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Simplify your planning process:

WORKFORCE PLANNING TEMPLATES

Your people are your greatest asset, and in today's turbulent times, they are the key to business continuity.

That makes it crucial to pay close attention to their **wellbeing**, engagement, and loyalty. It also means you need to plan effectively for changes in your workforce, such as promotions and departures.

The changing external forces of today's business world have driven home the importance of maintaining flexibility in your business and preparing multiple plans for the future. This is why when it comes to workforce planning, savvy HR leaders are now preparing a selection of plans to address different potential needs.

To get your preparations up to speed and ensure that your business will have the talent it needs as it evolves, take advantage of our workforce planning templates below. They have everything you need to get you started, whether you're building a wider workforce strategy or preparing for more specific periods of role transition.

(And if you're wondering, "**what is workforce planning?**" check out our **handy guide** first.)

What is a workforce planning template, and why do you need one?

A workforce planning template is a tool that poses the right questions to enable you to shape a clear and achievable workforce strategy. It encourages HR leaders to precisely assess their future workforce needs and to identify gaps in their current teams.

A workforce planning template might, for example, help you identify a suitable candidate for a new position before that role becomes available and keep this decision linked to the longer-term needs of your company.

Spotting skills gaps before they occur can mitigate the knowledge loss when a senior team member leaves, helping you lay the foundations for information transfer and effective **succession planning** so that people can succeed in relevant roles.

Fundamentally, an effective workforce plan will allow you to guide your company closer to its future form in service of your overarching business objectives. Workforce planning templates, integrated with modern HR tech, allow you to track **workforce planning metrics**, for example, via a **headcount** planning template, and make data-driven decisions about your workforce. They are a crucial element of your HR toolkit.

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Our workforce planning templates

Explore our free workforce planning templates below and find those most suited to your specific uses.

Strategic workforce planning template

Workforce planning processes are far simpler when you have a tried-and-tested model to get you started. Our strategic workforce planning template takes you through the key steps needed to build a comprehensive plan for your future people needs.

It helps you outline your intended direction of travel, identify key workforce gaps, build a **workforce planning solution**, and assess progress.

Executive summary

Stakeholders	
NAME AND ROLE	**CONTACT INFORMATION**

Big-picture strategy	
Short and long-term organizational goals	
Expected internal changes over the next 1-3 years and their key drivers	
Workforce challenges you're likely to face in the short and long term	
Expected external challenges, both economic and political	
Stakeholder engagement strategies	
Upcoming legislative, policy, or regulatory changes, and the impact they might have	

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Existing talent supply

Demographics of your existing workforce	
How closely does your current workforce align with your business strategy and needs?	
Number of employees at each organizational level	
Attrition rates and the impact on your services	
Current tenure distribution of your people	
Overall workforce retirement eligibility in (X) years, particularly looking at those in hard-to-fill positions	
Prepared plans for replacing departing talent, such as via recruitment or upskilling	
Costs of replacing talent internally versus externally	

Projected demand

Your plan for measuring your organization's workload	
Is your volume of work projected to change year over year?	
The number of people needed to accomplish your current workload	
Any anticipated workload changes due to efficiency gains, program changes, or other circumstances	

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Skills gaps

Describe the gaps between your workforce supply and workload demand	
Identify what gaps are most critical considering the strategic goals	
Prioritize these gaps in order of urgency/importance	
Which gaps are the hardest to close?	
Which gaps are the easiest to close?	
Which gaps have more of an effect on the performance of your teams?	

Planning for the future

Do you have any existing workforce intervention strategies?	
Strategies you could apply to your organization to address changing workforce needs	
Which gaps are the most critical to address?	
Identify any factors that might impede your strategy's success (such as legislation, policies, structural or resource limitations, etc.)	
The changes or programs you will implement in the short and long term	

Monitoring and evaluation

How will you measure the progress of your workforce planning solution? (Include metrics or key performance indicators.)	
Identify any factors critical to the success of your workforce planning and implementation efforts	
Describe how you will continue to assess and evolve your approach	

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Workforce development plan template

Developing your people not only helps you fill future staffing needs but also increases the happiness and loyalty of your teams. Use this template to identify key goals and steps for supporting talent development.

NAME		POSITION	
CURRENT SUPERVISOR		DEPARTMENT/ TEAM	
TENURE			
LONG-TERM GOALS	1. 2. 3. 4.		

SKILL TO DEVELOP	TRAINING PLAN	TIME FRAME	NOTES/OUTCOMES

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Workforce transition plan template

Workforce transition plans help you deal with big changes in your business, and particularly those which affect your management or leadership teams.

When a senior leader is promoted, moves on to another business, or retires, it can be quite a disruptive period for any organization. Similarly, changing business needs can **trigger changes** to team structures or working arrangements. In both cases, it's important to prepare for moments of transition, gathering a list of responsibilities and expectations, and planning for knowledge transfer.

Use our template to help you get started.

