

A Practical Guide to

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# STRATEGIC WORKFORCE PLANNING

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An introductory guide to building out strategic workforce plans in rapidly shifting environments with David Edwards

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## INTRODUCTION

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# The stakes for strategic workforce planning have never been higher.

Uncertainty in economic, political, and social environments is only compounding, not receding, making it incredibly difficult to plan for the future. According to a [recent survey of 400+ HR leaders in the US](#), 46% said economic uncertainty was impacting their ability to plan for the future, and 41% said a lack of strategic alignment was impacting their ability to plan. [Gartner even emphasized in its most recent HR symposium](#) that HR's role is to “build resilient workforce plans” in this time of constant disruption.

But beyond uncertainty, timelines for expected success are condensing. Those planning the future of work are not being hyperbolic when they say they are being expected to make better plans in shorter periods of time, all while societal foundations are shifting and budgets are tight.

What is a planner to do? We turned to David Edwards, a strategic workforce planning expert and author of *The Strategic Workforce Planning Handbook* for best practices. After an entire career in workforce planning, David has recently turned his attention to ensuring strategic workforce planning, or SWP, is as accessible as possible and not shackled within the clutches of consultants.

In this guide, he recommends proactive tactics any HR and planning professional can leverage to scenario plan, iterate, and ultimately have better success rates meeting business goals. Topics covered include:

- Foundational questions every organization should answer
- How to coordinate with strategic partners
- When and how to stress test plans
- How to leverage strategic workforce plans



INSIGHT FROM

**David Edwards**

“Why now? Because the variables just multiplied: AI, demographic cliffs, skills half-lives shrinking, which means ‘we’ll figure it out when we get there’ just got a lot more expensive.”

# “Is the workforce fit for its future business purpose?”

According to David Edwards, this is the central question of all strategic planning exercises, and the question that should frame every plan and decision made in the planning process.

Many HR leaders want to lead with data. While data is an incredibly useful tool, you need to understand what the business wants to achieve before you even look at it.

### What is the future business purpose?

Only once the business purpose is understood can you as a strategic workforce planner determine if your people are fit to execute your organization's vision. When the question of the business purpose is answered, then you can move on to the next strategic questions.

### What is the current workforce?

This is where the data and technology comes into play. HR leaders need to invest in tools that give them the most accurate visualization of their current workforce and the ability to layer different workforce information to get a comprehensive view beyond name and title.

For example, you should look at employee performance analytics to tell you about your current workforce, but you should pair this with span of control data as well as business performance and OKR data to see the full picture of your organization.

### What does the workforce need to be able to do?

This is undoubtedly going to be the hardest question to answer of the three. You can have a business purpose, i.e. increase market share, and you can get a better understanding of your current workforce, but many people don't know the skills and capabilities needed to move the workforce into the future. Instead of asking business leaders this question straight away, David recommends individual business partners develop an understanding through asking them probing questions, and working backwards from the business goal to skill level-details.



INSIGHT FROM

**David Edwards**

“The question ‘is the workforce fit for its future business purpose’ covers the whole story: what is business’ future purpose, what is the workforce, and what do we want it to be fit for?”

ESSENTIAL PARTNERS

Strategic workforce planning is a collaborative process, and your role as an HR leader is to facilitate conversations and synthesize information from multiple sources. Assuming you know your future business goals and have a solid view of your current workforce through an organizational visualization too, you must then go to different sources to answer the question of what skills your current workforce needs to meet your business goals.

| Understand what skills the current workforce needs to meet business goals:                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <b>Business Leaders</b> | <ul style="list-style-type: none"><li>• What are your current workforce problems?</li><li>• What are your OKRs for the next year</li><li>• Where are you struggling to find talent?</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|  <b>Finance</b>         | <ul style="list-style-type: none"><li>• Where do you think the main business issues are?</li><li>• What concerns you about future business goals?</li><li>• What costs concern you?</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|  <b>Strategy</b>       | <ul style="list-style-type: none"><li>• What are the biggest strategic challenges and opportunities of the business?</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|  <b>AI</b>             | <ul style="list-style-type: none"><li>• If you are a public company or you have a public company similar to yourself, upload their latest annual report to an AI engine and ask it what are the critical workforce segments and skills needed for the future.</li><li>• You can also put in your company's goals and OKRs into an AI engine and ask it what workforce skills are needed and why it is giving you that recommendation.</li><li>• Ask AI to surface insights about how AI is changing the structure of businesses to gain key insights from sources like McKinsey, the Wall Street Journal and HR experts like the Josh Bersin Company.</li></ul> <p>Note: AI is just another source of information to pair with insights gathered from different parties at your company.</p> |



