

Integrated Workforce Planning Building Organizational Readiness and Resilience

Workforce Planning: A Continuous Challenge in Today's Economy

As industries converge and technology continues to disrupt traditional business models, companies continuously struggle to coordinate their hiring needs, skill demands, and long-term headcount requirements against financial plans. Although this issue has persisted for decades, there is now a concerted effort to find effective solutions.

Consider the history of hiring: in the Industrial Era, companies hired leaders, managers, and labor based on demand forecasts, customer demand, and annual financial goals. Most companies built annual budgets in the mid to late part of the year, convinced managers and leaders to sign off on the numbers, and then allocated headcount for the coming year. This information was then shared with hiring managers, who, along with HR, began the recruiting process.

Unfortunately, this process is almost always interrupted and disrupted by change. The company may have a bad quarter, the economy takes a hiccup, or a merger or acquisition comes along. Suddenly, the plans are out of date, and the HR team, line managers, and finance organization must redo the plan and start over.

These three stakeholder groups, finance, HR, and the business, need time and planning to respond. When the company decides to lay people off, all planning goes aside, and HR and business leaders suddenly enter crisis mode. Months later, when the business picks up, the teams often realize they lost important people and must hire again.

In the case of HR, it takes time to post a position, advertise for candidates, and start the screening, assessment, interviewing, and hiring process. Most talent acquisition (TA) teams cannot quickly ramp up or ramp down this process, so they want to know quickly when budgets change or if the chief financial officer (CFO) needs to make adjustments.

The CFO's team has the same issues. If the numbers are weak and the company's growth is slowing (or it is not hiring fast enough), the CFO will likely walk to the chief human resource officer (CHRO) and immediately tell the CHRO what to do. How can the system respond in time?

Companies must ensure their teams are dynamic and reconfigurable and quickly adapt to business demands and new market requirements. Thus, the workforce planning process must evolve frequently with more agility instead of once every few months or annually.

The answer involves implementing a real-time planning system that integrates and coordinates workforce planning. This entails creating an ecosystem where the output from your financial, operational, and sales plans (each operating on its own timeframe) acts as input for your workforce plans. Changes made upstream are then reflected downstream in your workforce requirements, allowing for a continuous balance between workforce supply and business demand. The execution of these plans occurs through various solutions and systems such as human capital management (HCM), workforce management (WFM), recruiting, learning, and contingent workforce management. Actuals and market data can further guide adjustments to your plans.

The decisions you make about talent and the execution of your workforce plans have a direct influence on how finance and operations departments choose to proceed with their strategies and plans. While planning for finance, sales, operations, and your workforce may take place on different solution platforms, consolidating these on a single planning platform can greatly enhance the collaboration, agility, and benefits.

In this report, we examine the journey that forward-thinking organizations are taking to operate in a more connected, integrated way. Based on interviews with Ciena, the International Committee of the Red Cross, and a global energy provider, we uncover how important it is for workforce planning to be integrated with the company's financial systems because budget changes are a key driver of change. We also explore how constantly shifting demands make integrated workforce planning a new business imperative. Many companies offer planning tools within their HCM suite. Still, unless they're linked in real time to budgets and financial systems, they aren't particularly useful for the quick changes that are now the reality.

Few companies tell us they have a real-time process to improve workforce planning. However, implementing such a process will yield important and high-value results, so we encourage you to consider it.

The Knowledge Gap in Workforce Planning

Our research on HR organizations¹ finds that the highest performing companies are very good at workforce planning. But what are they planning for, and how do they find success?

Today, in a world shaped by new technologies, industry convergence, climate change, and remote or hybrid work models, the role of workforce planning has evolved. Rather than focusing solely on headcount growth and open positions, organizations must plan to acquire and develop new skills, identify missing capabilities, and navigate how to hire and grow the company in an era of AI-driven productivity.

In healthcare, for example, the emphasis is on finding new sources of clinical professionals, improving retention, and training new staff simultaneously.² In consumer banking, the challenge is to retain and deploy emerging and next-gen tech skills to continuously innovate.³ Thus, while workforce planning was once a financial exercise, it now encompasses organization design, skills analysis, and a forward look at retention, engagement, and internal mobility.⁴

Amid this dynamic environment, we're redefining roles and jobs. An engineer or designer with a clearly defined role in January may do something vastly different in July. More than half of hiring managers say AI will substantially impact the types of skills their companies need,⁵ and the shelf life of specialized skills keeps shrinking.⁶ As companies build plans to grow and hire, leading organizations are addressing talent shortages by implementing upskilling strategies and redesigning teams, roles, and tasks to support critical talent operating at top of license.⁷ The challenge of building a workforce for the future now involves planning based on skills, automation, and emerging new roles.

Given the rapid changes in jobs, roles, and skills, how does one develop a workforce plan? Enter strategic workforce planning (SWP), a broad term used to describe an organization's process to create a long-term plan for its workforce direction. Despite the inherent value of a SWP strategy in the evolving economic landscape, only about a quarter of organizations engage in this practice. In fact, one study finds that, of many HR practices, SWP has one of the largest gaps between perceived value and ability to implement it effectively. Organizations see SWP as a priority, but they have not yet found a way to integrate it into their business practices.⁸

Enabling Coordination Between Finance, HR, and Business Leaders

How do we improve this process? It all comes down to real-time access to a wide variety of information, a domain we call "integrated workforce planning." This comes down to building an integrated planning system, modeling the need for skills and capabilities, and carefully including metrics for compensation, turnover, promotion, and other patterns of employee mobility. Our research shows that leading companies take this a step further by incorporating financial, operational, sales, and other cross-functional metrics into their multivariable workforce-planning modeling.

Indeed, half of leaders agree that an inability to connect operational, people, and financial data to business outcomes impairs agility. Yet, only 12% of those leaders say that their organization's data is fully accessible to those who need it.⁹

In the subsequent sections, we explore the characteristics of an integrated planning platform and dive deeper into how organizations have bolstered their workforce planning capability through finance, operations, and sales inputs.

