

EBOOK

# Agile workforce planning

Building a dynamic workforce blueprint that responds to constant change



**/anaplan**

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# Work doesn't stay the same for long, and neither does the workforce. You can plan on that.

For C-suite executives, driving agility across the enterprise isn't optional; it's the differentiator. To thrive, drive growth, or even just stay afloat in today's unpredictable environment, every organization must be able to adapt quickly — and it all starts with workforce agility.

In a time when every executive is looking to the CHRO and their HR business partners for leadership, the pressure is high, and so is the potential. Business leaders are looking for more than support — they expect strategic guidance. They want to know:

- Where will the next talent and skills gaps emerge?
- What workforce scenarios should we prepare for?
- What are the risks and the cost impact of workforce changes for the business?
- How do we scale or reshape the organization without compromising productivity?

They want forward-looking guidance to navigate economic shifts, market and technology disruptions, and growth challenges. To meet these demands, HR and workforce planning leaders require modern planning tools — ones that can rapidly ingest demand signals, model scenarios, provide AI-powered insights to surface risks and opportunities, and align cross-functional strategies in real time so that business leadership can act with confidence.

That's where Anaplan comes in. Our scenario planning and analysis platform connects workforce, finance, and operations data into a single source of truth for planning so you can lead with clarity, take smarter actions faster, and turn workforce planning into a competitive advantage.

# Workforce planning transformation

## What it looks like, what goes into it, and what gets in the way

When done right, a true workforce planning transformation enables leaders to create a dynamic blueprint for their organization — that is, a set of plans that help identify vital talent and capabilities, provide visibility into budgets and costs, establish proper headcount and capacity levels, and stay ahead of skills gaps. The following three elements make up an iterative process that helps workforce leaders and their organizations lay out their success plans through a **dynamic workforce blueprint**.



### Aggregate

Accessing and integrating various company and third-party systems and data sources is important for a single, unified source of truth.



### Build

Blending data from multiple sources, developing it into models and scenarios, analyzing the results, and deriving insights from those results are critical to knowing and prioritizing the things that matter.



### Connect

Collaboration and transparency throughout the planning process among workforce planners, HR business partners, recruiters, external talent sources, hiring managers, finance, business unit leaders, budget owners, and executives is the most critical driver of decision-excellence and actions that impact business results.

# 1. Aggregate: Everyone in the organization should work with the same workforce planning data foundation.

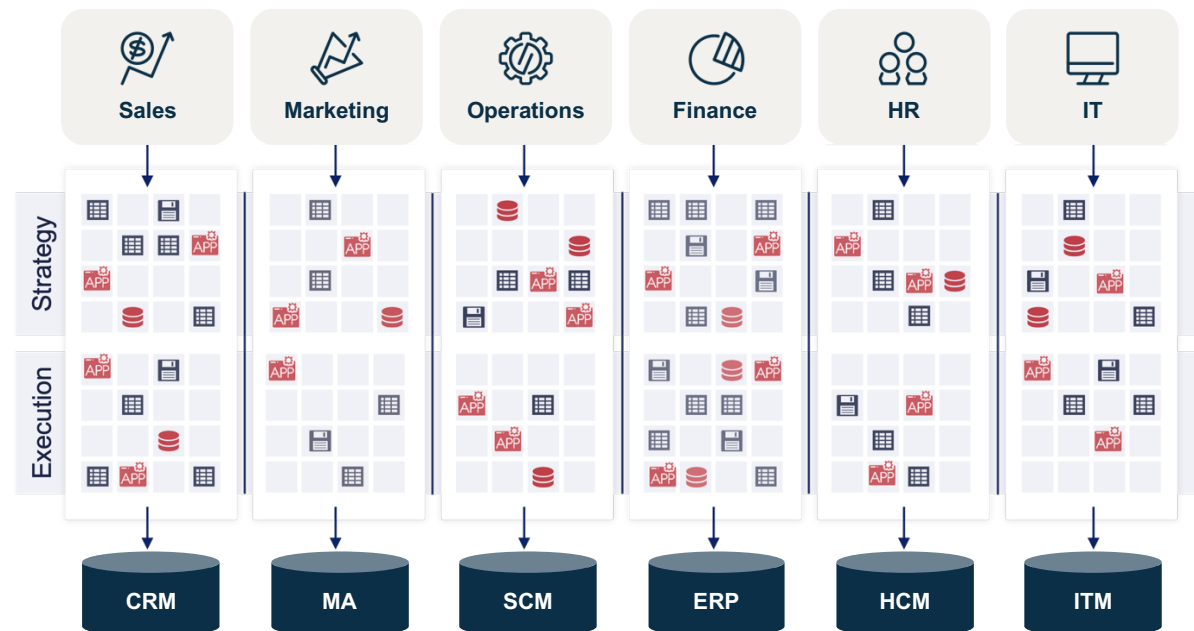
Planning initiatives typically begin with an appeal from executive leadership that all contributors and stakeholders need to be working off the same page. Everyone nods in agreement, and they commit to doing their best, yet gradually disengage as the process moves forward.