INSIGHT FROM  
David Edwards

“Don’t assume everyone thinks at the skill level and knows the skills they need. Many people will tell you they struggle with funding for people, but you need to go in and dig for the problems they face in their day-to-day lives, so you can uncover what the workforce really needs.”

HR’S ROLE: SCENARIOS & STRESS TESTS

Once you have a solid foundation and gather information about the business goals, your current workforce, and your future workforce needs, you can start collaborating with business leaders and putting a pen to paper to plan future scenarios.

It’s common misconception is that HR should own workforce planning end to end. In reality, business functions know their work best — they should own the plan. HR’s role is to stress test those plans using workforce data, demographics, and risk signals.

For example, let’s say you are workforce planning at a telecom company that makes a portion of its revenue licensing technology to hardware providers. The team that negotiates the licenses is relatively small, but over half of them are over the age of 55, and one fourth of them are over 65. This is a critical factor that needs to be considered in the company’s workforce plan. The team must consider: Are there early career opportunities in this department? How can the team add more early career opportunities to reduce the risk of losing knowledge when leaders soon retire?

David recommends looking at each plan through the PESTLE lens, assessing: Political, Economic, Social, Technological, Legal, and Environmental impacts. Then, add in your knowledge about the workforce for surfacing risks and making recommendations.



INSIGHT FROM

David Edwards

“HR’s role is to stress test those plans, and say: based on the things that we know about the workforce, about its dynamics, about its demographics, you’ve got a problem here.”

|                                                                                     |                      |                                                                                       |
|-------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------------------------------------|
|  | <b>Political</b>     | Regulation, labor law and policy shifts that reshape where and how you can hire.      |
|  | <b>Economic</b>      | Budget cycles, cost pressure and demand swings that resize your headcount plan.       |
|  | <b>Social</b>        | Demographic change and shifting expectations altering your talent supply and culture. |
|  | <b>Technological</b> | AI and automation redefining which skills the workforce needs next.                   |
|  | <b>Legal</b>         | Compliance, contracts and employment risk baked into every scenario.                  |
|  | <b>Environmental</b> | Sustainability mandates and location risk shaping your workforce footprint.           |

## SCANNING THE HORIZON

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Once plans are approved and in place, they should not sit dormant. With today's rapidly changing environment, plans should be expected to shift and you as an HR leader should expect to iterate on them.

David sees HR's role as using the strategic plan as an opportunity to "scan the horizon" and take proactive measures to engage employees to ensure successful plan results. For example, if the plan calls for a reduction in force arising from the deployment of AI, then you as HR have 6 months to prepare and train members of the team to be ready to take on new roles that are needed. If your organization needs more AI experts, start retraining those most at risk of their positions being eliminated now. It is not free for companies to eliminate employees— they must pay severance, vacation, etc., so this move will inevitably be beneficial for your organization.

Ultimately, the more visibility you have into a plan in advance, the longer opportunity you as HR have to prepare your workforce for successful plan execution on the horizon.

From there, David suggests modifying plans for the short and long term on an ongoing basis. Here is how he recommends leaders see planning timelines:



**NOW**

### **Set the foundation**

Align on business purpose, current workforce and future skill needs.



**1-2 YEARS**

### **Short Term**

Best for department-level operational plans, aligned to budget cycles. These are subject to stress testing by HR against workforce data.



**3-5 YEARS**

### **Long Term**

Best for expressing the organization's strategic intent for the workforce. Used by HR for horizon scanning and early signaling on skills and capability gaps.



### **Ongoing review cadence**

Once established, strategic workforce planning becomes an operational discipline — reviewed quarterly. External events like market shifts or geopolitical changes can invalidate plans rapidly, so make sure to check in with your plans on a regular basis even if it seems redundant at first.

