



Strategic Workforce Planning and Advanced Skills Workshop

07 DECEMBER 2023



Your BCG team today



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Agenda for Today

Agenda Items	Duration
1 Introduction: Global trends on skills and workforce evolution and implications on Turkish workforce market	15.00-15.20
2 Group Discussion: What are the key talent challenges your company industry facing	15.20-15.50
3 How to prepare for the uncertain future: Roadmap for Strategic Workforce Planning and Skills Management for the industry members	15.50-16.15
4 Case studies on how leading organizations across the world leverage the power of SWP	16.15-16.25
5 Group Discussion: How can your company/industry leverage SWP approach to identify/solve the talent challenges you face	16.25-16.55
6 Discussion on the presented use cases and closing remarks with key success factors	16.55-17.00

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It's been 30 years since the phrase “the War for Talent” was coined and many companies began to see employer value proposition as a source of competitive advantage

But to date, talent has been primarily on HR's plate to solve



Employers are dealing with major labor and skill shortages in today's turbulent business environment, and these challenges are likely to stay for the long term

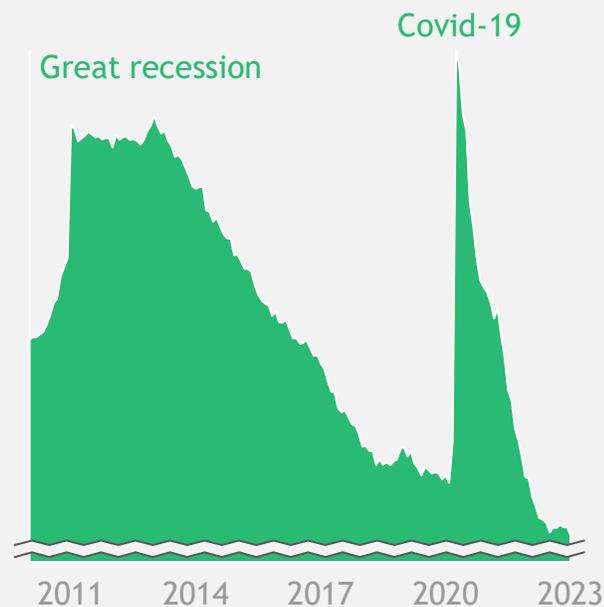
Talent now must be the CEO's, and every leader's, priority



Talent demand continues to grow despite the recession concerns bolstered by evolving business needs

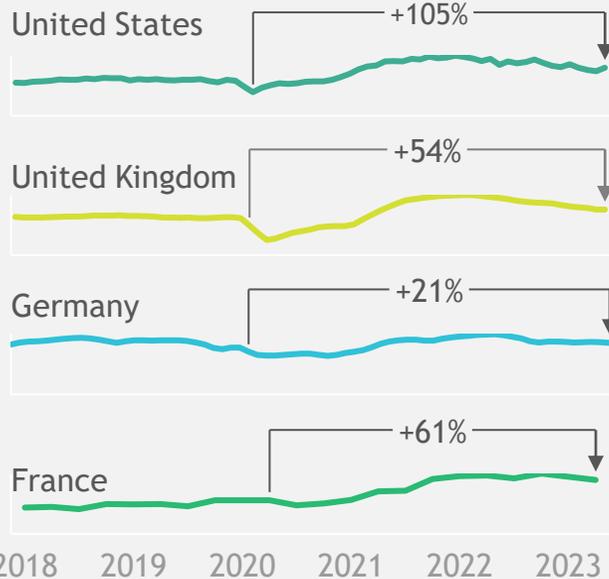
Global unemployment is in decline

Global unemployment rate¹



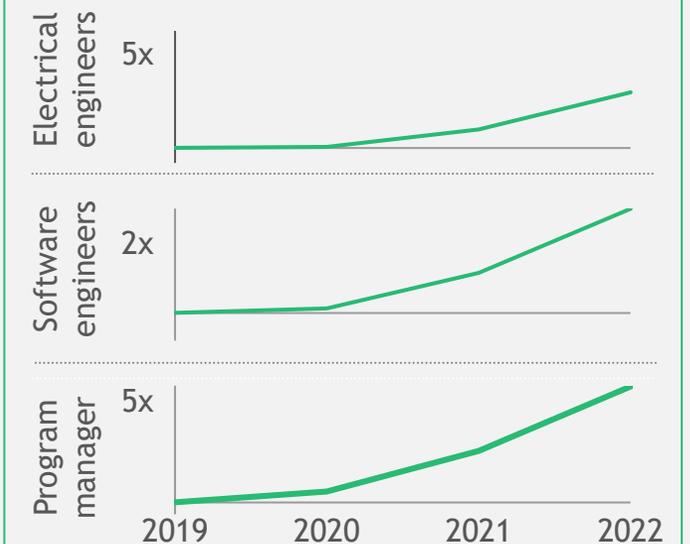
... while job vacancies are at an all time high ...

Job vacancies¹ across markets as of September 2023



... and the demand is driven by technical and digital job postings

Number of digitally-relevant job postings relative to each company's postings in 2019¹



1: OECD unemployment trends as of January 2023 2: Job vacancies as of September 2023: a) US: Job openings and labor turnover survey, BLS b) UK: Office for National Statistics c) Germany: Statistics of the Federal Employment Agency d) Job Vacancies in France, Dares (Quarterly as of Q2 2023); 2: ManpowerGroup 2022 Talent Shortage Survey; ; 3: Knowledge worker: Job switch data from Future Forum Pulse Survey, conducted Nov 16 - Dec 22, 2022. Number of respondents = 10,243 across U.S., Australia, Germany, Japan, France, and the U.K.; Deskless worker: BCG FOW Deskless Worker Survey, October 2022 (N=4,668 in the US, Germany, France, UK, approximately ~1,000 per country); 4: LinkedIn analysis: future of skills; 5: The Future of Jobs Report 2020 World Economic Forum; press search; BCG analysis. More details available in appendix; 6: Raconteur 2023 trends - the end of remote working and the 'great return'

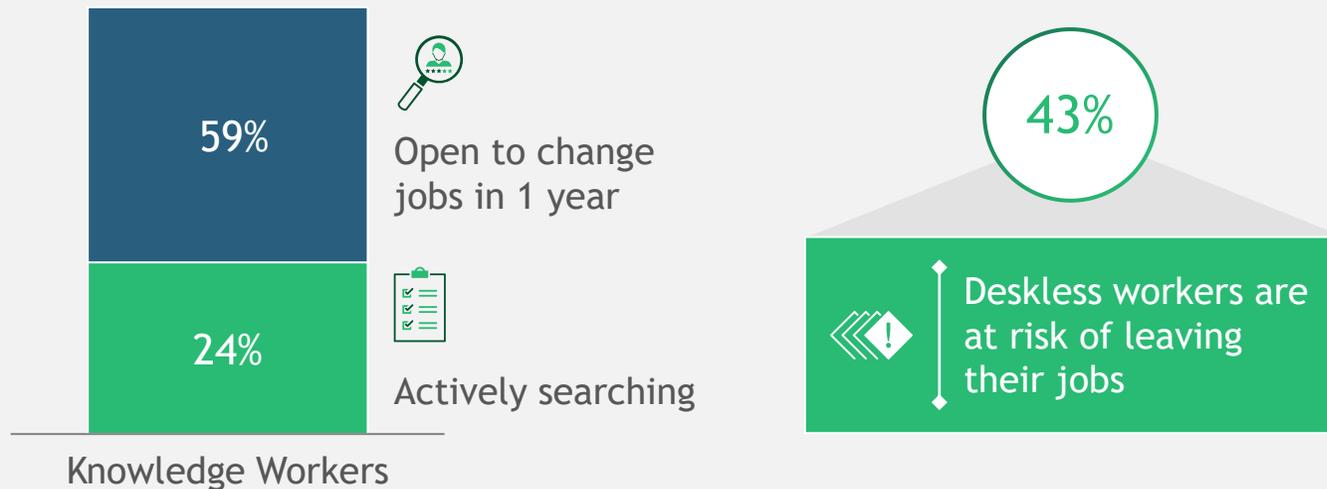


Talent supply continues to be short in key areas as talent demand grows

Knowledge and deskless workers are showing increased tendency to change jobs ...