1 Systemic HR research. The Josh Bersin Company, 2023.

2 GWI Project Healthcare research, The Josh Bersin Company, 2022.

3 *Consumer Banking: Solving the Tech Talent Challenge* (The Labor Market Insights Series), Josh Bersin and Stella Ioannidou/The Josh Bersin Company, December 2022.

4 *The Definitive Guide to Organization Design: The Journey to Agile*, Josh Bersin and Kathi Enderes, PhD/The Josh Bersin Company, March 2022.

5 *The Future of Workforce Development: Insights from 750 business leaders on how technology is transforming the future of work*, Salesforce Research.

6 "The rise of technology and impact on skills," Sungup Ra, Unika Shrestha, Sameer Khatiwada, Seung Won Yoon, and Kibum Kwon/*International Journal of Training Research*, September 7, 2019.

7 *Healthcare at a Crossroads: Filling the Urgent Talent Gap in Clinical Care*, Josh Bersin and Kathi Enderes, PhD/The Josh Bersin Company, September 2022.

8 "The Future of People Management Priorities | BCG," Brian Heger/Brian Heger HR, July 12, 2021.

9 *Strategic Workforce Planning: Closing the Gap Between Finance and HR*, Workday/KPMG, 2023.

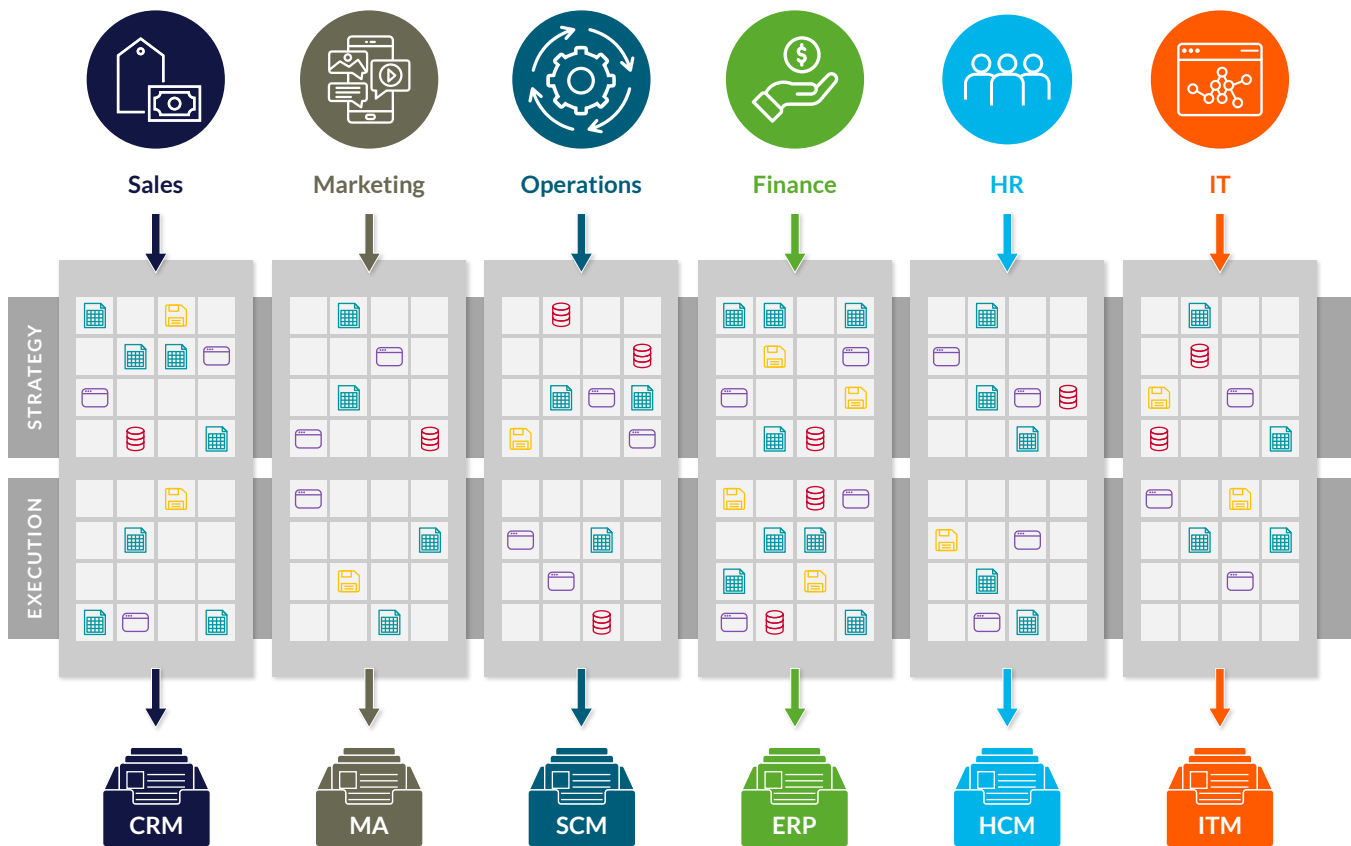
The Architecture of Integrated Planning Platforms

Most organizations capture plans and stakeholder/contributor input using fragmented applications, siloed systems, and “dueling spreadsheets,” the all-too-familiar phenomenon when multiple file versions are shared with different stakeholders and edits are made asynchronously (see Figure 1).

Today, cloud platforms enable stakeholders across the organization to share a single source of truth with built-in

live updates, messaging, and business rules. An integrated planning platform often operates through a multidimensional, in-memory calculation engine built to efficiently manage data uploads and changes while accommodating hundreds to thousands of users (see Figure 2 on the next page). Through integrations with customer relationship management (CRM), enterprise resource planning (ERP), human capital management (HCM), and more systems, often from many vendors, an organization’s disparate data sources become connected, enabling stakeholders across the organization to model, forecast, and scenario-plan with data they can trust.

Figure 1: Traditional Approach to Workforce Planning



CRM (Customer Relationship Management), MA (Marketing Authorization), SCM (Supply Chain Manufacturing), ERP (Enterprise Resource Planning), HCM (Human Capital Management), ITM (Information Technology Management)

Note: This figure depicts how strategy and execution data is fragmented outside transactional systems and located in various databases, computers, and even email.