# MEASURING SUCCESS

HR’s role in strategic workforce planning is decision support — not decision-making. The goal is to lead leaders to better thinking with a clear view of risks and opportunities.

| Success means:                                                                      |                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Creating different conversations in the business about workforce risk.                                                                                                           |
|    | Shifting how leaders frame and evaluate their plans.                                                                                                                             |
|    | Getting to answers that matter more quickly, using AI to accelerate the research without cutting corners.                                                                        |
|  | Storytelling. While AI can help with research, a planner’s role is to synthesize complex signals into a clear narrative that can influence leadership and challenge assumptions. |



INSIGHT FROM  
**David Edwards**

“The best a strategic workforce planner can hope for is that the evidence they present, the influence they exert, the advice they give — gets people talking and thinking in a different way. We are decision support. We lead horses to water. We are the ghost of Christmas yet to come.”

## STRATEGIC WORKFORCE PLANNING WORKSHEET

|                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  <p><b>FOUNDATIONAL QUESTIONS</b></p> <p>Is the workforce fit for its future business purpose?</p> | <ul style="list-style-type: none"> <li>• What is the business' future purpose?</li> <li>• What does your current workforce look like?</li> <li>• What does your future workforce need to do?</li> </ul>                                                                                                                                                                                                                   |
|  <p><b>ESSENTIAL PARTNERS</b></p> <p>What skills does the business need?</p>                       | <p>Source information from:</p> <ul style="list-style-type: none"> <li>• Business Leaders</li> <li>• Finance</li> <li>• Strategy</li> <li>• AI</li> </ul>                                                                                                                                                                                                                                                                 |
|  <p><b>STRESS TESTING</b></p> <p>How does your plan stack up to pressure?</p>                     | <p>Consider the impact of all PESTLE situations:</p> <ul style="list-style-type: none"> <li>• Political</li> <li>• Economic</li> <li>• Social</li> <li>• Technological</li> <li>• Legal</li> <li>• Environmental</li> </ul>                                                                                                                                                                                               |
|  <p><b>SCANNING THE HORIZON</b></p> <p>What can you do now to prepare your workforce?</p>        | <p>Ensure you have different plan for different use cases and are continuously monitoring them so you can equip your workforce with the right skills:</p> <ul style="list-style-type: none"> <li>• Long-term plans (3-5 years out) for general strategic vision</li> <li>• Short-term plans (1-2 years out) for department-level decisions</li> <li>• Quarterly check ins to modify and adjust plans as needed</li> </ul> |
|  <p><b>MEASURING SUCCESS</b></p> <p>How do you measure success?</p>                              | <p>Beyond the company meeting strategic goals, you as a planner in HR are responsible for:</p> <ul style="list-style-type: none"> <li>• Creating different conversations in the business about workforce risk</li> <li>• Shifting how leaders frame and evaluate their plans</li> <li>• Getting to answers that matter more quickly</li> <li>• Storytelling</li> </ul>                                                    |

## ABOUT ORGCHART & DARK ARTISTRY

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### About OrgChart

OrgChart is the leading org chart automation and workforce planning solution built for HR professionals. With direct integrations to more than 50 HR systems, OrgChart enables you to instantly create org charts and strategic workforce plans using employee and position data from multiple sources. Enhance your organizational visibility with an always-accurate org chart and strategically plan for the future with position-based, drag-and-drop planning capabilities that track KPIs and surface key insights.

**Learn more:** [theorgchart.com](https://theorgchart.com)

**Book a personalized demo:** [theorgchart.com/get-started](https://theorgchart.com/get-started)

### About Dark Artistry & David Edwards

Dark Artistry is a strategic workforce planning consultancy founded and led by David Edwards — author of the acclaimed Strategic Workforce Planning Handbook.

Dark Artistry helps organizations master both the art and the science of strategic workforce planning. Whether you're struggling to get started, can't secure buy-in from the business, have stalled on implementation, or are failing to turn insight into action, Dark Artistry works with you to diagnose what's blocking progress and fix it.

**Find out more or book a consultation:** [darkartistry.net](https://darkartistry.net)

**Connect with David:** [linkedin.com/in/davidedwardsswp](https://linkedin.com/in/davidedwardsswp)