

Michelle Ockers:

Welcome to today's episode of Learning Uncut. I'd like to kick off by acknowledging the traditional custodians of country throughout Australia and their connections to land, sea and community, and acknowledge the Brinja people on whose lands I record from today. We pay our respects to their elders, past and present, and extend that respect to all Aboriginal and Torres Strait Islander peoples who may be listening to today's conversation. Welcome, Kath.

Kath Hume:

Michelle, thanks for having me.

Michelle Ockers:

Absolute pleasure. Kath Hume is our guest today in conversation about workforce planning. So, Kath, your early history is in facilitation and instructional design. But if anyone goes to your LinkedIn profile on the link in the show notes, what they'll see is that your description of what you do now starts with workforce planning and your organization is called Workforce Transformations. So it kind of feels like you've got a foot in the camp of at least two domains or disciplines, if not more. So who better to speak to us today about workforce planning through the perspective of L&D professionals. So thank you for agreeing to join us for this conversation, Kath. I'm very excited. So I have one question I'm curious about before we kick into the heart of workforce planning. Your organisation, your business, you've chosen to call workforce transformation. So why workforce transformation and not learning transformation?

Kath Hume:

It's a really good question, I think, because I take the holistic view and the outcome we want through learning, in my opinion, is that we want a workforce that's got the capability to deliver on the strategic objectives of the organisation. So individually looking at learning is a part of the puzzle, but really we need the whole workforce to be operating in synchrony with itself. And so this is why I've taken the approach of looking at the whole workforce and the components within it and how we as learning professionals can influence that and shape it.

Michelle Ockers:

Hey, I love the cross disciplinary lens, and one of those disciplines that increasingly is coming up with our interest in skills and in attraction and retention and better utilizing the skills we have in the organization is workforce planning. So let's dive right into what is workforce planning?

Kath Hume:

So there's different types of workforce planning, and I guess I've been focusing more recently on strategic workforce planning. So that's the longer view of looking probably five years into the future. A lot of organisations are looking further. It's come about because we really have such a dynamic workplace and world now. We've got so much change and uncertainty that we really need to be looking ahead. Alicia Roach, who's one of the key thought leaders in strategic workforce planning is often quoted to say, leaders need to lift their gaze. And what she means is we need to be thinking further ahead than we are. And so there's strategic workforce planning, which is that longer term view. There's tactical, which is sort of midterm. And then there's the shorter term, which is more of the day to day. So what I've been focusing on is that how do we understand the environmental factors that are influencing organisations? Peter Schwartz, who's a great thinker from the 1960s, he's got a

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wonderful quote that I love. which is if you haven't thought about it before, you're unlikely to see it until it happens. And that is the whole underlying concept is plan in advance, think about what might happen. So you're ready and you've got your planning and your strategies ready to implement when you need them.

Michelle Ockers:

Yeah. So what is it you're planning? I mean, it seems it's kind of, I don't think you've explicitly mentioned what it is that you're looking at and planning. You've talked about the three time horizons. What are you planning?

Kath Hume:

So the size of your workforce, the shape of your workforce, where they are, what capabilities they have, how they integrate with the rest of the business, how they work together, how they work outside of the organization. All of those factors that those humans in that organisation can influence, how do we optimise that? How do we make sure we're getting the most value out of what often organisations say is their most valuable asset?

Michelle Ockers:

And you've got these three different time horizons. Who's typically doing workforce planning and thinking about all of those factors and optimising them across each of those three horizons?

Kath Hume:

It's really interesting. Nick Kennedy, who heads up the Workforce Planning Institute, often raises this because he, in his workshops, talks about who owns strategic workforce planning. And there isn't a real answer. And it varies across organisations. I think a lot of organisations probably think it sits with HR, but really it's strategic. We need all of the senior executives to be part of this and thinking through, so, finance needs to be involved because we need to know what's the likely budget, but also it needs to be two way. So finance needs to understand the implications of the decisions that strategic workforce planners are making collaboratively. So there's lots of functions, but yeah, it tends to probably sit more commonly within HR at the moment.

Michelle Ockers:

So that's the strategic level. So if we think about it, and I'll probably end up having to include a resource about RACI, R-A-C-I, in terms of allocation of roles and responsibilities, although it's becoming increasingly familiar to people, it's a common framework to thinking about roles and responsibilities. Is it then that HR often holds the space for the accountability for it, but in terms of who's responsible, there are multiple areas that are responsible and probably many more that need to be consulted. So, yeah, it cuts across the organisation at a strategic level. Is it the same picture at a tactical level? And then is the day-to-day different in terms of whose job is it or who needs to be involved?