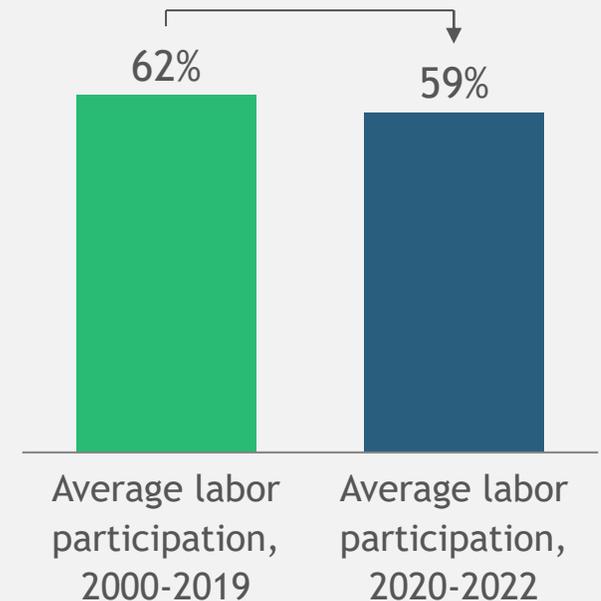


3 out of 4 companies globally report talent shortages, the highest in 16 years², while retention of both knowledge and deskless workers is at stake³



... while there is a reduction in workforce supply

Global labor force participation is 3 pp below the pre-pandemic avg



1: Job vacancies as of September 2023: a) US: Job openings and labor turnover survey, BLS b) UK: Office for National Statistics c) Germany: Statistics of the Federal Employment Agency d) Job Vacancies in France, Dares (Quarterly as of Q2 2023); 2: ManpowerGroup 2022 Talent Shortage Survey; ; 3: Knowledge worker: Job switch data from Future Forum Pulse Survey, conducted Nov 16 - Dec 22, 2022. Number of respondents = 10,243 across U.S., Australia, Germany, Japan, France, and the U.K.; Deskless worker: BCG FOW Deskless Worker Survey, October 2022 (N=4,668 in the US, Germany, France, UK, approximately ~1,000 per country); 4: LinkedIn analysis: future of skills; 5: The Future of Jobs Report 2020 World Economic Forum; 6: Raconteur 2023 trends - the end of remote working and the 'great return'



While changing employee expectations makes harder to recruit and retain talent

Selected examples

Changes in employee expectations ...

Share of workers looking for:

Flexible models

94%

Virtual mobility

60%

Learning & Development

91%

Retraining

71%

Societal impact

70%

... lead to employees actively seeking new employment and relocation opportunities ...

55%

Of desk-based workers are open to considering other positions within the next year

44%

Of digital workers are actively considering relocating in the next three year

... and a struggle to retain key roles

10.1%

Software engineering

2x

6.3%

Company wide

1. Job vacancies refers to jobs that are open and have not been filled at the end of the reporting period. All job vacancy data is in level of thousands; The UK reports monthly data as average of three months, and Australia reports job vacancies quarterly; The US and Germany report on a monthly frequency. Sources: Job switch data from Future Forum Pulse Survey, conducted May 2 - May 16, 2022. Number of respondents = 10,646 knowledge workers across US, Australia, Germany, Japan, France, and the UK; BCG FoW Deskless Worker Survey, March - April 2022 (N=7,105 in the US, Germany, France, UK, Australia, Japan and India; Job openings and labor turnover survey, US BLS data: International Labor Organization, BLS includes non-farm industries; Number of vacancies in the UK, Office for National Statistics; Job vacancies in Germany, Statistics of the Federal Employment Agency; Australian Bureau of Statistics, Job Vacancies, Australia May 2022; BCG analysis



Digital transformation, rise of AI and sustainability is rapidly changing the nature of work and skills required

Selected examples

Accelerated skill obsolescence raises the talent challenges

5 years
is the new half-life of a skill

2.5 years
of a skill for technical skills

85 million
Jobs to be displaced by a shift to machines

77% of CEOs
concerned about skill shortages

1B jobs
will be reconfigured by 2030 globally



Gen-AI further increased the skills-related challenges across organisations

Number of job postings requiring Gen AI related skills

Year	Number of job postings
2020	~20
2021	~50
2022	~100
2023	~500

Enterprise-wide

- Ability to work with AI tools
- Responsible AI and ethical practices

Leadership

- Strategic mindset to deploy Gen AI
- Change and culture management

Customer-facing team

- Stronger comms skills, empathy, and problem solving to handle only the most complex issues

Support functions

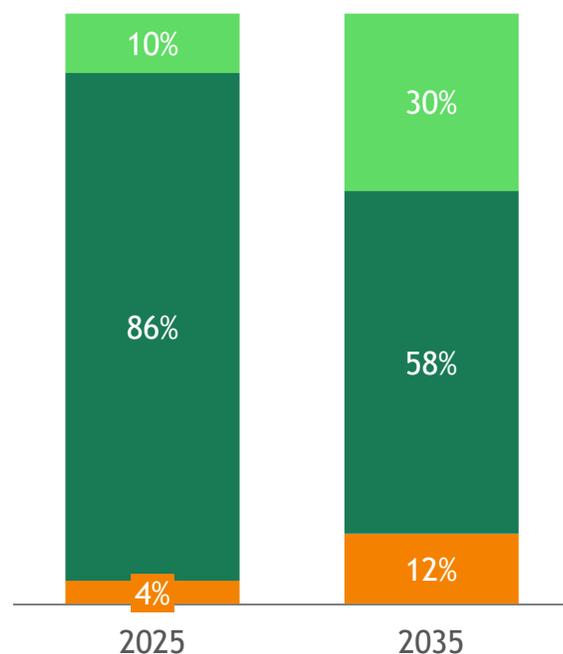
- Adaptability and collaborative problem solving to drive cross-functional execution



Automation, AI and technological advances are key drivers impacting the future of jobs and skills needed

Selected examples

Digitization and AI will affect jobs in all industries¹



● New occupations
Linked to new technologies

● Some jobs will be augmented
Shift to more non-routine nature

● Some jobs face automation risk
Jobs with routine manual tasks

Steel	Construction	Automotive	Retail
<ul style="list-style-type: none"> AI maintenance engineers Robotic operations managers 	<ul style="list-style-type: none"> Construction drone pilots 3D printing technicians 	<ul style="list-style-type: none"> EV integration specialists Autonomous vehicle fleet managers 	<ul style="list-style-type: none"> Personalized shopping advisors Omnichannel retail managers
<ul style="list-style-type: none"> Process control technicians Metallurgical analysts 	<ul style="list-style-type: none"> BIM coordinators Construction software specialists 	<ul style="list-style-type: none"> Vehicle systems analysts Advanced manufacturing technicians 	<ul style="list-style-type: none"> E-commerce strategists Customer experience analysts
<ul style="list-style-type: none"> Manual forgers Assembly line workers 	<ul style="list-style-type: none"> Traditional surveyors Manual excavators 	<ul style="list-style-type: none"> Assembly line welders Paint shop operatives 	<ul style="list-style-type: none"> Cashiers Stock clerks

1. Average estimate based on WEF, OECD, McKinsey and PwC estimates

Source: World Economic Forum; Will robot really steal our jobs? An international analysis of the potential long term impact of automation, PwC (2018); Arntz, M., T. Gregory and U. Zierahn (2016), «The Risk of Automation for Jobs in OECD Countries: A Comparative Analysis», OECD Social, Employment and Migration Working Papers, No. 189, OECD Publishing, Paris; A Future That Works, McKinsey Global Institute



Skills mismatch is a key driver of skills gap affecting 1 of every 3 employees globally

