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Let's Talk Workforce Planning: That Moves With Your Business

Wednesday June 11th, 2025 | 10 AM PT

QUICK TIPS

Zoom Webinars

Ask Questions in Q&A Box

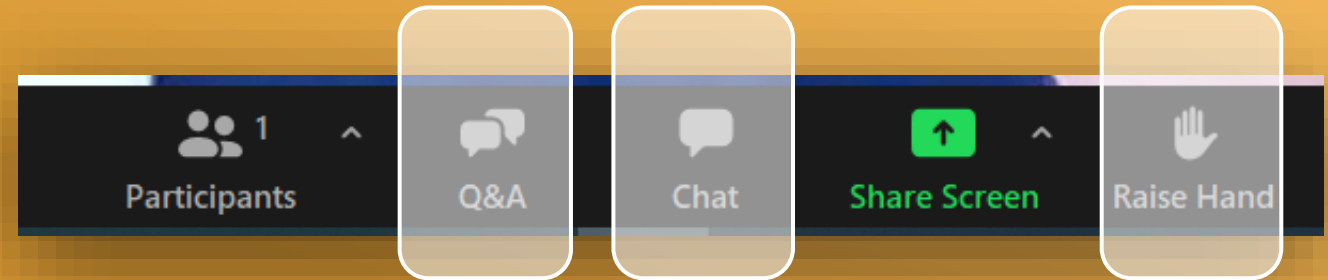
- Click the Q&A button to open the window
- Type your response in the text field
- Click Send

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



Poll

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

WELCOME

Today's Presenter



Gabe Macis

Armanino

LET'S TALK WORKDAY

Today's Agenda

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

Workforce Planning

Co-Pilot AI Definition

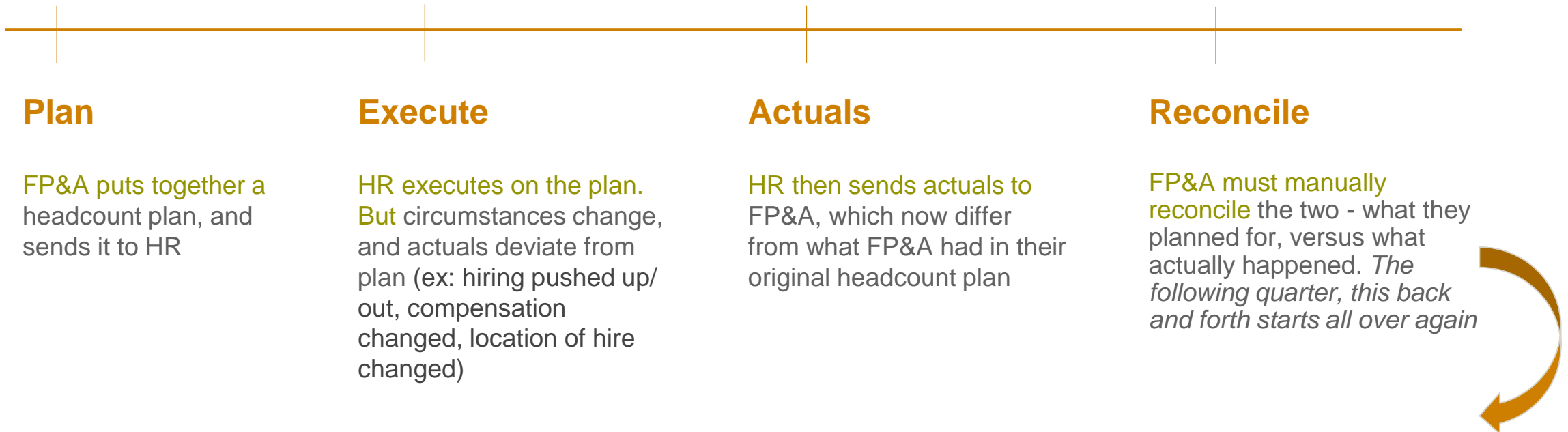
Workforce planning is a strategic process that organizations use to ensure they have the right people in the right roles at the right time. It involves analyzing current workforce capabilities, predicting future needs, and creating strategies to bridge gaps. The goal is to align human resources with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

Simplified View:

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



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.

Company-wide Workforce Planning Maturity



Evolution of Workforce Planning

Workforce Planning Foundation (PCM) | Dashboards

Workshop - Bottom-Up Headcount Time Feb-2024 Level Sales & Marketing

Welcome Baseline Roster Current Workers **Open Positions** What-If Analysis

Modify the **Open Positions** sheet to include new position requests and update hire dates where there might be a delay.

