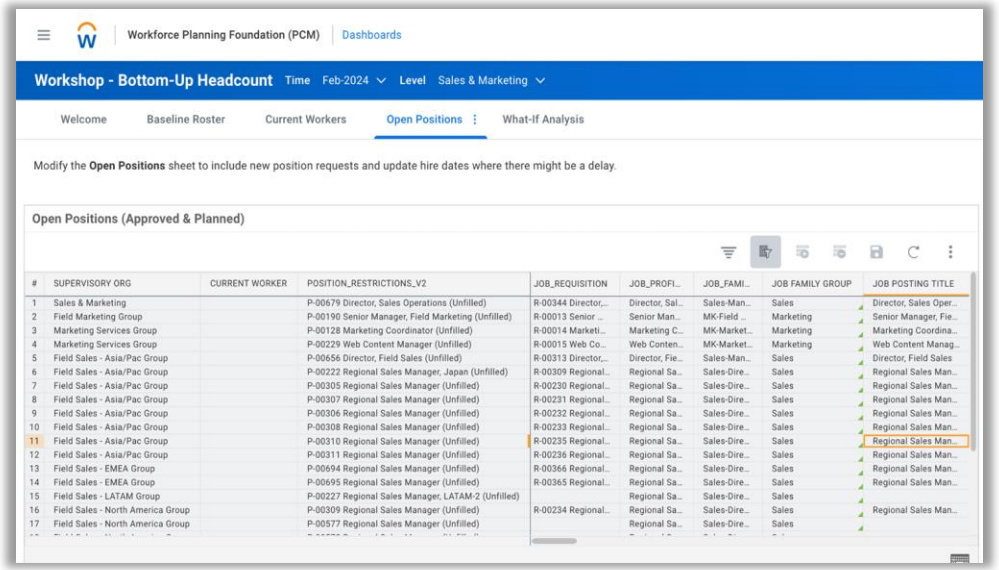
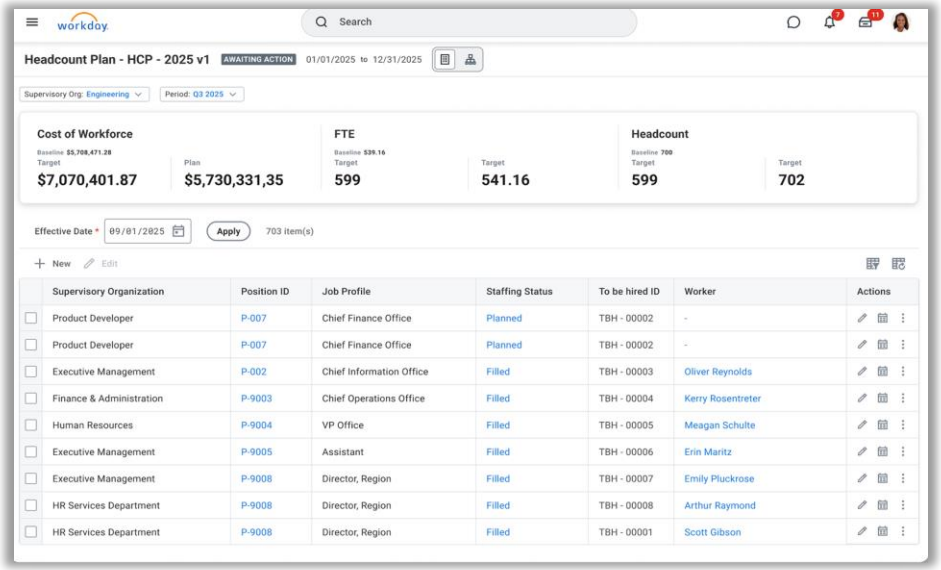
Evolution of Workforce Planning



Finance



Business / HR

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DEMO

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Questions?

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