Emerging trends result in significant skills mismatch in the medium to long term

Selected examples

1.3 Bn

People in the world are employed in jobs they are under- or overqualified for

6%

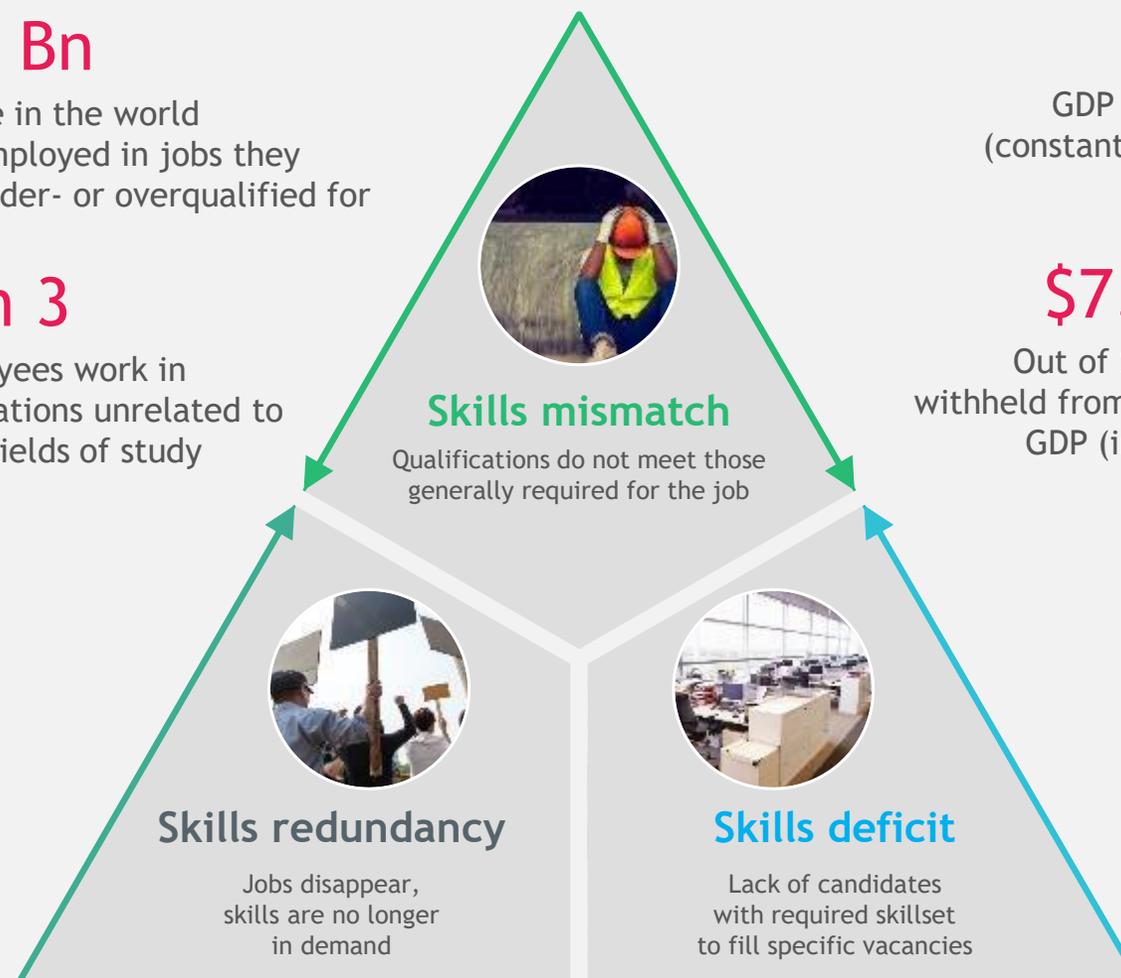
GDP loss, % (constant, 2010)

1 in 3

Employees work in occupations unrelated to their fields of study

\$7.7 T

Out of \$82.7 T withheld from global GDP (in 2018)

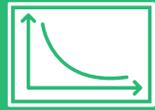




Türkiye specific factors compounding global trends



The enduring growth of Turkish companies is driving high demand for skilled professionals, making the job market extremely competitive



Much more pronounced inflation, economic and political uncertainties incentivize people to switch jobs more frequently



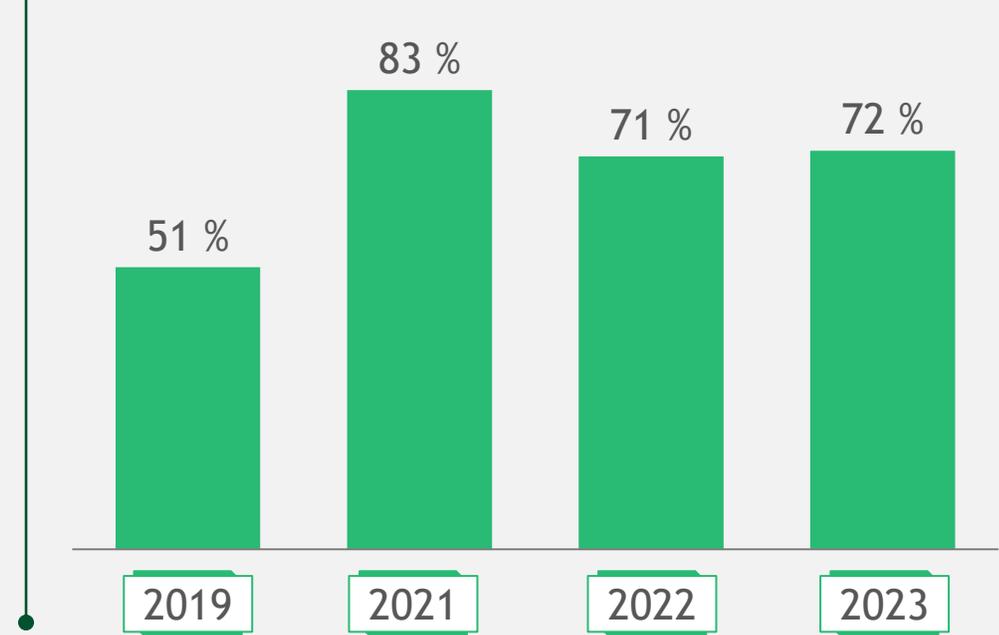
Global talent shortages incentivize developed nations to target high-potential Turkish talent, increasing brain drain



The enduring growth of Turkish companies drives a heightened demand for skilled professionals, particularly in the tech jobs

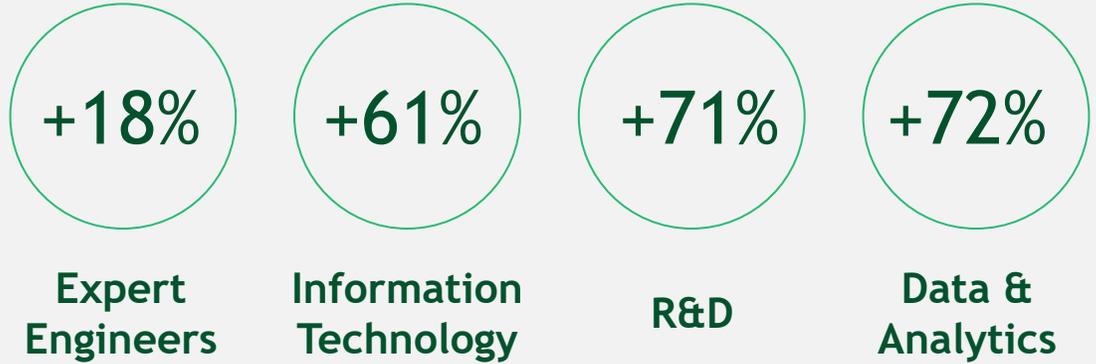
Global talent shortages are at 16-year high, posing challenges for employers in search of well-rounded candidates

3 in 4 employers face difficulties in locating the required talent in Türkiye



Majority of the FTE growth is driven by technical job families required by growth platforms