CURRENT HOLDER	EXIT DATE	SUCCESSOR	START DATE

CURRENT ROLE	CURRENT MANAGER	CURRENT ROLE	CURRENT MANAGER

ROLE RESPONSIBILITIES
1.   2.   3.   4.   5.   6.

ROLE EXPECTATIONS
1.   2.   3.   4.   5.   6.

IMPORTANT KNOWLEDGE AREA/SKILL	LEARNING PROCESS	LEARNING TIMELINE	NEXT ACTION

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Transition administration checklist

ACTIVITY	PLANNED COMPLETION DATE	NOTES
Introductory conversation between successor and new manager to discuss expectations		
Planning training needs		
Planning for transition timelines		
Clarification of previous incumbent support during transition		
Exit interview for incumbent		
HR notification of position changes		
Notification of direct reports and other team members		

Previous role offboarding checklist

ACTIVITY	PLANNED COMPLETION DATE	NOTES
Handing over projects and business priorities		
Direct reports information handover		
Contact and data storage handover		
Offboarding conversations with team members		
Handing over key client/ customer relationships		
Handing over external contractor relationships		
IT handover of IDs and passwords		
Final performance review/ exit interview		

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New role orientation checklist		
ACTIVITY	PLANNED COMPLETION DATE	NOTES
Activation of HR and payroll systems		
Office orientation, where applicable		
Handing over projects and business priorities		
Direct reports information handover		
Contact and data storage handover		
Handing over key client/ customer relationships		
Handing over external contractor relationships		
Transfer of IDs and passwords, digital handover		
Probation period review with new supervisor		

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Workforce gap analysis templates

Identifying gaps in your workforce's skill sets is an important data-gathering step as you plan for your business's future needs. It's important to look at both the big picture and the fine detail, as you assess how well prepared your people are for the changes that are likely to affect your business in the future.

Using our templates can help you to identify gaps in your workforce: The first allows you to analyze an individual's skill set and can help you to drive appropriate **learning and development (L&D)** programs, while the second is aimed at assessing whether your teams have the right capabilities and headcount to tackle future challenges.

1. Individual skills gap analysis (with example)

EMPLOYEE NAME		POSITION		DATE	
SKILL DESCRIPTION	CURRENT SKILL LEVEL (AND METRICS)	DESIRED SKILL LEVEL (AND METRICS)	EXISTING GAP AND EXPLANATION	ACTION PLAN	
Project management	Basic Excel expertise, one project successfully completed	Management of cross-department projects with 40 team members for role progression	Limited experience of major projects due to short tenure in existing role	Shadowing of experienced project manager, followed by management of a 10-person project within the next six months	

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2. Workforce-wide gap analysis

DEPARTMENT		PROJECT FOCUS		DATE	
FUTURE SKILL NEEDED	**WORKFORCE REQUIRED**	**CURRENT WORKFORCE**	**EXISTING GAP**	**EXPLANATION**	
[The capability you'll need to achieve set goals]	[The headcount and skill set required to fulfill the need]	[The number of people you currently have with appropriate skill]	[The gap that currently exists between your future need and current provision]	[An explanation of the gap]	

Using workforce planning templates to implement your workforce plan

Once you've identified which workforce planning templates best fit your needs, next up is putting in place the work needed to carry them out.

Generally speaking, there are three main steps to follow:

1. Gather the team

A large project like workforce planning requires clear leadership. Identify an HR team member who can organize the project and help keep things on track, and assign additional resources to match their needs.

2. Set clear goals

Drawing on your existing internal data, it's important to first chart the big picture before drilling down into the details. Identify where you are now and where you want the business to be, and associate these with a timeline and specific metrics, such as headcount or **skills gaps** that you need to fill.

With these criteria in place, it will be possible to create a detailed workforce plan with tangible—and achievable—steps.

3. Repeat, repeat, repeat

With times and business needs changing so rapidly, your workforce plan also needs to stay up to date.

A truly adaptable workforce requires a regularly evolving plan. So it's important to implement regular meetings to keep things up to date. That way you can feel confident that your strategy remains sound, and that you're truly prepared for all potential outcomes—and unforeseeable challenges, too.

Workforce planning:
The devil is in the details

Workforce planning is a key element in your strategic arsenal as you prepare your business for an **uncertain future**.

Building resilience and agility in your teams and preparing succession plans is the best way of instilling confidence that you will be appropriately resourced. It's also the best way to ensure your organization will have everything—and everyone—it needs to overcome the challenges ahead.

With our free workforce planning templates, it's easy to get started laying the foundations for your future success.

Meet Bob

An HR platform such as Bob offers a one-stop-shop for all things people. It sits at the center of your HR ecosystem, is fully customizable, and grows with your organization.

In a short time, Bob can be deployed to enable communication, collaboration, and connectivity that drives stronger engagement, productivity, and business outcomes.

For HR

It delivers automation of many common processes, allows greater oversight and visibility of the business, and centralizes all people data in a secure, user-friendly environment.

For managers

It provides access to data and insights to help them lead more effectively and streamline processes.

For employees

It's the tools and information they need to connect, develop, and grow throughout their journey.

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