



# WORKFORCE PLANNING

AN UNDERGRADUATE EDITION

OBI BERKO O. DAMOAH

# Workforce Planning:

AN UNDERGRADUATE EDITION

OBI BERKO O. DAMOAH, PhD



## **Title: Workforce Planning: An Undergraduate Edition**

Workforce Planning is a book which serves as a foundation for practising human resource management and, therefore, constitutes an essential requirement for every human resource management student, especially at the undergraduate level. As a foundational text for human resource practice, the book is built around one of the recommended conceptual frameworks for designing a workforce and/or human resource management plan.

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To  
*My Dear Wife and Children*

## **Preface and Acknowledgments**

The reader is brought to *Workforce Planning*: an undergraduate edition (1<sup>st</sup> Edition). The book introduces undergraduate human resource management students to the *Workforce Planning* process. The book is structured in such a way that there are activities and multiple-choice questions. The reason is that the practice is brought to bear on the principles informing the book and so it is a useful material where students, faculty and/or practitioners will all find the material useful and exciting learning experience.

What are the key elements of a good human resource text which aligns theory and practice? With the requirements of practice and theory in mind, the author attempts to offer (as) comprehensive concepts and principles of workforce planning as possible at least for entry-level undergraduate students to know the core concepts in workforce planning before entering the job market. Therefore, within the various topics, practice questions are provided to reinforce the understanding of (readers of) the concepts. Although the intent of the book is not to offer one best theory and practising text, it responds to practitioners' expectations regarding the requisite knowledge, skills and competence of entry-level graduates in the workforce planning process. For the purpose of corporate training, coaching and designing human resource manuals, the text is critical for current and aspiring human resource managers, including everyone involved in consultancy in the field. By completing the book, the reader will advance his or her knowledge on the topics both theoretically and practically.

Finally, in completing this book, I have received support from colleagues directly or indirectly and therefore, I take this opportunity to offer thanks to every Tom, Dick and Harry. My profound appreciation goes to my colleague and mentor, Prof. Richard Boateng, University of Ghana Business School, Legon, Accra, Ghana. My sincere appreciation goes to my colleagues at the Department of Organisation and Human Resource Management, University of Ghana Business School, especially my former Head of Department, Professor Kwasi Dartey-Baah.

**Professor Obi Berko O. Damoah**

Department of Organisation and Human Resource Management  
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## Foreword

The learning needs of undergraduate students are considered unique globally. This is because many undergraduate students lack industry experience which creates a vacuum in terms of their practical knowledge. As such, it is important that entry-level graduates are exposed to practical concepts and principles relevant to their fields of study. Consequently, *Workforce Planning: An Undergraduate Edition*, offers the opportunity for undergraduate students and entry-level graduates to fill the practical knowledge deficit in the field of human resource management. The systematic approach and logical flow, as well as the use of plain English devoid of technical terminologies, makes the knowledge presented in this book easy to understand.

Each chapter starts with clearly defined objectives, followed by a step-by-step presentation of the chapter content with both headings and subheadings within the book well explained. With undergraduate students and entry-level graduates as the core target audience, each chapter is accompanied by practical activities which link general human resource management concepts to practice. This is aimed at preparing them for the job market. Additionally, as a learning strategy, each chapter ends with multiple choice questions to test the understanding of users.

In conclusion, it is worth emphasising that this is one of the few textbooks that integrate the strategic aspect of human resource management with human resource management topics taught at the undergraduate level. I highly recommend this textbook to students of human resource management: for undergraduate students and entry-level graduates as a tool to equip them with practical knowledge, and for practising human resource managers and consultants, as a reference manual.

