

A one day Summit and two optional streamed workshops providing practical ideas and proven methods of best practice in workforce planning and workforce analytics

This highly interactive forum will explore how workforce planning insights can better integrate into key business decision-making processes, such as budgeting and strategy formulation.

Hear the experiences of successful HR business leaders who will share how they met their information needs, created insight and delivered impact.

Workforce Planning Summit

Explore the challenges and opportunities in Workforce Planning with...

- Dr John Sullivan, San Francisco State University
- Dan Hilbert, Valero Energy
- Jeff Higgins, Countrywide Financial Corporation
- Kari Trost & Merryl Rees, The Hartford
- Peter Howes, Infohrm Group, Inc.
- Anastasia Ellerby, Infohrm Asia Pacific



infohrm WORKFORCE PLANNING SUMMIT

CHICAGO • JUNE 18–20 2007

The premier workforce
planning event in 2007

Optional Workshop Streams:

Save 20% if you pay by April 27

Workforce Planning Workshop

A strategic approach to future staffing needs

- Using scenarios in planning future workforce needs
- Aligning the workforce with business strategy
- Identifying today's HR implications of future staffing requirements
- Learn techniques for forecasting future workforce needs
- Gain insight into ageing workforce and war for talent issues
- Learn approaches to embedding a workforce planning process

Applied Workforce Analytics Workshop

Superior workforce data analysis and diagnosis skills

- Add rigor to your analytic skills to increase insight into workforce issues
- Demonstrate how HR interventions add value to your business
- Enhance productivity by identifying drivers of workforce and business success
- Develop better interpretation and decision making skills

June 18 - Workforce Planning Summit

7:30 – 8:00 Registration

8:00 – 8:30 **Opening Address: Al Adamsen, Vice President of Consulting Services, Infohrm Group, Inc.**

Delivering Strategic Value with Workforce Planning: An Introduction

Today, more than ever, HR has an enormous opportunity to assert itself at the executive table and in the boardroom. This opportunity is Workforce Planning. HR needs to understand and, in turn, communicate where and when talent will be available as well as how it will be attracted and retained. It has to reconcile this knowledge with the anticipated demand for talent as dictated by the strategic objectives of the enterprise. This is not only an opportunity for HR practitioners, but a critical responsibility. This introductory session will set the stage for the day.

Al is a leading practitioner and consultant in workforce analytics, scorecarding, and leader decision-making. At Infohrm, he is responsible for developing consulting services throughout North America and servicing members within the Infohrm Program. Al specializes in strategy formulation, performance management, workforce analytics, leadership development, helping leaders make more informed, better decisions by using workforce insight within the Balanced Scorecard framework. Formerly, Al founded and led a bottled water company after having worked with Charles Schwab and Ernst & Young. Most recently, Al was at Gap Inc. where he was responsible for HR Metrics and Reporting, Employee Surveys, and Workforce Analytics.

8:30 – 10:00 **Anastasia Ellerby, Managing Director, Infohrm Asia Pacific**

Critical Success Factors For Effective Workforce Planning – Learnings from 15 years

Over the past 15 years Anastasia has worked on 30+ workforce planning consulting assignments across many industries including finance, telecommunications, energy, transportation, government and professional services. In this session Anastasia will share her experience in distilling the critical success factors in undertaking workforce planning. These critical success factors include:

- Selection of the right mix of quantitative and qualitative techniques
- Integration of workforce planning with the business planning process
- Identifying critical job roles for undertaking workforce planning
- Understanding the role played by key stakeholder groups in undertaking workforce planning
- How to institutionalize workforce planning
- Accessing workforce data to support workforce planning
- Effectively integrating workforce planning with other human management functions (staffing, development, retention, HRD, career management)
- Using scenario forecasting to drive workforce planning

Anastasia has worked with a vast array of private and public organizations globally, and developed unparalleled depth of knowledge around workforce planning, strategy, metrics, and reporting. Anastasia's leadership, and guidance have provided HR Executives with solutions across workforce analytics and workforce planning; human capital ROI and strategic HR management; KPI analysis and problem evaluation.

