

Whitepaper

How to Avoid The 12 Deadly Traps of Workforce Strategic Planning

By Colin Beames



Executive Summary

Many organisations are somewhat delusional about their workforce strategy claims. Whilst they may have bundles of HR policies and undertake workforce and succession planning together with talent management, very few have developed a comprehensive workforce strategy.

The 12 deadly traps of workforce strategic planning have been summarized below. The use of the term “deadly traps” is deliberate. It emphasises that a close identification with any of these traps most likely means that the development of a workforce strategy is only at a rudimentary stage.

Many people are “locked” into models and mindsets that are now either obsolete or of limited utility. Today’s workforce management complexity cannot be solved by recourse to yesterday’s models!

For those starting out or progressing on the journey of developing a workforce strategy, the avoidance of these traps should be front of mind.

The 12 Deadly Traps of Workforce Strategic Planning

1. Associating the importance of a role/job with its position in the organisational chart.
2. Relying on traditional job evaluation methodologies to identify the true value and contribution of roles to the business strategy and outcomes.
3. Failing to distinguish between “make” versus “buy” roles, critical roles, and roles suitable for outsourcing.

Note. A “make” role requires a more significant initial investment in training and development for new recruits, or requires a longer time to acquire proficiency in the role, compared to a “buy” role. Vastly different HR policies and practices should apply to the two roles.

4. Segmenting the workforce primarily on a job/organisational level, by job families or by generational cohort.
5. Offering the same Employment Value Proposition (EVP) for all roles.
6. Paying all people at the same market point.
7. Reporting turnover for the organisation as a whole.
8. Loosely adopting the term “workforce strategic planning” but missing the strategic component in the plan.
9. Not explaining precisely how business and workforce strategies are linked or aligned.
10. Failing to recognise the difference between lag and lead HR data.
11. Embracing HR analytics and investing in associated technology before having first developed a workforce strategy.
12. Not involving CEOs, CFOs and Executives in the development of a workforce strategy.

Note. These 12 traps are not complete but are typically some of the most common.

This white paper examines the mechanisms of these traps and recommends techniques to avoid them. In particular, the AWS Skills-Based Workforce Segmentation Model is presented, thus forming an intrinsic component of these techniques. The application of the AWS Model in understanding the characteristics of various roles, goes to the heart of configuring the workforce and addressing the people management challenges in the contemporary workplace. This Model provides a universal framework from which more informed people investment decisions can be made.

A number of case studies are provided as evidence in support of these advocated techniques.

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Introduction

Overview

Workforce strategic planning is a “hot” issue for many organisations as they seek to better manage their most vital intangible asset – their people.

In this white paper, the business case is argued as to why organisations should develop a workforce strategy, including the adverse consequences in failing to do so.

Additionally the meaning of the term “workforce strategic planning” is clarified given that some misconceptions abound.

The 12 deadly traps of workforce strategic planning are identified to assist both “young and experienced players” in developing a workforce strategy. Then an explanation of the reasoning behind why these traps have been identified as such is provided.

To avoid these traps, an AWS Skills-Based Workforce Segmentation Model, adapted from the Human Resource Management (HRM) architectural model of Lepak and Snell (1999, 2002) is presented.

Finally a number of case studies that illustrate both the presence and avoidance of some of these 12 deadly traps are presented.

Change and Challenges

Over the past two decades unprecedented change has swept the workplaces of the western world.

Companies have revamped practically every business process in their search for competitive advantage, apart from the area of human capital.

Many organisations are still lacking the concepts, strategies, models and measures that matter most to effectively manage their most vital intangible asset – their people. They most likely have a marketing strategy and an IT strategy, but they don’t necessarily have a people or workforce strategy to manage what is typically their highest cost item!

The people management challenges in the contemporary workplace are many and varied. Too often ad hoc approaches are adopted to problem solving that may be treating the symptoms and not the cause, or otherwise may have unintended consequences. An appropriate starting point in addressing these challenges is the development of a comprehensive workforce strategy.

The Workforce Strategy Business Case

The Adverse Consequences Without a Workforce Strategy

The adverse consequences of not having a workforce strategy include:

- A lack of insight and poor, inconsistent or ad hoc people decisions;
- A waste of resources (e.g., could include paying the wrong people too much and the right people too little);
- Locking in low performers by over delivering, and pushing out high performers by under delivering on expectations;
- Operational inefficiencies, poorer performance, excessive vacancies and lack of capability resulting in dissatisfied customers;
- Lack of labour flexibility;
- Lower engagement levels and increased turnover;
- Ignorance of people risks; and
- A lower ROI in people.

In summary, without a workforce strategy, an organisation is unlikely to be effectively harnessing its human capital to deliver on business outcomes.

Many HR functions are typically disparate or siloed, yet integration multiplies business value. Often workforce strategies (if indeed they exist) are misaligned or disconnected with business strategies.

Note. Advanced Workforce Strategies has recently surveyed over 60 Australian organisations (half of these with employee numbers between 1 – 5,000 employees) with the Workforce Strategy Audit Survey (WSAS). This research confirms that many organisations are only at a rudimentary stage of developing a workforce strategy.

Refer to Appendix B for further information on the WSAS.

Introduction

The Business Case

Too often business goals, plans and strategies are developed without any accompanying detail describing how people will be managed and assisted to deliver and achieve what the business has set out to do.

Properly thought through, integrated, and appropriately applied people management strategies and practices, customized to particular organisational circumstances, are the most powerful driver of sustainable success. (Lepak & Snell, 1999)

There is now a great deal of evidence that the contribution of people is the largest driver of organisational performance (CIPD, 2003).

Human capital is typically business's highest cost accounting for between 30-80% of the total cost of a business (depending upon the industry sector). Despite the overwhelming evidence that the people factor is now regarded as the single most important driver of business success, according to surveys of CEOs, it is one of the least effectively managed corporate functions (Hall, 2008)!

What is a Workforce Strategy?

A workforce (or human capital) strategy is a form of asset management, the sum of actions taken to acquire, retain, develop, motivate, and deploy human capital in the service of an organisation's mission.

Many organisations are somewhat delusional about their workforce strategy claims. Whilst they may have bundles of HR policies, and undertake workforce and succession planning, together with talent management, very few have developed a comprehensive workforce strategy.

At the heart of such a strategy is a focus on:

Understanding how various roles contribute to business outcomes, including the strengthening of organisational critical capabilities and core competencies, the key to sustainability and performance improvement;

- Understanding the characteristics of roles ("make", "buy", "critical", outsourced), including the value (impact) and costs (investment) associated with those roles;
- Segmenting roles according to their relative importance, which is the key to treating an organisation's workforce asset as a portfolio that can be analysed and managed, and applying differentiated HR policies and practices accordingly; and
- Directing investments to achieve the maximum benefit (i.e., maximum ROI on people) with limited resources.

Ultimately the essence of a workforce strategy is making choices about the relative importance of roles (i.e., role differentiation). These choices should be based on considerations of risk, costs and value.

Furthermore a workforce strategy is more than "having the right people in the right roles at the right time". This description fails to address how roles are linked to the business strategy, including what levels of investment should be directed to various roles.

The 12 Deadly Traps

The following 12 deadly traps provide guidance for executives and HR professionals as to what they should be mindful of, and what they should avoid, in the development of a workforce strategy.

1

Deadly Trap:

Associating the importance of a role/job with its position in the organisational chart.

Amongst other things, organisational charts are useful for defining reporting arrangements, span of control, accountabilities and responsibilities, and informing on the relationships between various business units and departments or sections.

However organisational charts are not necessarily an indication of the importance of roles. Roles differ in their potential to add value and contribute to business success. Roles at the same level in an organisation will therefore differ in their contribution to business outcomes. Furthermore the investment in training and development and hence cost of turnover for some lower level specialist roles may be more than higher mid-level management roles.

Note. Confusion sometimes abounds between the importance of first focusing on roles versus people. In a workforce strategy asset based approach, roles come before people. A role exists to serve a particular purpose or function for an organisation.

