


109 Donna Gleason

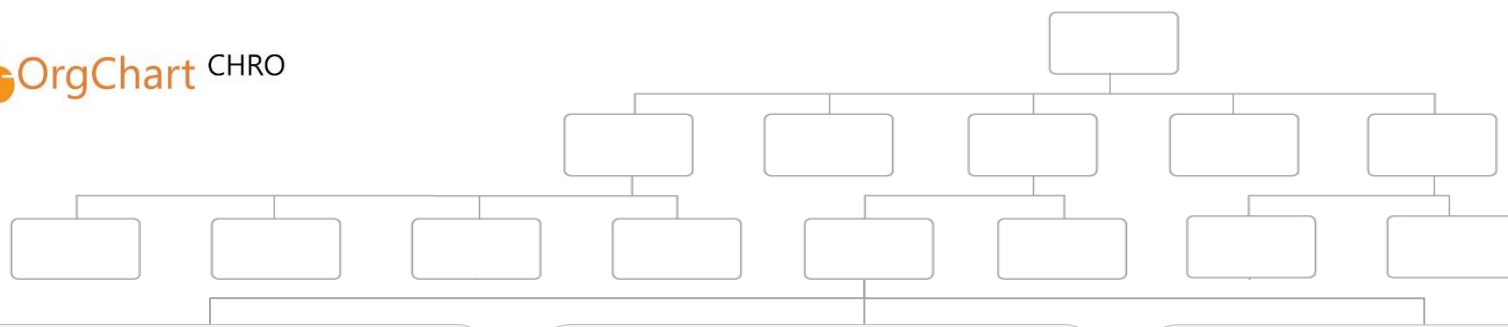


Department name	: Marketing & Sales
Job title	: Sales Representative
Employee type	: Internal
Appointment type	: Permanent
FTE	: 1
Available skills	:
9Box	: 3_3
9BoxIndication	: Star
Action	: Short term promotion

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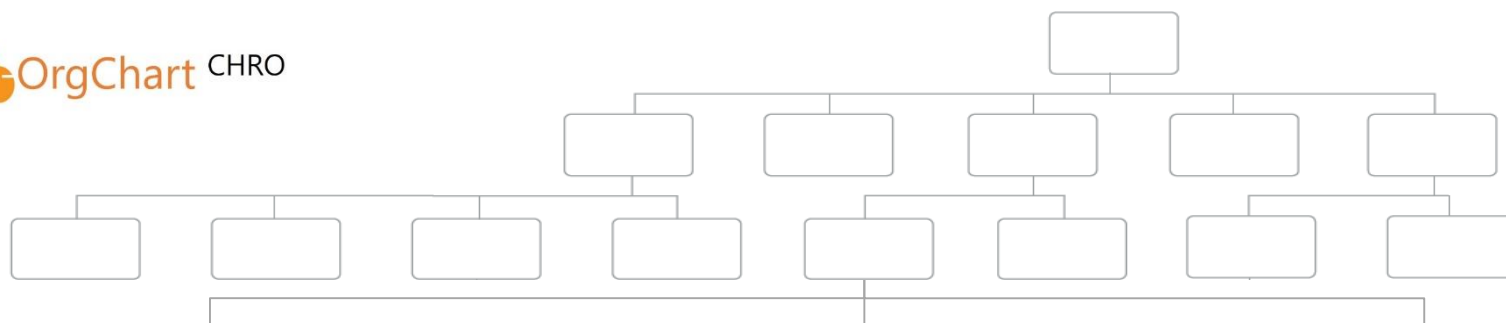


SUCCESSION PLANNING - The difference between succession – and workforce planning is the time span: many critical positions are so complex and demanding that candidates must be prepared far in advance. Otherwise, when it is actually necessary to move people, it may be that none of the suitable candidates is ready for it. Therefore, make early succession plans with the aim of leaving critical positions for the company unoccupied as short as possible.

Succession Planning is therefore the early exploration and elaboration of long term options. My-Orgchart solves this with "dotted lines" from candidates to their potential positions. But also the other way around: from positions to potential candidates. This means that the employee will remain in his or her own place within the orgchart for the time being, but that future career paths have been outlined. Furthermore, candidates can also be external and not (yet) present in the current orgchart. These candidates must first be added manually.

A useful categorization method is working with the 9-box matrix, in which potential is plotted against performance (HR3P). My-Orgchart offers the possibility to provide color labels for employees boxes. Those labels visualize the 9-box scores and offer the CHRO a quick overview.