In recent years, Anastasia has managed a majority of Infohrm's business activities, building the client base and Program sophistication to become the global leader in HR metrics, analysis, and reporting.

10:00 – 10:20 Break

10:20 – 11:45 **Dr John Sullivan, Professor of Management, College of Business, San Francisco State University**

Workforce Planning: HR's Urgent Priority

Improving the effectiveness of recruiting processes is currently one of the hottest topics on the planet – and with few exceptions, workforce planning isn't. Unfortunately, most recruiters see workforce planning as something that occurs beyond their scope, when in fact it could be their ticket to job security during these increasingly competitive times. It is no secret that recruiting today is radically different than it was just a short decade ago. Today organizations recruit for a variety of different forms of labor both locally and globally. Unfortunately, many organizations lack a unified focus that is required to be truly strategic.

What few realize is that workforce planning provides that focus. The data generated during workforce planning can be used to coordinate and drive recruitment strategies, development strategies, employment brand strategies, retention strategies, and even compensation strategies, all of which align more closely with the overall corporate strategy. Come learn about how and why workforce planning must become a foundational practice for any modern, strategic recruiting function from the man whom *Fast Company Magazine* called the "Michael Jordan of Hiring".

Dr John Sullivan has been described as one of the leading strategists in the field of human resources around the globe. As a recognized thought leader on topics ranging from talent management to integrated HR strategy, he has been working to challenge the archaic perceptions that have limited HR's contribution to the business for more than 30 years. Via his roles as an author, corporate advisor, and educator, he challenges the status quo and offers a bold forward-thinking look at what it takes to become a smarter, more powerful, function.

11:45 – 12:30 **Kari Trost, Assistant Vice President of Human Resources, Strategy and Planning; Merryl Rees, Assistant Vice President/Workforce Planning, Talent Management and Development, Centre of Excellence, The Hartford**

Client case study: Driving Business Results at The Hartford with Workforce Planning

Over several years, The Hartford's HR function has developed quite sophisticated workforce metrics analytic capability. During 2006, it married this expertise with workforce planning pilot programs in two quite dissimilar parts of the business. The experience enabled The Hartford to adapt Infohrm's workforce planning methodology to the unique business needs, systems and culture of The Hartford. In this presentation, Kari and Merryl will cover challenges and learnings such as:

- The role of scenario planning in workforce planning
- The relationship between staff forecasting (1 year outlook) and strategic workforce planning (2–5 year outlook)
- Selecting and operationalising the right metrics
- Managing stakeholder expectations
- Different approaches to skills forecasting
- Creating a scalable, repeatable and sustainable WFP methodology/process.

Kari is currently responsible for developing the strategic planning process and annual HR Operating Plan at The Hartford. Prior to this assignment, Kari played an integral role to the redesign of the staffing process and development of metrics, including the recruiting dashboard and other performance indicators, to help HR improve its staffing model and forecasting capability. She joined The Hartford as an Organizational Development Consultant and served as the Project Manager for the 2003 Chairman's Award-winning asbestos reserve review team. Prior to The Hartford, Kari was the Communication and Change Management Leader for GE Capital's Vendor Financial Services system redesign. She was also a Manager of Training and Development at GE Capital.

Merryl has held various roles within The Hartford since 2001, primarily in the Staffing organization managing a national division Staffing department, and more recently leading a start-up Talent Sourcing unit. Prior to The Hartford, Merryl worked for the Lincoln Financial Group and CIGNA in Staffing and Talent Management centers of excellence, primarily leading start-up functions or organizations. Merryl received a Staffing Excellence Award from CareerJournal.com and Staffing.org for achieving staffing cost efficiencies, and also was highlighted in an ITWorld.com webcast regarding 'High Performance Staffing'. Merryl is a past Board member from the SHRM/EMA Foundation, and also served on the Board of Advisors for Staffing.org.

