

The HR Strategic Workforce Planning, Resourcing & Sustainability DIY Resource Manual



Creating an effective
Workforce Planning
Program for your
organisation aligned
with future business
plans, objectives &
aspirations

Having the right people in the right place
at the right time, at least cost & risk to
your organisation

1.0 Introduction

Welcome to the HR Department Strategic Workforce Planning, Resourcing & Sustainability DIY Resource Manual Sneak Peek.

It contains more than of 135 pages of guidelines, models, process maps and template forms which all combine to create an integrated framework for Strategic Workforce Planning that will assist you in establishing and maintaining an effective program throughout your organisation.

To assist you in achieving the best possible outcome, we have provided our content to you in two separate formats, being Adobe PDF and Microsoft Word. The first provides you with a master – copy of the original template you purchased, while the second provides you with a version that can be progressively updated/amended in accordance with changing circumstances within your organisation or the external market - place.

At Moore HR, we provide a diverse range of Strategic HR Management programs, services and DIY tools that will (firstly) optimise workforce management and performance in your organisation and (secondly) elevate the Human Resources Department's role, contribution and recognition throughout the business.

Our services are all centrally focussed around the following five Advanced HR Management Capabilities and Competencies that we have researched, tested and successfully applied across a diverse range of organisations over the past 25 years: -

Our Four Advanced Core Capabilities for Every HR Department

- Optimising Workforce Governance & Environment
- Optimising Workforce Efficiency & Expenditure
- Optimising Workforce Performance & Effectiveness
- Optimising Workforce Planning & Sustainability

Our New-Age Core Competencies for Every HR Professional

- Optimising Human Resources Advocacy & Persuasiveness

If you are interested in learning more about our services and how they can benefit your organisation, please feel free to email me at enquiries@moore-hr.com.au or call me on **03) 9994 5193**.

We trust that your HR Department Strategic Workforce Planning, Resourcing & Sustainability DIY Resource Manual will be a worthwhile addition to your HR Department resource centre.

Kind Regards,



Stephen Moore
Founder & Director
Moore HR



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The HR Strategic Workforce Planning, Resourcing & Sustainability DIY Resource Manual

Examining the Eight Essential Pre-Requisites



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1. The Essential Pre-Requisites for Success – Defining Role Purpose, Objectives & Functionality

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To ensure that your appointed workforce planning lead has the best chance of success and retention, it is essential that in the first instance key position accountabilities and objectives be collaboratively established and assigned, and thereafter clearly understood and supported by other functional heads within the HR Department.



*A departing Workforce
Planning Lead whose role was
not clearly identified or
supported within the HR
Department*

Suggested Key Areas of Accountability

1. To create integrated labour demand, supply & sustainability systems and processes that enable executives & line managers to effectively forecast and manage their future workforce requirements.
2. To coordinate and oversee the execution of identified labour utilization programs that progressively enhance workforce efficiency & effectiveness.
3. To coordinate and oversee the execution of forecast short to long range labour supply strategies that maximise resourcing capability on an ongoing basis.
4. To coordinate and oversee the execution of workforce development programs that enhance bench-strength and depth in forecast critical risk roles & job families.
5. To coordinate and oversee the development of intervention strategies that effectively address forecast medium to long range workforce sustainability issues.
6. To coordinate & oversee the establishment of effective Workforce Planning status reporting and annual scorecards that regularly inform of performance outcome versus established forecasts and budgets.

Once these key accountabilities and objectives have been established and confirmed, I recommend that: -

- They are anchored within a comprehensive Position Description, (as illustrated on the following pages).
- They are accompanied by the design and development of a comprehensive Workforce Planning Model and Methodology, (as illustrated on pages 18, 19 & 20).

Workforce Planning Lead - Template Position Description



Position Title:	Workforce Planning Lead		
Department:	Human Resources	Location:	Corporate Office
Reports to	General Manager of Human Resources	Date prepared:	1st April 2020
Evaluated by:	General Manager of Human Resources	Authorised by:	Chief Executive Officer

Position Scope:

- This is a senior position within the Human Resources Department, reporting directly to the General Manager.
- The incumbent carries primary responsibility for the organisation's Workforce Planning program, to be managed directly via the corporate Workforce Planning function and indirectly via Divisional Human Resources Business Partners.