The reality is that often the most-needed workforce data is scattered across multiple departments, in the systems they most frequently use, in formats that make the most sense to them. That includes financial systems, HR and workforce management solutions, enterprise systems components, data warehouses, and spreadsheets. The more scattered and idiosyncratic the data sources are across departments and systems, the more difficult it will be to begin, or repeat, the initiative to ensure data hygiene – cleanliness, accuracy, timeliness, and reliability.

**Legacy planning**  
wasn't built to quickly  
adapt and respond

Traditional approach is:

- Siloed
- Fragmented
- Slow
- Static
- Unscalable





## The data disconnect

Things only get trickier when it comes time to retrieve and distribute key data and insights. Often, good planning initiatives get mired down into a troublesome disconnect between the functional applications and core systems of record that produce abundant data and the analytic tools and capabilities that make sense of said data. Arguably, it's the weakest link in the entire planning process, vulnerable to bottlenecks, latency, miscommunication, error propagation, and data mishandling.

Often analyses are conducted ad hoc, and data is delivered piecemeal, without context. HR and workforce leaders get caught in a situation where they cannot easily combine and examine all relevant information about individuals, teams, and departments. They also struggle to bring together the accurate and timely information that their executives need to make workforce and business decisions.

Repeatedly the sources and quality of data come into question, which can change the course of the conversation and distract from the objective. Without complete visibility into all relevant data, decisions about recruiting, deploying, and retaining people are made in a vacuum and based on anecdotal information.





The HR Director survey found that HR professionals still rely **primarily** on spreadsheets and emails for workforce planning.

## Spreadsheets — a standby solution that creates more problems

The most common solution to provide some workforce visibility is to aggregate the data into spreadsheets. A [survey](#) from The HR Director revealed that HR professionals at companies with over 1,000 employees still rely on spreadsheets and emails as key components of their workforce planning operations.

Despite their ubiquity, spreadsheets were never designed to serve as enterprise-grade planning tools. They're accessible, familiar, and flexible — but they're also manual, siloed, and fragile. Spreadsheets offer no single source of truth and lack the security, scalability and modeling power necessary to align workforce supply with business needs in an enterprise setting.

In organizations that use spreadsheets as a default solution for workforce planning, teams often face time-consuming, error-prone processes just to compile a baseline headcount plan. And once that plan is created, it can be nearly impossible to iterate on it quickly and keep current throughout the year. This hinders cross-functional alignment, delays hiring decisions, and results in missed opportunities to course-correct in real time.

Valuable hours are spent stitching together data across systems, reconciling multiple versions, and troubleshooting formulas — time that could otherwise be spent driving analysis and strategic talent decisions.

The answer isn't to rip and replace your core systems, it's to deploy a workforce planning solution that enhances them. An ideal workforce planning solution will continuously ingest key data from various systems of record and stage it into a single platform. It will assemble a real-time data foundation logically according to organization KPIs, structure, and operational dependencies instead of structuring it according to the system architecture of its main software vendor.

This flexibility enables HR, finance, and operations leaders to stay aligned and agile, even when plans change. By replacing makeshift spreadsheet workarounds with a scalable, cloud-native scenario planning and analysis platform, organizations gain the visibility, confidence, and speed they need to make the right workforce decisions at the right time.

## 2. Build: Everyone works with, builds, models, and expands on the same foundation of information.

Integration and aggregation of data, visibility into it, and the ability to cascade information and roll it back up are at the foundation of comprehensive workforce planning. Together, they assure us that the process ensues with everyone having access to the same information.

**Yet this is where many organizations falter.** Despite being data-rich, most companies still struggle to activate that data. Insights remain buried in disparate systems such as their human resource information system (HRIS), finance tools, and beyond. Workforce planning leaders are left citing gaps in collaboration, misaligned metrics, outdated data, and a lack of relevant technology as key blockers to their strategic workforce planning. Reporting and business intelligence tools can help to reveal that data and identify attrition “hot spots,” which in turn allow managers in all departments, with help from HR, to recognize and retain individuals whose critical skills have been recruited for and nurtured. But they are not enough.