**Professor Kwasi Dartey-Baah**

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# Chapter 1: Overview of Workforce Planning

## **Objectives**

At the end of this chapter, readers will be able to:

1. Define workforce plan
2. Describe the function of workforce plan
3. Explain the benefits of workforce plan
4. Outline the challenges of workforce plan
5. Explain the relationship between workforce plan and corporate strategy; and
6. Practice the multiple-choice questions based on the concepts of the chapter

# Introduction

---

This chapter presents an overview of workforce planning. As a result of the increasingly competitive operating environment in the present-day, business planning has become one of the core functions across organisations. Workforce planning addresses the requirement of human resource management in the face of rapid changes in the local and global operating arena.

The purpose of this chapter is to show how a workforce plan acts as a strategic partner in achieving the firm's strategic objectives from a human resource management viewpoint. In light of this, the introductory chapter offers an overview of workforce planning. In particular, the chapter discusses the meaning, function, characteristics, benefits, and demerits of a workforce plan.

## Definition of Workforce Plan

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Sometimes called the human resource plan, workforce planning is a strategic document that takes an organisation into the foreseeable from a human resource perspective. It is a document which serves as a strategic partner to the overall direction of an organisation from a workforce planning viewpoint.

## Functions of Workforce Planning

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A strategic human resource goal: workforce plan offers a firm a strategic human resource goal. A strategic human resource goal implies that the human resource department of the firm must craft a goal to reflect one of the strategic goals of an organisation. What this means is that there must be a workforce goal whose achievement will span a minimum of three (3) years and above. An example of a strategic goal from a human resource perspective can be where a firm will intend to have a competent and motivated workforce within its operating industry.

## *Creating a competitive human resource advantage*

When a workforce plan offers a strategic goal to a focal firm, the implicit assumption is that the implementation of such a strategic goal yields a competitive advantage. Samples of this unique competitive advantage will include but are not limited to a creative workforce, exclusive management capability, exceptional employees' commitment and strong attachment to the organisation.

## *Aligning human resource management to strategic plans*

A workforce plan is an interface between a firm's strategic plan and the human resource activity of the firm. What this means is that, following the company's strategic plan, the human resource outfit of the firm generates activities that fulfil the long-term goal of the firm.

A strategic goal refers to the overall long-term goal of the firm. When an organisation moves from operational human resource activities to a strategic human resource plan, it fuses its planned activities into that of the overall goal of the firm thereby playing the role of HR strategic partner

## *Acts as a work plan for the human resource outfit*

Having a workforce plan serves as the foundation for all the human resource activities of a firm. The human resource department plays an important role to the development of the entire organisation. This function is played effectively and efficiently when a firm has a comprehensive workforce plan. This consequently helps the organisation to appraise the effectiveness and efficiency of the human function.

### **Activity 1.1**

- a. Distinguish between strategic human resource function and operational function.
- b. State three (3) human resource management strategic and operational goals for any firm you have worked with or that you are familiar with.

# The Benefits of a Workforce Plan

---

## *Looking beyond the human resource functions*

Firstly, it challenges the human resource department to look beyond its traditional role of being a support function. This means that human resource is not only a support function but moves beyond its operational activities such as conducting induction, issuing appointment letters and hosting interviews to playing a corporate role.

## *Making the human resource (HR) department a strategic partner*

Secondly, a workforce plan makes any human resource department to become a strategic partner to an organisation's long-term development. This means that before the firm undertakes an activity, the human resource department has to throw in its massive support to help achieve the strategic goal. For example, the University of Ghana, since 2014 has had a vision of becoming a world-class University. By operationalising this vision, the human resource department of the University of Ghana is tasked to create activities that support the strategic goal thereby making the HR department a strategic partner to the University's strategic goal.

## *Creating a competitive advantage*

Last but not least is that it creates a competitive advantage for the firm. When a firm engages in a workforce plan it stands the benefit of having a favourable position over its competitors in the same industry. The reason for this is that, because the workforce plan is strategically crafted, its implementation offers a benefit of competitive advantage.

## Limitations of Workforce Planning

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### *Lack of internal skills to create or craft a workforce resource plan*

Previously, the tendency for institutions to focus their attention on the operational activities of human resource management deprived human resource staff of developing their skills in strategic issues. Consequently, most HR units lacked the skills to design workforce plans and at times that task needed to be outsourced to external consultants.