Overall Position Purpose:

To establish, implement, coordinate and maintain an effective Workforce Planning program that can be effectively applied & utilised across all business divisions/units throughout the organisation in order to: -

- Continually shape and align the workforce with the organisation's strategic business plans and objectives.
- Enable executive's/line managers to effectively forecast, structure, budget and cost their future workforce labour requirements.
- Effectively resource & supply all forecast position requirements at least cost & risk to the business.
- Identify and pro-actively address medium to long-term endemic workforce composition and capability issues that threaten to adversely impact upon organisational continuity and workforce viability.
- To establish and maintain an integrated suite of People Analytics that underpin and sustain the Workforce Planning program.

Workforce Planning Lead - Template Position Description



Position Title:	Workforce Planning Lead		
Department:	Human Resources	Location:	Corporate Office
Reports to	General Manager of Human Resources	Date prepared:	1st April 2020
Evaluated by:	General Manager of Human Resources	Authorised by:	Chief Executive Officer

Core Capabilities, Knowledge and Experience Requirements:

- Minimum ten years' experience in a senior HR or business planning role that preferably incorporates organisational structure and job design capability.
- Demonstrated exposure to People Analytics/Workforce Planning software applications and execution.
- Demonstrated experience in People Analytics/Workforce Planning systems development in liaison with IT & Finance departments.
- Significant exposure and understanding of People Analytics reporting and their application within the Workforce Planning discipline.
- Demonstrated experience in effectively facilitating major change programs across a diverse organisation.
- Advanced strategic planning, interpersonal and communication skills.
- Commercial acumen and a sound business/operational focus.
- Tertiary qualifications in either Business, Commerce or Human Resources (or a combination thereof).

Workforce Planning Lead - Template Position Description



Key Position Accountabilities	Minimum Standards	Performance Measures
Workforce Planning Methodology	<p>To design, establish and maintain an integrated Workforce Planning Model that: -</p> <ul style="list-style-type: none"> • Is practical, logical and fully functional across the organisations operating divisions and support functions. • Is fully integrated within the Human Resources Department’s annual strategic planning process. • Is an integral component of the organisation’s annual business planning process. 	<ul style="list-style-type: none"> • All divisions within the organisation willingly embrace and utilise the designated WFP methodology as provided. • All labour efficiency, resourcing and sustainability projects assigned to the HR Department are initiated and effectively undertaken within specified timeframes.
Workforce Planning Process and Tools	<p>To design, implement and maintain an integrated set of tools that support the workforce planning process throughout the organisation: -</p> <ul style="list-style-type: none"> • Master resource manuals. • Workforce planning reporting templates. • Workforce planning exception reporting. • Workforce planning software tools. 	<ul style="list-style-type: none"> • All divisions within the organisation willingly embrace and utilise the designated WFP tools as provided.
Workforce Planning Governance & Coordination	<ul style="list-style-type: none"> • To establish the three-tiered workforce planning management model, including the appointment, education & facilitation of the workforce planning steering committee. • To guide and support HR business partners/representatives in the structure, establishment, education and facilitation of designated Workforce Planning divisional sub-committees. 	<ul style="list-style-type: none"> • The Workforce Planning Steering Committee is effectively established, structured and operational within specified timeframes. • Workforce Planning divisional sub-committees are effectively established; structured and operational within specified timeframes.

