TALENT ENGINEERING ACADEMY

Workforce Planning and Skills Strategy

PRACTICE WORKBOOK

Translate business scenarios into capacity, skills gaps and a justified build, buy or borrow plan.

PATHWAY	Talent Engineering Practitioner
LEVEL	Practitioner
EDITION	2026.09
UPDATED	2026-09-24

Free learning. Practical work. Better recruitment.

An education initiative by Vitae.

WORKBOOK GUIDE

Build something useful as you learn.

This workbook turns the course into a practical piece of work you can review, refine and adapt. Print it, annotate it digitally, or use the prompts in your preferred notes tool.

YOUR COURSE DELIVERABLE

A scenario-based workforce plan with assumptions and review triggers.

How to use this workbook

01 Work through the course lessons in order, then complete the matching workbook prompts.

02 Use fictional or properly authorised information. Do not add candidate or client confidential data.

03 Compare your decisions with the self-review guidance. Revise assumptions, gaps and unclear ownership.

04 Keep the finished workbook as evidence of your learning and as a starting point for real work.

BEFORE YOU START

Talent Engineering Fundamentals, or equivalent recruitment experience.

Course page: https://talentengineering.org/courses/workforce-planning

PART 1

Plan your course deliverable.

Use these planning pages to define what you are producing before you work through the lesson exercises. Return to them as your thinking develops.

WORKSHEET 01

Business scenarios and horizon

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 02

Workload and productive capacity assumptions

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 03

Current skills and availability

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 04

Gap and alternative responses

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 05

Lead times, cost ranges and dependencies

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

WORKSHEET 06

Decision triggers and review owner

Capture the evidence, decisions, assumptions, owners and next actions that make this section usable.

YOUR WORKING NOTES

PART 2

Apply each lesson.

Each exercise is designed to turn the lesson into evidence of practice. Complete the task, then use the guidance to challenge your first answer.

LESSON 01 / 04

Translate workload into capacity

YOUR PRACTICE TASK

Calculate capacity for 900, 1,200 and 1,500 tasks, then add two constraints the arithmetic misses.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A fictional service expects 1,200 tasks a month at 30 minutes each: 600 hours. If one trained worker contributes 120 productive hours, the arithmetic gives five worker-equivalents. It does not account for shift coverage, skill mix or demand peaks.

SELF-REVIEW GUIDANCE

The simple scenarios require 3.75, 5 and 6.25 worker-equivalents. Do not automatically round these into hiring requests. Explore scheduling, cross-training and coverage constraints before agreeing headcount.

LESSON 02 / 04

Map skills supply and evidence

YOUR PRACTICE TASK

Build a fictional four-person matrix for three capabilities and identify a time-bound gap.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

Eight engineers appear available, but only two have recent evidence of signing off a regulated test. A third can qualify in six weeks with supervision. The plan records that development route instead of assuming all eight are interchangeable.

SELF-REVIEW GUIDANCE

Use evidence such as a recent assessed task, not self-rating alone. Record a development date and supervisor. Distinguish unknown evidence from confirmed lack of capability; they require different follow-up.

LESSON 03 / 04

Compare build, buy, borrow and redesign

YOUR PRACTICE TASK

Compare three responses to the gap from your matrix using time, continuity and uncertainty.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

A six-week launch gap precedes uncertain long-term demand. A fictional plan combines a limited specialist engagement, internal shadowing and a hiring decision after confirmed orders. It does not commit to permanent expansion on an unverified sales forecast.

SELF-REVIEW GUIDANCE

A strong option table explains why a route fits the horizon and identifies supervision costs. A blended plan names the handover deliverable and the trigger for changing course rather than relying on an indefinite temporary arrangement.

LESSON 04 / 04

Run a rolling workforce review

YOUR PRACTICE TASK

Write a monthly review agenda and three decision triggers for your plan.

YOUR RESPONSE

FICTIONAL WORKED EXAMPLE

Orders fall below the lower scenario while a planned hire is approaching offer. The review asks whether the role remains essential, whether work can be redeployed and what commitments have already been made. It updates the hiring decision rather than silently leaving an obsolete vacancy open.

SELF-REVIEW GUIDANCE

Include demand evidence, capability changes, committed hires, budget and candidate commitments. Assign each trigger to an owner and a decision date. Preserve the old assumptions so a change is explainable rather than rewriting history.

FINAL REVIEW

Strengthen the work before you use it.

Review the completed workbook as one connected piece of work. The strongest deliverables are internally consistent, explicit about limitations and clear about who decides what happens next.

- [ ] The work distinguishes facts, evidence, assumptions and open questions.
- [ ] Decisions have named owners, dates and review points.
- [ ] Measures connect to the outcome rather than activity alone.
- [ ] Risks, accessibility needs, privacy considerations and limitations are visible.
- [ ] The next action is specific enough for another person to follow.
- [ ] The finished deliverable can be explained in plain language.

FINAL CHANGES AND NEXT ACTIONS

FURTHER READING

Continue with trusted sources.

These sources support further study. A reference does not imply endorsement. Check the current official rules and obtain appropriate professional advice for real legal, financial or regulated decisions.

CIPD: Workforce planning

Further reading on workforce demand and supply.

https://www.cipd.org/uk/knowledge/factsheets/workforce-planning-factsheet/

CIPD: Recruitment

Professional context for the recruitment lifecycle.

https://www.cipd.org/uk/knowledge/factsheets/recruitment-factsheet/

ABOUT THIS WORKBOOK

Original educational scenarios. Practical work is self-directed and is not independently assessed. Adapt any method to your context with appropriate review.

Talent Engineering Academy is an education initiative by Vitae.