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Executive Summary

ILR School HR Studies Professor John Hausknecht welcomed participants, outlined the objectives, and emphasized the peer-learning design of CAHRS working groups. He reminded attendees of confidentiality and noted that an attendee list and follow-up report would be shared afterwards.

He began with a short activity asking participants to list the first words that come to mind when they think of strategic workforce planning. Chat responses included: layoffs, resource actions, people, future, roles and resources, leader involvement, spreadsheets, complex, forecasting, skills, modern, and competency assessments. The array of responses signals that strategic workforce planning is a complex, multidimensional process whose meaning varies depending on the organization, industry, and individual's role.

Summary

Why Workforce Planning Is Challenging

Participants discussed the challenges of aligning talent strategy with rapidly changing business needs.

Key Themes:

- Volatile business strategy — rapid shifts in strategic priorities make planning challenging.
- Mismatch between planning and external conditions — expansion followed by contraction leads to overstaffing and layoffs.
- Balancing depth with simplicity — leaders can be overwhelmed by overly complex Strategic Workforce Planning (SWP) processes.
- Critical role of business intimacy — Human Resources' ability to meaningfully forecast depends on its understanding of operational realities.
- Data availability—inadequate data and tools constrain the ability to adapt workforce plans

Getting Organizational Buy-In

Participants shared strategies for building understanding and adoption among leaders.

- Engage strategy, finance, and Human Resources Business Partners (HRBPs) early to create alignment and embed SWP into existing processes.
- Use proof-of-concept cycles to demonstrate value by comparing plans with actual outcomes.
- Leverage decentralized HR advisors who have deep local/regional expertise to adapt plans to the realities of the local context.

Getting Examples of Early Successes

Participants highlighted several examples of early progress.

- Narrowing focus to critical roles, such as Profit & Loss (P&L) leaders, allows organizations to move faster and show early wins.
- Internal mobility during restructuring — one company redeployed 200 employees from a downsizing unit into a growing one.

Data, Tools, and Technology

Participants highlighted both progress and limitations in technology and data readiness.

Tools Mentioned:

- Tableau dashboards for SWP, though limited by data quality.
- Workday implementations requiring mindset shifts toward position management.
- External labor insights tools.
- Skills-based job description libraries developed as a foundation for consistent role definitions.

Challenges also include fragmented data sources across business, HR, finance, and external datasets.

Planning Horizons

Organizations shared how they structure their SWP timeline and review cadence.

- Many organizations operate on a one-year planning cycle with quarterly updates.
- Some have bi-annual or quarterly formal reviews tied to financial planning.
- Participants asked how often longer-term plans (> one year) should be revisited; no consensus emerged.

Artificial Intelligence (AI) and the Future of Work

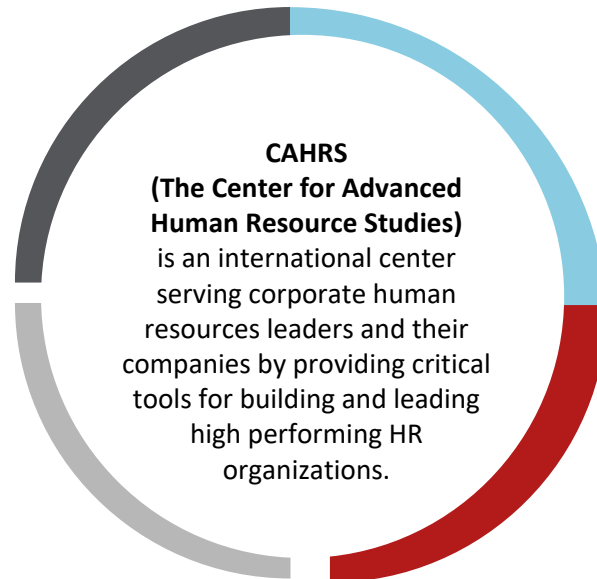
AI's potential impact on workforce planning generated significant discussion.

- AI is more likely to disrupt tasks than entire roles, creating a series of incremental efficiency shifts.
- Some organizations are mapping job requisitions to tasks to estimate where automation may occur.
- Companies struggle to balance high expectations of AI with legal, ethical, and practical implementation challenges.

Open questions remain about forecasting workforce composition and reskilling needs under AI disruption.

Closing

Participants emphasized the value of shared experiences. Several referenced ongoing internal efforts to build SWP capability, including development of playbooks and HRBP upskilling plans.



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