2

Deadly Trap:

Relying on traditional job evaluation methodologies to identify the true value and contribution of roles to the business strategy and outcomes.

The conventional approach to job evaluation is static, inflexible and primarily focused on internal equity... There is a need to move away from conventional approaches to determining job importance and job-worth to a model that focuses on future value creation, strategic job worth and competitive advantage. (Becker, Huselid & Beatty, 2009)

To a certain extent, salary levels are a reflection of market forces (e.g., customs and practices, supply and demand) and internal equity considerations, and may not necessarily reflect the true value of a role's contribution to the business (i.e., value creation, competitive advantage).

For example, the same role in one organisation (e.g. HR Director/Manager) may be more important than the same role in an equivalent organisation, because of the difference in business strategies between the two organisations.

Furthermore job evaluation does not illuminate the characteristics of the role in question. For example, is it a "make" or "buy" role? Depending upon which category the role might fall under, vastly different HR policies should apply (refer to Deadly Trap 3).

The 12 Deadly Traps

3

Deadly Trap:

Failing to distinguish between "make" versus "buy" roles, critical roles, and roles suitable for outsourcing.

An understanding of the characteristics of roles is the key to differentiating the workforce and developing a workforce strategy. Vital questions in developing such an understanding include the following.

- What really are the critical roles in your organisation?
- What roles should you "make" (i.e. invest in) by developing people from within?
- What roles should you "buy" people ready-made from the market?
- What roles should you consider outsourcing?
- How should psychological contracts (employer/employee relationships) differ for these role types?
- More specifically how should attraction or Employment Value Propositions (EVP)/"deals", engagement and retention, and \$ investment in Learning and Development (L&D) differ for these role types?
- How does the cost of turnover differ for various roles?
- What is the investment in initial training and development and/or time to acquire proficiency in various roles?
- Which roles are more closely linked to the achievement of the business strategy?
- What is the impact of the role on business outcomes?

Many organisations are unable to answer all of these questions, or otherwise the answers are not "front of mind". They therefore fail to make these important distinctions.

Employees and roles now come in all shapes and sizes. Dealing with the complexities of people management in the 21st Century workplace requires a more sophisticated and hence differentiated approach.

The most prominent conceptual model remains Lepak and Snell's 1999 architectural theory of HRM (Cappelli & Keller, 2014)

To that end, the Lepak and Snell (1999) HRM architectural model (see later) provides a framework for classifying roles and answering the above key questions.

4

Deadly Trap:

Segmenting the workforce primarily on a job/organisational level, by job families or by generational cohort.

Segmentation is the key to treating an organisation's workforce asset like a portfolio that can be effectively analysed and managed. Just as a marketer segments or stratifies their clients, products and services according to their value, the same principles should apply to segmenting the workforce.

The choice of segmentation model is therefore fundamental to developing a comprehensive, rational and consistent approach to the people management complexities and challenges. It should underpin the management of the workforce/talent, and hence the development of a workforce strategy.

The 12 Deadly Traps

Organisational Level Segmentation

Most organisations adopt a hierarchical model as the primary model of segmenting their workforce (i.e., based on salary or job level or job evaluation considerations). Whilst this model may be suitable for defining reporting arrangements, it doesn't serve as a basis for:

- Determining attraction, engagement and retention strategies;
- Determining which roles are more closely linked to developing critical capabilities and core competencies of the organisation; and hence
- Determining how the relative importance of roles are linked to the business strategy.

Note. Organisational level segmentation and reporting may still be useful for the purposes of assessing leadership capabilities of managers (e.g., based on 360 degree feedback of subordinates), or engagement levels and retention risk of subordinates reporting to various managers (e.g., based on survey data).

Job Family Segmentation

Some organisations segment their workforce by job families (e.g., finance, engineering, sales). However, this like the former, is also a "blunt" approach because it fails to come to grips with the characteristics of roles.

Often "make" and "buy" roles exist within the one job family. Combining "make" and "buy" roles with respect to HR policies and HR data reporting is akin to combining apples with oranges. Whilst they both belong to the fruit family, they are significantly different.

Generational Cohort Segmentation

Whilst the workforce has become much more multi-generational in age, the three age cohorts of Gen Y, Gen X and Baby Boomers are somewhat arbitrary and artificial, with differences exaggerated and notwithstanding, these groups are not homogeneous (i.e., don't have uniform attitudes and aspirations).

Other Useful Workforce Segmentation Approaches

Other useful secondary workforce segmentation approaches include: segmentation by business unit or section, age, gender, length of time in the job, length of time in the organisation, location, function.

5

Deadly Trap:
Offering the same
Employment Value
Proposition (EVP) or
promise for all roles.

The Employment Value Proposition (EVP) comprises a mix of tangible items (e.g., pay, resources) and intangible items (e.g., support, recognition). Different roles will have different combinations of these items or "deals", depending upon the characteristics and importance of the role.

For example, the EVP/"deal" for a "make" role will include a greater investment in training and development compared to a "buy" role.

A failure to define the EVP/"deal" up-front will most likely result in substantial recruitment inefficiencies as evidenced by inappropriate applicants, muddled candidate expectations, and subsequent confusion about whether the EVP/"deal" or the promise has really been delivered.

In the case of the latter, a perceived failure to deliver on the promise is likely to lead to higher turnover in the initial 12 months of employment.

The 12 Deadly Traps

Note. The EVP may be conceptualized as the content of the psychological contract or relationship between employer and employee. Psychological contracts are a major determinant of employees' behaviours.

Typically psychological contracts comprise a mix of 15 tangible and intangible items categorized as follows: (1) rewards and recognition; (2) safety and security; (3) career development; and (4) social and support.

6

Deadly Trap:
Paying all people at the same market point.

A "one size fits all" approach to people management is a recipe for mediocrity (e.g., paying all employees at say the 50% range of the market). While simplistic and convenient, such an approach fails to distinguish between the relative importance of roles to business outcomes.

For example, the manufacturing function may be more important than the sales and marketing function in delivering business outcomes.

7

Deadly Trap:
Reporting turnover for the organisation as a whole.

The cost of turnover can vary between 0.5–2.5 times the salary of the job in question. (Cascio, 1991)

Reporting turnover for the organisation as a whole is an exercise in futility. It fails to identify where the real people costs and associated risks lie.

Different roles have different turnover multiples. For example, a "buy" role (where there is a lower investment in training for the job or time on the job to attain adequate performance), will have a lower turnover multiple compared to a "make" role where there is significant up-front investment. In the case of the latter, this more significant investment is lost if that person leaves.

Refer later to the turnover cost example in the section on the AWS Skills-Based Workforce Segmentation Model to illustrate the above point and also in case study 6.

Note. This same trap applies to the reporting of any HR metric for the organisation as a whole (e.g., absenteeism, safety, engagement). For example, the implications of say higher absenteeism in a particular workforce group or segment may be much more significant (e.g., immediate disruption to service delivery), compared to another group or segment.

8

Deadly Trap:
Loosely adopting the term "workforce strategic planning" but missing the strategic component in the plan.

Whilst many organisations are now adopting the term of "workforce strategic planning", the reality is that they haven't moved very far beyond a people gap analysis and supply and demand considerations.

The 12 Deadly Traps

A plan is not a strategy. Typically workforce planning is primarily about filling roles (i.e., a gap analysis). It is tactically focused on head counts and time lines, undertaken for short-term budgeting purposes by HR, and not necessarily owned by the business. As such, it neglects to consider the broader strategic workforce questions, many of which have been touched on in this white paper.

These broader strategic questions also include consideration of the contingent workforce, in which there has been a high growth rate in recent years. Underpinning this growth is the drive for organisations to maximize their flexibility and minimize their risks.

Despite the loose use of this term "strategic", a simple gap analysis approach lacks the insight, models and a methodology to link workforce and business strategies (refer to Deadly Trap 9).