Source: Anaplan and The Josh Bersin Company, 2023

Predictive algorithms and evolving AI and machine learning capabilities enable automated data insights, transforming complex inputs into actionable insights while minimizing time spent on manual data collection and dashboard creation.

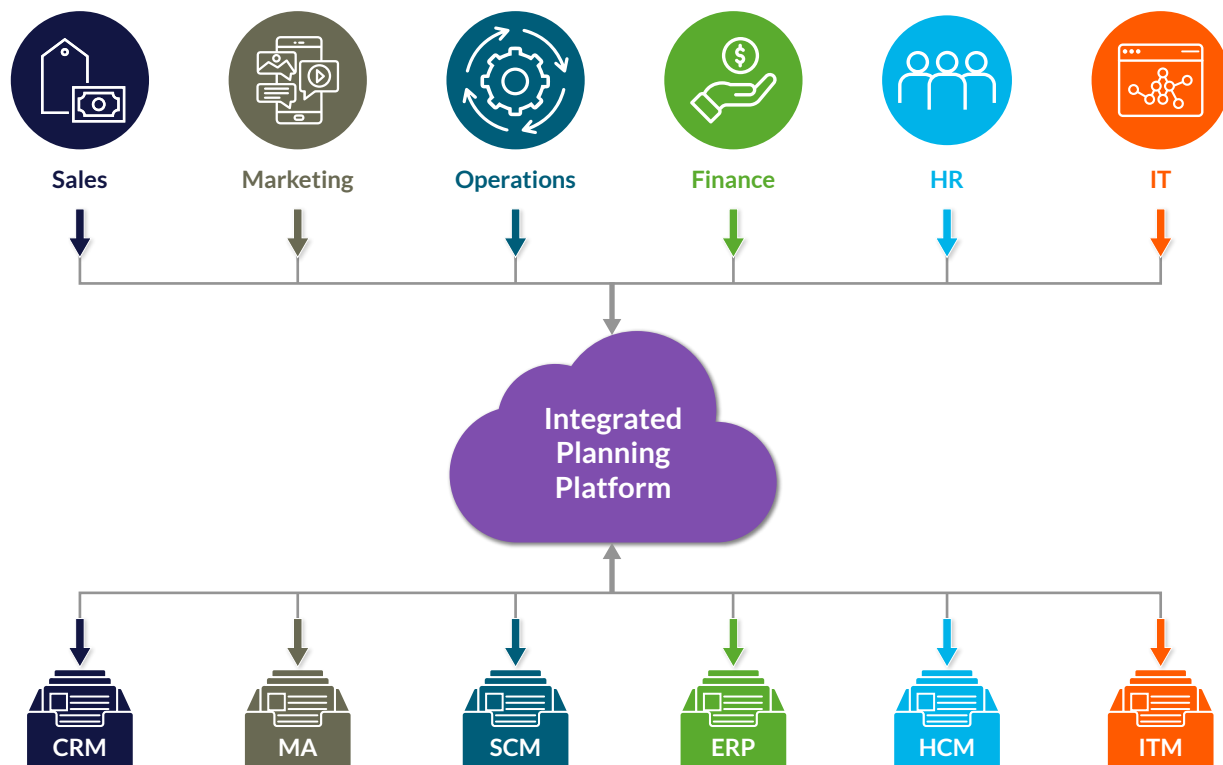
Turning Siloed Functions into Planning Partners

When functions operate in silos, planning follows a waterfall process with lots of bottlenecks. Finance will take the lead and kick off a quarterly or annual process. The CFO team will compile information on sales and operational costs, conduct revenue analysis, and then devise a workforce plan (including the forecast of salary increases, attrition, retirement, and layoffs) that meets the company's financial

goals. Plans and insights into skills gaps, internal mobility, and job redesign are left out.

Integrated workforce planning, by contrast, brings the organization along a transformation journey, turning siloed functions into planning partners (see Figure 3 on the next page). Once such a shared planning system exists, who are the teams who will use it? In a large organization, the "integrated plan" should be used by the CFO, local finance managers, HR teams, hiring managers, and more. Sales leaders may use the system to plan hiring for the sales organization and revenue growth; marketing leaders will use it to plan global capacity to launch new campaigns or outreach programs; and HR teams will use it to understand important issues like how many recruiters to hire, where to locate HR support, and what new requirements will emerge for global payroll and compliance.

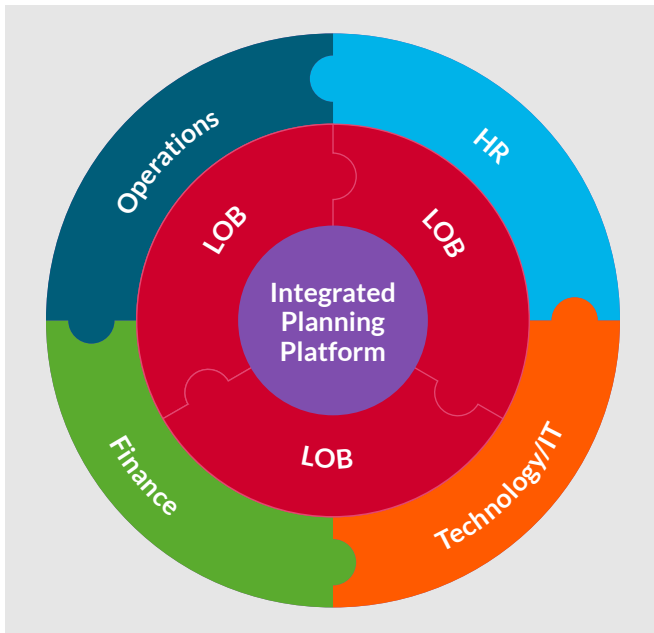
Figure 2: Integrated Approach to Workforce Planning



CRM (Customer Relationship Management), MA (Marketing Authorization), SCM (Supply Chain Manufacturing), ERP (Enterprise Resource Planning), HCM (Human Capital Management), ITM (Information Technology Management)

Source: Anaplan and The Josh Bersin Company, 2023

Figure 3: Collaboration across Functions/Organization



LOB (Line of Business)

Source: Anaplan and The Josh Bersin Company, 2023

Ciena, a telecommunications firm, breaks down its preexisting headcount planning to create full-fledged, continuous workforce planning conversations. Originally, its headcount planning efforts were finance-driven, conducted according to the fiscal calendar, not strategic business needs. Once business unit budgets were planned, managers were prescribed a workforce plan, leaving the knowledge of their people mostly untapped. Today, after embracing an integrated planning platform, these groups have a continuous, connected

conversation between finance, HR, and managers. As sales or operations data fluctuates, Ciena's finance and HR functions now discuss how the plan should change.