12:30 – 1:30 Lunch and self-guided discussions, networking

1:30 – 2:30 Dan Hilbert, Managing Director of Workforce Planning, Valero Energy Corporation

Strategic Workforce Planning at Valero Energy

Dan designed and implemented what is being hailed as the industry's most advanced workforce planning system. He also designed and implemented the industry's first global Workforce Talent Supply Chain. His metrics systems are praised by Dr. John Sullivan, "Valero comes through with the best metrics in recruiting, bar none". In this session Dan will discuss the seven workforce secrets as seen through the eyes of a CEO. The workforce secrets are meant to position HR as strategically critical to Boardroom discussions in the new era of globalization, talent wars, an ever increasing pace of change, and constant pressure to deliver positive financial results.

Due to his predictive modeling, Dan is considered to be the leading industry expert on the effect of the Baby Boomer retirement in the manufacturing, energy and transportation industries. He has been referred to by HR Smart as the world's most brilliant workforce technology architect and by Jobster as the Bill Gates of workforce design and planning. Dan's efforts in workforce planning, metrics and talent acquisition have led to over a dozen awards including the 2006 Optimas Award for Innovation from Workforce Management, 2005 International Staffing and Recruiting Leader of the Year (International Quality & Process Center) and 2004 Recruiter of the Year (First Runner-Up – ER Exchange). Before Valero, Dan led early-stage, venture capital backed software companies, while his decade in HR includes executive positions in staffing, HR and hands-on recruiting.

2:30 – 3:15 Jeff Higgins, Executive Vice President of Workforce Planning, Countrywide Financial Corporation

Workforce Planning and Predictive Modeling, Unleashing The New Human Capital Management Tools

Due to business volatility and uncertainty over the past decade or so, many workforce planning methodologies use highly judgmental workforce forecasting techniques. These qualitative techniques can play a very important role, especially in freeing workforce planners from the tendency to base workforce demand forecasts on a simple extrapolation of business trends. However, companies that can supplement these qualitative techniques with quantitative techniques, such as predictive modelling, can gain a competitive advantage in identifying critical workforce needs.

Jeff Higgins has led numerous initiatives to quantify human capital metrics, successfully turning HR data into predictive modeling analytics to reduce turnover, deliver ROI and drive company strategy. Notable projects include turnover/retention driver studies, high performer profiling, ROI of recruiting, sales force performance profiling, and creation of a workforce classification framework to analyze and manage human capital.

Jeff has presented his work at numerous national HR metrics conferences and is a member of the Human Capital Institute advisory board on Talent Leadership and Human Capital Analytics, and is a former member of the PricewaterhouseCoopers Saratoga Institute advisory board.

Jeff's previous professional roles include senior HR roles at The Irvine Company and IndyMac Bancorp Inc. He is a former CFO with over 15 years in finance and accounting roles for companies such as Johnson & Johnson, Baxter International and Colgate Palmolive.

3:15 – 3:30 Break

3:30 – 4:30 Peter Howes, Founder and CEO, Infohrm Group, Inc.

The Future of Workforce Planning

During this session Peter will share his views on the future directions of workforce planning, based on his 30 year history specializing in the field. The projected future trends that Peter will discuss include:

- Role of quantitative techniques in workforce planning
 - re-emergence of mathematical models in workforce planning
 - role of internet deployment in modeling workforce planning
- Career paths: the new requirement for talent management
 - managing high potential talent by more effective workforce planning
- Retention as the emerging role of the staffing function
- Capability and capacity (headcount): managing both in workforce planning

Peter has over 30 years of experience in workforce planning, analytics and reporting. Peter has a distinguished global reputation in workforce planning which he has built from both his early academic career and his extensive consulting on a global scale. Peter has consulted on workforce planning in the finance, technology, mining, energy, telecommunications and government sectors. He was winner of the 2003 Outstanding Alumni Award from the Faculty of Business, Queensland University of Technology in Brisbane Australia.