### *Rapid environmental changes*

Constant external changes affect the design of most workforce plans. External changes are environmental changes (e.g. changes in government policies on employment and labour).

### **Cost**

Cost to the firm when the plan is outsourced to external consultants. Cost arises when employees within the firm are not able to draw up the workforce plan internally, putting much burden on firms.

# Workforce Plan and Strategic Plan

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## **Defining Strategy**

Strategy can be defined as a plan of action that is designed to achieve a long-term goal of a firm.

## **Levels of strategy making in an organization**

The levels of strategy refer to the various dimensions of strategy in an organization which are associated with human resource management. However, the main levels are described as follows;

### **Corporate level strategy**

This refers to the overall strategic direction of an organization. For example, it consists of the specific businesses that top management requires an organization to invest in. Typical examples are mergers and acquisitions.

### **Business (level) strategy**

This strategy concerns specific businesses and markets that the firm must enter into and the particular strategy to be used in these markets.

### **Functional (level) strategy**

This refers to various plans or strategies that are being designed at all the levels of the business functions (e.g. the general support functions).

### **Operational (level) strategy**

This serves as a support to the functional and business strategies as outlined above.

## Summary

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The chapter sets the background information of the book. It introduces the course by defining workforce plan, describing its functions, explaining its benefits, including potential challenges and the relationship between workforce plan and corporate strategy. The chapter ends with multiple choice questions based on the concepts and principles presented.

## Chapter Review

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### Review question 1

The concept of workforce planning is associated with.....

- A. Strategic planning
- B. Objective planning
- C. Human resource planning
- D. Organisational planning

### Review question 2

Hax (1990) identifies .....critical dimensions of strategy.

- A. 2
- B. 3
- C. 6
- D. 4

### Review question 3

How many levels of strategy making do we have in an organisation?.....

- A. 6
- B. 4
- C. 2
- D. 3

### Review question 4

Which of these must directly support the organisation's strategy and objectives?

- A. Human resource policy and planning
- B. Corporate level planning
- C. Human resource management
- D. Strategic level analysis

### **Review question 5**

Among the level of strategy making in an organisation, which one becomes the overall or management game plan for the firm?.....

- A. Business level
- B. Functional level
- C. Corporate level
- D. Operation level.

### **Review question 6**

Which of these is not a function of workforce planning?.....

- A. It challenges the HR department to look beyond its traditional functions.
- B. It aligns with the company's overall strategic plan
- C. It explains how a firm can create a competitive advantage including how it will sustain it.
- D. It offers the firm a strategic human resource goal.

### **Review question 7**

Which of these cannot be classified under workforce planning? .....

- A. Training
- B. Career planning
- C. Performance management
- D. Organisational practices

### **Review question 8**

The process through which an organisation ensures that it has the right number of employees with appropriate skills in the right jobs at the right time to achieve organisational objectives is called.....

- A. Job analysis
- B. Staffing
- C. Training
- D. Compensation management

### **Review question 9**

A situation whereby an employee of a company sets out to become the future CEO and devises ways in which to achieve that goal is referred to as .....

- A. Career development
- B. Performance management
- C. Organisational development
- D. Growth.

**Review question 10**

A more specific approach which is aimed at supporting functional and business strategies and also at achieving the operating unit's objectives is termed.....

- A. Corporate level strategy
- B. Operating level strategy
- C. Functional level strategy
- D. Business level strategy

**Review question 11**

If a firm sets its strategic goal as the leading firm with the most well-trained and motivated workforce for the organisation. This is one of the examples of.....

- A. workforce's long-term goal
- B. Strategic plan
- C. Total quality management
- D. Performance management system

**Review question 12**

Which of these statements cannot be counted as a necessary condition for determining a strategy?.....