We also talked with an energy firm expanding its plant asset management module, a system that connects scheduled maintenance to supply chain planning. When the company schedules a maintenance project, the workforce planning on the same platform can predict labor hours, roles needed, and labor costs of the repairs. It also connected this planning platform to its crew scheduling system so the maintenance project could be planned, scheduled, and managed. And because its solution looks at roles by skill certification, it also discovers skills gaps.

A senior financial performance manager at the firm shared, "This capability to have deep skill insight to aid in the cost-effectiveness of our daily operations naturally expanded into longer term succession planning."

These above examples reinforce how integrated workforce planning can become the backbone for a dynamic process that fuses operations with finance, HR, and recruiting. Finance data sources often predominately contribute to an organization's integrated workforce planning strategies. Still, direct integrations between sales, supply chain, and operations can also be starting points for the workforce planning process.

Figure 4 (on the next page) showcases how the planning platform integrates many business processes in the company. Once this type of solution is in place, the various stakeholders (operations, finance, HR, recruiting, succession planning) can collaborate to optimize the company's talent and business decisions.

Organizations see SWP as a priority but have not yet found a way to integrate it into their business practices.

Benefits and Outcomes of Integrated Workforce Planning

Our Organization Design research reveals that having the capability to regularly build organizational models to easily scenario-plan and “right-size” the number of people needed across the organization was correlated with the ability to innovate effectively.¹⁰ In this section, we unpack the core benefits and outcomes of integrated workforce planning.

Benefits

Integrated workforce planning accomplishes the following goals:

Enabling Organizational Agility

Because the planning information is updated in real time and connected, organizations are prepared for change. Teams can quickly assess market signals and adapt during a downturn, acquisition, or other business change.

Reducing Complexity

Rather than sending spreadsheets around and waiting for meetings to resolve differences, various stakeholders like HR can collaborate in real time with data that is always current and focus on strategic priorities.

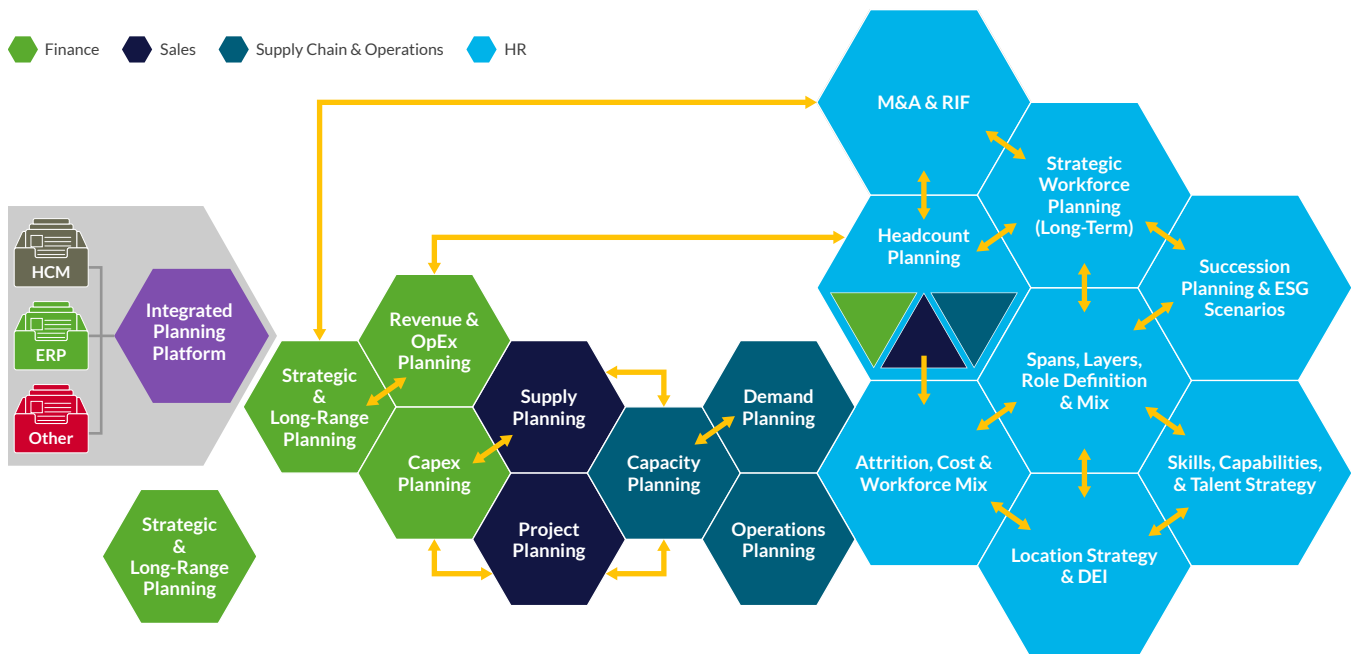
Unifying Various Groups

HR now knows what operations and finance needs are, and vice versa, these teams understand what HR needs. This kind of collaboration makes every group more accountable and aware of their interdependencies by considering several variables before modeling the workforce needs (business needs, skillsets, certifications, etc.).

Scaling the Process

As a company grows and becomes global, the integrated planning tool lets each group grow in a coordinated way.

Figure 4: Sample Integrated Workforce Planning Model



HCM (Human Capital Management), ERP (Enterprise Resource Planning), OpEx (Operational Expenditure), Capex (Capital Expenditure), M&A (Mergers and Acquisitions), RIF (Reduction in Force), ESG (Environmental, Social, Governance), DEI (Diversity, Equity, Inclusion)

Source: Anaplan and The Josh Bersin Company, 2023

10 The Definitive Guide to Organization Design: The Journey to Agile, Josh Bersin and Kathi Enderes, PhD/The Josh Bersin Company, March 2022.