FTE demand in technical job family groups from 2021 to 2026

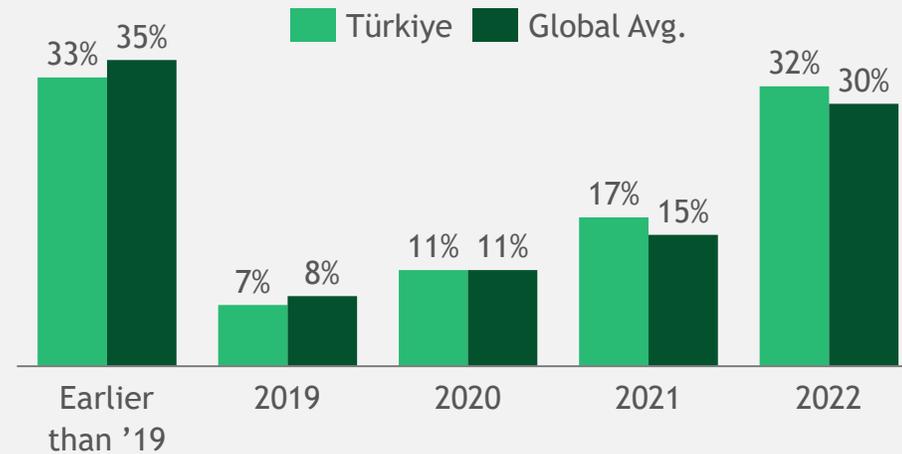




Rising local competition and economic uncertainty are driving increased mobility and high attrition in the Turkish job market



% of people who switched to a new job



60% of people switched jobs in Türkiye since the pandemic compared to 56% globally, driven by salary and career increase opportunities as well as new foreign companies entering the Turkish market to utilize talent for economic activity abroad

attrition rates by job and skill category (% , 2022)

Category	Attrition
Digital & Technical WC	25-45%
Other WC	12-20%
Technicians	5-10%
Other BC	2-5%



Türkiye faces high attrition rates, particularly among skilled workers, due to factors such as inadequate compensation, limited career growth, cultural mismatches, and economic fluctuations



The outflow of talent is on the rise, propelled by a surge in flight for Turkish tech talent

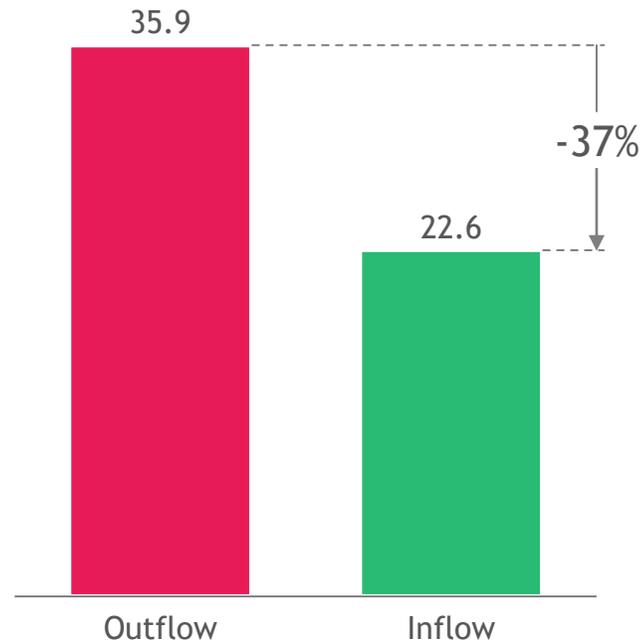
Summary

- 1) Talent outflow **surpasses** inflow
- 2) **Tech talent** witnesses a **wider gap** between outflow and inflow

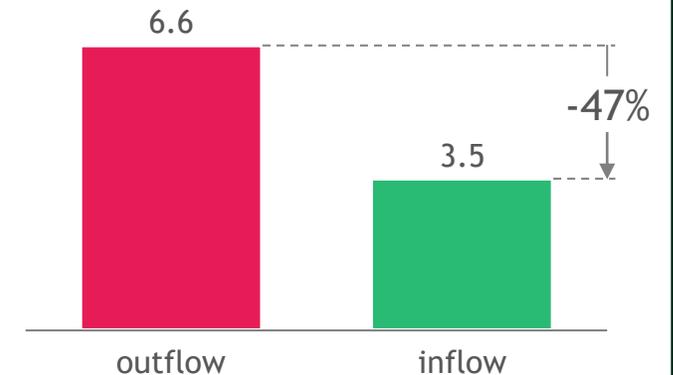


Turkish companies encounter **heightened competition** for talent, particularly in **high-potential tech roles**

All Talent¹ flows in K, last 12 months²



Tech Talent¹ flows in K, last 12 months²



1. Numbers for Istanbul only, total numbers for Turkish economy likely at least 2-3x higher

2. For June 2023 LTM

Note: Tech = Software, IT, Engineering Functions.

Source: BCG Migration Futures Database

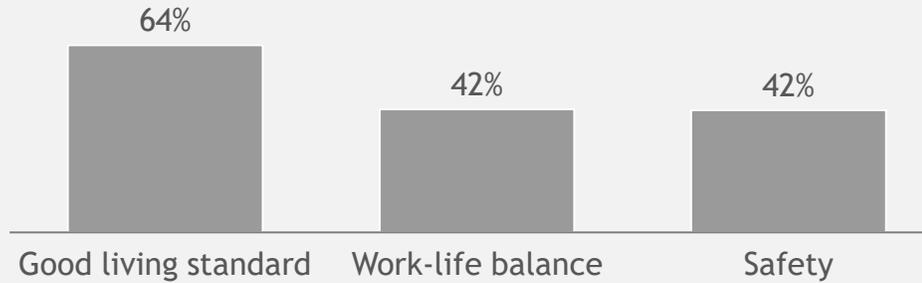


Brain drain is here to stay in the short-medium term, hence companies should prepare themselves for global competition for talent



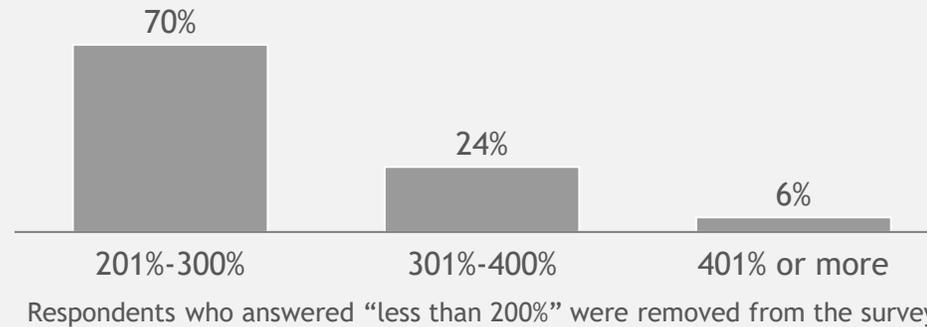
Good living standard, work-life balance, safety and values are the most important lifestyle levers for relocation

“Out of the following, please select the contributing lifestyle factors to your decision to move.”



Relocated digital talents mostly earn 200-300% more than their origin country's average

“What is your current net annual income, compared to the average income in your original residence country?”



Turkish companies need to focus on **addressable levers like earnings and work life balance** to stay competitive in the global marketplace

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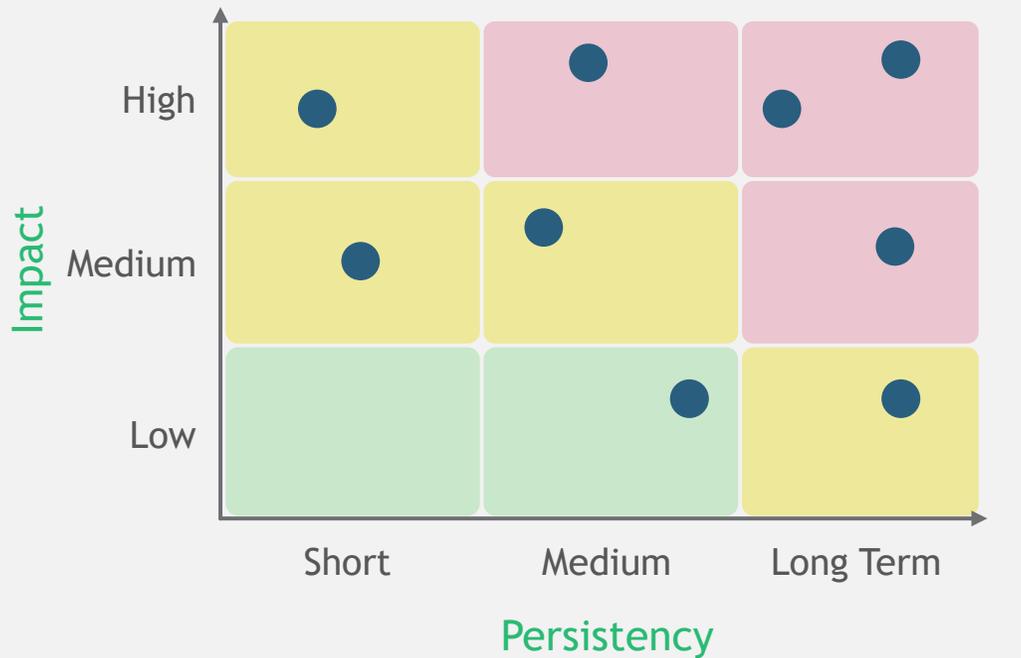
Group Discussion



What are the key talent challenges your company industry facing?