Open Positions (Approved & Planned)

#	SUPERVISORY ORG	CURRENT WORKER	POSITION_RESTRICTIONS_V2	JOB_REQUISITION	JOB_PROFI...	JOB_FAMIL...	JOB FAMILY GROUP	JOB POSTING TITLE
1	Sales & Marketing		P-00679 Director, Sales Operations (Unfilled)	R-00344 Director...	Director, Sal...	Sales-Man...	Sales	Director, Sales Oper...
2	Field Marketing Group		P-00190 Senior Manager, Field Marketing (Unfilled)	R-00013 Senior ...	Senior Man...	MK-Field ...	Marketing	Senior Manager, Fie...
3	Marketing Services Group		P-00128 Marketing Coordinator (Unfilled)	R-00014 Marketi...	Marketing C...	MK-Market...	Marketing	Marketing Coordina...
4	Marketing Services Group		P-00229 Web Content Manager (Unfilled)	R-00015 Web Co...	Web Conten...	MK-Market...	Marketing	Web Content Manag...
5	Field Sales - Asia/Pac Group		P-00656 Director, Field Sales (Unfilled)	R-00313 Director...	Director, Fie...	Sales-Man...	Sales	Director, Field Sales
6	Field Sales - Asia/Pac Group		P-00222 Regional Sales Manager, Japan (Unfilled)	R-00309 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
7	Field Sales - Asia/Pac Group		P-00305 Regional Sales Manager (Unfilled)	R-00230 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
8	Field Sales - Asia/Pac Group		P-00307 Regional Sales Manager (Unfilled)	R-00231 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
9	Field Sales - Asia/Pac Group		P-00306 Regional Sales Manager (Unfilled)	R-00232 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
10	Field Sales - Asia/Pac Group		P-00308 Regional Sales Manager (Unfilled)	R-00233 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
11	Field Sales - Asia/Pac Group		P-00310 Regional Sales Manager (Unfilled)	R-00235 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
12	Field Sales - Asia/Pac Group		P-00311 Regional Sales Manager (Unfilled)	R-00236 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
13	Field Sales - EMEA Group		P-00694 Regional Sales Manager (Unfilled)	R-00366 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
14	Field Sales - EMEA Group		P-00695 Regional Sales Manager (Unfilled)	R-00365 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
15	Field Sales - LATAM Group		P-00227 Regional Sales Manager, LATAM-2 (Unfilled)	R-00237 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
16	Field Sales - North America Group		P-00309 Regional Sales Manager (Unfilled)	R-00234 Regional...	Regional Sa...	Sales-Dire...	Sales	Regional Sales Man...
17	Field Sales - North America Group		P-00577 Regional Sales Manager (Unfilled)					

Finance



workday

Headcount Plan - HCP - 2025 v1 Awaiting Action 01/01/2025 to 12/31/2025

Supervisory Org: Engineering Period: Q3 2025

Cost of Workforce	FTE	Headcount
Baseline \$5,708,471.38 Target \$7,070,401.87	Plan \$5,730,331.35 Target 599	Baseline 700 Target 702

Effective Date: 09/01/2025 Apply 703 Item(s)

Supervisory Organization	Position ID	Job Profile	Staffing Status	To be hired ID	Worker	Actions
<input type="checkbox"/> Product Developer	P-007	Chief Finance Office	Planned	TBH - 00002	-	
<input type="checkbox"/> Product Developer	P-007	Chief Finance Office	Planned	TBH - 00002	-	
<input type="checkbox"/> Executive Management	P-002	Chief Information Office	Filled	TBH - 00003	Oliver Reynolds	
<input type="checkbox"/> Finance & Administration	P-9003	Chief Operations Office	Filled	TBH - 00004	Kerry Rosentreter	
<input type="checkbox"/> Human Resources	P-9004	VP Office	Filled	TBH - 00005	Meagan Schulte	
<input type="checkbox"/> Executive Management	P-9005	Assistant	Filled	TBH - 00006	Erin Maritz	
<input type="checkbox"/> Executive Management	P-9008	Director, Region	Filled	TBH - 00007	Emily Pluckrose	
<input type="checkbox"/> HR Services Department	P-9008	Director, Region	Filled	TBH - 00008	Arthur Raymond	
<input type="checkbox"/> HR Services Department	P-9008	Director, Region	Filled	TBH - 00001	Scott Gibson	

Business / HR

DEMO



POSSIBLE (RE)DEFINED
Questions?

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TALK
WORKDAY