4:30 – 4:45 Closing Remarks

5:00 – 6:00 Cocktails, networking and workforce planning tool demonstrations

Summit Presenters



Anastasia Ellerby



Dr John Sullivan



Merryl Rees



Dan Hilbert



Peter Howes



Jeff Higgins

June 19 & 20 - Workforce Planning Workshop Stream

8:15am – 8:30am Workshop registration (June 19)

8:30am – 4:30pm Workshop program (June 19 & 20)

Workshop Summary:

- Are you equipped with techniques for forecasting future workforce needs?
- Do you need to forecast workforce numbers and job roles?
- Could you benefit from identifying today's HR implications of future staffing requirements?

Learn how to formulate a workforce plan which is integrated with the organization's business planning process. This workshop covers core workforce planning techniques including demand and supply forecasting, succession planning and the integration of workforce planning with other people management functional areas.

This workshop includes a strategic framework for HR planning, of which workforce planning is a component. It facilitates the development of practical skills in workforce planning through the use of a comprehensive case study and Infohrm's four step methodology.

Workshop Leaders:

Peter Howes, CEO, Infohrm Group, Inc.

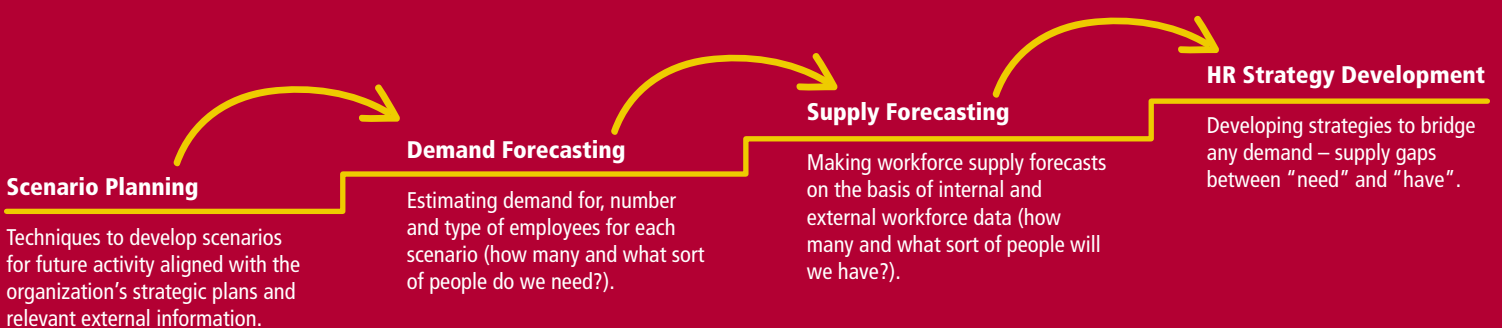
Peter is an innovator in workforce planning, measurement, and reporting. Founder and Chief Executive Office of The Infohrm Group with over 30 years of experience, Peter has earned a distinguished global reputation as a consultant. He has presented papers at HR events across ten countries. Previously Peter was an academic staff member lecturing at the Queensland University of Technology, and received the Outstanding Alumni Award from the Faculty of Business. He is a fellow of the Australian Human Resources Institute, and has served as its President for the Queensland Division.

Paige Menge, Manager, Consulting Services, Infohrm Group, Inc.

As a consultant with Infohrm, Paige is responsible for working with members to achieve value in their use and analysis of human capital data. Paige Menge joined Infohrm after receiving her MBA from Vanderbilt University where she graduated in the top 5% of her class. Paige has worked for the Boston Consulting Group as well as a number of other companies in a variety of consulting engagements, including human resources, business strategy and market intelligence. She previously worked as part of the CLC Metrics program (an offering in partnership between Infohrm and CLC since 2002).