Workforce Planning Lead - Template Position Description



Key Position Accountabilities	Minimum Standards	Performance Measures
<p>Workforce Planning Governance & Coordination</p>	<p>To ensure that the appointed workforce planning steering committee establishes effective operating parameters in key areas including: -</p> <ul style="list-style-type: none"> • Workforce/organisational segmentation. • Operational versus support functions. • Forecasting timeframes. • Designated job families to be utilised. • Implementation time - table and process. 	<ul style="list-style-type: none"> • All specified key operating parameters are effectively addressed by the Workforce Planning Steering Committee within specified timeframes.
<p>Workforce Planning Data Capture</p>	<p>To oversee and ensure that the appointed workforce planning steering committee identifies and produces meaningful historical data in key areas including: -</p> <ul style="list-style-type: none"> • Business growth factors. • Business planning factors. <p>To oversee and ensure that appointed workforce planning HR Department steering committee representatives identify and produce meaningful historical data in key areas including: -</p> <ul style="list-style-type: none"> • Workforce efficiency. • Workforce headcount. • Workforce replacement. • Economic/Unemployment performance & projections. • Workforce recruitment. • Workforce development. • Workforce demographics. 	<ul style="list-style-type: none"> • All identified/desired business data is effectively captured and provided to the Workforce Planning Steering Committee within specified timeframes. • All identified/desired workforce data is effectively captured and provided to the Workforce Planning Steering Committee within specified timeframes.

Workforce Planning Lead - Template Position Description




Key Position Accountabilities	Minimum Standards	Performance Measures
Workforce Planning Environmental Scanning	<p>To facilitate and oversee the Workforce Planning Steering Committee in relation to: -</p> <ul style="list-style-type: none"> • The analysis and interpretation of all applicable business and workforce data captured. • The effective translation of data captured into applicable labour demand, supply & sustainability forecasting templates. • The establishment of recommended forecasting ranges where applicable. 	<ul style="list-style-type: none"> • All forecasting templates and recommended forecasting ranges are duly completed by the Workforce Planning Steering Committee and subsequently distributed to divisional sub-committees within specified timeframes.
Workforce Planning Scenario Planning	<p>To guide and support HR business partners/representatives in the effective completion of labour demand, supply & sustainability scenario plans in each division throughout the organisation.</p> <p>To facilitate and oversee the Workforce Planning Steering Committee in relation to the detailed analysis and evaluation of all Scenario Plans as developed and presented by designated divisions throughout the organisation.</p>	<ul style="list-style-type: none"> • All job family scenario plans submitted by designated divisions are collaboratively accepted by the Workforce Planning Steering Committee.
Workforce Planning Forecasting	<p>To facilitate and oversee the Workforce Planning Steering Committee in relation to the integration of all finalised/agreed job family scenario plans into consolidated:</p> <ul style="list-style-type: none"> • Labour efficiency forecasts for each division. • Labour demand forecasts each division. • Labour supply forecasts for each division. • Labour sustainability forecasts for each division. 	<ul style="list-style-type: none"> • All consolidated labour planning forecasts are compiled and completed within specified timeframes.

Workforce Planning Lead - Template Position Description



Key Position Accountabilities	Minimum Standards	Performance Measures
Workforce Planning Authorisation & Budgeting	<p>To facilitate and oversee the Workforce Planning Steering Committee in relation to the presentation of consolidated labour demand, supply, and sustainability forecasts to the CEO/SMT for sign-off/final approval.</p> <p>To ensure that the Workforce Planning Steering Committee supports the Finance Department thereafter in the establishment and implementation of complimentary headcount procurement schedules plus salaries and wages budgets.</p>	<ul style="list-style-type: none"> • CEO/SMT approve consolidated Workforce Planning forecasts as submitted. • Headcount procurement schedules are established and implemented in alignment with each financial year being forecast. • Salaries and wage budgets are established and implemented in alignment with each financial year being forecast.
Workforce Labour Efficiency Plan	<p>To oversee and ensure that the approved corporate labour efficiency plan is progressively/effectively implemented throughout designated divisions within the organisation.</p>	<ul style="list-style-type: none"> • Forecast changes in workforce configuration and utilisation are achieved within projected timeframes.
Workforce Labour Resourcing & Development Plan	<p>To oversee and ensure that the approved corporate labour resourcing & development plan is progressively/effectively implemented throughout designated divisions within the organisation.</p>	<ul style="list-style-type: none"> • Forecast labour development and resourcing programs are established and operational within projected timeframes.
Workforce Risk Mitigation Plan	<p>To oversee and ensure that the approved corporate workforce risk mitigation plan is progressively/effectively implemented throughout designated divisions within the organisation.</p>	<ul style="list-style-type: none"> • Forecast risk mitigation intervention programs are established and operational within projected timeframes.