We want to categorise the challenges on two main axes



- Critical talent challenges
- Medium talent challenges
- Short team eadwinds

Exercise steps:

- 1**
~15 mins
As groups discuss the principal issues your industry and companies are facing and identify at least 5 main challenges
- 2**
~10 mins
Place the challenges into the Impact/Staying Power matrix as groups
- 3**
~5 mins
Discuss the outputs between the groups

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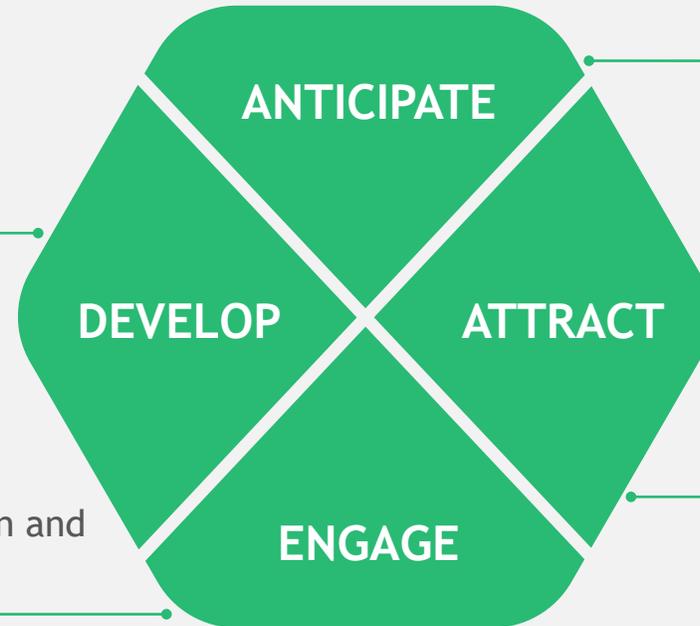
Overcoming talent challenges and building talent and skills advantage requires a holistic approach

ANTICIPATE

Understanding talent and skills needed to deliver on business strategy

DEVELOP

Upskilling and reskilling talent at speed with high reach



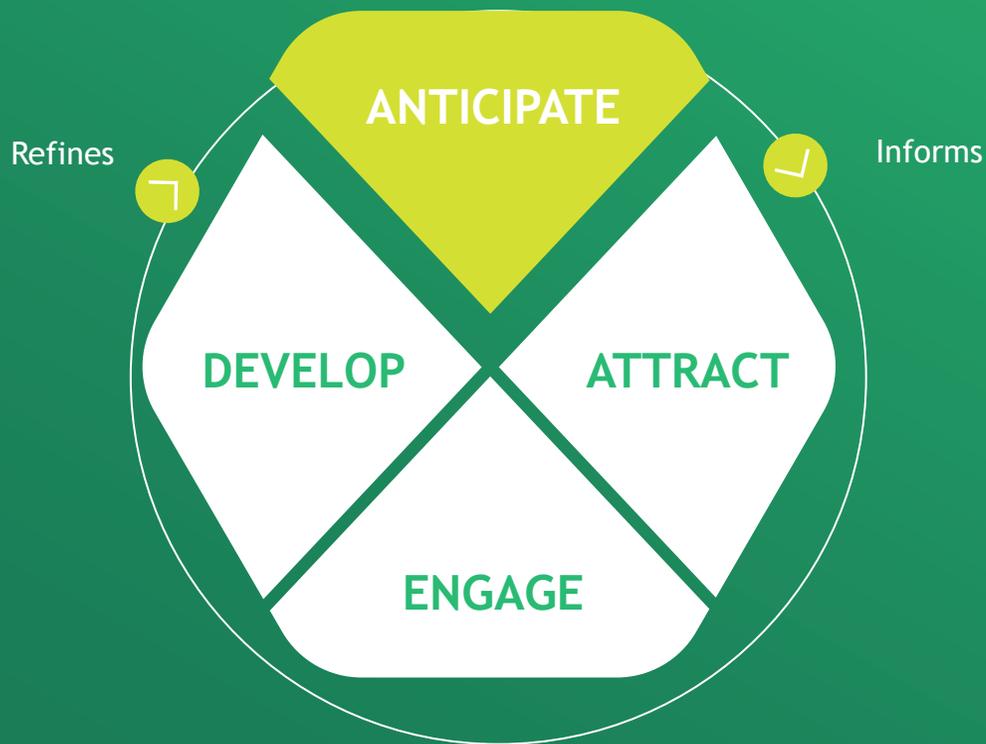
ATTRACT

Sourcing creatively and providing best-in-class candidate experience

ENGAGE

Delivering talent value proposition and experience

Anticipating is the first step for to develop a future ready talent strategy



.... as it uncovers future talent and skills needs to guide the talent strategy

- What is the workforce will I need to meet my business goals ? With what skill mix ?
- What is my current workforce and with what skill mix? How it will evolve over time
- Where are my critical gaps?
- How does that compare to our peers or best practice ?
- How to anticipate the impact of trends on our talent & skill mix ?

However,
organizations face
typical challenges
when anticipating
the future
workforce need

- 1 Workforce forecasting only has a **short-term orientation**
- 2 Pure **capacity planning** without differentiation by qualification, skills, or job families
- 3 Often no workforce demand planning with **link to company strategy**
- 4 **Demographic challenges** often **not systematically addressed**
- 5 **Integration of HR department** into strategic discussions often **not happening**

Understanding talent and skills need requires 2 layers of anticipating

A



Based on business strategy, where will we have gaps or surpluses in FTE supply and demand?

- Focus on headcount / FTE
- Based on job clusters
- Assesses quantitative gaps & develops measures to close



B



What skill gaps do we need to address to be successful in the future?

- Focus on skills
- Based on job clusters (demand) and individuals (supply)
- Assesses qualitative gaps & develops measures to close

SWP links corporate strategy to people strategy

SWP uncovers future talent gap with...



Long-term Horizon

3-10 years plans created depending on company's specific needs and sectoral requirements