9

Deadly Trap:
Not explaining precisely how the business and workforce strategies are linked or aligned.

Every organisation operates in a unique competitive situation. In order to implement its strategy and achieve its goals, each organisation must develop and build capabilities and core competencies that are critical to strategic intent.

A Three Layered Model of Capabilities and Competencies



Differentiating or Critical Capabilities

Critical capabilities represent what the organisation is known for, what it is good at doing, and how it patterns its activities to deliver value. They constitute a key source of sustainable competitive advantage.

Note. Some organisations may not necessarily have a critical capability that differentiates them from their competitors, so they compete more on an efficiency or cost/price basis.

Core Competencies (of the organisation)

Core competencies directly relate to the key activities or functions that the organisation undertakes in conducting its business. They are a narrower or more specific concept than the previous more global critical capabilities.

Some of these core competencies will be more important than others depending upon current external and internal circumstances and the business strategy.

The 12 Deadly Traps

Developing and Strengthening Capabilities and Competencies

The value of human capital is inherently dependent upon its potential to contribute to the competitive advantage or core competence of the firm (Lepak & Snell 1999, p. 35).

In recent times there has been a shift in emphasis to focusing on developing and strengthening these critical capabilities and core competencies, rather than just focusing on individual competencies.

This emphasis should therefore constitute a prime business focus or priority. It is the key to organisational sustainability and performance improvement.

Workforce strategy questions that then arise include:

- What are the key drivers of these capabilities and core competencies?

Note. Examples of key drivers could include an emphasis on quality, or cost control, or increased sales.

- How does the workforce strategy support the strengthening of these capabilities and competencies?
- Which roles are more closely linked to these drivers?
- Is the organisation structure and are the resources (including people resources), consistent with or supportive of strengthening these capabilities and competencies and hence the business strategy?

Roles that incorporate more of those key drivers become more central to the achievement of the business strategy. They should receive more focused attention in terms of selection and recruitment, rewards and benefits, learning and development, performance improvement, and retention.

10 Deadly Trap: Not recognising the difference between lag and lead HR data indicators.

Lag data is historical or “coroner” data – the “patient” is already dead! Examples of lag data include turnover, investment in training and development, and performance ratings.

Lead data is “physician” data – the “patient” is still alive and the key question is: What can be done to improve the health of the patient (e.g., enhance engagement, reduce turnover risk)?

Lead data is predictive of future performance and is arguably the most important data source. Examples of lead data include engagement and retention risk survey findings, and competency or skills assessment.

The third category of HR data is demographic data (e.g., gender, age, length of time in the job, workforce segment).

Note. Demographic data can also be predictive. For example, age may predict retirement intention, length of time in the job is an indication of experience which may predict superior performance.

With clarity around the three categories of HR data, they can be configured to form the basis of a practical framework, transforming ad hoc or disjointed data into an integrated platform. This unlocks the hidden value of HR data silos to create business value.

The 12 Deadly Traps

More specifically, the data set can be interrogated with meaningful analysis undertaken to determine the extent of relationships between variables. For example, are high performers or high potentials (lag data) at greater risk of leaving (lead data) compared to others in the organisation? Or are female workers in a particular age group (demographic data) more or less engaged (lead data) than others in the organisation?

Once these relationships are explored and if confirmed, then targeted interventions can be designed and implemented to address these people risks.

11

Deadly Trap:
Embracing HR analytics and investing in associated technology before having first developed a workforce strategy.

There is a current spike in investment in HR technology. Whilst many organisations are in a rush to adopt HR analytics and improve their reporting, this effort will be partially wasted without having first developed a comprehensive workforce strategy to underpin the analytics and reporting.

HR analytics should inform on strategy and not exist in isolation. Otherwise the right measures and data may not be collected and configured in an appropriate way to provide the necessary workforce insights.

The use of HR analytics extends to identifying key workforce risks in particular groups or segments (e.g., low engagement or performance, high turnover or turnover risk). Their use also serves as a basis for evaluating the effectiveness of past interventions. For example, did recent salary increases to a particular workforce group or segment reduce turnover risk?

12

Deadly Trap:
Not involving CEOs, CFOs and Executives in the development of a workforce strategy.

The development of a workforce strategy is not something that can be simply passed off to HR. It is a business issue and as such it is imperative to have the "buy-in", mandate and ownership of the CEO and executives.

The role of HR is to manage and facilitate the workforce strategic planning process and act as the Subject Matter Expert. In so doing, it is essential that HR professionals have an in-depth understanding of the business, including the business acumen skills to align people management with the needs of the business.

Note. The business strategy must precede the development of a workforce strategy, otherwise the latter exists in isolation without a context for interpretation.

Avoiding the Traps

The AWS Skills-Based Workforce Segmentation Model

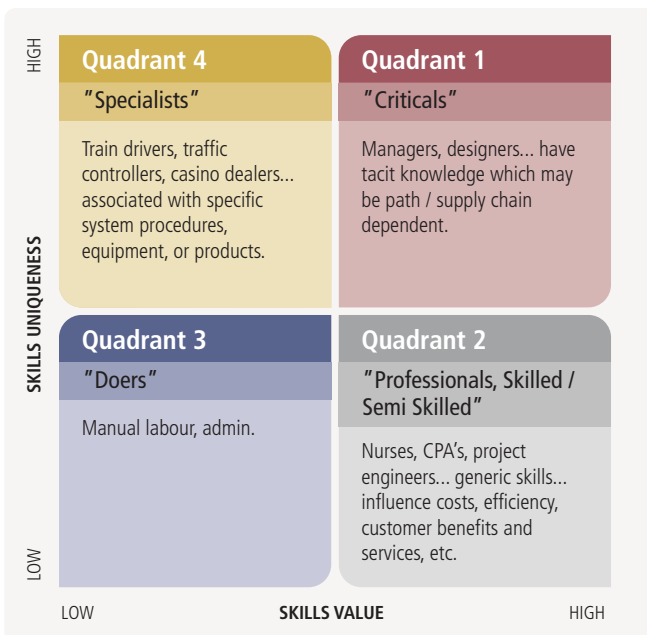
The inadequacies and limitations of typical approaches to workforce strategic planning (i.e., deadly traps) have been highlighted thus far. Attention shall now be turned as to how these traps can be best avoided.

Advanced Workforce Strategies has adapted a Skills-based Workforce Segmentation Model based on the HRM architectural model of Lepak and Snell (1999, 2002). This AWS Model takes into account both the value and uniqueness of skills relative to the role.

Based on this AWS Model, there are four role types:

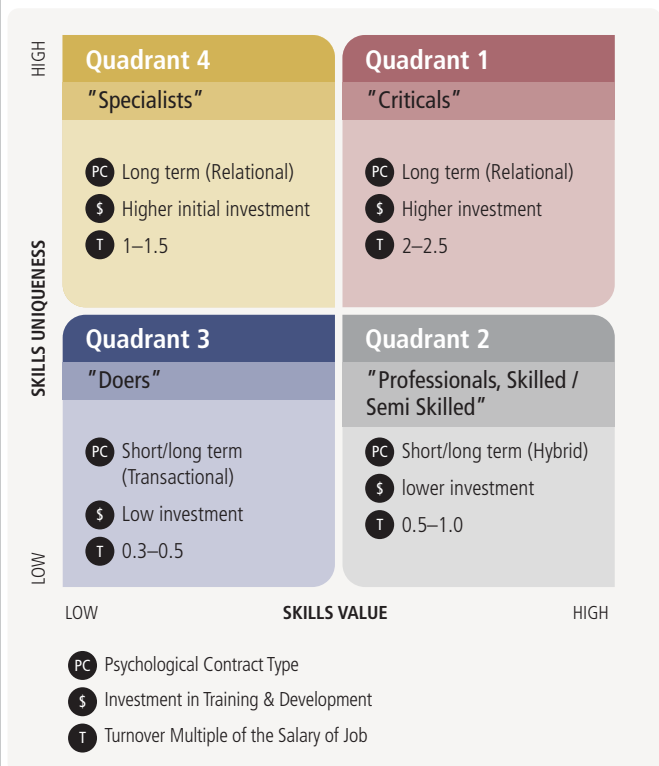
- 1 Criticals ("make" role)
- 2 Professionals, skilled and Semi-Skilled ("buy" role)
- 3 Doers ("buy" role)
- 4 Specialists ("make" role)

Examples of Roles



Note. Advanced Workforce Strategies has developed the Skills Segmentation Questionnaire (SSQ) for analysing and plotting roles according to this model. Refer to Appendix A for further details.