Workforce Planning Lead - Template Position Description		MOORE HR
Key Position Accountabilities	Minimum Standards	Performance Measures
<p>Workforce Planning Evaluation and Review</p>	<p>To ensure that the Workforce Planning Corporate Steering Committee meets at regular intervals in to evaluate progress and/or deal with unplanned/unexpected changes.</p> <p>To ensure the HR Department regularly prepares and distributes Workforce Planning progress reports to the CEO/SMT all divisions throughout the organisation.</p>	<ul style="list-style-type: none"> • Regular quarterly meetings are planned and maintained on an ongoing basis. • Exception reports are prepared and issued at minimum quarterly intervals.

Workforce Planning Lead - Template Position Description		
JOB KNOWLEDGE	HUMAN RELATIONS SKILLS	
a) Displays essential levels of professional and technical expertise necessary to effectively perform the role	a) Trains and develops subordinate employees to meet future Company operating requirements	
b) Demonstrates sound business acumen and a general understanding of overall Company operations, objectives and operating philosophy	b) Displays empathy and understanding of employee's strengths and weaknesses and provides ongoing guidance and support	
c) Possesses sufficient knowledge of areas, disciplines and functions with which the position relates	c) Communicates and effectively motivates employees at all levels to maximise departmental productivity and performance	
	d) Articulates ideas fluently, clearly and persuasively	
	e) Actively seeks feedback and considers own performance and impact on others	
APPLICATION	PROBLEM-SOLVING SKILLS	
a) Self-motivated, high energy level, action-orientated, and a strong desire to achieve.	a) Learns rapidly and grasps complex or abstract concepts.	
b) Dependable and reliable, readily accepting responsibility to meet deadlines with minimum direction.	b) Thinks logically, critically and analytically.	
c) Continually considers more effective and productive ways to achieve individual and departmental objectives	c) Exercises sound, practical business judgement.	
d) Persistent and tenacious in following through to achieve desired results.	d) Is innovative and creative, continually considering more effective and productive ways to achieve business objectives	
e) Seeks out and incorporates information from others and utilises productively.	e) Thinks with a broad perspective and relates diverse ideas.	
LEADERSHIP SKILLS	BEHAVIOURS	
a) Organises and plans effectively utilising time and available resources to best achieve objectives.	a) Delivers value and service to internal and external customers always	
b) Gives clear and concise direction to employees, including timely, honest and effective follow up.	b) Always treats other employees and customers with respect and courtesy	
c) Displays a flexible, adaptable approach to meet changing priorities and demands.	c) Communicates in an open, honest and credible manner at all times	
d) Integrates and coordinates efforts of subordinates to achieve departmental and Company objectives.	d) Willingly trusts and supports peers, subordinate employees and managers	
e) Communicates verbally or in written form in a concise, effective manner.	e) Promotes and effectively participates in team building and team-based activities	
	f) Actively seeks out and recognises employee achievements and performance beyond normal expectations	

2. The Essential Pre-Requisites for Success – Establishing Your HR Strategic Workforce Planning Model

1. Governance & Infrastructure

Establishing your workforce planning methodology systems & process

- Establishing your SWFP model and methodology.
- Developing HR Department understanding & capability.
- Establishing your SWFP governance structure & facilitation process.
- Determining your SWFP operating framework.
- Determining your ongoing data/analytics requirements, capacity & population.

2. Workforce Labour Demand Planning

Forecasting & planning future workforce job families & staffing levels (FTE Headcount), utilization, efficiency & labour mix

- Determining key business factors impacting future workforce headcount & composition.
- Determining key business plans & objectives that impact workforce size & shape.
- Determining your workforce replacement projections.
- Establishing job family & headcount forecasts.
- Establishing annual labour resourcing schedules & strategies.

