

# Workforce Planning Transformation



## Executive summary

With innovation and disruption rewriting the rules daily, business leaders can't afford to wait long on data or analysis to make critical workforce and business decisions. Yet for many, traditional workforce planning approaches fall short, unable to keep pace with constant change or reflect the complexity of the business. To drive sustainable growth and organizational health, workforce planning must evolve. That means shifting to a connected, collaborative, and disciplined approach that aligns people strategy with business goals.

Anaplan enables this transformation by delivering the adaptability, transparency, and governance your business needs to plan with agility — so your workforce strategy can drive the direction of your business.

## The problem with traditional approaches to workforce planning

In many organizations, workforce planning remains fragmented, reactive, and overly dependent on spreadsheets. Spreadsheets offer great flexibility for the individual, but they weren't built to keep pace with scale and complexity of businesses and the dynamic conditions they operate in — whether it's shifts in market demand, technology and automation, regulatory changes, or evolving ways of working. As a result, workforce planning is often treated as a once-a-year exercise, lagging broader business priorities and lacking clear ownership. This approach limits visibility, agility, and it carries real costs. Reactive hiring decisions driven by outdated plans or gut feel can lead to unplanned spend and budget overruns, delayed execution, and pressure on margins. And it's avoidable.

Here are just a few of the challenges stemming from a disconnected planning model that put your organization at risk:

- **Data and planning silos:** HR and finance often plan in isolation, systemically, leading to inconsistent assumptions, duplicated efforts, stale data, and delays.
- **IT-heavy maintenance:** Custom-built tools require ongoing IT support to maintain integrations and update models — slowing down responsiveness.
- **Limited forecasting capabilities:** Many systems aren't built for forward-looking planning or scenario modeling, which makes it difficult to anticipate workforce needs.
- **Disconnected planning cycles:** Strategic, financial, and operational planning often run on different timelines, making it hard to align talent plans with business goals or see the downstream impact of change.

When organizations rely on static, disconnected tools, they risk inefficient talent deployment, overspending, and missed opportunities to respond to market changes.

Because workforce planning spans teams, data and disparate systems, and decisions, it's easy to deprioritize investment in better capabilities, especially when the ROI isn't immediate. But the cost of inaction is high. When HR and finance come together on a connected planning platform like Anaplan, they gain the clarity, flexibility, and collaboration needed to make smarter workforce decisions more quickly and build lasting business resilience.

### Does your traditional approach answer these critical questions?

- Are we hiring for the skills we need next, or the ones we needed last year?
- How are we weighing trade-offs between compensation, location, and tenure in our hiring decisions?
- Have we built enough flexibility into our budget to support in-year hiring needs?
- Can we identify and redeploy talent from within before sourcing externally?



## Start building an agile workforce plan

### How Anaplan helps you lead with confidence.

Anaplan gives you everything you need to drive a true workforce planning transformation (WPT) — one that's connected, dynamic, and tuned for the pace of your business. Most workforce demand doesn't originate in HR, it comes from your business. Whether that's driven by a new strategic initiative, a shift in customer demand, or operational plans, Anaplan helps you translate those signals into clear, actionable workforce requirements. With a single platform and source of planning truth, you can align finance, HR, and operations to plan and forecast in real time, breaking down silos and moving from reactive to proactive.

Anaplan is the only AI-infused scenario planning and analysis platform that supports a wide range of workforce use cases, no matter your starting point:



**Finance teams** often begin with headcount expense planning, a process already familiar to FP&A, and then partner with HR to close the loop between budget and hiring and ensure governance



**Operations teams** may start from the bottom up, focusing on demand-driven capacity planning for specific functions like contact centers, projects, front or back office, IT, or field service — then scale to broader workforce strategies



**HR teams** adopt our **Operational Workforce Planning application** — a flagship, out-of-the-box solution that helps you plan, track, and act with precision and discipline



**Go-to-market sales and revenue operations teams** align resources with market demand, optimizing sales coverage to boost revenue and achieve strategic goals

This is workforce planning reimaged. Anaplan puts powerful modeling, AI-driven insights, and forecasting directly in your hands. You gain the visibility, flexibility, and speed needed to make workforce decisions that align with your strategy and drive performance.