Strategic Perspective

SWP fully aligns the talent needs with company business strategy



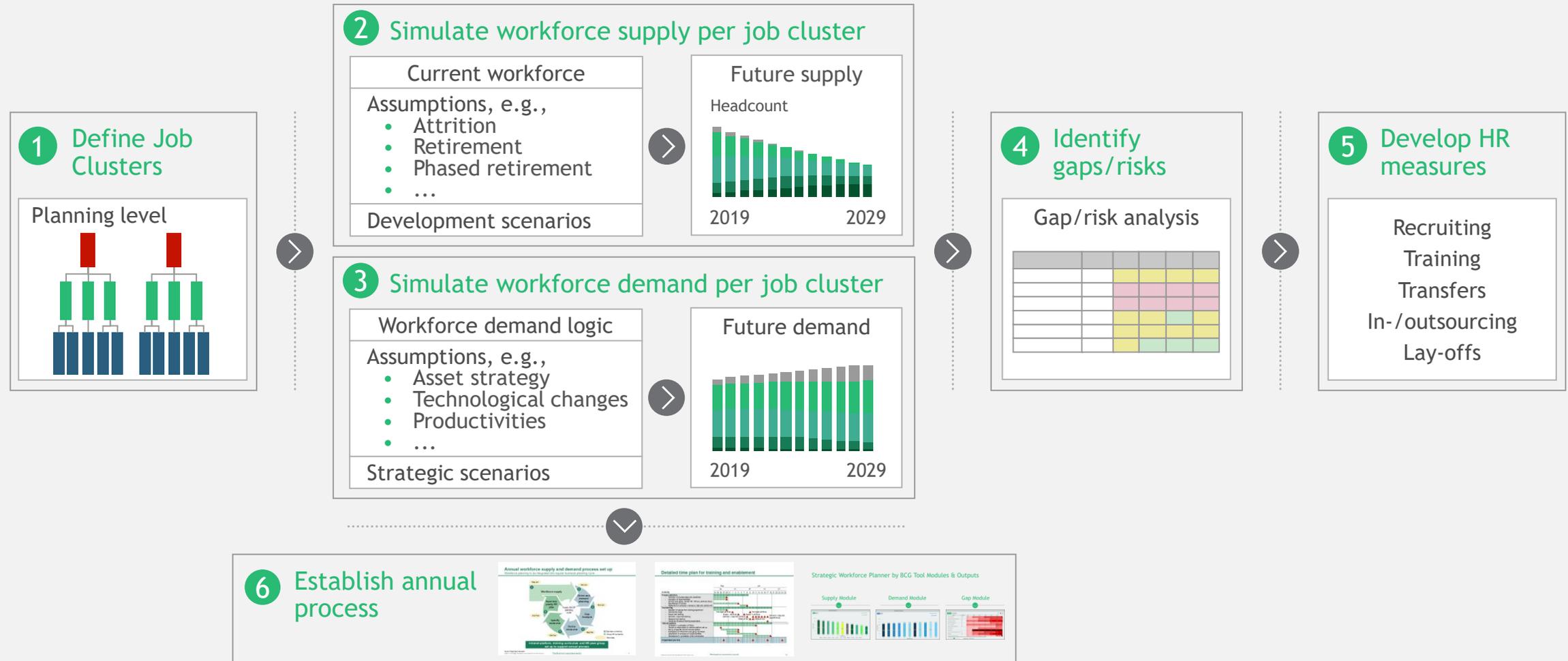
Directional Estimations

With supply & demand simulations not precise & accurate but directional forecasts are obtained



SWP enables assessment and identification of **skills, tools, processes that will be required** to fulfill strategic ambitions

How to approach strategic workforce planning?





Illustrative

Exchangeability horizon



≤ 36 months



< 18 months

Job family groups

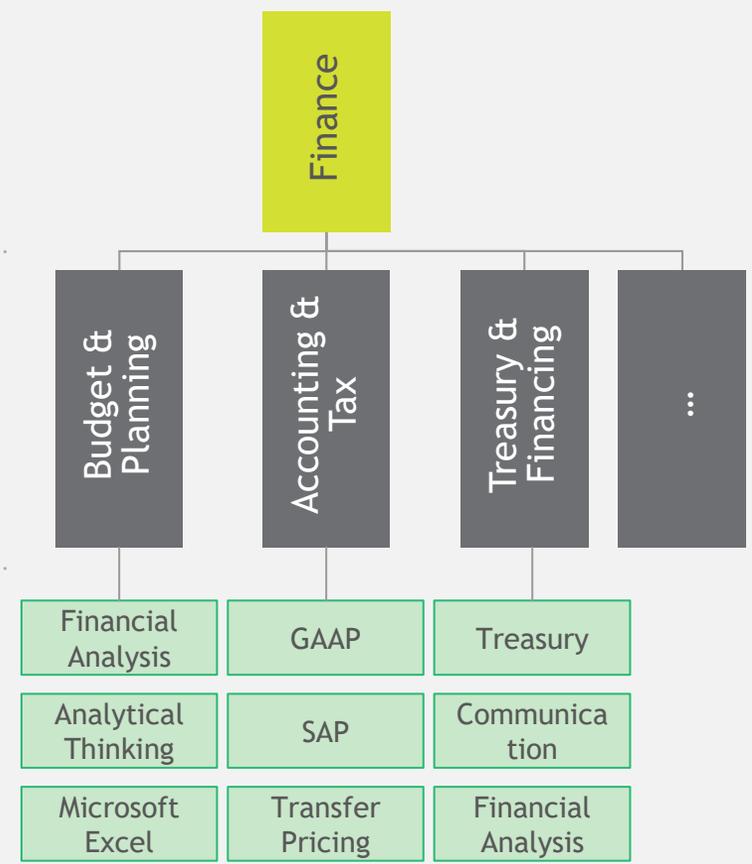
Staff development possible in medium term—at relatively high expense

Job families

Exchangeability quickly achievable—little additional training required

Skills¹

Skill requirements of selected top priority job families



Job-family logic with focus on skill and qualifications similarity and exchangeability



Flexible simulations help create workforce supply scenarios

Illustrative

Illustrative parameters

Retirement: Average age
65 years

Fluctuation: Attrition of permanent staff p.a.

Ø 3.8% per year, derived from historical data by age group and by business unit

Phased retirement: Number of people entering non-working phase of partial retirement

Development of staff levels



Supply scenarios can be drilled down for available clusters e.g. job family groups, job families, department etc.

Demand modeling links strategy to FTE's



Production/Revenue Scenarios
FTE demand linked to production and sales



New Business Areas
FTE demand shifts due to entries into new business areas



Geographical Expansion
FTE increase due to entry and expansion in new geographies



New Technologies
FTE demand flux by the adoption of digital, analytics and production technologies or due to automation



Productivity Changes
FTE effect of changes in productivity from to new ways of working, new plants and other initiatives

Illustrative

Demand model outputs





Gap analysis provides detailed identification of capacity risks

Illustrative



Cumulative FTE gaps resulting from supply decrease and demand increase



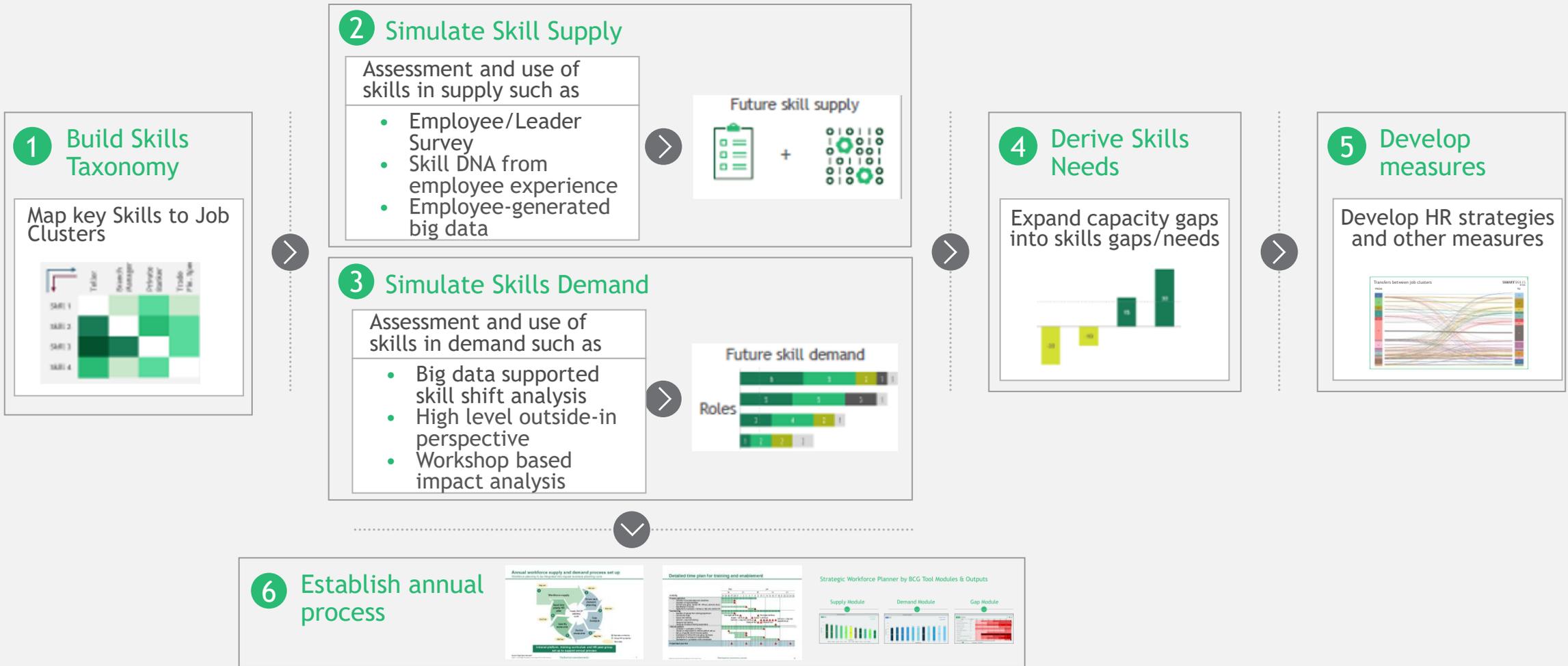
Can be analyzed on SWP job family structure, company org, by collar type etc.