Outcomes

Integrated workforce planning can help companies achieve the following outcomes:

Integrated, Trusted, and Actionable Data

Companies that deploy an integrated planning platform now have common, high-quality, consistent data with transparency across the business. This will also lead to better analysis. The calculation engine of a connected platform enables the system to know which downstream groups will be impacted by a change, enabling quick response. Imagine, for example, if a manufacturing line fails or a facility has a fire or accident. Product demand and supply may change quickly, forcing managers to figure out what to do, who to hire, and who to put on leave. The planning system gives managers immediate help in deciding what to do when the business changes.

“We had trouble with systems of truth,” explained Scott Soukup, Global Director of Business Intelligence at Ciena. “Our whole planning process was driven by spreadsheets. We had finance and HR professionals separately cobbling their ‘truth’ together in silos. Still, even within silos, you had to go to this person for that piece and another person for another piece.”

After analyzing the type of work its planning professionals were undertaking, Ciena knew there was more it could harvest from its intelligence. “Over time, as our business grew, our planning leaders became swept up in keeping up with spreadsheet work. The ground was moving fast beneath them, and their tools could not meet our business needs,” elaborated Soukup.

Spreadsheet-induced limitations on workforce planning are not an isolated issue. In fact, a study conducted by Ventana Research reveals that 35% of individuals routinely find errors in the spreadsheets they deem most important to their work. Furthermore, 45% of surveyed professionals encounter “dueling spreadsheets,” resulting in data discrepancies. On top of this, 34% of professionals uncovered out-of-date information in spreadsheets that supported important business practices. Errors, discrepancies, and out-of-date information hinder the accuracy of analyses, impair decision-making, and often require manual intervention to correct.

Integrated planning platforms eliminate these administrative headaches and resource drains, enabling organizations to manage the constant change they face efficiently.

A Common Forecasting Process

Leveraging a connected planning platform as part of an SWP strategy enables organizations to adopt a uniform language and cohesive interface. Organizations that have adopted connected workforce planning report that data misinterpretation was reduced despite many stakeholders being given access to cross-functional data that they previously didn't have insight into.¹¹

Organizations with connected platforms report that the consistency of planning processes enables analysts from different functions to better understand how findings are calculated, enabling quicker movement between scenario planning, decision, and action. “Using our connected planning tools has significantly changed the collaboration between our finance and HR organization. They are really joined at the hip,” shared Tammy Coleman-Craig, Vice President Supply Chain Digital Solutions & Business Operations at Ciena. “There are a lot more planning conversations happening between these two functions now that they have a common source of information to unite them, which has been a big benefit to the company.”

Ciena is now moving forward with “commoditizing” workforce planning to a greater variety of leaders across the organization because they are hearing demand for access to more models, dashboards, and insights. “We’ve got every business unit in the company wanting to have a dashboard for forward-looking workforce planning metrics,” shared Brian Ivay, Senior Director of People and Culture at Ciena. After instituting its connected planning platform, Ciena has transformed from an organization that partook in spreadsheet-based, high-level conversations amongst a select few to a connected enterprise with deeper workforce planning conversations cross-functionally, unlocking workforce planning strategy in all corners of the organization. The CFO of Ciena openly speaks to this transformation, citing that integrated planning has been adapted into a common language across the organization and has become part of the Ciena culture, not something that has to be forced.

11 [The Imperative for Integrated Planning: The Power to Maximize Performance](#), Ventana Research, 2023.

A Clear Identification of Required New Data

Integrated planning can help the company decide what new data may be needed. Ideally, in a workforce planning process, you'd look at headcount, skills, location, seniority, and many other factors in the hiring plan. But if that data is not available, it doesn't get considered.

Ciena quickly learned where it needed more visibility into other data sets. "By putting everything into one larger engine in our early integrated planning days, we were able to have conversations about where our data gaps were at an enterprise level," shared Soukup. "We identified and resolved several data deficiencies holding our business back from growth."

Similarly, when the International Committee of the Red Cross, an organization that serves people affected by armed conflict, violence, and other natural emergencies, analyzed its talent deployment challenges, the team discovered a lack of visibility into the business-critical intersections among professional skills, language capabilities, nationalities, and evolving political constraints. By building a custom model in its integrated planning platform to pull from disparate talent and operation data sources, the team created an automated solution that forecasts talent gaps not merely by position but, at a deeper level, considers the organization's unique staffing needs and constraints.

Improved Business, People, and Transformation Metrics

Companies who engage in strategic workforce planning are seeing positive outcomes on business and people metrics and are more prepared for digital transformation in the Post-Industrial Era. On average, organizations that engage in strategic workforce planning see a 10% increase in revenue per employee.¹²

Furthermore, organizations with a strategic workforce plan see, on average, a 12% increase in talent outcomes such as engagement, succession, and retention, as well as a 60% increase in the influence of HR on the business. This is coupled with a 70% increase in HR's influence on business decisions.¹³ Such outcomes are rooted in the productivity achieved by creating an integrated workforce planning process.

¹² [Strategic Drift: How HR Plans for Change](#), ADP Research Institute, 2016.

¹³ *Ibid.*

Organizations with a strategic workforce plan experience an average of:

10% Increase in revenue per employee

12% Increase in talent outcomes (engagement, succession, and retention)

60% Increase in HR's influence on the business

70% Increase in HR's influence on business decisions

Source: ADP Research Institute, 2016

After a single year of implementation, organizations see approximately a 40% increase in workforce planning productivity. This enables up to 65% of a workforce planning professional's time to focus on other value-added activities, including more frequent analysis. Over half of all organizations and 61% of executives say that digital transformation amplifies the importance of integrated planning.¹⁴ Organizations with SWP capabilities involving scenario modeling are 2.4 times more likely to have a successful digital transformation than companies not engaging in SWP. However, when the strategic workforce plan involves a dynamic, co-owned plan, that likelihood increases to 2.9 times, revealing that leveraging scenario-modeling capabilities alone leaves value off the table.¹⁵

If revenue, people, and transformations had to be boiled into a single indicator, that indicator would be business growth. According to an international survey commissioned by Anaplan, a connected planning platform vendor, and independently carried out by Dimensional Research, 72% of companies who report being highly effective at developing,

¹⁴ [The Total Economic Impact™ of Anaplan: Cost Savings And Business Benefits Enabled by Anaplan](#), Forrester Consulting/Anaplan, April 2022.

