



TempusResource  
by ProSymmetry



# The Essential Guide to **Workforce Planning**

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Workforce planning and capacity management are critical for ensuring that the right people with the right skills are available at the right time to meet business demands. Whether managing large-scale projects, compliance audits, long-term contracts, or product development cycles, organizations must have a proactive strategy to allocate and optimize their workforce.

This guide explores best practices for business leaders – portfolio managers, project managers, audit teams, resource managers, and product managers – on how to effectively plan workforce capacity, mitigate risks, and collaborate with HR for optimal results.

# The Fundamentals of Workforce Planning

Effective workforce planning requires strong collaboration between HR and business leaders across the enterprise. By integrating talent strategies with project, audit, and product needs, organizations can build a more resilient and agile workforce. Workforce planning is more than filling open positions and making sure the proper people are hired. It's about collaboration to make sure that resources are planned strategically, the talent pipeline is developed, and strategy and resources are aligned to anticipate future needs that align with strategic goals and initiatives.



## Key Components of Workforce Planning:

- ✓ **Demand Forecasting:** Estimating future workforce needs based on project, audit, and product development timelines.
- ✓ **Capacity Planning:** Evaluating the current workforce, available skillsets, and employee capacity.
- ✓ **Resource Allocation:** Ensuring the right people with the right skills are properly allocated.
- ✓ **Gap Analysis:** Identifying resource capacity and skill shortages or surpluses and taking proactive action.
- ✓ **Scenario Planning:** Modeling different “what-if” situations to prepare for changes in workload.
- ✓ **Workforce Optimization Strategies:** Implementing flexible talent acquisition plans and upskilling initiatives for efficient and directionally correct resource forecasts.



## Why Workforce Planning Matters for Business Leaders:



Improves business performance by being more adaptable and agile to changes in headcount and competitive landscape.



Optimizes costs by minimizing overstaffing and underperforming teams while investing in areas that drive growth.



Provides strategic alignment between business strategy and goals and the work people are doing.

## Workforce Planning for the Entire Organization

Leaders across the business have a stake in ensuring workforce planning is done effectively, as it impacts the human resources across all business units and the company's strategic goals. Here is how each department can take steps to advance workforce planning efforts.



### Project Management Offices



Ensuring the right skills are available when needed to prevent capacity bottlenecks.



Managing constraints such as time, budget, and competing priorities both today and in the future.



Using scenario modeling to prepare for strategic goals and future initiatives.

Learn more with our [Guide to Portfolio Success with Scenario Planning](#)

## Internal Audit Organizations



Allocating skilled and experienced auditors to meet compliance requirements.



Addressing future audit plans and regulatory requirements with workforce planning strategies for optimized hiring plans.



Leveraging historical audit data to anticipate future staffing needs.

For more info: Read our [Auditor's Guide to Strategic Workforce Planning](#)

## Professional Services Organizations



Aligning workforce needs with contract obligations and service-level agreements.



Forecasting client demands with historical data to address long-term capacity needs.



Balancing fixed vs. flexible resource strategies to meet fluctuating demands.

## Product Development Organizations



Capacity planning for entire Go-To-Market motion including, R&D, product development, product launches, and ongoing support.



Managing cross-functional workforce needs, from development to marketing and customer support.



Forecasting workforce demand to scale teams as products and the market evolve.



## Human Resources Department



Supporting recruitment and retention strategies to maintain workforce stability.



Collaborate with project, audit, and product leaders to understand capacity and future resource and skill needs



Collaborating with leadership to ensure workforce needs align with business priorities.

Read our guide specific for HR: [Strategic Workforce Planning for HR Leaders](#)

## Best Practices for Effective Workforce Planning

It's in the name – planning means you're anticipating the needs before you do the work. To have your workforce planning efforts be successful, it's imperative that you're doing your planning at minimum before your portfolio or project planning work, enabling you and your team to be more strategic and account for important scenarios that might arise to alter or impact your plans years in advance. While the list of what tasks would be included for each organization or team might be pages long, here are some essential steps for each group to focus on:



# 1

## Project Management Offices



Utilize workforce planning tools to gain visibility into current resource capacity, skills and availability.