Job Family Group (L1)	2021	Annual Cumulative FTE Gaps ('2x vs '21)				
		2022	2023	2024	2025	2026
Operators	1835	-88.8	-247.2	-357.5	-414.4	-485.2
Technicians	516	-39.9	-82.2	-113.6	-132.8	-150.3
R&D	79	-19.2	-33.7	-45.8	-55.8	-64.0
Production	95	-10.4	-19.2	-27.0	-33.5	-39.3
IT Development	19	-7.5	-12.7	-17.1	-21.0	-26.0
Supply Chain	47	-8.3	-14.2	-19.3	-22.7	-25.6
IT Operations	22	-4.7	-9.8	-13.3	-17.2	-23.7
Administrative Support	62	-4.5	-9.0	-12.4	-14.2	-19.1
Commercial Operations	40	-3.3	-6.3	-9.6	-11.4	-14.9
Senior Leadership	38	-5.9	-8.5	-10.1	-11.6	-13.8
Data & Analytics	1	-10.4	-11.2	-11.7	-12.2	-12.9
Sales	25	-5.8	-7.4	-10.2	-11.6	-12.8
Marketing & Communications	14	-5.2	-7.2	-8.6	-9.3	-9.9
Finance	51	-1.9	-3.9	-7.2	-8.4	-9.5
Human Resources	33	-2.3	-4.5	-5.9	-6.7	-8.8
Legal	6	-3.4	-4.4	-5.3	-5.9	-6.4
Strategy	6	-4.6	-5.1	-5.6	-6.0	-6.4
Agile	0	-1.0	-1.0	-2.0	-2.0	-3.0
Auditing	4	-1.5	-1.9	-2.2	-2.5	-2.7
Risk & Compliance	2	-0.5	-0.8	-1.1	-1.3	-1.5
Health & Safety & Environment	9	-0.1	-0.3	-0.3	-0.3	-0.3
Total	2904	-229	-491	-686	-801	-936



How to approach advanced skills planning?





Comprehensive skills taxonomy forms the basis for assessing skills needed in current and future roles

Illustrative

Key inputs ...

Building from industry standards as a starting point to create tailored job & skills solutions that address unique requirements:



Industry standards and frameworks, where applicable (e.g., ISO QM principles for Risk)



Benchmarks for job/skills at leading organizations



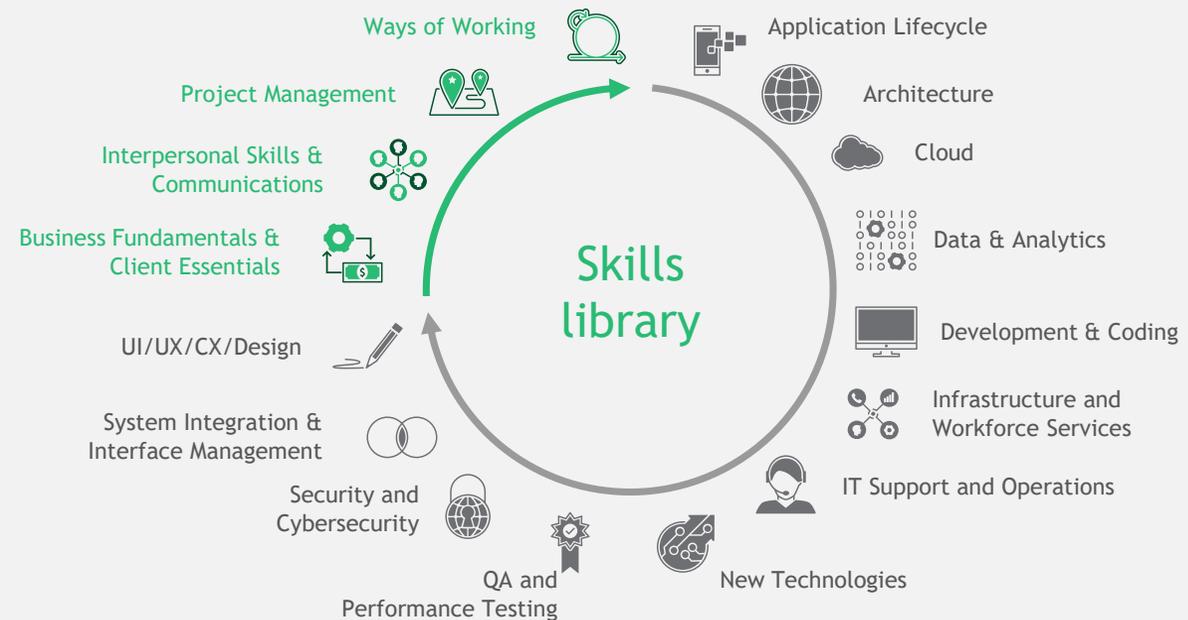
Input from organizational leadership (e.g., unique requirements, context, and data)



... to create a future-proof skills library

Business & soft skills

Technical skills



Libraries are divided into domains of Technical Skills and Business/Soft Skills

Each skill is clearly defined; e.g., Audit Execution: "Working experience with the execution and daily tasks associated with an audit, including sampling and review"



Diverse skill supply and demand assessment options, considering employee involvement and data availability levels

Definition of consistent skill taxonomy



Functional Skills

- Project management
- Industry knowledge
- ...



Technical Skills

- Statistical analysis
- Enterprise systems
- ...



Digital Skills

- Agile and scrum methods
- UX/UI design
- ...



Interpersonal Skills

- Effective Communication
- Conflict Management
- ...



Assessment and use of skills in supply

Employee/ leader survey



Survey requests current skill composition & proficiency level of each individual

Skill DNA from employee experience



AI tool assesses current skills based on historic employee data (e.g., past jobs, related skills, trainings)

Employee-generated big data



Current skill profiles build on available internal data sources, e.g., intranet, calendar events, SharePoint documents, group messages

Assessment and use of skills in demand

Workshop based impact analysis



Guided workshop formats to translate future trends (esp. digital) on skill requirements

High level outside-in perspective



Outside-in analysis of key skills for specific job-functions from externally available sources



Big data supported skill shift analysis



Systematic big data supported analysis of job postings covering most recent trends in required skills



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Strategic workforce
planning and
advanced skills
management helps
companies to
answer key talent
questions

Key Questions

Non-exhaustive

- How many jobs are needed to achieve business goals?
- What skills are required to qualify for a job?
- How does that compare to each employee skillset?
- What internal candidates can be sourced/upskilled?
- How can the supply/demand gaps be filled best?
- Where to source key talent?
- ...and many more

Companies worldwide use SWP to achieve their enduring workforce objectives



Chemical Industry
Player



German Automotive
Supplier

Allianz 



Context



How They
Leveraged SWP

- 2-year HR modernization project requires sustainable planning to address talent shortages, recruiting challenges, and an aging workforce

- **Adaptive Role Design:** SWP guides role evolution for workforce alignment and motivation
- **Skill Anticipation:** SWP-driven forum prepares employees for future skills, enhancing agility
- **Tailored Development:** SWP-based career plans boost job satisfaction and retention

- Rapid growth necessitates a flexible tool to identify workforce gaps across business units and regions for HR-related actions

- **Targeted Recruitment:** SWP optimizes talent acquisition with a focused approach
- **Workforce Flexibility:** SWP enables a versatile workforce, preventing skill gaps
- **Skill-Specific Rewards:** Bonus programs for scarce skills enhance recruitment and retention in critical areas

- Adapt to digital workforce planning to stay competitive in a rapidly changing industry by having transparency about changing job requirements

- **Future-Ready Staffing:** SWP prepares a digital-ready talent pool for competitiveness
- **Custom Learning Initiatives:** SWP optimizes digital upskilling for key departments
- **Strategic Pay Scales:** SWP retains talent in critical digital roles with competitive compensation