## With Anaplan, your workforce planning transformation is grounded in four key capabilities:

### 1. Talent demand and supply planning

- Map each FTE (or headcount) against a set of business, project, technical, and relationship skills
- Identify gaps in future jobs and skills such as AI and data security

### 2. Modeling alternative and future states

- Define and evaluate the impact on operating expenses (OpEx) and headcount
- Anticipate events, such as technology shifts, M&A, or reduction in force
- Model potential scenarios to understand how different plans affect your priorities and resources

### 3. Action planning and decisioning

- Share outputs among HR, finance, and operations in real-time
- Enable leaders to view centralized consequences of talent decisions
- Drive efficiencies in cross-functional business processes such as budgeted hiring, contract decisions, and internal mobility

### 4. Execution

- Accelerate hiring velocity or a hiring freeze with increased visibility into open and approved positions
- Promote internal mobility to maximize internal workforce engagement and utilization
- Augment with contractor, contingent, or temporary talent to bridge immediate needs

Anaplan's capabilities are tailored to support your organization through these integral and complex processes, and are built for the business to own and operate without the need for IT. This allows users to build, adjust, and deploy models without writing a single line of code. Anaplan is built to make your WPT accessible and effective, allowing for advanced modeling and scenario planning to be available to users across your organization with the power of Anaplan Intelligence supporting high-performance, complex planning at scale.

HR and finance teams can model workforce supply and demand, simulate organizational changes, and assess cost implications in real time — without sacrificing transparency or auditability. Easily trace assumptions, track changes, and maintain compliance with built-in audit trails and role-based security.

Organizations that adopt Anaplan are better equipped to respond to disruption, reduce risk, and build workforce strategies that scale.



## Turn the partnership between HR and finance into a powerhouse for driving goals

Workforce planning has never been just an HR responsibility — it's a critical financial and strategic lever for your entire business. When HR and finance operate from a shared source of truth, you unlock the ability to make smarter, faster, and more aligned decisions about your most important investment: your people.

Additionally, HR gains strategic insight into the financial implications of talent decisions, and the visibility between departments reinforces the importance of HR in accurately charting the course of the needs of your organization. From forecasting future skill needs to optimizing labor costs and modeling workforce scenarios, Anaplan helps you plan and forecast with precision and agility. You bring discipline to the process of aligning hiring plans with revenue goals, justify workforce investments with clear ROI, and respond confidently to change — making workforce planning a strategic driver of performance and a growth enabler, not a constraint. Anaplan empowers HR and finance teams to:

- **Align talent strategy with financial outcomes:**  
Tie headcount, compensation, and workforce initiatives directly to revenue goals, operating margins, and broader business goals.
- **Forecast workforce supply and demand:**  
Use real-time data to predict future skill gaps, model attrition trends, and optimize hiring plans in the context of evolving business priorities.
- **Drive workforce cost efficiency:**  
Identify cost-saving opportunities through internal mobility, automation, or strategic role consolidation — reducing over-reliance on costly external hires.

- **Scenario plan with financial precision:**  
Test multiple labor strategies, such as regional expansions, reorganizations, or reskilling programs, and immediately understand their financial impact.
- **Justify strategic workforce investments:**  
Build compelling business cases for initiatives like training and development and DEI by linking them to financial value and ROI.
- **Enhance resilience during change:**  
Navigate mergers, acquisitions, restructurings, or economic shifts with tightly integrated HR-finance plans that support informed, timely decisions.

Ultimately, a unified planning framework between HR and finance better positions your business to respond to disruption, address risk, and build scalable, data-driven workforce strategies — today and in the future.

With Anaplan, your workforce planning transformation becomes a competitive advantage.

### Potential ROI (up to)

**40%** Workforce planner productivity

**3%** Short-term cost reduction

**2%** Long-term cost reduction

## Be the next industry leader to transform your workforce

Organizations that take the next step to evolve in their workforce planning by adopting Anaplan can gain up to 3% cost reduction in the short-term and an additional 2% over the long-term. Why wait to experience these benefits enjoyed by global leaders right now?



Reporting, like I said, has been one of the greatest benefits of this model, and the vacancy report, I guess, is one of our most popular. HR actually uses this report the most, our talent acquisitions teams, our HR business partners, it gives them a status of where every position is, not only planned roles that haven't been acted on, but ones that are currently being recruited for.

HR professional, Leading management consultancy firm



With Anaplan, we know what our hiring will cost and how that affects our risk profile.

Head of Process Optimization, Fortune 500 Bank



Anaplan gives us global visibility to our workforce costs, our workforce headcount. It gives us a forward-looking view of where we're spending our human capital dollars in one consistent platform. There's never been, in the history of Whirlpool Corporation, when we've been able to say we can do that. So it was a big win when it came to bringing everything together under the one platform.

Director, Fortune 500 company



We've seen a number of benefits that using Anaplan has helped us tremendously. For one, we have an automated reconciliation process. So we no longer need to use Excel spreadsheets to track position by position. We actually apply a unique identifier during our annual process for each position, and that unique identifier tracks through the position during the recruiting phase and onto the hire, and that is how, once it feeds back into Anaplan, that hire is then applied to the position and we're able to track filled roles. So that's helped us tremendously for reporting.

Director of FP&A, Global Research Firm



## 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)