Kath Hume:

Yeah, I think it's a really good question. So I think that when you get to tactical, it then becomes more the business leaders, so the heads of departments. So thinking about what does that look like? And so it's a translation piece of the strategic plan into then how do we make that live and breathe at the tactical level. And then it comes down to, you know, frontline managers at the operational level.

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Michelle Ockers:

So we've got three horizons, probably slightly different groups of people who need to be on point, taking the lead for workforce planning at each of these horizons. What kind of decisions are people making in those three time horizons, Kath?

Kath Hume:

So, Michelle, I think that at the strategic level, we're thinking 'What's your talent management strategy?' So what's your overall approach? Do you have a nine box grid, for example, where you're identifying your top talent? So in terms of their potential and their performance, those bigger decisions that are impacting the whole organisation. Also, you might do role job architecture. So thinking across the hierarchies in the organisations, what are the consistent role titles, role responsibilities, getting some really good structure across the whole organisation. And then your tactical might be, well, what's our recruitment strategy? How are we actually going to deliver on that? What, how are we going to do, how are we going to manage performance and development? What's our career planning approach? And so they're more shorter term projects, I guess, in terms of how to then we deliver on the whole workforce plan. And then the operational is, All right, so we know our recruitment strategy may be to recruit this many people, or our learning and development strategy would be, so this is how we're going to develop a workplace culture. Actually, sorry, the learning culture would be more at the strategic level, as you would know, but then it's, so what are frontline managers doing? So how are they building psychological safety? How are they coaching their teams on a regular basis to be building that capability?

Michelle Ockers:

Okay. So it almost sounds like you're mapping out your whole HR strategy in a way. Is this just another term for thinking right through your HR strategy or is it a specific lens on all of those people management functions?

Kath Hume:

I think the differentiator is probably the longer term. And so your workforce plan would hopefully fall out of a workforce strategy. So your workforce strategy being the what do we want to achieve? The plan being the how are we going to achieve it? So breaking that down into those horizons. So yes, we've got this long term plan, but what does that mean today? What we are going to need to do, who's responsible and how we're tracking against that. So making sure it's implementable, monitored, evaluated, and then reviewed too. It's a living document. There's no way you can deliver a strategic workforce plan today and think in five, 10, 20 years time that that's going to still meet your needs.

Michelle Ockers:

Yes. And I must say, I was a little bit surprised when you said some people are looking out beyond the five-year mark at a lot of this, because things seem to be shifting so quickly. It's like, wow, how can you actually see much beyond the five-year mark?

Kath Hume:

And I was talking to Colonel Patrick White on my podcast the other day, and he's for the US Air Force doing strategic workforce planning. And interestingly, he's been doing it for 21 years, strategies are really long term. But what fascinates me is how reactive they would need to be. Because how do you predict the conflicts that are going to occur and the level of capability they would need to deploy those workforces just boggles my mind.

Michelle Ockers:

Yeah. Scenario planning, I was absolutely fascinated with that episode, having been in the military for 16 years myself. And I know it's a really well-structured discipline in the military.

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And there are some other organizations I've struck who have this as a really well-structured discipline as well. Qantas, interestingly, I think where you have long talent development pipelines, There's a more natural imperative to think about the workforce planning because you just can't snap your fingers and create, you know, new types of people skilled to do certain roles in your organization in, you know, even a year is too short a time frame for some kind of roles which are highly skilled. So it feels like L&D is part of workforce planning in a way, but there's this bigger set of decisions of approaches and so on that L&D is operating within. Why does workforce planning matter for L&D professionals working in an organization?