- A. Pressure to raise corporate performance
- B. Competition in product market
- C. Identification of strategic option
- D. More employees in the organisation.

**Review question 13**

One benefit of a workforce plan is that.....

- A. It challenges the HR department to look beyond its functions
- B. It aligns with the company's overall strategic plan
- C. It explains how a firm can create a competitive HR advantage including how it will sustain it.

D. It gives the firm a strategic human resource goal.

**Review question 14**

The process of choosing from a group of applicants the individual best suited for a particular position in the organisation is termed.....

- A. Selection
- B. Recruitment
- C. Staffing
- D. Development

**Review question 15**

A workforce plan is similar to.....

- A. Financial management plan
- B. Development plan
- C. Overall project plan
- D. General plan

**Review question 16**

Human resource management is geared towards.....

- A. Setting rules for workers
- B. Achieving organizational goals from HR viewpoint
- C. Punishing workers who do wrong
- D. Reinstating workers

**Review question 17**

HRM is different from personnel management in that.....

- A. Personnel management deals with workers as assets and HRM does not
- B. HRM is more strategic and connects all functions to achieve organizational goals
- C. Personnel management allows workers to participate in decision making
- D. Personnel management is generic

**Review question 18**

A workforce plan is often designed to assist in the attainment of:

- A. The corporate plan

- B. Human resource plan
- C. Financial management plan
- D. Personnel management plan

**Review question 19**

One main reason for creating the workforce plan is to.....

- A. Extend the support function of the HR unit
- B. Support the financial management plan
- C. Serve the social function of a firm
- D. Boost the supply chain of the firm

**Review question 20**

The first stage in the creation of the HR plan is strategic analyses where.....

- A. The organization's objectives are examined
- B. The workers are trained
- C. New workers are employed
- D. Resources are allocated

# Chapter 2: Workforce Planning Framework

## **Objectives**

At the end of this chapter, readers will be able to:

- Define workforce planning framework;
- Explain dimensions of workforce planning framework; and
- Explain the benefits and challenges of using the framework.

## Introduction

---

The previous chapter presents the overview of workforce planning by presenting its key concepts and principles, namely definition, functions, benefits, limitations and its link with corporate strategy. This chapter exposes students to the processes involved for doing a workforce plan. Whilst in practice the content of the dimensions of the model and/or the framework for doing a workforce plan could be different, the principles embedded in the framework are generic and transcends industries.

## Workforce Planning Framework

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Workforce planning framework refers to the approaches and the processes which inform designing a workforce plan.

## Dimensions of the Workforce Planning Framework

---

The workforce planning framework consists of eight (8) steps, approaches and processes. Each step requires data from the focal organization to design the plan. The eight processes are explained below.

### *Step 1: Analysing the organisation's strategic goals and objectives*

The first starting point of designing a workforce plan is the need to have a clear understanding of where the organization is heading. Where an organisation is heading is called its strategic goal expressed in its vision. The reason for this is that the workforce plan comes about to align with the strategic goal.

### Activity 2.1

University of Ghana's present vision is to become a world-class university. Explain five implications of this vision from a workforce planning perspective.

## *Step 2: Understanding the organisation's internal capacity*

The next step is to understand the capacity of a firm wholly from a human resource viewpoint. The key questions that will inform this process will include but are not limited to: 1) what are the current human resource profiles of the firm in terms of knowledge, skills, competences, age and gender?

## *Step 3: An understanding of the external influences*

The next step is that there is a need to identify the external factors that could affect the organization's HR's capacity to meet its vision. Elements of the external influences, include, but are not limited to, availability of HR supply in case there is the need for demand, competitors' actions from the HR viewpoint (e.g. conditions of services pertaining to other organisations), and government regulations also from HR's perspective.

### Activity 2.2

List five external influences which can influence the design of a workforce plan.