Short Term 1 to 3 Years Out

3. Workforce Labour Supply Planning

Forecasting & planning future workforce resourcing capacity & procurement

- Evaluating external & internal labour market trends.
- Identifying & prioritizing critical risk job family resourcing capacity.
- Developing & costing critical risk job family resourcing strategies.
- Creating integrated talent management/bench-strength strategies
- Reviewing & evaluating staff value proposition and branding.
- Reviewing & evaluating staff engagement & retention.

4. Workforce Labour Sustainability Planning

Forecasting & planning long term changes in workforce configuration, composition & capability

- Conducting regular demographic profiling & risk assessment.
- Determining medium term resourcing high risk occupations.
- Evaluating knowledge transfer & retention.
- Determining key competency changes/training needs.
- Evaluating workforce diversity, integration & vilification.
- Evaluating gender equity and pay differentials.
- Evaluating workforce communication & involvement.
- Evaluating leadership capability in a virtual workplace.

Medium Term 5 to 10 Years Out

Some of Our Many Satisfied DIY Customers - *Denotes Custom Designed Programs

1. Cisco Systems	31. Cabrini Hospital Group*	61. TAL*	91. Sydney Water*
2. Revlon	32. Panasonic	62. JNH Australia*	92. Frank Knight Australia
3. House of Reps Canberra	33. Ticketek	63. Hawthorn Football Club*	93. Vemco Pty Ltd
4. NHP Electrical Engineering*	34. Australian HR Institute*	64. Cricket Australia	94. Deakin University*
5. EMI Music Australia	35. Orix Australia	65. Haymes Paint*	95. McLarens Young*
6. Jeans West	36. Caterpillar Australia	66. Rayson Industries	96. Primelife Corporation*
7. ESANDA Fleet Partners	37. Baytech Institute	67. Cap XXX	97. Capital Finance
8. Local Government QLD*	38. Swimming Australia*	68. Hume City Council	98. Dept of Education WA
9. Victorian Cricket Association	39. Simplot Australia	69. Rural Ambulance Victoria	99. Mellons*
10. Sims Lockwood	40. Fawkner Cemetery	70. Integrated Design Services	100. Aus Chamber Orchestra
11. Woollahra Council	41. Victorian Public Sector Commission*	71. Biolab Australia	101. Aust Admin Services
12. Suncor Energy	42. Armstrong Industries	72. Integrated Vision*	102. Co-Invest Limited
13. Telefix	43. Financial Planning Association	73. Yallourn Energy	103. McManus & Associates
14. Trader Systems International*	44. Mainland Dairies	74. Filcon Precision Engineering	104. Millennium Chemicals
15. South East Water*	45. Melbourne Victory Football Club*	75. Beltreco Ltd Victoria	105. Govt Superannuation Board
16. DC Australia	46. City of Wyndham	76. URS Corporation*	106. Telefix
17. City West Water*	47. Southcorp Packaging	77. Wide Bay Water	107. WIN Support Services
18. APA	48. Aust Care Australia	78. Adidas	108. Bond University
19. ABB Industries	49. Mercy Hospital	79. Brimbank City Council*	109. City of Belmont
20. Vic Roads	50. Astra Pharmaceuticals	80. BTR Nylex	110. RWAV*
21. Chiquita Mushrooma	51. Western Mining	81. Juniper Development Group	111. CPSCU Credit Union
22. Bankstown Health Service	52. Macquarie Health Service	82. Ticketmaster	112. Freehills
23. AFL	53. Greening Australia*	83. Maxxium Australia	113. Catholic Insurance
24. Utilux	54. PowerWater NT	84. Houstons Farm	114. KBR Corporation*
25. Aust Pacific Paper	55. Butterworths	85. Melbourne & Olympic Park*	115. Victorian Auditor General
26. Data Connection	56. Cablex Australia*	86. Bridgestone NZ	116. Kalari Transport*
27. TPG Consulting*	57. Melbourne Sports & Aquatic Centre	87. Melbourne Business School	117. AHIMA USA
28. Shire of Yarra Ranges	58. Marchetti Smallgoods	88. St Kilda Football Club*	118. Football Federation Australia*
29. City West Water*	59. Moet Chandon*	89. Coogee Bay Hotel	119. Headstrong
30. Essendon Football Club*	60. Totalcare Health Industries*	90. Fowles Auction Group	120. Reflections Group*



MOORE HR

Stephen Moore
Founder & Managing Director

Stephen Moore spent the first twenty years of his professional career occupying a diverse range of Employee Relations roles within leading organisations including Trans Australia Airlines, Ford Motor Company & Coles-Myer.