Agenda for Today

Agenda Items	Duration
1 Introduction: Global trends on skills and workforce evolution and implications on Turkish workforce market	15.00-15.20
2 Group Discussion: What are the key talent challenges your company industry facing	15.20-15.50
3 How to prepare for the uncertain future: Roadmap for Strategic Workforce Planning and Skills Management for the industry members	15.50-16.15
4 Case studies on how leading organizations across the world leverage the power of SWP	16.15-16.25
5 Group Discussion: How can your company/industry leverage SWP approach to identify/solve the talent challenges you face	16.25-16.55
6 Discussion on the presented use cases and closing remarks with key success factors	16.55-17.00

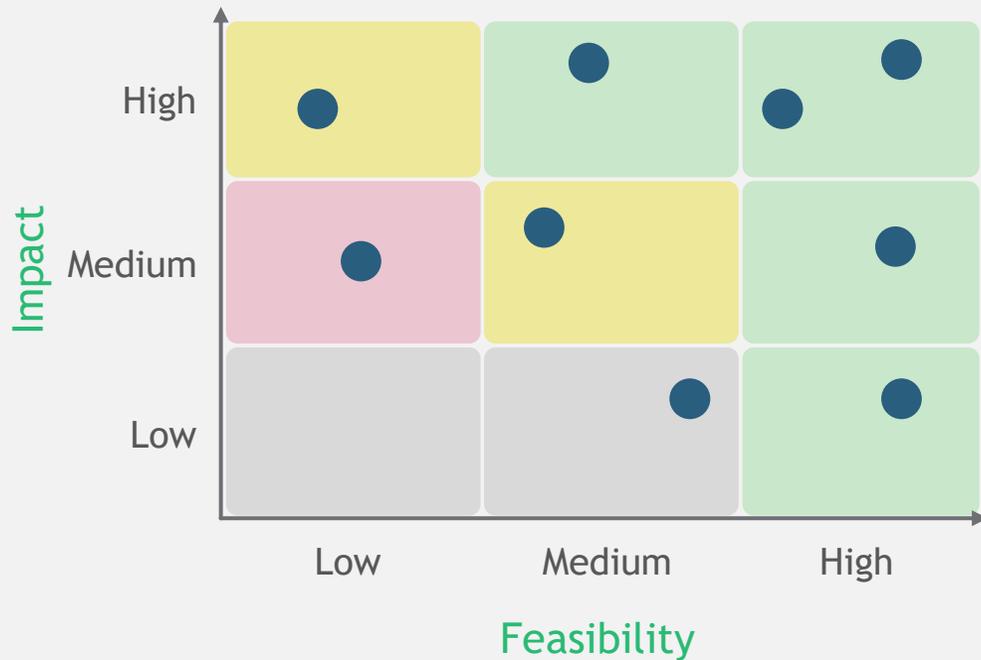
Group Discussion



How can your company/industry leverage SWP approach to identify/solve the talent challenges you face?



We will evaluate the potential use-cases for SWP by impact and feasibility



- High Prio. & Quick Win use-cases
- Mid-term use-cases
- Long-term use-cases
- De-prioritized use-cases

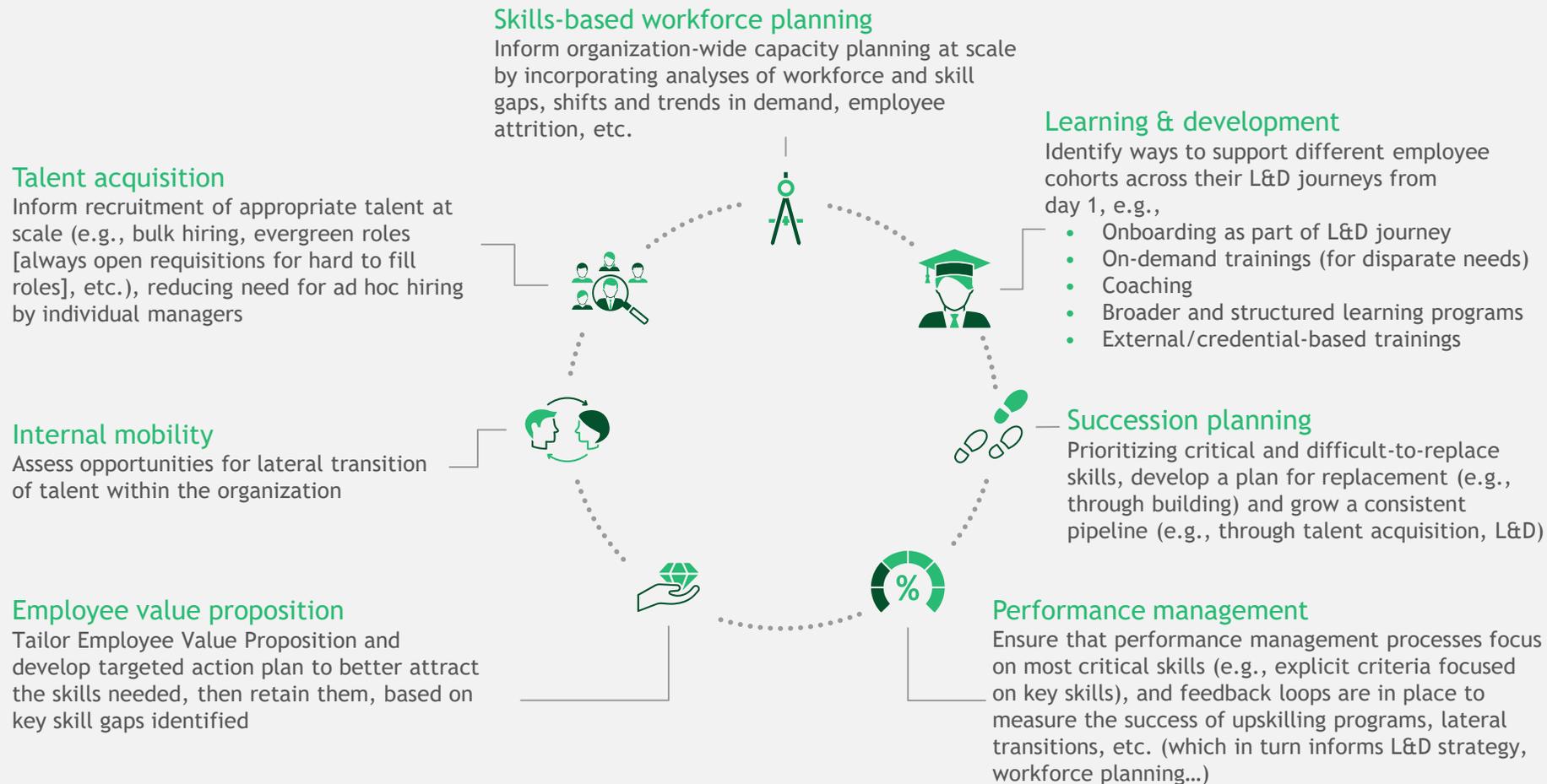
Exercise steps:

- 1**
~15 mins
As groups discuss the ways SWP methodology can tackle or discover the issues you are facing while keeping in mind the issues from the prev. exercise
- 2**
~10 mins
Place the use-cases into the matrix as groups
- 3**
~5 mins
Discuss the outputs between the groups

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SWP accelerates the transition to Next-Gen people management



Benefits for HR

- Less time (re)writing job descriptions
- Broader pools of talent to draw from
- L&D moves from "push" to "pull"
- More data-enabled SWP decision-making

...and more

Key success factors for scaling "Strategic Workforce Planning"



Set SWP as a strategic management priority



Assign Human Resources with a dedicated role and team



Employ a unified global methodology

Digital tools as enablers of SWP



- **Speed and Efficiency:** Advanced software streamlines data processing for quick insights
- **Intuitive Reporting:** Interactive dashboards simplify workforce data interpretation
- **Flexible Analysis:** AI and ML predict supply and demand trends
- **Data Integration:** Seamlessly combine data sources for a holistic view
- **Collaborative Planning:** Cloud-based platforms promote cross-departmental alignment in workforce strategy

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