¹⁵ [Five moves to make during a digital transformation](#), Jonathan Deakin, Laura LaBerge, and Barbara O'Beirne/McKinsey & Company, April 24, 2019.

executing, and tracking plans are aggressively growing. Furthermore, nearly half of the companies turning at least three-quarters of their plans into action are growing aggressively, suggesting that frequent insight analysis and action delegation are drivers of business growth. This further supports the criticality of opening workforce planning professionals' time to strategic pursuits rather than manual data wrangling and analysis processes.

Enabling Scenario-Planning and Strategic Decision-Making

In addition to enabling organizations to grow their connected data strategy in alignment with their operating model, integrated workforce planning equips companies with a planning strategy that will easily adapt to long-term growth, short-term disruptions, and business changes.

Let's take the example of an insurance company's contact center with a major weather event about to occur. The question the leadership must ask itself isn't only "What if the hurricane lands?" The question is also, "What if it doesn't?" These competing scenarios may require vastly different staffing plans. How do managers staff appropriately so people are not sitting around doing little while mitigating the risk of having too few people and customers calling during a crisis and put on hold for hours on end?

An integrated platform can enable scenario analysis and planning across various dimensions, such as time, location, business line, skills, costs, and more.

Conclusion

By bringing finance, operations, sales, and people data together into a single purpose-driven platform environment, integrated workforce planning yields data transparency, breeds trust in analytics, creates synergy between the business and HR,

and enables proactive, agile talent practices that align with the business needs. Increased data visibility combined with a common forecasting language that encourages targeted collaboration between functional silos has made integrated planning solutions the foundation for many organizations' decision-making transformation journeys.

Irrespective of industry, asynchronous spreadsheets and planning emails have become obsolete to automated, real-time, trustworthy, and actionable insights. Integrated planning is an enabler of both collaboration and a culture of empowerment.

Organizations with a unified source of business and people data are uncovering talent strategies that support long-term success. In the next section, Lessons from the Frontlines, we look at the stories of three companies—Ciena, the International Committee of the Red Cross, and a global energy firm—in more detail to uncover how they use integrated workforce planning to unlock business and talent strategies.

SWP (strategic workforce planning) is shifting to become a continuous process. It is not only about long-range planning. The process must be linked to strategic decisions and the direction of the enterprise. It must also answer the questions: What are the talent implications of our business strategies? Will we have the talent we need? One could argue that you are doing SWP when you are continuously monitoring over time what roles are the most at risk (hard to find people, roles in decline, lots of automation, skills changes) or most critical for your current and future success as an organization.

Ciena Unlocks People Empowerment through Data-Infused Culture Transformation

Ciena is a networking systems, services, and software company headquartered in Hanover, Maryland, with more than 8,500 employees globally. The company specializes in enabling organizations to create open, scalable, and secure networks with technology solutions such as 5G, data center interconnect, Fiber Deep, GeoMesh, and Virtualized Edge. Founded in 1992, Ciena has grown significantly during the past 30 years with continued expansion of its role and reach in the telecommunications industry. In the Post-Industrial Era of work, it is important for Ciena to remain agile and strategically grow its workforce.

As an expanding organization, Ciena has faced workflow growing pains. “While most large enterprises have an enterprise resource planning (ERP) system for shipping transactions, a customer relationship management (CRM) system for customer interactions, and an HCM system for people data to feed into their planning, our planning process lacked enterprisewide technology,” shared Scott Soukup, Global Director of Business Intelligence at Ciena. The telecommunications firm had often relied on spreadsheets to conduct planning. “While a manual process made sense when we were a smaller organization, by 2017, our financial planning team could only produce table stakes—enough information to support the organization as is, but not enough to conduct long-term, predictive planning,” shared Soukup. Knowing that capacity—not capability—was the limiting factor. In 2017, the organization sought to partner with a vendor that could digitize its financial, people, and overall business planning processes. Removing the need for manual spreadsheet creation, manipulation, and distribution would once again enable finance professionals to provide strategic financial leadership through value-added analytics.

Ciena recognized that financial planning was connected to sales signals, demand forecasting, and, ultimately, workforce planning. This is why the company chose to partner with Anaplan, a connected-planning solution provider that empowers companies to transform how they see, plan, and lead their business by connecting their cross-functional forecasting

and planning needs into a single platform. “We pride ourselves on being people driven, and our C-suite speaks to the value of bringing people into the right roles where they can do the right things, as that will help all else fall into place,” shared Soukup.

With this people-centric mindset, Ciena sought to build a connected workforce planning model early in its partnership with the vendor. Before 2017, the workforce plan was an output of the finalized forecast, making it difficult for leaders to influence. “The automation piece of our connected planning platform was a key fundamental change,” shared Antonietta Laccone, Vice President of Finance at Ciena. “The 30,000 clicks it took to create a spreadsheet are now automated in the model.” By automating the analysis of financial and people data, the time once spent on manual spreadsheet creation could now be spent having HR, finance, and business leaders collaborate on an integrated plan that leverages managers’ expertise about their people and teams to create a truly people-centric planning strategy.

Ciena’s workforce planning model was intimately connected to business cost and expense tracking, swiftly becoming the second module to be fully implemented within the organization. Revenue assurance was the third model, which has resulted in several submodules that allow Ciena to closely monitor weekly, quarterly, and long-term financial statuses, enabling the company to make talent and cost-center decisions in parallel with financial and organizational growth. To encourage agile action, Ciena has empowered individual business units to decide which stakeholders can access the organization’s connected planning platform. Talent acquisition leaders and HR partners regularly access the platform. Some business units opt to have frontline managers access it to inform day-to-day operations. In this case, managers enter and update their own budgets and headcounts monthly. Other business units operate smoothly by identifying a finance professional as their go-to subject matter expert in organizational planning. Regardless of user dynamics, Ciena is now engaging in live workforce planning, analyzing monthly financial, supply chain, and people data to adjust the annual

workforce plan created in sync with the financial cycle.