### Appealing to a limited audience and telling them only what they like to hear

Many workforce planning efforts fail not due to the wrong tools, but because they lack strategic reach. Efforts remain cyclical, underfunded, and narrowly focused on HR and workforce outcomes. Without a proper and direct line of sight, analytics show up late, miss context, or simply echo what departments already know. This leaves business leaders asking: “So what?” or worse, “Why didn’t we see this sooner?”

While HR data is plentiful, workforce planning and analysis routinely get hung up measuring and driving HR objectives, which may not be directly connected to the broader business objectives. Regardless of how many other departments participate, initiatives are usually episodic or cyclical (versus being a year-round activity), project-based, and all too often retrospective. They seldom benefit from being a budget item and therefore must make do with limited resources. And despite everyone’s best efforts, analytics as it relates to workforce planning often delivers its results out of sync with various departments’ staffing needs.





## Everyone owns the outcome in workforce planning

An ideal situation takes a broader perspective, with everyone playing their part in determining the connections of analytic findings and workforce planning with strategic and operational business objectives and striving to make those connections understandable beyond an HR context. That doesn't mean that HR or anyone must always have the answers to workforce analytics puzzles. But it does mean that everyone shares the same line of sight and are always asking one another critical questions based on the same set of analytics findings: "Are we going in the right direction?" "Do we need to course-correct?"

With this broader perspective, workforce planning and analysis becomes more forward-looking and positions you in a better place to support growth plans and strategic initiatives. As planning teams grow, they naturally accumulate the specific analytic skills needed to link insights across models and plans to both get influenced and drive influence. This includes conducting "what-if" scenario modeling and analysis, evaluating impact —

laying the foundation for true scenario planning. A goal of workforce analytics is to enable and inform scenario planning that gives managers and leaders from across the organization the insight they need to anticipate different situations and proactively develop workforce options that put them in a position to win.

As powerful as it can be, high analytical proficiency is a means, not the end. Taking a step back, **the key takeaway is that planning is iterative, starts simple, and is always linked to organizational goals and objectives.** But be aware that organizational goals and objectives are likely to be very fluid. Workforce planning is not a one-time initiative — it's an ongoing and evolving practice. And while analytical tools and models are essential, they're not the end goal. True workforce agility comes from planning that is iterative, business-linked, and responsive to change.

### 3. Connect: Everyone can align and work toward the same goal.

With workforce data integrated and visible, and the ability to analyze that data in place, collaborative workforce planning becomes the ultimate strategic apparatus. This cross-departmental form of workforce planning serves the needs of HR, business units, finance, and operations by helping teams across the organization stay connected, aligned, and working towards shared goals. That's the promise of connected workforce planning: aligning everyone around a single set of insights, so decisions can be made faster, smarter, and with full context.

When you create a planning ecosystem where all stakeholders have access to a single source of truth for their planning information, it eliminates the need to resort to emails and spreadsheets and slide decks for communication and collaboration and naturally accelerates the cycle.

So as business demand goes up and down, as new strategies and initiatives are introduced, when there's a mandate from finance to pause spending, or if there's scarcity with recruiting particular talent that HR needs to address, the effects become readily visible to stakeholders and they can more seamlessly and quickly analyze possible scenarios and their impact, orchestrate, and act in unison all the way downstream. For example, to increase or redirect hiring, or push for a hiring freeze. This workforce agility in turn translates into business agility.

# Benefits of continuous planning to stakeholders

## FP&A

- Cost centers budget translated into management organization
- Accurate forecasting of filled, open, and planned positions
- Visibility into variances against budget guidelines
- Ensure ongoing workforce changes are aligned with committed budget

## HR

- Plan top-down by allocating budgeted amounts down to line managers
- Adjust baseline assumptions for hiring and turnover
- Coordinate hires, transfers, promotions, and departures at the position level
- Align with finance planning cycles

## Talent acquisition

- Visibility into planned positions, priorities and metrics to align with strategy and plans
- Alignment of recruiter capacity with current and future hiring plans and recruiting pipeline
- Minimize over- and understaffing to optimize costs

## Business

- Visibility into current period workforce activity at all levels
- Established position-level plans and support analysis of various scenarios
- Ready access to always-on plans throughout the year
- Appropriate security and access to worker-specific details

It takes a collaborative, connected approach to workforce planning to ensure the right people, with the right skills, are in place when and where the business needs them most.



# Three components of successful workforce planning:

Successful workforce planning hinges on three key factors:



**1. Shared ownership:** Everyone involved agrees on the right KPIs, buys into the plan, and has a stake in the outcomes.