## *Step 4: Analysis of the link between the internal and external assessment*

At this point, the outcomes of steps 2 and 3 must be analysed to understand the company's human resource position. The outcome of this stage can result in the following four quadrants:

- A conducive external HR environment, coupled with a conducive internal HR environment

- A weak internal HR environment, coupled with a conducive external HR environment
- A conducive internal HR environment, coupled with unfriendly external HR environment and
- A weak internal HR environment, coupled with unfriendly external HR environment.

Overall, depending on the position(s) of the company based on the four quadrants above, a firm addresses how to move to the next level.

### **Activity 2.3**

With practical examples, explain the meaning of the following:

1. Conducive external HR environment, coupled with conducive internal HR environment;
2. Weak internal HR environment, coupled with conducive external HR environment,
3. Conducive internal HR environment, coupled with unfriendly external HR environment and;
4. Weak internal HR environment, coupled with unfriendly external HR environment.

## ***Step 5: Identifying gaps and forecasting HR needs***

Based on step 4, the firm must determine the organization's current and future HR needs based on the gaps from the four steps above.

## ***Step 6: Crafting strategies based on the HR needs***

After the gaps are identified, the next step is to determine the major workforce plans and/or strategies needed to achieve the desired goals and this can be achieved by filling the gaps identified in the previous step. Here, filling the gaps is based entirely on the HR practices.

## ***Step 7: Designing the implementation of the HR plans***

At this stage, an implementation plan based on each of the plans and/or the HR plans needs to be designed. In this case, workforce implementation plan

consists of creating processes such as activities, budgeting, schedule officers and measures.

## *Step 8: Designing HR audit*

The key to successful planning is constantly measuring, monitoring, controlling, reporting, and demanding feedback on its progress as well as responding to changing circumstances. The last component of the workforce plan is to design HR audit plan to track the efficiency and effectiveness of the plan. The purpose of the audit is to allow regular reviews, adjustments, and communication of changes to the plan, and to gather experiences for future plans

## Summary

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The chapter has dealt with the framework for designing a workforce plan. In particular, it explains the meaning of the framework and the processes involved. This is followed by multiple choice questions based on the content in the chapter.

## Chapter Review

---

### Review question 1

The workforce planning framework is used to design.....

- A. The workforce plan
- B. Financial management plan
- C. Project management plan
- D. General management plan

### Review question 2

How many steps make up the framework for designing a workforce plan  
.....

- A. Seven
- B. Six
- C. Eight
- D. Nine

### Review question 3

To carry out an effective and efficient workforce plan, the HR unit needs to follow certain necessary steps known as.....

- A. Framework for workforce plan
- B. Backbone for HR plan
- C. Dimensions involved in HR plan
- D. Steps for generic plan

### Review question 4

To do the workforce plan the first step is to know the firm's .....

- A. Strategic goals
- B. Strategic workforce
- C. Workforce objectives
- D. Strategic aims

### Review question 5

All the following are examples of an organization's internal capacity except.....

- A. Capital
- B. GDP
- C. Physical structure of the organization
- D. Management systems

**Review question 6**

The second step involved in designing a workforce plan is ....

- A. Understanding the organization
- B. Understanding the organization's strategic goals
- C. Understanding the organization's internal capacity
- D. Understanding the organization's employees

**Review question 7**

All the following are examples of an organization's internal capacity except

.....

- A. Staff strength
- B. Mark-up
- C. Management
- D. Gross national product

**Review question 8**

Understanding the external influences which have an impact on the organization's activities forms the ..... step of designing a workforce plan.

- A. Third
- B. Second
- C. Fourth
- D. Fifth

**Review question 9**

An organization's external influences may include all of the following except

.....

- A. Competitors
- B. Current economy
- C. Politics
- D. Mark-up

**Review question 10**

The link between internal and external assessment helps in identifying .....

- A. Gaps
- B. Maps
- C. Lapse
- D. Directions

**Review question 11**

A gap can also be referred to as .....

- A. A Need
- B. Asset

- C. Processes
- D. Management idea

**Review question 12**

The following may be termed as gaps in relation to workforce plan except

.....