Characteristics of the Four Role Types



Each of these role types has a different psychological contract (or employer/employee relationship or EVP/"deal"), with different levels of investment in employees and different turnover cost implications.

Quadrant 3 roles in particular and some quadrant 2 roles may be suitable for outsourcing, subject to a range of other considerations. Outsourcing decisions should be based on both strategic and economic considerations. The shift to outsourcing some Doer quadrant 2 roles signifies attempts by many organisations to shed non-core activities, reduce complexity, and increase their focus and flexibility. This shedding can free up management and resources to grow the core business.

Avoiding the Traps

This model guides the development of an effective workforce strategy, including providing the basis for determining “make” versus “buy” roles, critical roles, and roles suitable for outsourcing. This understanding of the characteristics of various roles goes to the heart of configuring the workforce and addressing the people management challenges in the contemporary workplace. This Model provides a universal framework from which more informed people decisions can be made.

Note. The above turnover multiples are provided as a guide only and may need to be calculated for particular organisational circumstances. These turnover multiples take into account both the direct costs (e.g., recruitment costs), and the indirect costs (e.g., loss of short term performance or productivity) of turnover.

Valuable skills

Valuable skills are those skills that improve the efficiency and effectiveness of the organisation, exploit market opportunities, and/or neutralize potential threats.

Valuable skills can be created in various ways (e.g., increasing revenue/sales, enhancing productivity/reducing costs, enhancing quality, fostering innovation).

Unique skills

Unique skills are rare and specialized, or organisational specific. They are unlikely to be found in the open market, hard to replace, and hard for competitors to imitate or duplicate.

These skills need to be nurtured over time, given that they are not developed and acquired overnight. Firms are most likely to have to invest in the education, training, and development of these skills.

Turnover Considerations

As indicated previously, different turnover multiples apply for different segments as per the previous diagram.

Note. The cost of turnover is calculated based on the salary level of the job, multiplied by the turnover multiple for the job in question.

For example, the cost of turnover for a person in a Critical role on a salary package of \$200k is $\$200k \times 2.5 = \$500k$. Whereas the cost of turnover for a person in a Doer role on a salary of \$60k is $\$60k \times 0.5 = \$30k$.

So 15 Doers leaving at a total cost of \$450k would still be less costly than one Critical leaving at \$500k.

Hence the rationale behind the need for a more “fine grained” analysis of the cost of turnover and the identification of associated risks.

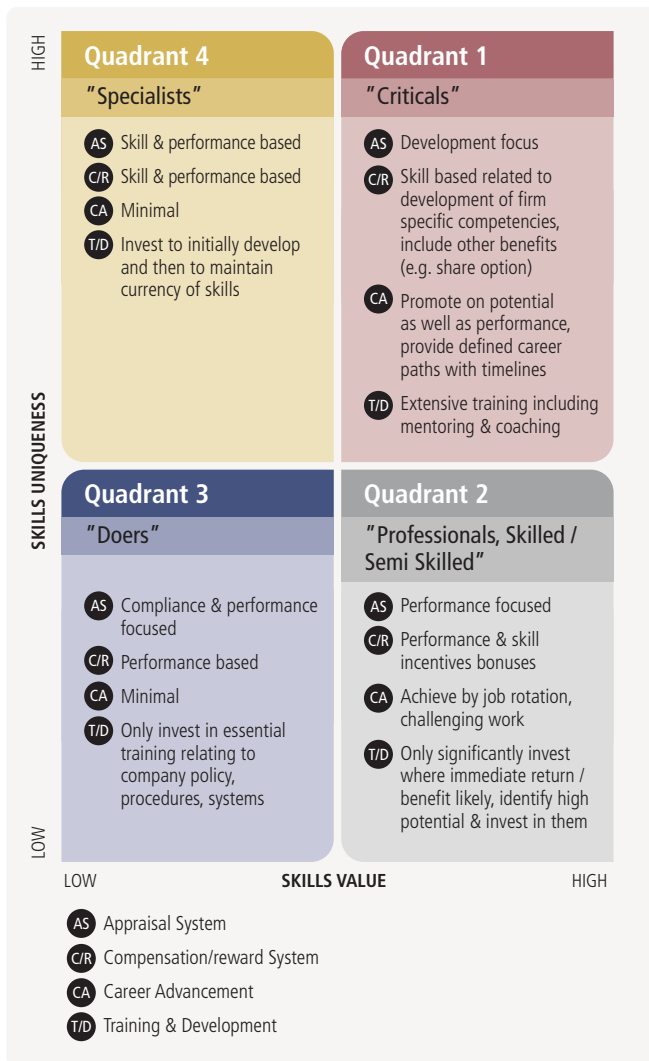
How HR Policies Vary by Segment

HR policies and practices will vary by segment with respect to the following:

- Appraisal systems;
- Career advancement;
- Compensation/reward systems; and
- Training and development.

Avoiding the Traps

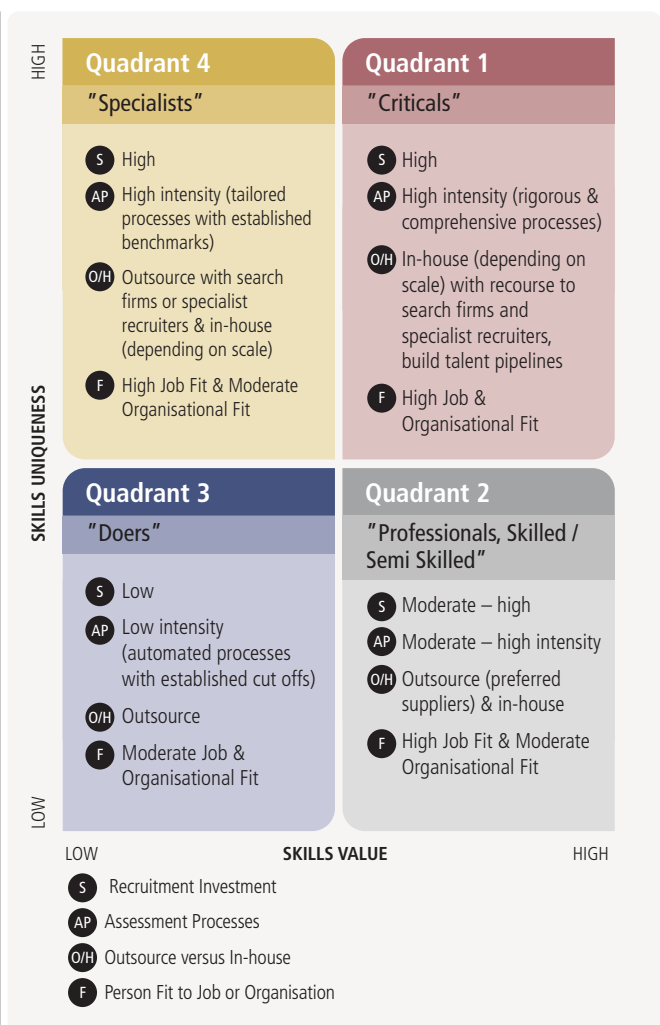
How HR Policies Vary by Segment



How Recruitment and Selection Policies Vary by Segment

Recruitment and selection policies and practices will also vary by segment with respect to the following:

- The overall investment in selection and recruitment (including the time to fill);
- The assessment processes;
- Recourse to outsourced versus in-house recruitment;
- Employment Value Propositions (EVPs), including the mix of tangibles and intangibles being offered for the role in question.