Work with HR to develop a pipeline of skilled professionals through upskilling or hiring.



Implement flexible staffing solutions, such as contractors for anticipated demand.



# 2

## Internal Audit Organizations



Collaborate with HR to ensure a talent pipeline for compliance roles.



Implement cross-training programs to build cross-functional expertise.



Use scenario modeling to anticipate peak workload needs and plan accordingly.

# 3

## Professional Services Organizations



Develop retention strategies to keep key employees engaged.



Work with HR to forecast permanent and contingent workforce needs.



Establish workforce risk mitigation plans to address potential staffing shortages.

# 4

## Product Development Organizations



Leverage agile workforce planning to scale teams efficiently.



Partner with HR to create career development programs that retain top talent.



Implement workforce analytics to track efficiency and skill gaps.

# 5

## Human Resource Departments



Creating a skills inventory to track employee capabilities and development opportunities.



Understand the businesses strategic goals and future initiatives to align people with work.



Implementing employee engagement programs to reduce turnover and retain top talent.

# Tools & Technology for Workforce Planning

Modern workforce planning relies on technology to improve accuracy and efficiency. While it may be tempting to fall back on spreadsheets for capacity and project demand planning, those solutions are too simple to handle resource forecasting, capacity planning, scenario planning and analysis, and skills management.



## Key Components of Workforce Planning:

- ✔ Real-time data and years-long forecasting capabilities.
- ✔ Ability to hold both resource capacity and project demand data.
- ✔ Integration with HR systems and project management tools.
- ✔ Scenario modeling to simulate various workforce planning outcomes.
- ✔ Reporting and analytics for strategic decision-making.

# Case Studies: Real-World Examples of Workforce Planning

## Case Study: TDS Solving Problems Strategically

Telephone and Data Systems (TDS) is a Fortune® 1,000 company that provides wireless products and services, cable and wireline broadband, TV and voice services, and hosted and managed services to approximately six million customers nationwide. Before moving to a workforce planning platform, TDS leadership was overseeing its resource management through Excel spreadsheets, a very manual and time-consuming process that left the door open for errors and inaccuracies. TDS leadership has gained much insight into its resource forecasting and capacity planning with Tempus Resource. The team utilizes Tempus's What-If scenario planning to allow Resource Analysts to run scenarios and plan more effectively, a key to strategic alignment. Being able to answer questions such as what happens to a project if a skilled resource is reassigned, or if budget constraints mean a project might be delayed, provides much more potential for success. By being able to accurately and efficiently plan for today, the TDS team can better support workforce planning efforts in the future.



To read more about how TDS achieves its strategic goals with a resource management platform, [read the complete case study here](#).

## Focusrite Achieves Better Planning and Forecasting

Focusrite, a global company that's publicly listed in the United Kingdom, offers audio interfaces and other solutions for recording musicians, producers, podcasters, and audio professionals. Before implementing a resource management practice, Focusrite leaders struggled to put together and maintain in a coherent way a roadmap that they could collaborate on as a team. Properly allocating resources to meet their roadmap was a big struggle as well. Having implemented resource portfolio management processes has helped Focusrite leaders have a better grasp of overall resource utilization and more efficient planning and forecasting. Additionally, the ability to resource plan more efficiently and with more flexibility built into Tempus has benefited Focusrite leadership when changes to the roadmap inevitably occur.



To learn more about how Focusrite utilizes resource forecasting and scenario planning to ensure it achieves its goals, [read the complete case study here](#).



Effective workforce planning requires strategic collaboration between business leaders and HR. By proactively managing workforce capacity, organizations can drive efficiency, meet deadlines, and achieve sustainable growth.

## Next Steps for Business Leaders:



Assess current workforce capacity and skills and identify workforce gaps.



Work with HR to align talent acquisition and training with business goals.



Leverage workforce planning tools to enhance decision-making.



Foster a culture of workforce agility to respond to changing business demands and future initiatives.



By implementing these strategies, business leaders can ensure they have the right people, in the right roles, at the right time—driving successful outcomes for projects, audits, contracts, and product development.



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