Kath Hume:

Because L&D is so crucial to making the plans come to life. They need to be informing what's possible in the plan. So if you don't have that experienced professional in those conversations, you're going to end up with a plan that then L&D are going to be tasked to deliver that they haven't, you know, it might not even be feasible. So that human centred design piece comes in, you know, is it feasible? Is it valid? We need to be at the table having these conversations because One of the things that most strategic workforce planners will talk about is the six Bs. Now, arguably there's more Bs and we won't go into that, but essentially most people would think that L&D sit within the B that is build. So that's saying, okay, we've got our workforce that we've got today. We understand what capabilities they've got, but in the future, we know that they're going to need different or more skills. So how do we build those? In L&D, it's clearly obvious where L&D sit there. But I think as when I look at this through an L&D lens, there's also things like BIND. So that's about typically about the workplace culture and making sure people are satisfied with the employment that they have. But I know you and I know and most L&D professionals know how critical career planning is and that person professional development in keeping people in organisations. So we're critical to that and we can inform that and we can talk to people with evidence to say this is how we could approach this and quite confidently say and that will support you to retain those people within your organisations and give some costing around that too to say you know this is how much it's going to cost you to develop a person as opposed to a buy strategy which you know it might be great, yes, you might, if that person is available, which increasingly we're seeing that there's difficulty there, but if that person is available, there's still not that organisational knowledge, they still need to come in, there still needs to be onboarding in that scenario. When I look at those six Bs, I just see L&D across all of it.

Michelle Ockers:

The six Bs, we'll proper resource in the show notes for that. So you've told us about bind and about build. What are the, just very briefly, what are the other four Bs? Cause you're pointing curiosity out.

Kath Hume:

Yeah, cool. So buy as well, which is your group strategy. Borrow, so that means taking people on secondments possibly, getting contractors in, people short-term. Boost, so that's also about saying who are our critical people, what's where our top talent and how do we make sure we've got those on the trajectory to achieve their potential. And bounce, now bounce is about when we no longer need the people in the roles that they're in. So typically people might think that's about exiting people, but really if we think about redeployment, that's where we say we've actually got the workforce. We've got a workforce, so two parts of workforce planning is capacity and capability. So we've got people, they just don't have the capabilities that we now need or we will need in the future. L&D are critical to be able to identify, okay, there's skill adjacencies here. Those people might not be able to do the current role, but they might be able to do the future role with some development. And how do we as L&D professionals come to the table and say, it's going to be much cheaper for us

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and much better for these humans who we are playing with their lives to say we can take them on this trajectory if they choose to.

Michelle Ockers:

It feels like L&D has a role to play in all six of those Bs. But we don't always get invited to the party when decisions are being made across all six of those Bs, to your point earlier. So how can L&D find a way to get more involved and to work more effectively across all of those six Bs?

Kath Hume:

I would really love to see L&D professionals develop their own capability in strategic workforce planning to understand how they can be involved in those conversations. So, much of what we do is the same as strategic workforce planning. So, the human-centered design process that we work through for L&D, it's virtually the same. Yes, we do different activities, but that stakeholder engagement, that scoping, that future horizon, the data analysis, the environmental scanning might be a little bit different. So looking at what are the things in our macro, meso and micro environments. So doing SWOT analysis, PESTEL analysis, just to really think about what are our current and future demand and supply of our workforce going to be, identify those gaps and then come together and do that scenario planning that you mentioned. But really, if we're not informing those conversations around, you know, if you're having a conversation about future workforce supply and people say, we can't find these people, that conversation that I was talking about earlier where you can say, no, but we've got a workforce who we might be able to develop to do that in the future. You know, there's some really great case studies of transport, for example, who, they found, I think, people who were doing research and they were able to find their skill adjacencies. They did a lot of data analytics, but they were struggling to find data analysts. So they were able to develop those people and transfer them into or redeploy them into roles that were meaningful with the skills that they had. But without that scenario planning, without that creative thinking, it might have resulted in, OK, we lay off these people and then we recruit more over here who don't have the organisational knowledge, don't have the relationships, and then we're sort of starting from scratch. And there's a whole lot of, and what I was talking about before about optimisation, it's about saying things are expensive. We've got to make the most of the resources we have, and we are critical to being able to tell people or support people and have conversations around how we might do that.

Michelle Ockers:

Yes. Kath, you've used the term skill adjacencies a couple of times. It sounds like it might be a fancy term for understanding the skills that are used in a particular role and looking for people who are in roles already or have those skills already to be able to build upon them.

Kath Hume:

It's really just if I think about it, it's a map. So it's about saying, OK, if I've got the role that this person is in now, but then I've got these gaps over here. What are the current things that this person can do who we think we don't need anymore? that we could actually utilize somewhere else. And it's that skill adjacency is just sort of picking up the skills that we've got now that we need in the future, but it might look different. It might be deployed in a different way.