Employees with high scores on both potential and performance need promotion. They will be the future successors. The employer, that withholds their promotion, risks that they leave. In order to be able to draw the dotted lines, it is important to have insight into the (hard and soft) skills of the candidates. At the same time, it makes sense to establish the required skills at the position level. Furthermore, evaluation results and POPs play a role. So all this data can be stored in the system. Later on, the search function can be used to search for candidates on any criterion that is specified, after which detailed information can be requested. When a candidate is linked to a position, additional data (such as action points, time limits, etc.) can be added to facilitate the possible transfer.



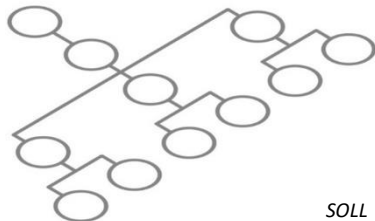
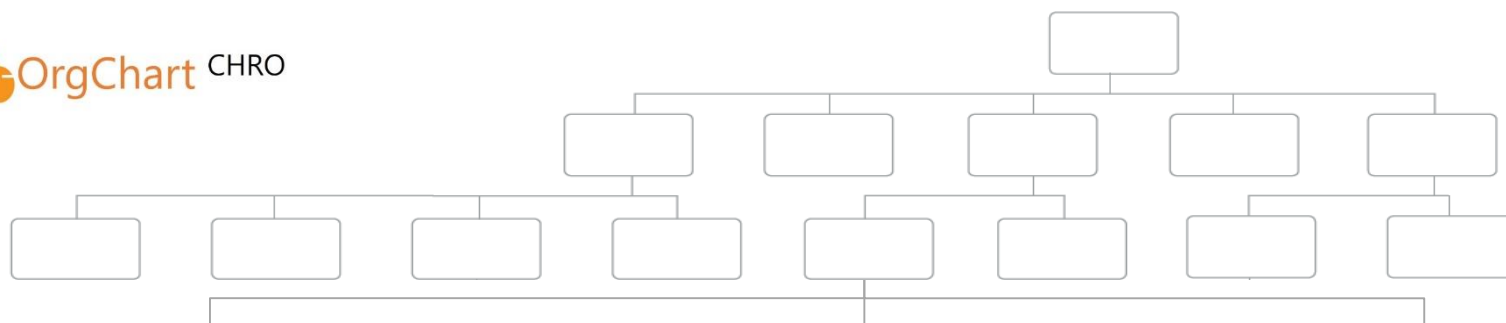
WORKFORCE PLANNING - A strategic workforce plan is a future film of the organization, which is made up of departments, positions and employees. Where a position is a function in a department. The desired FTE is determined at the staffing level (the budget). At employee level the realized FTE (the actuals) is registered. Although employees are only added afterwards, it is advisable to temporarily put them in place in advance to substantiate the budget.

A strategic workforce plan starts with an organization plan: a picture consisting of empty departments and positions plotted over time. A position is actually a job within the department. The desired number of FTEs is determined at the position level (later this will become the budget).

Employees do not appear in it initially, but it can be useful to put them in during the build-up. The organization plan can be built in two ways: 1.) from scratch or 2.) from the existing situation.

Several plans can be worked out by different users. These can be alternative scenarios as well as sub-plans that still need to be combined. The final plan will be chosen and will be defined as the budget. It helps if it is known afterwards what assumptions formed the basis of the budget at the time.

The approved organization plan is in fact the "to-do list" for HR. In order to get the staffing levels in accordance with the plan, HR has to work on inflow, outflow and throughput. This jigsaw puzzle is solved in the "plan board". Employees, applicants and supernumeraries can be moved there. Employees can be placed in their new place, or can be temporarily parked. Boxes or chains can be temporarily parked in the parking lot (the scratch area at the right side of the screen). External parties can also be brought in there, such as temporary workers, applicants in portfolio, on-call workers, etc. It is always useful to have these candidates at hand. The planning board has two special facilities: the continuous gap calculation (Soll versus Ist) and copying forward and upward. The ultimate goal is to match the actuals with the budget.



SOLL



IST

SOLL VERSUS IST

The essence of planning: determine first where you want to go and then what the best way is to get there. Soll is the goal and Ist is the realization (or the situation you will end up with). There is usually a gap between Soll and Ist that must be bridged. A gap measured in: FTE, Money and Skills.

The My-Orgchart model calculates the following: Soll (→), Ist (✓), Absolute Gap (Δ) and Percentage Gap (%). These four variables are aggregated along the hierarchy lines: from position to department, from department to main department etc. (up to the highest level), from highest level to month and finally from month to year.

