



# STRATEGIC WORKFORCE PLANNING: 10 STEPS TO EXECUTIVE BUY-IN

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# STRATEGIC WORKFORCE PLANNING ISN'T A SOLO JOB

Talent shortages don't just increase workloads for existing staff. They can affect an organization's bottom line.

The vice president of sales might point to the shortage of sales staff as a reason for increased customer turnover, for example. Or the chief innovation officer could blame the unfilled positions for AI experts as the reason for the delay of next quarter's chatbot launch.

This leaves HR in the hot seat, scrambling to backfill gaps. This situation often leads to worse outcomes, like less-than-ideal talent and higher costs to hire.

It's time to stop reacting and start planning. Business leaders and HR need to work together to develop a shared, strategic approach to workforce planning—one that supports both short-term hiring needs and long-term people strategy.

# WHAT IS STRATEGIC WORKFORCE PLANNING?

Also known as talent demand planning, it's the process of identifying the gaps between the people a business has today and the people it needs tomorrow.

“But it's not just about predicting how many positions you're going to fill this year,” says Korn Ferry's Alex Ragland. Strategic workforce planning considers the skills and capabilities needed to achieve business objectives. Then it looks at how to fill them, whether through reskilling, upskilling, redeploying, hiring, interim talent, or other tactics.

HR can (and often does) build talent demand plans on its own. But for workforce planning to do its job well, leaders across the business need to be active participants. They're the only ones who really understand their team's KPIs, skills needs, and mid- to long-term objectives.



# HELLO? ANYONE THERE? WHY EXECS DON'T ANSWER HR'S CALLS

Despite the clear link between talent and business outcomes, HR often struggles to engage senior business leaders in the workforce planning process.

Pressure is unlikely to come from the top. “A CEO isn’t going to stop a discussion about a new initiative to say, ‘Wait, we haven’t talked about workforce planning strategy yet,’” says Ragland.

That’s not to say CEOs don’t value HR’s strategic input. In fact, 61% of CHROs say their CEO frequently relies on them for strategic advice on key business issues, according to Korn Ferry’s [2025 survey of CHROs](#).

But even in organizations where HR has its proverbial seat at the table, business leaders may question their role in workforce planning.

You might hear things like:

- “Why not just use historical data and repeat what has worked before?”
- “Does HR really drive business value?”
- “Isn’t workforce planning HR’s job?”

These are tough questions, and overcoming that skepticism is no small task. But it’s possible with a collaborative and empathetic approach that focuses on the pressures business leaders face and the goals they care about. This then builds the executive buy-in needed for long-term success.

Our 10-step process for engaging executives in strategic workforce planning can help.



# HOW TO GET LEADERS INTERESTED IN STRATEGIC WORKFORCE PLANNING



**A 10-step plan for HR leaders.**





## 1. Map Your Talent Demand Stakeholders

The most important stakeholders to engage in workforce planning are usually the executives who head up your organization's functional areas (e.g., sales, R&D) and business units (e.g., retail, Asia-Pacific).

Their knowledge and insight are essential to effective workforce planning, and they oversee others who can play a valuable role.

Also consider engaging the finance lead of each executive. "They'll need to approve the investment behind each strategy," says Ragland.

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## 2. Tailor Your Message

Getting executives engaged will be much easier if you make it clear how talent demand planning supports their business objectives. Tailor your message and questions to each executive's interests and area of oversight to help them understand.

"It's important to speak to the business in a way that helps them understand and interpret what you're trying to deliver," says Korn Ferry's Michele Capra. "That comes from understanding their business well enough to ask probing questions, versus just showing up and expecting them to deliver everything to you."

Sharing relevant data, like a workforce forecasting trend that could disrupt a strategic initiative, can prompt deeper dialogue and create urgency around workforce planning. It also reinforces your strategic HR leadership.

**"All of a sudden, you're building credibility with the business leader. They're going to start inviting you into the conversation."**

— Alex Ragland, Korn Ferry





### 3. Use Your Stakeholders' Language

Using the same vocabulary as your executive collaborators will make communication more efficient and clearer, with less chance of talking past each other.

While it would be ideal if executives spoke HR's tongue, it's more effective for HR to adopt the language of each business unit. This effort will build the rapport, credibility, and trust that helps to erode executive resistance.

Speaking your stakeholders' language means framing talent conversations in terms that reflect their priorities. That might include highlighting how workforce planning supports goals like profitability, speed to market, or business growth.

And be sure to translate HR data into business-relevant impacts. For instance, in a discussion about employee attrition, you could focus on the cost of recruiting and training new employees.

**“Linking recommendations back to growth levers or competitive advantage can help connect talent decisions to the broader business agenda.”**

— Alex Ragland, Korn Ferry

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## 4. Start With a Pilot Project

A pilot project is a low-risk way to explore workforce planning before rolling it out more broadly. It gives you a chance to identify best practices that can be applied across business units. It's also the easiest way to get started, typically requiring just one executive and their business unit.

If it's successful, you can use it to showcase the benefits of workforce planning and stimulate broader interest.



## 5. Set Clear Expectations

Partnerships thrive when both parties contribute to success. But what are those contributions, who makes them, and what defines success when it comes to workforce planning?

HR should take the lead in setting clear, shared expectations early in the adoption process. The business will have expectations, too, but their understanding of workforce planning inputs, outcomes, and their role in it may need correction.

“It’s a collaborative process and both parties need to communicate their expectations, but HR should be the proactive party because the business may think they already have workforce planning figured out,” says Capra.

Use project management basics to guide expectation-setting. What are the objectives, timelines, roles, and data needs? How will progress be tracked and success defined?