Not a Disruptive Concept

The application of the AWS Skills-Based Workforce Segmentation Model involves minimal disruption to the status quo for the purposes of analysing and reporting HR data, but nevertheless requires the adoption of a new mindset.

Once roles are analysed and classified based on the Skills Segmentation Questionnaire (SSQ), one additional field is required in the HR data set (i.e., an equivalent job level). Data similar to that reported in case study 6 can then be relatively easily generated. As demonstrated in this case study, the benefits include greater workforce insights and understandings, and more informed people making decisions.

Case Studies

A series of case studies follow that demonstrate the appropriate application of a workforce strategy in some cases, and in other cases, the lack of such a strategy (including the adverse consequences).

The application of the AWS Skills-Based Workforce Segmentation Model in many of these case studies is an intrinsic component in analysing the issues of concern, identifying the cause of the problem, and then designing relevant interventions.

Case Study Scenarios

These case studies include the following examples of:

- Workforce reconfiguration and labour cost reduction (case study 1);
- Role characteristics misrepresentation (both over and under misrepresentation) with high turnover and performance deficit implications (case studies 2, 3 and 4);
- Business strategy and workforce strategy/organisational structure disconnection (case study 5); and
- High growth, assessment of people risk and focused people investment (case study 6).

These case studies are based on real organisations from large global firms, to large national firms, to Small Medium Size enterprises, including Not-for-Profits, in both the private and public sectors. Whatever the size or type of organisation, the principles remain the same.

Whilst in retrospect the analysis and identification of some of the issues of concern may seem obvious, these issues were distilled from a raft of information. In a number of cases, interviews, surveys, reports and observations were used to gather evidence as part of the analysis.

1

Case Study:

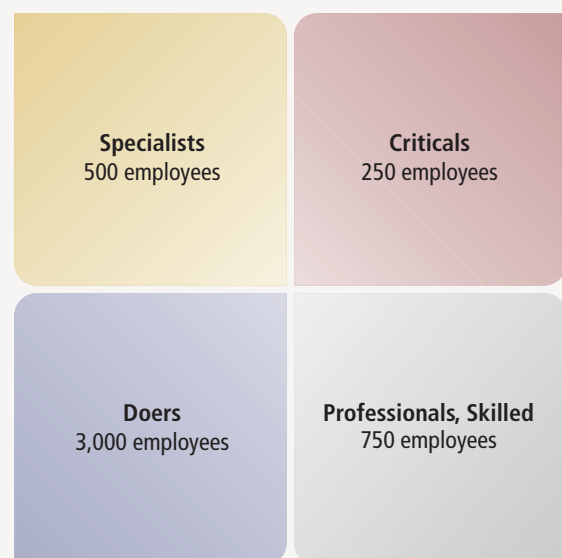
Labour Cost Reduction: A "Softly Softly" Approach!

Deadly Trap 3 Avoided:
Workforce Segmentation

The Scenario

- A major Telecommunications (Telco) firm in South East Asia with 4,500 employees.
- The ratio of labour costs to revenue was outside industry benchmarks (i.e., too high).
- The firm needed to reduce its labour costs but political sensitivities existing around terminating people meant that a "softly softly" approach was required!

Workforce Segmentation: Initial Analysis of Numbers of Employees



- The labour cost reduction focus was then directed to the 3,000 Doers.

Case Studies

Workforce Segmentation: Further Analysis of 3,000 Doers

Doers	
900	revenue generating employees
300	revenue protecting employees
750	revenue generating and revenue protecting support employees (i.e. the above 900 and 300 employees)
1,050	general support employees to other parts of the business

- After consideration of a range of factors, the further labour cost reduction focus was then directed to the 750 and 1,050 support Doers.
- An age profile revealed that approximately 600 of the above 1,800 support employees were + 50 years.

Solution Stage 1: (Target reduction in 600 support Doers + 50 years)

- An early voluntary retirement scheme was offered (at the discretion of the firm) with a pay out based on number of years of service for +50 year old employees.
- This offer was taken up by 50% of the target group (i.e., 300 people), with annual savings of \$6m AUD with an ROI of 1.5 years.
- Other initiatives implemented included:
 - An increased performance management emphasis to target and manage out non-performers;
 - A recruitment freeze on support roles;
 - Part-time options offered for support roles.

Solution Stage 2: Organisational Restructure

- Some organisational restructuring is envisaged given there will be less people.

Note. This case study is still in progress.

Case Studies

2

Case Study: Rhetoric Not Backed by Substance: High Turnover

Deadly Trap 3 Applicable:
Failure to Correctly Identify a "Doer" Role

Scenario

- The Australian Operations of a global recruitment company.
- High turnover of Administrators (33%) was being experienced.
- Survey findings confirmed insufficient job challenge (low job satisfaction), but nevertheless high affective (organisational) commitment.

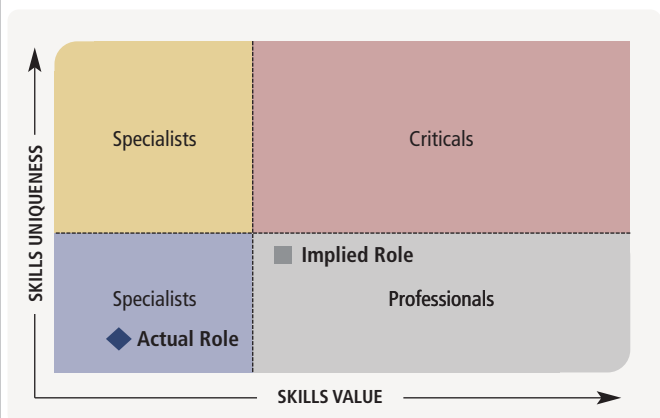
Note. In other words new Administrator recruits liked working for the organisation but did not like their job.

- The company was recruiting University Graduates in Administration roles and overselling the role as an enticement to join.
- Also the step up from Administrator to Recruitment Consultant was too big.

Segmentation and Role Characteristics Plot

The Administrator role was actually a "Doer" role but it was being promoted (i.e. implied) as a "Professional" role as illustrated in the role analysis and plot below.

Skills Workforce Segmentation Plots



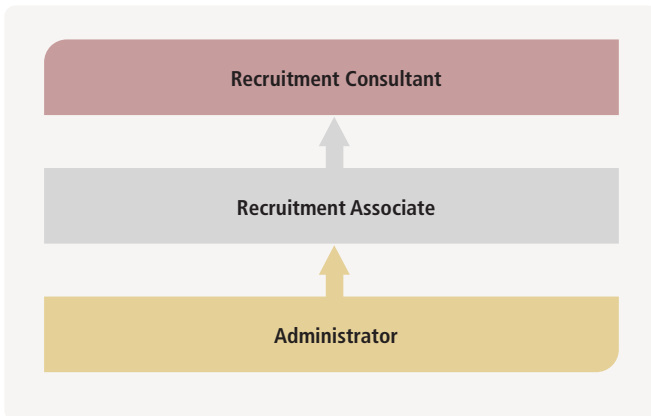
Solution (negligible cost)

- The company changed its recruitment policies and practices and recruited a mix of people, some of whom were prepared to stay as Administrators (i.e., non-graduates), as well as continuing to recruit some graduates.
- The company also made an organisational structural change (see next page) by creating the intermediate role of Associate so Administrators could articulate to this role in the first instance, and then ultimately to a Recruitment Consultant.
- Turnover of Administrators was halved to 17% with annual savings of +\$1m.

Note. Sometimes there may be a relatively "quick fix" turnover intervention, whilst at other times, a slower and more expensive fix may be required.

Case Studies

New Organisational Structure (Simplified)



Note. It is somewhat ironic that a recruitment company that offers advice to its clients regarding people management issues should not have its' own house in order!

Typically many recruitment firms experience high staff turnover (+ 25% per annum) because they employee recruitment consultants on a more "transactional" psychological contract basis.