“Ultimately, our live, connected workforce planning process is the starting point that enables our strategy that we want to put in play, whether going to market or innovation. Therefore, putting workforce planning into the annual fiscal planning process and having a connected tool to support it wasn’t just a benefit to us, it was an imperative,” shared Laccone.

During the past three years, Ciena has continued building its connected business environment. On the horizon are product and accounting upgrades that will provide further supply

chain and finance visibility. “But data insights alone don’t mean anything,” added Soukup. “We are building a language around connected planning within our organization that empowers our employees to not only leverage our connected tools but actually act on the insights they yield. People empowerment through data is the cultural journey we see developing over the next few years.” Through automated, connected planning, this telecommunications firm has transformed its decision-making levers. Time once spent conducting manual data compilation is now greater capacity for collaborative conversations—breaking silos with a common source of truth—a trusted data source. ■

Global Energy Company Connects Finance, Operations, and People Planning to Lower Costs and Empower Leaders

We spoke with a global energy and resources (ENR) company that bolstered its business plan by uniting workforce planning with financial planning. This organization employs more than 10,000 employees and, like many companies of this size, was conducting financial planning in a silo, primarily through spreadsheets. “Benchmarking activities and calculating our costs across the value chain was a challenge because it was a manual process without any controls,” shared a manager of financial performance at the energy firm. “To get a larger picture, we used to consolidate data from across the value chain into a spreadsheet, which was sent to relevant stakeholders via email for their planning needs.” While this ad-hoc, manual process was effective early in the organization’s history, the limitations imposed by such an asynchronous process held it back as the firm grew. “Our organization’s asset management and operation sides are naturally people driven, as people are our single largest cost item. Yet, there was a disconnect between hours worked and the staffing of business priorities,” elaborated the financial performance manager. Greater synergy between business and talent strategy was needed to guide the workforce planning process.

To put structure into its people planning strategy, this ENR company first decided to put controls around business data gathering, storage, and analysis. In 2019, the company partnered with Anaplan, a scalable, scenario-based planning platform that bridges data across an enterprise by working with clients to develop a common forecasting language. At first, the two organizations worked together to implement a standardized financial modeling tool across the business. The success of this use case led to the continued partnership of this ENR organization and the connected planning vendor. Today, the company has implemented over 30 use cases across finance, operations, and people data, all of which have been integrated into a single data environment and consolidated into a central people planning model.

One of the early use cases involved integrating operational data from the organization’s mining sector into financial forecasting models to increase transparency into the organization’s financial health. This sector was chosen as an initial integration priority due to its considerable influence on short- and long-term business prospects. “After we gain greater visibility into the status of our mining operations, we incorporated capital planning and revenue consolidation into our connected planning environment, among many other use cases,” shared the financial performance manager.

To create business agility, this ENR organization further invested in several people planning use cases. This journey began with a strategic workforce planning model called rostering and scheduling. Rather than predicting long-term business needs, this model enabled the organization to manage the allocation of its available workforce daily. Schedules layered with employees’ skills data were fed into the connected planning platform to provide headcount insights and automated intelligence to optimally allocate tasks. “The capability to leverage skill insights in our efforts to increase the cost-effectiveness of our daily operations naturally expanded into longer-term workforce planning,” added the financial performance manager. “We now look three to five years into the future.”

The role of frontline managers in people planning has not been overlooked in this ENR organization. To empower leaders and promote the development of employees, this firm has long given assistant managers a linchpin role in succession planning. However, this role historically consisted of manual data-oriented work. For example, assistant managers used to communicate sensitive employee salary and promotion recommendation information to HR and finance units through email. Manual spreadsheet creation and transmission bogged down not only these managers but also the functional leaders who consolidated assistant manager inputs into unit and organization-level spreadsheets. Today, the organization’s

connected data environment enables the smooth transfer of employee information while adding a layer of safeguarding. “We have a central place where the data ingestion from assistant managers is automated into a single model, which is configured with business and department-level securities to protect sensitive people data. Furthermore, we’ve streamlined the process of incorporating asset management, forecasted production hours, and financial information into the workforce planning process,” said the financial performance manager. Having a centralized data source has equipped frontline leaders with the level of integrated data necessary to make proactive, insight-driven workforce planning decisions beyond simple succession planning recommendations.

Today, the ERN organization feeds its connected planning with data from its finance software, HCM, and CRM. The CRM is used to manage sales and marketing data. The organization also recently signed a contract to integrate its supply chain management data into the platform, which will aid in material demand planning from consumer demand and human capital resource perspectives. In the future, the ERN company will expand its connected planning solution with a mining forecasting tool to predict production requirements in parallel with the financial forecasting process. The organization is keen to make this investment and add additional use cases, for having a single platform where stakeholders from across the organization can collaborate while maintaining their own system of record has unlocked better and faster decision-making. “Having a single

source of data across the business has helped us overcome the challenge of leaders doubting our data sources, which was a direct result of our manual processes,” shared the financial performance manager. The increased confidence in the organization’s connected data environment has led to not only quicker insights but also better questions. “If a number didn’t make sense, our leaders used to challenge the validity of it. “With the increased reliability and organizationwide confidence in our data, our leaders have shifted to asking “why” and finding root causes rather than focusing on the data source.”