- A. Excess capacity
- B. Uncompetitive service
- C. Over staffing
- D. Lack of management systems

**Review question 13**

The sixth step in designing workforce plan is crafting strategies based on ..... needs.

- A. Human resource practices
- B. General management practices
- C. Finance management practices
- D. Social responsibilities practices

**Review question 14**

The human resource manager cannot prepare a workforce plan without identifying the.....

- A. Gaps
- B. Internal capacity
- C. External threats
- D. All the above

**Review question 15**

The final step of the framework for designing workforce plan is .....

- A. Implementation of plan
- B. Analysis of plan
- C. Designing workforce tracking plan
- D. Designing HR audit plan.

**Review question 16**

Which of the following stage is highly important because its effects on the number of employees, skills needed and skills the organization possesses.....

- A. Strategic analyses
- B. Internal analyses
- C. Gap
- D. Workforce stage

### **Review question 17**

The workforce possessed by XYZ BANK is examined to know the current tellers and what skills they have, how many tellers leave the workplace annually, and their capability to work to achieve the strategic objective. This bank is said to be carrying out.....

- A. Strategic analyses
- B. Internal analyses
- C. Gap
- D. workforce stage

### **Review question 18**

Choose the correct order

- A. Strategic analyses, bridging the gap, internal analyses, review, identifying the gap
- B. Identifying the gap, bridging the gap, strategic analyses, internal analyses, review
- C. Strategic analyses, internal analyses, bridging the gap, identifying the gap, review
- D. Analyses strategic objectives, internal analysis, external analysis identifying the gap, bridging the gap and control

### **Review question 19**

One way of bridging the gap is by knowing the number and skills of an organization and what the organisation's needs are, at what point more workers are needed and how these will be acquired as well as the steps involved in acquiring qualified people. This is termed as.....

- A. Redundancy plan
- B. Plans for bridging the gap
- C. Recruitment plan
- D. Strategy

### **Review question 20**

Strategic objectives are aligned with.....

- A. The workforce plan
- B. The project plan
- C. The IT plan
- D. The plan of the office and administration



# Chapter 3: Determining The Requirement of Jobs

## **Objectives**

At the end of this chapter the reader will be able to:

- Understand the meaning of the requirement of jobs
- Know when to identify the requirement of jobs
- Understand the samples of jobs
- Comprehend the processes of identifying the requirement of jobs
- Explain the difference between job description and person specification

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# WORKFORCE PLANNING

Workforce Planning is a book which serves as a foundation for practising human resource management and, therefore, constitutes an essential requirement for every human resource management student, especially at the undergraduate level. As a foundational text for human resource practice, the book is built around one of the recommended conceptual frameworks for designing a workforce and/or human resource management plan.

With the requirements of practice and theory in mind, the author attempts to offer as comprehensive concepts and principles of workforce planning as possible at least for entry-level undergraduate students to know the core concepts in workforce planning before entering the job market. Therefore, within the various topics, practice questions are provided to reinforce the understanding of readers of the concepts. Although the intent of the book is not to offer one best theory and practising text, it responds to practitioners' expectations regarding the requisite knowledge, skills and competence of entry-level graduates in the workforce planning process.

For the purpose of corporate training, coaching and designing human resource manuals, the text is critical for current and aspiring human resource managers, including everyone involved in consultancy in the field.

The author, Prof. Obi Berko Damoah, is an Associate Professor and the Head of the Department of Organisation & Human Resource Management at the University of Ghana Business School.

Prof. Damoah researches and consults in strategy and international business. Prof. Obi has consulted for a number of organisations; the notable ones include but are not limited to: the Africa Economic Commission of the United Nations, Addis Ababa, Ethiopia; the National Development Planning Commission (NDPC) Ghana; the Glico Group of Companies, Ghana; the National Board for Small Scale Industries (NBSSI), Ghana; and the YALI Regional Leadership Centre, West Africa.