**2. Clear communication:** People understand how the plan works and can explain it to others.



**3. Data confidence:** Stakeholders trust the data, understand where it comes from, and know how it's used to drive decisions.

Without these fundamentals in place, even the most well-intentioned workforce plans struggle to gain traction.

To execute a successful organizational design, leaders need to understand current skills and capabilities, team structures, and culture, and then determine where restructuring can make employees and processes more efficient. This requires a holistic yet detailed picture of the workforce and its costs. Generating such a comprehensive view requires collaboration between HR, business leaders, finance experts, and other professionals with domain knowledge.



With a collaborative, connected workforce planning approach, business leaders can determine the right number of people they need, with the right skills, in the right departments and teams, at the right time and cost. They can determine the optimal skills the people in a department need, which roles drive profitability, how best to manage current talent, and what pipeline of incoming recruits they need to fill important roles. Forecasting these functions drives recruiting, retention, deployment, employee development, and leadership decisions. Collaborative workforce planning also helps to fine-tune the balance between cost control and company growth.

**The key takeaway is that planning should be inclusive, dynamic, and orderly, characterized by connecting more stakeholders.** Workforce planning is valuable in its own right, but collaborative, continuous workforce planning is the key to making your workforce plan a dynamic, agile blueprint.





# A dynamic workforce blueprint: Agile workforce planning

We opened by stating that success in a world of constant disruption begins with an agile workforce, and that still holds true. But in reality, building and managing that kind of workforce is anything but simple. It requires continuously aligning the right people with the right work, at the right time, in the right place, and at the right cost. Each of these dimensions involves its own layer of planning — and all of them must work together.





# A dynamic workforce blueprint: Agile workforce planning

That's why organizations need more than just an annual hiring plan or a headcount spreadsheet. They need a **dynamic workforce blueprint**: a living, flexible, and connected strategy that evolves with the business and enables leaders to respond to change with clarity and confidence.

A dynamic workforce blueprint is a multidimensional master plan for the workforce that reveals and maps out various paths by which organizations can reach their goals, which can be modified to adapt to any changes in both market and workforce dynamics. A dynamic workforce blueprint enables collaborative workforce planning, which in turn supports the HR mandate to “find the best, keep the best.” Within the HR and workforce function context, collaborative workforce planning helps your organization stay ahead of the competition and address skills gaps

quickly with connected headcount planning and budgeting, operational workforce planning, strategic workforce planning, and capacity planning and optimization.

This approach strengthens strategic HR capabilities, helping teams address skills gaps, improve headcount forecasting, manage compensation planning, and optimize how people are deployed across the business.

And most importantly, it's collaborative. A dynamic workforce blueprint brings together HR, business leaders, finance, and operations in an ongoing dialogue. Everyone operates from the same data, understands demand drivers and how workforce decisions impact broader outcomes, and contributes to shaping the path forward.

# Your blueprint for building value through workforce planning

Business goal you want to achieve	The improvement that the dynamic workforce blueprint offers	How your organization realizes the value of dynamic workforce blueprint
Increasing ROI of talent investment	Feeding operational and tactical workforce plans into long-term skills requirements	Maximizing individual and team performance by proactively moving employees into new roles
Cost savings, controlling labor and related expenses, and improving budget variance control	Enabling unlimited driver-based scenario modeling that exposes the impact of changes in headcount, organizational structure, and compensation by department, skillset, and experience	Hiring internally instead of searching externally reduces costs, saves time, and decreases turnover rates
Increasing strategic flexibility	Identifying, modeling, tracking, analyzing, and predicting key workforce metrics such as hiring, development, and retention	Optimal staffing and coverage for both full-time and contingent workforces
Clear, repeatable end-to-end workflows, improving employer brand, improving retention	Putting needed people information in the hands of the ultimate consumers of that information: the business users	Creating a candidate experience that seamlessly flows from recruitment to talent management and beyond
Improving staffing operations efficiency, reducing time to hire	Empowering all parties to adjust planning models, dashboards, views, drivers, scenarios, and forecasts without IT intervention	Increasing ability to staff by internal placement, redeploy personnel to critical positions, and backfill key roles faster management and beyond



# Connecting data

A dynamic workforce blueprint assembles, codifies, and connects HR and talent data with finance, business, and operations data from across the enterprise and third-party systems. This becomes the foundation for planning and modeling of a wide range of workforce and talent management approaches that inform the overall talent strategy, including addressing current skills gaps, mapping anticipated future skills needs to business strategy and always ensuring workforce readiness.