They pay a lower fixed salary component and a high bonus or success fee that encourages shorter-term thinking, despite the fact that the recruitment firm is endeavouring to build longer-term client relationships.

This is a prime example of a "disconnect" between workforce and business strategies, with the consequences being high turnover!

Case Studies

3

Case Study: Mistaken (Role) Identity: High Cost of Turnover

Deadly Trap 3 Applicable:
Failure to Correctly Identify a Critical Role

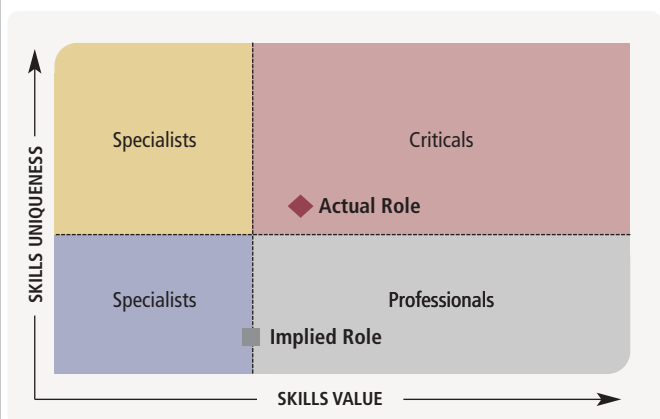
Scenario

- A global IT Company providing business intelligence software solutions to clients (“blue chips”).
- IT Professionals were working on site at clients’ offices installing software packages.
- There was a lack of training of these IT Professionals in these software packages.
- These IT Professionals were floundering and leaving (turnover 35%) because they felt frustrated and inadequate.
- Clients were also becoming dissatisfied as a result of the IT professionals’ performance difficulties.

Note. The above was also confirmed by a combination of interviews and survey findings.

Segmentation and Role Characteristics Plot

- The role was being treated as a Professional role but it was actually a Critical role, because of the necessity to acquire unique knowledge associated with the products, as illustrated in the role analysis and plot below.



Skills Workforce Segmentation Plots

- This is an example of a role being under misrepresented (i.e., the opposite of the previous case study), although the consequences of high turnover were the same in both cases.

Solution

- There was an increased focus on improving the training and development of IT Professionals, both at the initial employment stage and ongoing.
- Also a key manager (who some of these IT Professionals reported to) was transferred to a more strategic and technical role, to which he was better suited.
- Turnover was reduced to 20% in the first 12 months with annual savings of \$4.1m.

Case Studies

4

Case Study: Not Seeing the Wood from the Trees: Role Importance and Performance Issues

Deadly Traps 1, 3 & 9 Applicable:
Misalignment between Business and Workforce Strategies

Scenario

- A global coal mining company was suffering from a shortage of Mine Planners and experiencing production inefficiencies at a number of their mines.

Note. These were large mining operations (e.g. 1,000 people working at various mine sites, operating 24/7).

There are a number of activities involved in open cut coal mining including: overburden removal, drilling and blasting, loading and hauling, blending, processing, stockpiling, and loading out.

Within a mine site there are a number of pits over large area (e.g. 70km long). Variations in coal quality exist between these pits with various types of coal blended and produced for client requirements.

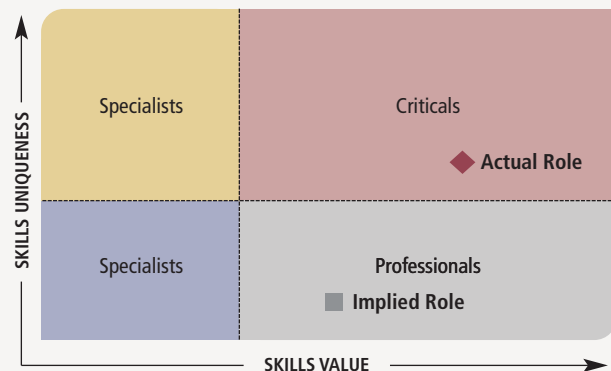
- Integration of the various mining activities is critical to mine operating efficiency (i.e., a Critical capability).
- The role that impacts most on integration is that of Mine Planner.
- The company employed junior (inexperienced) engineers in Mine Planning roles as part of their career development.

- The company also employed contract Mine Planners who were unfamiliar with the mine operations.
- Consequently mistakes were being frequently made resulting in production inefficiencies, and also short-term decisions made that were not in the best interests of the longer-term economic development of the mine.
- The company hadn't recognised the impact and importance of the Mine Planning role.

Segmentation and Role Characteristics Plot

- The role was being treated as a Professional role but it was actually a Critical role because of the necessity to acquire unique knowledge associated with the operations and characteristics of the mines, as illustrated in the role analysis and plot below.

Skills Workforce Segmentation Plots



Note. This Mine Planning role importance issue was identified as a peripheral issue to a larger consulting assignment. The obvious solution was to direct greater effort towards the management, training and development of Mine Planners.

Case Studies

5

Case Study: Business Strategy and Organisational Structure Disconnect

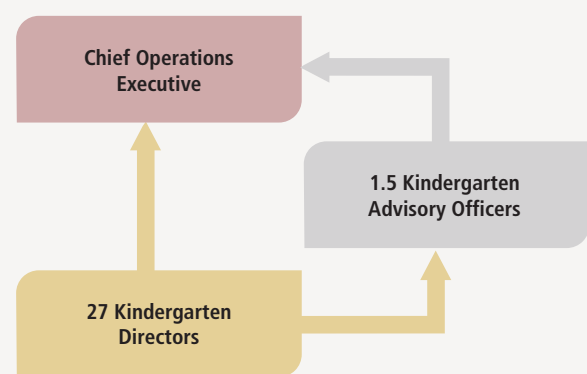
Deadly Trap 3 Applicable:
Failure to Correctly Identify a Critical Role

Scenario

- A Not-for-Profit (NFP) Kindergarten and Childcare Provider.
- The organisation operated 27 kindergartens and 7 child care centres with 225 staff.
- The business strategy included the following: To provide high quality education to 4 year old children.
- The Director at each kindergarten (i.e., the person in charge of the kindergarten) is a primary determinant of quality education.
- Thus there is a direct “line of sight” between the role of Kindergarten Director and delivering on the business strategy.
- These 27 Kindergarten Directors reported jointly to 1.5 Kindergarten Advisory Officers and a Chief Operations Executive, who had other operational responsibilities and direct reports.
- The Kindergarten Advisory Officers had limited authority.
- Hence there was minimal support (e.g. coaching, development, performance management) provided to the Kindergarten Directors because of the large span of control of the Kindergarten Advisory Officers and the lack of leadership responsibility associated with their role.
- The organisational structure, role responsibilities and limited resources available to the Kindergarten Directors was inconsistent with the business strategy.

Note. Interviews and survey findings confirmed that the Kindergarten Directors felt neglected and isolated.

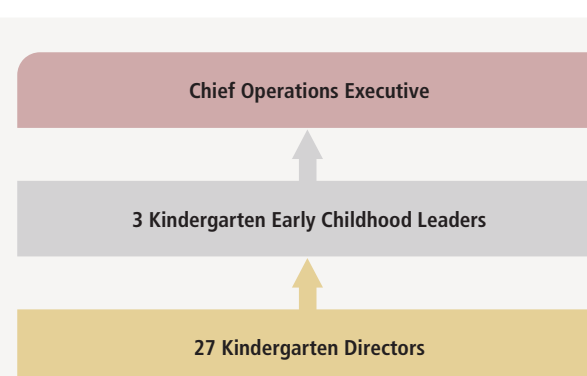
A Simplified Organisational Structure



Solution

- The Kindergarten Advisory Officers were retitled to Kindergarten Early Years Leaders, with this role upgraded to include leadership and support responsibilities.
- The number of people between the Chief Operations Executive and the Kindergarten Directors was increased from 1.5 Advisory Officers to 3 Kindergarten Early Years Leaders (i.e., span of control for these Leaders reduced to a more manageable size).