Workshop Structure:

Infohrm applies an integrated, four-step process to workforce planning with sessions leading delegates through the steps shown below:



Workshop outline:

DAY 1

What is workforce planning?

Developing a workforce planning framework

Linking workforce planning with corporate and business planning process

Initial challenges implementing workforce planning

Key workforce planning activities

- Environmental scanning
- Stakeholder consultation

Scenario forecasting

- Developing scenarios to support workforce planning

Demand forecasting – qualitative techniques

- Nominal group technique
- Future search
- Focus groups
- Interviews

Application to case study

DAY 2

Demand forecasting – quantitative techniques

- Benchmarking and productivity measures
- Regression analysis
- Decision analysis forecasting
- Case study work

Supply forecasting

- Age distribution
- Labour turnover
- Transfers and promotions – undertaking a supply forecast
- Case study work
- Technology tools to support supply forecasting

Integration of supply and demand into workforce planning

- Gap analysis
- HR strategy formulation
- Structure of HR – getting started in workforce planning
- Sources of supply data
- Case study work

Participant Action Planning

- Developing action plans for execution post-workshop

June 19 & 20 - Applied Workforce Analytics Workshop Stream

8:15am – 8:30am Workshop registration (June 19)

8:30am – 4:30pm Workshop program (June 19 & 20)

Workshop Summary:

- Are you able to use your HR information to drive action?
- Should you learn how to effectively communicate the implications of workforce diagnostics?
- Do you understand the insights to be gained by dynamic analysis of the workforce profile?
- Are you able to build strong business cases for HR interventions?
- Should you elevate your diagnosis capabilities of human capital issues?

This workshop explores how to get the value-add from workforce data no matter how captured. The focus is on building skills in interpreting workforce data, turning it into information for use in driving decision making and calculating the costs and value associated with HR/people management practices. This workshop is aimed at those with some experience in interpreting workforce data, and will skill delegates in better diagnosis of human capital issues and in the building of a strong business case for HR interventions. Many organizations have come to regard this workshop as an essential component in the development of HR professionals, with over 800 participants in five countries having already attended.

Workshop Leaders:

Anastasia Ellerby, Managing Director, Infohrm Asia Pacific

Anastasia has worked with a vast array of private and public organizations globally, and developed unparalleled depth of knowledge around workforce planning, strategy, metrics, and reporting. Anastasia's leadership, and guidance have provided HR Executives with solutions across workforce analytics and workforce planning; human capital ROI and strategic HR management; KPI analysis and problem evaluation. In recent years, Anastasia has managed a majority of Infohrm's business activities, building the client base and Program sophistication to become the global leader in HR metrics, analysis, and reporting.

Al Adamsen, Vice President, Infohrm Group, Inc.

Al is a leading practitioner and consultant in workforce analytics, scorecarding, and leader decision making. At Infohrm, he is responsible for developing consulting services throughout North America as well as servicing members within the Infohrm Program.

Al's specialties include strategy formulation, performance management, workforce analytics, and leadership development. Much of Al's work focuses on helping leaders make more informed, better decisions by using workforce insight within the Balanced Scorecard framework.

Formerly, Al founded and led a bottled water company after having worked with Charles Schwab and Ernst & Young. Most recently, Al was at Gap Inc. where he was responsible for HR Metrics & Reporting, Employee Surveys, and Workforce Analytics.

Workshop outline:

DAY 1

Introduction

What is analytics? Why is it critical? Why is it so hard? Participants will gain an understanding of:

- The business case for measurement
- Key measurement challenges
- A framework and process for addressing key challenges, which aligns measurement and analysis with organizational strategy

Analysis framework and techniques

- A simple 5-step framework to guide your analysis process
- Hints and tips to ensure your analysis is insightful and accurate
- Root cause analysis technique to structure your analysis
- Descriptive vs statistical analysis: when is each appropriate?