Another major benefit that this ERN organization was keen to share is the sheer time and money saved by automating data consolidation. “The ROI of our planning efforts has significantly increased. We are getting more value per task because we no longer must invest in large, manual consolidation exercises. Our leaders also have more time to focus on other value-added tasks.” Employees who were once resistant to adopting automated technology are now relying on the ERN’s connected tools and asking for more enhancements. A gradual implementation of connected use cases has resulted in a culture of data transparency, adoption, and informed decision-making, a critical shift in the post-industrial world of work. Looking forward, this ERN is exploring the integration of AI into its forecasting process—a goal that appears feasible due to the data culture transformation driven by a connected, automated data environment. ■

ICRC Enables Agile Talent Deployment through an Adaptable Connected Workforce Planning Solution

The International Committee of the Red Cross (ICRC) was first established in 1863, making it the oldest organization within the International Red Cross and Red Crescent movement—the largest humanitarian network in the world. The ICRC is also the most recognized organization within the movement, having won three Nobel Peace Prizes. With its mission to alleviate human suffering, protect life, and uphold human dignity, the organization's staff of more than 20,000, alongside millions of volunteers, support people affected by armed conflict, violence, and other emergencies. However, primary services are not limited to providing aid and protection. The ICRC also advocates for laws that safeguard victims of war. It has a presence in every country, but it is no surprise that its headquarters are based in Geneva, Switzerland, as much of its operations are both mandated and protected by the Geneva Conventions of 1949—international treaties that limit barbarity in war.

To bolster its agility and maximize impact, the ICRC began an initiative in 2020 to establish a more robust and reliable workforce planning process. From the onset, this initiative had support from senior leadership, as it had become a business imperative. “Workforce planning is critical for achieving ICRC’s mission,” explained Jonas Ottiger, Head of People Analytics and Workforce Planning at ICRC. “It is a main determinant of our ability to respond quickly and efficiently in emergency situations to help people affected by armed conflict.” The organization’s seemingly boundless geographical operations, coupled with the unpredictability of the worldwide need for its services, demands agile staffing and proactive upskilling. “For us, workforce planning is not a cost-driven business initiative. It’s primarily about talent,” shared Ottiger.

The most critical use case for workforce planning at ICRC pertains to the organization’s 3,000 mobile roles, which can be classified into nearly 300 job profiles, such as water engineers, logisticians, and protection delegates. The employees in these profiles are called international staff, as they rotate

geographies regularly to meet the constantly evolving global demand for humanitarian response services. These mobile profiles can be classified by competency and activities, enabling clarity of recruiting, reskilling, and deployment with proper workforce planning tools. For this group of professionals, however, workforce planning solutions cannot be based on a foundation of geographical data. “It’s not relevant for us where people are based today because we know that next year, they will be based somewhere else,” said Jonas Ottiger. What is relevant is having insight into factors such as the international staff’s language competencies and nationality. Having insight into their nationality can be critical for the safety of employees and those whom ICRC serves because of political barriers. For example, ICRC may know it must hire 15 more water engineers in three years. This recruiting task quickly becomes complex when language requirements, such as needing five more Arabic-speaking water engineers, are coupled with limitations in the nationalities that can be deployed due to security. Thus, talent-oriented workforce planning at ICRC must consider more than just expertise. A complex pool of talent considerations needs to come together to create an agile, reliable pipeline plan.

Geography does play a stronger role in the workforce planning for ICRC employees on domestic contracts. For this population, which is most of the ICRC workforce, the organization needed a more traditional long-term strategic workforce plan that looks two to three years into the future. However, finding a workforce planning vendor that could also accommodate the unique inputs ICRC needed for its international, mobile population proved challenging. The organization sought a flexible solution that could enable it to plan for any time horizon—from a couple of months to a few years in advance—and act quickly when unpredictable circumstances arise. “Our organization’s operations are more unpredictable than most because we have to react quickly when a new crisis happens,” said Jonas Ottiger. The war in Ukraine is a recent example of when the ICRC needed to deploy rotating professionals

quickly and at scale. At the onset, the size of the needed ICRC workforce in this region varied considerably from day to day. The organization needed a solution that could provide real-time insights and long-term planning capabilities.

To address its workforce planning needs, ICRC partnered with Anaplan, a connected planning vendor, to configure a custom workforce planning platform tailored to the organization's unique operating model. Currently, ICRC has a people analytics and workforce planning team of three. While this center of excellence will maintain a leadership role in the organization's workforce planning efforts, more than 150 HR professionals will be a part of the global implementation of the connected platform to achieve the agility required to successfully navigate the unpredictability of world events. "The specificity of our workforce planning approach requires us to embrace teamwork. In many organizations, workforce planning is the

work of the few. For our organization, we need to empower many HR professionals to use long and short-term workforce planning for their specific population," shared Ottiger.

To generate buy-in, the people analytics and workforce planning team at ICRC partnered with an internal project manager to facilitate a mindset shift that workforce planning is mission critical. "We're building a mindset of accessing gap forecasts from our platform, seeking to understand our needs, and then taking action in anticipation of those needs," shared Ottiger. To further this workforce planning mindset, once the 150 HR professionals serving regions across the globe are trained, ICRC plans to train more than 200 business leaders to use the platform. Eventually, select managers at all levels will be given visibility into talent forecasts to embed workforce planning further into the culture and mission at ICRC. ■

About the Authors



Josh Bersin

Josh founded Bersin & Associates in 2001 to provide research and advisory services focused on corporate learning. He expanded the company's coverage to encompass HR, talent management, talent acquisition, and leadership and became a recognized expert in the talent market. Josh sold the company to Deloitte in 2012 and was a partner in Bersin by Deloitte up until 2018.

In 2019, Josh founded the Josh Bersin Academy, a professional development academy that has become the "home for HR." In 2020, he put together a team of analysts and advisors who are now working with him to support and guide HR organizations from around the world under the umbrella of The Josh Bersin Company. He is frequently featured in publications such as *Forbes*, *Harvard Business Review*, *HR Executive*, *The Wall Street Journal*, and *CLO Magazine*. He is a popular blogger and has more than 800,000 followers on LinkedIn.



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Janet is senior vice president of research at The Josh Bersin Company where she conducts empirical research on topics related to work, technology, and HR—developing actionable insights for today's talent executives. With over 20 years of experience, she has worked in multiple industries around the world, helping CHROs and their teams build flexible organizational structures and next-gen leadership models. Prior to joining The Josh Bersin Company, Janet led the global HR research program at IBM's Institute for Business Value where she published landmark studies on the global skills gap and the evolving role of the CHRO. Her research has been cited in publications including *Time*, *Forbes*, *Business Insider*, *Bloomberg*, and *Fast Company*. Janet holds degrees in psychology, computer science, and education and is a frequent contributor and speaker at industry conferences.



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