A Revised Organisational Structure



Case Studies

6

Case Study: Putting it All Together – Identifying Workforce Risk and People Investment Priorities

Deadly Traps 3, 4 & 7 Avoided:
Workforce Segmentation and Turnover Risk

Scenario

- A fast growing local council (+8% per annum).
- The council needed to take a step back and have a fresh look at managing their workforce, including their key risks and how best to allocate investments in people, given their limited resources.

Note. In this case study, a snap shot of some of the key analysis and findings has been provided, including interventions to address perceived risks.

The AWS Skills-Based Workforce Segmentation Model also forms a basis for analysing and reporting human capital data as illustrated below.

Workforce Segmentation and Demographics

	Criticals	Profess.	Doers
No. of staff	48	175	149
Average age	47	42	39
Gender composition	32 M : 16 F	45 M : 130 F	65 M : 84 F
No. in part time	2	65	76
Ave. time in job (yrs)	4.5	3.5	2.8

Note. There were no Specialist roles at this organisation.

- The risk of Critical baby boomers retiring (i.e., loss of key talent) was minimal.
- Criticals were reasonably experienced in their roles (i.e., length of time in the job of 4.5 years is a de facto indication of experience).
- There was a reasonably high % of female Professionals part-time, thus providing the organisation with maximum flexibility and minimum risk.
- This employment arrangement also suited these females, some of who had family responsibilities (i.e., a “win-win” scenario for both employer and employees).

Note. There is no ideal composition/ configuration of employees in the various segments as this will depend upon the nature of the business.

Workforce Segmentation and Turnover Analysis

	Criticals	Profess.	Doers
No. of staff	48	175	149
Annual voluntary T/O	12% (6 left)	15% (26 left)	17% (25 left)
Ave. salary (AUD)	\$150k	\$95k	\$55k
T/O multiple	2	0.5	0.3
Cost of T/O p.a.	\$1.8m	\$1.24m	\$0.42m

- The biggest risk/cost was the turnover of Criticals (\$1.8m for 6 people) based on the previous year’s turnover analysis.
- This cost was more than the combined cost of turnover for the other two segments (\$1.66m for 51 people).
- The risk strategy was to focus on Criticals in reducing turnover \$ costs, including investigating the extent to which “Push”, “Pull”, or “Personal” reasons may be the cause.
- These Criticals were particularly important to creating a stable management platform for a rapidly expanding organisation.

Case Studies

Note. Investment \$ in retention is the highest ROI of any HR initiative!

The above analysis demonstrates the need for a more “fine grained” approach to reporting turnover to tease out the true risks and associated costs.

Workforce Segmentation, Succession Planning and Forecast of Recruitment Needs

	Criticals	Profess.	Doers
No. of staff	48	175	149
No. of successors now	11		
No. of successors in 1–3 yrs	25		
No. of no successors	12		
Est. recruitment needs next year	7	26m	32

- There were 12 single point role sensitivity positions (i.e., no successors) for Criticals. The council needed to determine whether to recruit prospects now, or rely on recruiting externally if and when these positions become vacant.
- Forecast recruitment needs for the ensuing 12 months by segment was based on the number of current positions, any changes in these number of positions, voluntary retirements, and estimated turnover.

Other Key Findings

- **Workforce configuration:** Executives and HR needed to develop a “Critical role mindset” by investing disproportionately in Criticals (e.g., career development programs for individuals to be formulated).
- **Retention risk:** Turnover of Criticals (previously 12%) was a key risk exacerbated by no current measure of engagement or retention risk. Hence the need to survey Criticals (with an engagement and retention risk survey) to assess this risk.
- **Staff numbers:** There was capacity to absorb some growth in demand for services with existing systems, processes and infrastructure, without necessarily increasing staff numbers.

Note. The workforce strategic planning process included a series of Business Unit workshops for gathering information, assessing future skills requirements, gaps and roles.

- **Employment Value Propositions (EVPs):** Not currently defined so EVPs needed to be developed by workforce segment for roles as they become vacant, as part of the recruitment process.
- **Reporting HR data:** Basic reporting of HR data existed in silos with limited ability to interrogate and analyse this data to determine relationships. An integrated HR data base of payroll, and other relevant lag and lead data needed to be developed to improve HR reporting and analytics.

Conclusions

Almost the Final Word

Traditional ways of thinking and some associated models have limitations in addressing the workforce strategy and people management complexities and challenges of the contemporary workplace.

Whilst it is not necessarily advocated to completely discard some of them, nevertheless they should now be augmented with some fresh thinking and concepts.

To that end, the effective application of the AWS Skills-Based Workforce Segmentation Model is central to this fresh thinking and concepts.

As has been demonstrated through a number of case studies, the application of this Model in understanding the characteristics of various roles, goes to the heart of configuring the workforce and addressing the people management challenges in the contemporary workplace. This Model provides a universal framework from which more informed people investment decisions can be made.

Approaching the Dawn of a New Era?

Configuring and then managing a workforce that is accessible, skilled, motivated and efficiently deployed will increasingly be a key differentiator of business performance and financial success.

It is speculated that we are at the dawn of a new era in people management. This era will include:

- Adopting a HRM architecture and human capital models that address the complexities and challenges of contemporary workforce management;
- Moving beyond a suite of HR policies, succession planning, talent management, and workforce planning focused on gap analysis and supply and demand, to a whole of workforce strategy that is integrated with the business strategy;
- Adopting a more “fine grained” approach in understanding the characteristics of roles (both their costs and value) and their relative importance;
- Identifying people risk and developing sound business cases for investments in people.

Best practice is now about adopting a sound framework and models to underpin human capital/workforce management, rather than simply attempting to replicate what another organisation may be doing.

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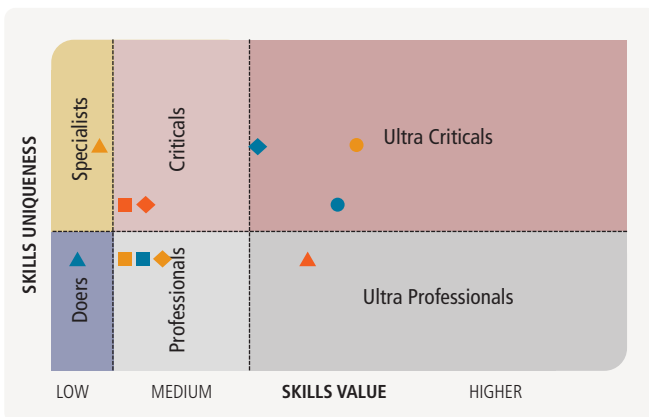
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Appendices

Appendix A: The Skills Segmentation Questionnaire (SSQ) and Plotting of Roles

Advanced Workforce Strategies has developed a questionnaire – the Skills Segmentation Questionnaire (SSQ) – a 49 item questionnaire that enables roles to be analysed, classified and then plotted according to the AWS Skills-Based Workforce Segmentation Model (see example role plots below).

Skills Workforce Segmentation Plots



- | | | | |
|--------------|-------------------|-----------------------------|-------------------|
| ▲ Driver | ◆ HR Manager | ■ Supervisor (Construction) | ● Factory Manager |
| ▲ Technician | ◆ Teacher | ■ Nurse | ● CFO |
| ▲ Journalist | ◆ Biz Dev Manager | ■ Sales Person | |

The Benefits of the SSQ

With this generic tool, various jobs or roles within an organisation can be classified according to four possible employment roles or skills quadrants:

- Criticals (includes the two sub-categories of Criticals and Ultra-Criticals);
- Professionals, Skilled or Semi-Skilled (includes the two sub-categories of Professionals and Ultra-Professionals);
- Doers; and
- Specialists.

Thereafter, appropriate HR strategies can be applied to the various roles.