A dynamic workforce blueprint integrates workforce and talent data with business, finance, and operations data — sourced from across the enterprise and beyond. This includes systems like HCM, Workforce Management (WFM), ERP, financial planning tools, and third-party benchmarks.

With this planning data foundation in place, organizations can model a wide range of workforce strategies — from filling immediate resource gaps to preparing for future skills needs. The ability to see all relevant data in one environment allows planners to shift from reactive to proactive, linking workforce readiness directly to business performance and long-term goals.

**With Anaplan, these [integrations](#) aren't just theoretical** — they're built into the platform's flexible architecture, which supports seamless data ingestion from systems like Workday, SAP, Oracle, ADP, and more.



# Connecting people

The blueprint doesn't just unify data — it connects people at every level of the planning process.

At the planning level, it enables HR, finance, and operations leaders to collaborate in a shared environment where assumptions, dependencies, and priorities are clear from the start. Teams can co-create plans with full awareness of how decisions in one area impact the rest of the business.

At the organizational level, that collaboration scales. Leaders across functions gain a deeper understanding of shared workforce challenges, model more effective “what-if” scenarios, and develop aligned responses to talent needs —

whether it's hiring, redeploying, or developing people internally. Such collaboration has the additional benefit of enabling more effective long-term planning for critical roles that drive the organization's strategies, near-term alignment of headcount with the budget, and short-term capacity planning and optimization.

**Anaplan supports this through live, multi-user collaboration**, allowing teams to build, adjust, and track plans together. Commenting, workflow and approvals, and real-time versioning help everyone stay on the same page and move forward in sync.





# Connecting processes

Planning doesn't happen in a vacuum; it lives within broader business workflows. A dynamic workforce blueprint connects those dots, bridging workforce planning processes with other operational functions, from finance to sales, to recruiting, facilities, IT, engineering and R&D, contact centers, stores, logistics and warehousing, and beyond.

When plans are linked across departments, organizations gain full visibility into workforce implications — costs, timelines, infrastructure needs — and can respond with speed and alignment. For example:

- **HR and finance** can jointly track workforce costs, forecast compensation impacts, and stay within budget.
- **HR and facilities/IT** can align on resource needs for office space, technology, and equipment.
- **Recruiting and line managers** can sync hiring timelines with operational demand.

One of the most visible processes affected by a dynamic workforce blueprint is compensation modeling. A dynamic workforce blueprint better enables shared insights to orchestrate

compensation plans and fair practice. HR and business leaders can confidently create compensation plans and frameworks that undergird talent acquisition and retention with equity, diversity, and inclusion and drive performance and results.

**Anaplan's [AI-infused scenario planning and analysis platform](#) allows teams to connect and layer plans over time** — supporting increasing levels of complexity without losing speed, clarity, or control. It helps orchestrate core planning workflows like compensation modeling and headcount forecasting, and gives your business the visibility and flexibility to align with performance drivers and retention strategies.

A dynamic workforce blueprint doesn't just connect data to data, or people to people. It connects across data, people, and processes — eliminating silos and enabling coordinated, agile planning at scale.

With this kind of connected approach in place, workforce planning becomes a strategic lever — not just an operational exercise.

## Your blueprint for delivering value through workforce planning

Your workforce doesn't just represent more than 70% of your total business costs — it's also your organization's most powerful driver of value. And value is created when people, plans, and resources are aligned with purpose. That's what a dynamic workforce blueprint is designed to do: bring clarity to complexity and help you align your talent strategy with business strategy in a way that's responsive, inclusive, and built to scale.

When workforce planning is connected, collaborative, and continuous, it becomes a catalyst for organizational agility. It enables leaders to make smarter, faster decisions that improve productivity, close skills gaps, and drive

sustainable growth. This isn't about doing more with less. It's about doing more with focus. Creating a workforce that can adapt, thrive, and lead — no matter what is around the corner.

By shifting from static plans to a dynamic workforce blueprint, your organization can move beyond compliance and cost control toward a model of real resilience and long-term value creation. That's good for employees, leaders, customers, and shareholders alike.

**[Discover how you can begin creating a dynamic workforce blueprint for your workforce.](#)**

### About Anaplan

Anaplan is the only scenario planning and analysis platform designed to optimize decision-making in today's complex business environment so that enterprises can outpace their competition and the market. By building connections and collaboration across organizational silos, our platform intelligently surfaces key insights — so businesses can make the right decisions, right now.

More than 2,500 of the world's best brands continually optimize their decision-making by planning with Anaplan.

To learn more, visit [www.anaplan.com](http://www.anaplan.com)