Workforce planning (Steps 1–5)

Use this template to help you to identify and document the profile of your current workforce and the profile of your projected future workforce, then analyse the ‘gap’ between the two workforces and develop strategies that you can put into place to ‘fill’ the ‘gap’.

Step 1 – Context and environment

What are your future goals for your business, eg introduce new products or marketing techniques, target new markets?

How will these future goals affect your workforce?

What external challenges are currently being faced or likely to be faced by your business or industry in the future? (For example skills/labour shortages, attraction and retention issues, change in technology, economic conditions, organisational budgets.)

What is your current workforce’s capability and capacity to deliver products and services?

What is your current workforce’s capability and capacity to deliver future products and services?

Step 2 – Current workforce profile

You can use this table to help you to record the details of your current workforce profile.

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| **My current workforce profile** | | | | | | | | | | | | | | |
| **Staff ID** | **Employee name** | **Age** | **Date of birth** | **M/F** | **First start date** | **Job/Title** | **Location** | **Classification level** | **Employment status** | | | | **FTE** | **Highest level qualification attained** |
| **Permanent** | **Part Time** | **Temporary** | **Casual** |
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| **Classification Levels: 1 = critical role; 3 = required role; 5 = optional role – we have a similar rating system.** | | | | | | | | | | | | | | |

**Conclusions**: Does your workforce profile identify any risk areas? (Eg an ageing workforce, employees with long service due etc)

Current workforce skills

You can use the following template to help you to document the skills, capability and capacity of your current workforce.

|  |  |
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| **Functional skills** | |
| What are the main functions of our business?  What are the common skills required for each function? |  |
| **Core skills** | |
| What core skills are required in our business? |  |
| **Job skills** | |
| What are the main job roles in our business?  What are the specific skills required for each job role? |  |
| What are our current workforce strengths and development needs? | |

**Conclusions**: What are the strengths and development needs made obvious by the skills profile of your current workforce?

What are the workforce development priorities for your current workforce, based on the analysis of your current workforce profile?

Step 3 – Future workforce profile

1. What are the products and services that will be provided by your business in the future? (Eg new/more/less services and products)

1. What are the workforce implications and issues stemming from what you identified in number 1 above? (Eg more/less staff or different skills or qualifications required)

1. What are your future workforce needs based on what you identified in numbers 1 and 2 above?

1. What skills and competencies will your future workforce require?

1. What are your workforce priorities, based on the supply and demand of available employees, their skills, capability and capacity and the skills, capability and capacity that you will need your projected future workforce to have in order to meet your future business goals?

Future workforce skills

Now use the information you have identified from completing the questions about your projected future workforce needs to help you to document a workforce skills profile for your projected future workforce.

|  |  |
| --- | --- |
| **Functional skills** | |
| What will be the main functions of our business in the future?  What will be the common skills required for each function? |  |
| **Core skills** | |
| What will be the core skills required for everyone in our business in the future? |  |
| **Job skills** | |
| What will be the main job roles in our business in the future?  What will be the specific skills required for each job role? |  |
| What are the gaps between our current workforce profile and our future workforce needs? | |

Step 4 – Gap analysis

Using your **Current workforce skills** template and your **Future workforce skills** template, identify any gaps that exist between your current workforce and your projected future workforce needs. What are the key areas that require action to move your business from where it is now to where you want it to be in the future?

After you have completed steps 1-4, fill in your **Workforce action plan** template. You will also need to set a timeframe for reviewing and evaluating your workforce action plan to keep it relevant and current.

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| **My workforce action plan** | | | | |
| **Business name:** | | | **Date:** | |
| **Issue/Need** | **Actions** | **Outcomes** | **Resources** | **Timelines** |
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Step 5 – Review and evaluate

Prioritise your key areas to focus on and identify actions for each of these priority areas. Then put these priority actions into a **workforce action plan** to help you to close your workforce ‘ gaps‘ between the workforce you have today and the projected workforce that you will need to meet your business needs in the future.

Now, consider and identify the resources you will need and the next steps that you will take to begin implementing your **workforce action plan**. For example,  
who else in your business will be involved (supervisors, managers and key staff) and what are your short, medium and long term actions?