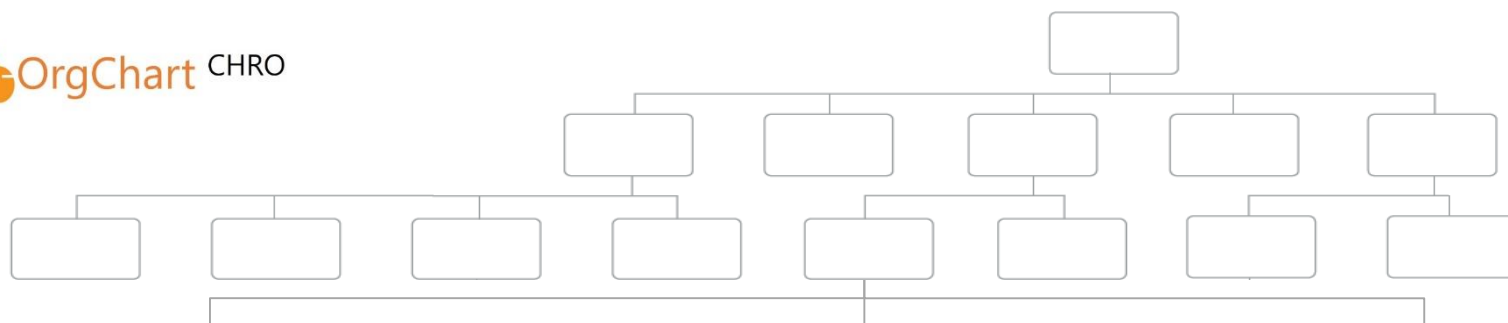
Model calculations are always "on" (OLAP-technology). After each edit or movement the model automatically recalculates the four variables.

COPY FORWARD AND UP

The My-Orgchart model has two special functionalities extrapolation and budget deduction (Copy → and Copy 1).

COPY FORWARD - The full data set (organization, position and population) is copied from the start month to the specified number of future months. The assumption is that transactions in month one will also apply the month(s) to follow. For that matter, copy forward is done with exception of future transactions found in the HR system.

COPY UP - The population data is aggregated and copied to the position level for all months in the model. In fact: the SOLL-values are taken over from the IST-values. The user can slide, raise, fire and add dummies to our heart's content before executing the copy up command.

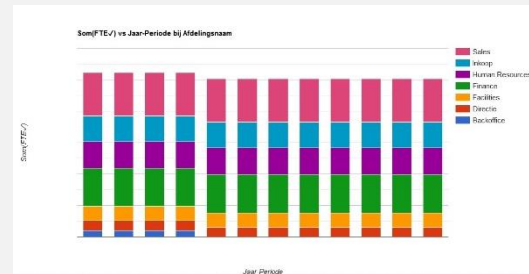
[illegible]

The screenshot displays the 'Planning' application interface. On the left, a vertical sidebar contains the labels 'Periode' and 'Bedrijf'. The main content area is divided into two sections. The top section, titled '2019 01', shows a table for 'Demo bedrijf' with the following data:

Medewerkers	✓	136
FTE	✓	97,79
FTE salaris	✓	284.067,12
Loonkosten	✓	837.202,92
Overige kosten	✓	122.202,68

The bottom section, titled 'My-Orgchart Neth...', shows a hierarchical tree structure for 'NEDERLAND'. The root node is 'NEDERLAND', which has a child node 'FTE' with a value of '97,79'. Below 'FTE', there are several levels of sub-nodes represented by dots, indicating a complex organizational chart.

On the right side of the interface, there is a 'Planning' sidebar with the following buttons: 'details', 'zoeken', 'analyse', 'kopieer →', 'kopieer ↑', and 'verwijderen'.

[illegible]

Advantages:

- ✓ desired organization in the picture
- ✓ successors prepared on time
- ✓ in-, out- and through-flow are okay
- ✓ be able to anticipate quickly

Orgcharts

- Cloud solution. Always and everywhere within reach.
- Runs in all web browsers on all devices.
- Can be used as a standalone or integrated application.
- Powerful pop-up screens provide information of your choice.
- Quick search and easy navigation within the orgchart.
- Design can be set yourself

Security

- Multiple layers of security down to the hierarchy level.
- Portal security (on portal placement).
- Internal org chart security.
- Data is kept with the customer.

Easy to deploy and maintain

- Zero install.
- Runs on clients.
- High performance (even with 100,000+ employees).
- Suitable for any organization.