If that level of detail might raise your partner’s hackles, aim for an easy and early win by narrowing the scope of the exercise. “It could be as simple as reviewing the business plan for the next 12 to 18 months with the executive,” says Capra.

Finally, be sure not to make promises you can’t keep due to data challenges. Nearly three-quarters of respondents to [Korn Ferry’s 2025 CHRO survey](#) say their HR analytics capabilities maturity is basic or descriptive only.

## 6. Create Structured Engagement Moments

Another workforce planning lesson from project management? The project is always at risk. Executives may lose interest, the business team may miss deadlines, or early results may be too slow to inspire confidence.

Structured engagement moments help mitigate these risks. A primary example is a brief, recurring meeting between HR and business leaders.

Keep the process visible and relevant. Early-stage meetings might emphasize the process and sustaining momentum. As the process matures and fluency increases, the focus will shift to reviewing and refining the demand plan.

Regardless, these structured engagement moments don't have to be limited to the duo of HR and executive. Injecting workforce planning discussions into high-level, cross-organizational gatherings, like leadership summits, can generate even more business value.

**“Having the opportunity to discuss strategic workforce planning among your peers in a different setting with a different focus generates more ideas.”**

— Michele Capra, Korn Ferry





## 7. Design Smart Workforce Planning Dashboards

A well-designed dashboard reminds executives that workforce planning is a data-driven, strategy-aligned exercise tied to their own goals.

“Well designed” is critical. A dashboard showing HR metrics in isolation may reinforce the idea that demand planning is solely HR’s domain. Instead, it must clearly link talent metrics to business objectives and KPIs.

For example, attrition trends could be shown alongside their impact on cashflow or production delays. These links not only underscore relevance, but they turn dashboards into tools for identifying risks, spotting missed opportunities, and assessing readiness for future initiatives.

Ragland recommends that dashboards display 24–36 months of historical data. Layer in job function and level, current data, and forecasts covering the time set for workforce planning, whether 12 months or five years. And add notes to clarify historical anomalies.

If such dashboards can engage executives in strategic workforce planning, consider their broader potential. Only 18% of respondents to Korn Ferry’s 2025 CHRO survey said their organizations consistently use analytics to drive better people decisions.

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## 8. Celebrate Your Wins

Promote workforce planning's strategic value until senior leaders consider it essential. They'll be eagerly awaiting the results you've promised, so share success stories as soon as possible.

Workforce planning proves its value every time it triggers timely responses to talent gaps and their business impacts. Point out small wins to your executive during your regular engagement moments. Larger successes might be packaged as case studies and delivered by business partners at leadership town halls.

"The celebration can come from finance as well," says Capra. "They can say, 'We budgeted more effectively this quarter thanks to talent demand planning, which helped us reallocate dollars to achieve an objective in another area.'"

These communications can also be used to inspire and inform your HR colleagues, particularly those struggling with business partner engagement.





## 9. Upskill Your Business Leaders

Many business leaders will lack fluency in workforce analytics or how to connect talent data to business outcomes. HR needs to help them interpret, challenge, and act on talent data in the same way they do financial or operational data.

“It’s about showing them the impact that different talent decisions can have and educating them in the tools to use throughout the process,” says Ragland.

This will make them better contributors to the effort and help them overcome any discomfort they feel over the process or their own capabilities, which could cause them to disengage.

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## 10. Make Engagement-Building Continuous

Don't expect any overnight successes when engaging executives in workforce planning. The depth and quality of participation you want takes time to develop. But you can accelerate the engagement-building process if you treat it like a continuous feedback loop.

Frequent, regularly scheduled check-in discussions will create more opportunities for executive learning. Those learning opportunities will build executive skill and confidence, which will solidify their commitment to the process and generate more wins. Celebrating those wins will generate more interest and enthusiasm across the organization, making stakeholders more eager to contribute to their next check-in discussion.

Once your executives are fluent and fully engaged in workforce planning, keep the momentum going.

“You're not going to start having workforce planning conversations once a year,” says Ragland. “It's a rolling process where you're always gathering and analyzing data and aligning talent with strategy.”



# AT A GLANCE: ENGAGING EXECUTIVES IN WORKFORCE PLANNING

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## PREPARE THE GROUNDWORK

Before you dive in, make sure you've got the right people and the right message. This is about building curiosity and trust from the start.

- 1. Identify your stakeholders**
- 2. Tailor your message**
- 3. Use their language**

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## LAUNCH & EXECUTE

It's time to get moving. Start small, be clear, and keep everyone in the loop.

- 4. Run a pilot**
- 5. Set expectations**
- 6. Structure the engagement**
- 7. Design smart dashboards**

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## SUSTAIN & SCALE

Once you've got traction, keep it going. Build skills, celebrate wins, and make workforce planning part of everyday business.

- 8. Celebrate wins**
- 9. Upskill business leaders**
- 10. Build continuously**

# AN OPPORTUNITY TO PROVE HR'S STRATEGIC VALUE

Workforce planning produces optimal results when it's owned by business leadership, with HR in a supporting role. To get there, HR must place responsibility on itself to generate executive buy-in and participation.

By building the necessary relationships and influencing strategically, HR can weave workforce planning into the fabric of business decision-making. Before long, the whole organization will benefit in the ways that matter most to executives—proof positive of HR's capacity for creating business value.

A woman with glasses is smiling and looking towards the right in a meeting room. Other people are visible in the background, some working on laptops.

Discover how HR can drive workforce planning forward. Watch our on-demand webinar, **People Analytics as a Catalyst for Business Transformation.**



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