The Structure of the SSQ

The SSQ comprises four components:

1. Assessing the skills value (includes eight skills value elements) relative to the role;
2. The impact of these skills on the provision of the products and services to external customers (i.e., localised or widespread);
3. The optional weighting of each of the eight skills elements, according to their importance to the business strategy; and
4. Assessing skills uniqueness (includes both specific and generalized unique skills) relative to the role, as reflected in time and/or intensity of training required to acquire these skills.

Thus the SSQ has more of an external orientation relating to the provision of products and services to external customers. After all this is the very basis for the existence of the organisation.

Note. Access to the SSQ and associated plotting of roles is only available in the Advanced Version of the Develop a Workforce Strategic Plan Pack.

The Basic Version of this Pack can be purchased on line from the Advanced Workforce Strategy Web Site.

Appendices

Appendix B: The Workforce Strategy Audit Survey (WSAS)

Advanced Workforce Strategies has developed a “cutting edge” workforce strategy audit survey comprising 11 sections and 64 items.

This audit survey represents arguably the most comprehensive and advanced approach to assessing the state of development of an organisation’s workforce strategy and people management practices.

Benchmark survey data has been collected from a significant number of organisations across Australia, both in the private and public sectors.

Questions that the Workforce Strategy Audit Report is able to answer include the following:

- How do the workforce management practices in your organisation rate against best practice?
- Do you really have a workforce strategy?
- How aligned is this workforce strategy with your business strategy?
- What are the areas that you need to focus on in further developing your workforce strategy and people management practices?

This comprehensive Report includes the following nine sections:

1. Alignment between business and workforce strategies
2. The documentation, scope, involvement and process in developing your workforce strategy
3. Workforce segmentation and role differentiation
4. Collection, integration, analysis and interpretation of HR data
5. Acquisition of human capital (i.e., recruitment and selection)
6. Utilisation/engagement and retention of human capital
7. Development of human capital (i.e., learning and development)
8. Deployment of human capital
9. Implementation and outcomes of your workforce strategic planning

Targeted recommendations are then provided to address areas of perceived deficits.

**For further information contact
Advanced Workforce Strategies at:**

info@advancedworkforcestrategies.com

About CRF

How are we different?

We believe in a systematic approach to Human Resource Management which is based on:

- a clear line of sight to the business imperatives of cost, sales, quality, innovation, customers and time to market
- a tangible theoretical underpin combined with practical application
- analysis before action
- clearly stated objectives
- evaluated outcomes
- an effective communication and involvement process.

Our research reports are based on qualitative comparisons by acknowledged global experts, and are substantial enough to go beyond the superficial, while taking a pragmatic slant on topics. Our meetings are discursive, informal and thought provoking.

CRF – What we do

Our annual programme of high-level, participative events, provides the highest standards of intellectual rigour and excellence, together with a focus on practical application of ideas in the organisation context. We actively facilitate both face-to-face and online networking to enable collaboration and the sharing of new ideas and good practice. Our research is an invaluable source of latest thinking and practice in key areas of organisation and leadership development, and learning.

How will membership make a difference to your organisation?

- Gain new insights and fresh thinking.
- Improve performance through benchmarking against leading organisations.
- Evaluate and continuously improve your existing practices.
- Quickly identify practical, actionable solutions.
- Differentiate between approaches that work and those that are simply passing fads.

Annual membership offers your organisation:

- attendance at each event in the annual programme
- facilitated networking at each event ensuring you are connected to peers, experts and practitioners
- access across your organisation through the CRF website to the full catalogue of research reports, models, video interviews, benchmark tools and diagnostic instruments
- copies of all new research reports with the opportunity to participate in, and contribute to, the research
- advisory questions answered by our expert team of practitioners, consultants and business associates who are on hand to respond to your queries and HR challenges
- regular webinar programme, enabling global teams access to our content in an online environment built for exchange and discussion
- access to the Ashridge Business School Virtual Learning Resource Centre offering extensive sources of guidance and research on management and leadership
- opportunity to connect with other members through our online networking tool allowing relationships to be established, surveys completed and queries answered
- regular meetings with the CRF team in order to gain insights on key trends and for CRF to facilitate introductions to other members
- complimentary copies of Harvard Business Review.

Contact Details

For more information about CRF please contact:

Richard Hargreaves
Commercial Director

T: +44 (0) 207 470 7287
E: richard@crforum.co.uk

www.crforum.co.uk

About Advanced Workforce Strategies

Advanced Workforce Strategies (formerly known as the WRDI Institute), is a boutique Australian consultancy firm specialising in the development and provision of a range of “cutting edge” human capital consulting services, products, tools, and resources.

We believe in the adage that if you can’t measure it, then you can’t manage it! Our work is holistic, rigorous and innovative, combining latest empirical research and “best practice” frameworks, models and architecture underpinned with sound methodologies, applied in the form of practical solutions that work.

We are committed to enhancing people management and performance, and raising the importance of the people factor in organisations – arguably the biggest single driver of business success. To that end, we assist organisations, their executives and HR professionals to:

- Adopt better people measures and reporting;
- Align their business strategies with their workforce strategies;
- Address the people challenges and complexities of the 21st century workplace;
- Manage people risk, maximise the ROI in people and make better people decisions; and
- Improve performance and achieve enhanced business outcomes.

Consulting Approach

Our consulting approach is highly collaborative, resource rich, high yield and designed to maximise the transfer of learning and knowledge. We aim to build capability and self-sufficiency in our clients, whilst minimising our consultancy input.

Our client list includes global, national and SME firms including NFPs, both in the private and public sectors.

Workshops

We run public and in-house workshops on workforce strategic planning, workforce segmentation and HR analytics.

Online Resources

Resources available from our web site include the Develop a Workforce Strategic Plan Pack. This comprehensive and resource rich Pack includes a Workbook and Guide, Templates, a Sample Workforce Strategic Plan, Excel Tools, etc.

Contact Details

Postal:
Locked Bag 4012, South Melbourne
VIC 3205, Australia

Tel: + 61 0411484923
Fax: + 61 3 9505 9044

Email: info@advancedworkforcestrategies.com
Web: www.advancedworkforcestrategies.com

About the Author

Colin Beames

BA (Hons) Qld, BEng (Hons), MBA, MAPS



Managing Director,
Advanced Workforce
Strategies

Colin Beames is an author and thought leader in workplace trends and human capital, with a deep and expansive knowledge of these subjects. In his first career life, Colin worked as an engineer in senior management and consulting roles in the mining and resources sectors. Then in the early 90's, he made a mid-life career change to organisational psychology.

The topic of Colin's psychology honours thesis was mid-life career change. His Master of Business Administration included a dissertation on psychological contracts in the workplace and the development of the Workplace Relationship Development Indicator (WRDI®) diagnostic employee engagement and retention tool.

Colin's organisational consultancy experience includes assignments in Australia and overseas, both in the private and public sectors, across a wide variety of industries. More specifically, these assignments have included: assessment centres, career development, change management, coaching, development and commercialisation of diagnostic surveys including administering and reporting on the same, employee engagement and retention, high performance teams in alliances and large multi-disciplinary projects, HR, human capital measurement, M/A, OH&S, organisational reviews and development, psychometric testing, selection and recruitment, start-ups, strategic workforce planning and business improvement, talent management, and TNAs.

Apart from developing and commercialising the Workplace Relationship Development Indicator (WRDI®) diagnostic survey tool, Colin has also developed and commercialised a number of other diagnostic survey tools (all based on a model of the psychological contract applied to different contexts), and other HR tools and IP. The latter includes the development of a Workforce Strategic Planning Pack.

He has written and published two books:

- "Aligning Workforce and Business Strategies: Mobilising the 21st Century Workforce".
- "Transforming Organisational Human Capital: Emerging Stronger from the GFC and Beyond" (now in its 3rd edition). In this book, Colin examines emerging trends of management and organisational studies over the past two decades and how these can be harnessed to guide management practice and improve organisational performance.

These books are available for purchase from the Advanced Workforce Strategies web site at: www.advancedworkforcestrategies.com