Michelle Ockers:

Yeah. Thank you. So what if no one in the organisation has got that, we talked about RACI before, no one's in a formal position where it's clear that your job is strategic workforce planning, you make it happen with all of the different parties across the organisation, you make sure that then it's being cascaded down to that tactical and day-to-day level. What if

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nobody in the organisation seems to have overall accountability for workforce planning, what does L&D do there? How does that affect L&D's role and how they can be informed about and think about workforce requirements?

Kath Hume:

Probably a bit biased here, but I think if L&D can upskill and understand the whole strategic workforce planning process and approach and the benefits I think we can play a role in actually helping organisations to do it, which is actually how I've fallen into it. So I was doing it at New South Wales Health. I was developing the capability framework for workforce planning. But in doing so, I found that this is so critical. And what you will always also find in organisations is strategic workforce planning isn't something that you do every day. It's something that is not always necessarily a dedicated function or someone's role. So it's about what happens in strategic workforce planning and against those skill adjacencies that we as learning professionals are doing. And how do we go to business leaders and say, do you know that this is what we're seeing on the horizon? Who is doing the scenario planning? Get some data to predict and anticipate where the risks are, where your gaps are. Go and talk to the people who are going to suffer from those pains if those risks materialise, start those conversations. And even if we're not the people to lead the strategic workforce planning process, we're definitely demonstrating that we've got value within that.

Michelle Ockers:

Yeah, thanks, Kath. Part of the kind of discovery process, the research that I ask people to do when I'm supporting them with learning strategy is to take a look at industry context and also business context. And part of that is that the skills environment. And there's always an understanding of that somewhere in the organization. Someone is always thinking about that. So maybe they don't have workforce planning in their title, but I bet somebody's got their finger on the pulse with a lot of that data because it's, you know, just the landscape we operate in.

Kath Hume:

And it's back to that, what you're talking about, your RACI framework and finding those champions within your organisation and having those conversations, but leading them and finding the other people who really are going to care about this and helping to progress those conversations.

Michelle Ockers:

Yeah. Are there any tips you'd like to add for any L&D professionals who are looking to either get started or do more with workforce planning in the organisation?

Kath Hume:

I think there's lots of resources out there now. I think most government organisations are starting to release documents that are really helpful. So I can include a few things in the show notes.

Michelle Ockers:

Yeah, let's do that.

Kath Hume:

I've done a couple of podcasts with people who talked about how they've done it in their organizations. And there's one just around Introduction to Strategic Workforce Planning. So that actually, interestingly, was one of the first ones I did, but is still by far one of the most popular, which says to me, the title is Introduction to Strategic Workforce Planning.

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Michelle Ockers:

We'll pop a link in the show notes to that one as well, Kath.

Kath Hume:

Cool. What that data tells me is that it's the introduction word that people are looking at. So it tells me that we've got a lot of people who are still very new and we know that. In the circles that I move in, we know that this is pretty new and not many organizations are mature. And then as you and I know, connect with other people, ask questions, be curious, be creative, be courageous.

Michelle Ockers:

Thank you. And on that note, if anyone would like to reach out to you, Kath, we'll pop a link to your LinkedIn profile in the show notes if anyone is curious and wants to follow up directly. And I know we'll add a stack of well-curated resources. So thank you for joining us, Kath, and sharing some thoughts and some pointers around workforce planning for L&D.

Kath Hume:

Thanks for having me.

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Learning Uncut are learning and development consultants that help Learning and Development leaders and their teams become a strategic enabler so that their businesses can thrive. We work in evidence-informed ways to drive tangible outcomes and business impact and are strong believers in the power of collaboration and community. We specialise in helping to build or refresh organisational learning strategy, update their L&D Operating Model, enable skills development, and conduct learning evaluation. We also offer workshops to shift learning mindset and practices for both L&D teams and the broader workforce – as well as speaking at public and internal events.

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About your host, Michelle Ockers



Michelle is the co-founder and Chief Learning Strategy at Learning Uncut. She is an experience, pragmatic organisational learning strategist, L&D capability builder and modern workplace learning practitioner. She also delivers keynotes, workshops and webinars for learning and broader professional or workforce groups at both public and in-house events.

Michelle received the following prestigious industry awards in 2019:

- Australian Institute of Training and Development Dr Alastair Rylatt Award for L&D *Professional of the Year – for outstanding contribution to the practice of learning and development*
- *Internet Time Alliance Jay Cross Memorial Award – for outstanding contribution to the field of informal learning*



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