In late 1995 Stephen formed Optimum Performance HR Consultants, where he spent the next two decades primarily designing & delivering people metrics, analytics & planning solutions to a diverse client base located throughout Australia, New Zealand, Asia & South Africa.

After a short stint in the HR software development industry, in early 2018, Stephen established a new consulting practice (Moore HR), which provides a diverse range of Strategic HR Management programs, services and DIY tools that will (firstly) optimise workforce management and performance in your organisation, and (secondly) elevate the Human Resources Department's role, contribution and recognition throughout the business.

Along this long and often unpredictable journey, Stephen has collaborated with the Australian Human Resources Institute, the Human Resources Institute of New Zealand, the Hong Kong Human Resources Institute, the Public Service Commission WA and Latrobe/Deakin University Graduate Schools of Management in designing & delivering a diverse range of public training workshops, conferences, tertiary level distance learning courses and MBA master-classes to more than 3,000 HR professionals located across nine separate countries.

Stephen also developed and managed his own USA HR Best - Practice Study Tour, where for more than a decade, senior Australian Human Resources executives were provided with the opportunity to benchmark pre-eminent organisations, who amongst others included Harley - Davidson, FedEx, NASA, Cisco Systems, Hewlett-Packard and Marriott Hotels.

Moore HR Pty Ltd

T: +61 3 9994 5193

M: +61 (0) 419 337805

E: enquiries@moore-hr.com.au

W: www.moore-hr.com.au



What Some of Our Clients Say About Us

"Stephen is an entertaining, straight to the point and experienced professional with great public speaking skills and the ability to apply theory into practical examples in many different structures and organisations. We are happy we were able to join the course and will definitely stay in touch with Stephen for more learning moments and insights."

Vice President of Strategic Analysis Venetian Macau Limited

"Stephen is a guru who coached the SEEK team to make significant improvements in our approach to HR metrics. Stephen is a pleasure to work with and a great trainer. He can adapt to any level of experience and gives amazing insights no matter where the conversation goes"

Group HR Director, SEEK Limited

"Stephen's in-depth knowledge and experience with HR metrics is integral to any organisation trying to establish an HR Metrics Dashboard within their business. Stephen is a strategic thinker who can influence HR personnel to deliver the right metrics for their operations which has assisted Caltex to transform the way HR metrics are reported throughout our organisation."

HRSC Manager, Caltex Australia Petroleum

"The Workforce Planning model developed and presented by Stephen has been very useful in allowing us to plan for changes in our workforce and the wider recruitment market and develop strategies to adapt to any global or local changes. Highly recommended process and facilitator."

Manager Organisation Development, City of Whitehorse

"Stephen presents an excellent model for human resource management metrics. This model is practical, easy to implement, and he explains how to use the metrics exceptionally well. Very engaging facilitator and consultant."

General Manager Learning & Development AHRI

"The success of our HR Metrics training program was beyond expectations, exciting all who attended, with an agreement reached on key areas that will enable us to move forward and establish consistent, value-adding HR Metrics that will support decision making for our managers in managing their business."

Group Human Resources Manager, Hills Holdings

"Stephen helped to develop our understanding of strategic workforce planning, providing a relevant framework, advice and practical forecasting tools. It enabled us to develop a strategic workforce plan that led to our Board approving what became an award-winning workforce development program for a critical workforce segment of our business."

Manager People Strategy and Change, City West Water

"Stephen is an astute, strategic, business thinker with a wealth of knowledge around HR and Metrics. He is able to deal with diverse clients, builds excellent relationships and is one of the few people who get the importance of people strategies & metrics to the business."

People and Culture Partner, Deloitte Australia