Analyzing workforce metrics – Stage 1

Details the core workforce measures and the issues they address. Participants will learn how to analyze and interpret the following metrics:

- Workforce profiles e.g. age, tenure, occupational group – understand the workforce profile in terms of the ageing workforce and workforce planning

DAY 2

Key Performance Indicator (KPI) selection and target-setting

Participants will learn how to:

- Select meaningful KPIs
- Establish KPIs in your workplace
- Setting appropriate targets

Analyzing workforce metrics – Stage 2

- Staff movement e.g. recruitment, internal movement, separation – learn the insights to be gained from movement data analysis in the areas of career development, recruitment efficiency and retention of high performers
- Employee wellbeing e.g. absence, OH&S – develop an understanding of the area of employee wellbeing and the metrics that can inform your decision-making

Getting the message across

Participants will learn ways to effectively communicate analysis findings and develop business cases to "sell" HR initiatives. Topics covered include:

- Story telling: filtering available information which is relevant to building a compelling, interesting story
- Utilizing cost analysis to develop a business case
- Key questions to address in presentations and reports

Venue

The Palmer House® Hilton

17 East Monroe Street, Chicago, Illinois, 60603
Tel: 312 726 7500 • Fax: 312 917 1707





Infohrm Workforce Planning Summit

Early Bird Discount:

Pay Before April 27 2007 and save 20%.

To register

To register online and pay by credit card:

www.infohrm.com/summit

To be invoiced:

- Fax the registration form to 202 223 0324
Attention: Duncan Scott
- Call 202 589 2660

Registration Inclusions:

Each registration includes:

- Lunch, morning and afternoon refreshments where specified within the program;
- Conference notes provided at the event.

Confirmation

All delegates who register will receive confirmation by email. If you have not received confirmation by June 12, please call us on (202) 589 2660.

Cancellations

For earlybird registrations: a 50% refund will be provided for cancellations received before April 27. No refunds apply for cancellations received after April 27. Substitutions may be made at any time. **For all other registrations:** cancellations received before May 18 will receive a full refund less \$300 cancellation fee. No refunds will be provided for any cancellations received after May 18, 2007. Substitutions may be made at any time.

Dress

As meeting room temperatures may vary, we suggest you wear layered clothing to make sure you are comfortable. Business casual dress is suitable.

Program Changes

Infohrm reserves the right to make changes in the program and speakers, or to cancel programs if enrolment criteria are not met or when conditions beyond its control prevail. Every effort will be made to contact each delegate if a program is cancelled. If a program is not held for any reason, our liability is limited to the program fee only.

Privacy Notice

In registering for this conference, relevant details will be incorporated into a delegate list for the benefit of all delegates (name and organization only) and may be made available to parties directly related to the Conference including the venue for accommodation purposes, and key sponsors (subject to strict conditions).

You may also receive information regarding other events and offers by email from time to time. Should you not wish your details to use for this purpose, please contact Infohrm.

Section 1: Delegate details

Organization: _____

Infohrm Member: yes no unknown (please circle)

Mailing address: _____

City _____ State _____ Zip _____

For more than two delegates please photocopy this form. A single invoice will be provided.

Delegate 1

Full name: _____

Job title: _____

Telephone: _____ Fax: _____

Email: _____

Special/dietary requirements: _____

Delegate 2

Full name: _____

Job title: _____

Telephone: _____ Fax: _____

Email: _____

Special/dietary requirements: _____

Section 2: Workshops

DELEGATE		
1	2	Post-Summit workshops: June 19 & 20
		Workforce Planning Workshop
		Applied Workforce Analytics Workshop

Section 3: Registration Fee

Includes morning tea, lunch, afternoon tea, the conference dinner on June 17 and all conference materials.

Delegate Package	Rate	Sub-Total
1. _____	x _____	= \$ _____
2. _____	x _____	= \$ _____
	Total Registration Fees	= \$ _____

Section 4: Registration Contact Person's Details

Name: _____ Job title: _____

Email: _____ Phone: _____