

UC Talent Management Consortium

Organizational Readiness Step 1: Vision of the Future

Planning Options Guide and Resources

Vision is the core of leadership and is at the heart of strategy. The leader's job is to create the vision for the organization in a way that will engage both the imagination and the energies of its people.

Step 1: Organizational Readiness Vision of the Future should begin after the organization's future strategic plan is complete. After reviewing that organization's strategic plan and values, this step clarifies the underlying talent strategy to build the needed future workforce that will move the organization in the direction to meet its strategic plan vision and goals.

By shifting from an approach that reacts to change to one that anticipates and navigates through change, organizations can improve enterprise talent outcomes by as much as 17% (CEB 2014).

Planning Options Recommendation

There are many ways that leaders may want to approach the vision planning step. This document provides a list of options, resources, tools and templates that may help you develop an organizational readiness vision.

Each of the following tools may be customized to use at the enterprise-wide level or within a specific department or unit.

1. Identify a core team of functional experts with unique leadership experience, perspective, and creative ideas to help plan, implement activities, and develop the vision.

Team should include:

- Leaders representing the enterprise organization to ensure congruence with the organization's future strategic plan.
- Human Resources staff who can provide historical and current data.
- Other key leaders and staff

2. Implement a Strategic Summit or Planning Meeting

This is an interactive workforce planning summit/meeting begins with providing participants with an overview of the business model, vision, values, strategic imperative, environmental scan. The rest of the summit/meeting solicits their input in what they envision the future workforce needs to look be and how the organization needs can accomplish this.

You may want to solicit input using a pre-summit or meeting survey to have a starting data and make the best of use of the participant's time at the event.

Tools

- Step1 Vision Organizational Readiness Strategic Summit SAMPLE INVITATION.TMC 9-2015

- Step1 Vision Organizational Readiness Strategic Summit PPT TEMPLATE.TMC 9-2015
- Step1 Vision Organizational Readiness Strategic Summit WORKBOOK TEMPLATE.TMC 9-2015
- CEB_Outcome_Oriented_Workforce_Planning_JUSTIFICATION
- CEB State of Organizational Talent PRESENTATION GUIDE TEMPLATE
- CEB Integrated Talent Management BUSINESS CASE TEMPLATE
- CEB Integrated Talent Management Trigger-based_Integration_Strategy_Review_Tool
- CEB_Strategic_Workforce_Planning_Playbook_PLAYBOOK

3. Gather Data through a Meeting or Using a Survey

Leaders may want to gather data formally or informally depending on the organizational culture.

Anonymous surveys to key stakeholders can be helpful to identify the potential sources and nature of execution breakdown while executing against a particular business unit priority, in order to understand how ready the organization is for the implementation of that priority. Be sure to request basic demographics, such as function, region and organizational level, to permit segment-level analysis and fixes.

The following tools provide different perspectives and questions to ask that help develop the vision.

Tools

- Step1 Vision Organizational Readiness - Questions to Diagnose Strategic Priorities SAMPLE
- Step1 Vision Organizational Readiness Scorecard TEMPLATE
- CEB_Outcome_Oriented_Workforce_Planning_JUSTIFICATION
- CEB Integrated Talent Management BUSINESS CASE TEMPLATE
- CEB Integrated Talent Management Trigger-based_Integration_Strategy_Review_Tool
- CEB_Strategic_Workforce_Planning_Playbook_PLAYBOOK
- Book by Lisa Bodell: Kill the Company: End the Status Quo, Start and Innovation Revolution – Chapter 8 (Tools that can be translated to help think creatively and innovatively about vision planning.)

Additional Resources

Following are a list of additional books or articles that provide additional information or resources to understand the challenges, strategic imperative, and best practices in creating an organizational readiness vision.

BOOKS

1. Kill the Company: End the Status Quo, Start an Innovation Revolution – Chapter 8

Tools that can be translated to help think about vision planning differently. Examine the obstacles to innovating thinking that is traditionally part of traditional corporate culture. Explore new ways

that we can uphold our high standards for productivity and efficiency without sacrificing our ability to foster creativity and innovation.

Bodell, L. (2012). Chapter 8: Your Innovation Toolkit. In *Kill the company end the status quo, start an innovation revolution*. Brookline, Mass.: Bibliomotion.

ARTICLES

1. Bersin Research: The Modern Approach to Workforce Planning: Best Practices in Today's Economy

Organizations need to align workforce planning with overall business planning and workforce segmentation. Organizations that invested in and developed a systematic workforce planning process will be able to achieve results by closing talent gaps and helping business leaders predict future talent demands.

Although 92 percent of companies have some level of workforce planning, only 21 percent take a strategic, long-term approach to addressing the talent demand, talent supply and the actions necessary to close the gap between the two. A robust workforce planning process will ultimately cut recruitment costs in the long run and provide accurate data to business leaders in the short term. By not revisiting the topic on a regular basis, organizations can become complacent – and are ill-prepared for workforce transitions, as well as unexpected external and internal changes that may occur.

"The Modern Approach to Workforce Planning: Best Practices in Today's Economy." Bersin and Associates Research Report 1 (2009). SAP. Web. 1 July 2015.

http://fm.sap.com/data/upload/files/the_modern_approach_to_workforce_planning.pdf.

2. Trends at Work: An Overview of Tomorrow's Employment Ecosystem

Where will work be in the future? And where will workers be? The economic, social, and technological landscape is shifting rapidly. Here are some of the major trends altering the future workplace.

Mack, T. (2014). Trends at Work: An Overview of Tomorrow's Employment Ecosystem. Retrieved February 1, 2014, from <http://www.wfs.org/futurist/2014-issues-futurist/november-december-2014-vol-48-no-6/trends-work-overview-tomorrow-s-emp>