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Dresner Advisory Services, LLC

2024 Edition

# **Workforce Planning and Analysis Market Study**

*Wisdom of Crowds® Series*

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# 2024 Workforce Planning and Analysis Market Study

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This report should be used for informational purposes only. Vendor and product selections should be made based on multiple information sources, face-to-face meetings, customer reference checking, product demonstrations, and proof-of-concept applications.

The information contained in all Wisdom of Crowds® Market Study Reports reflects the opinions expressed in the online responses of individuals who chose to respond to our online questionnaire and does not represent a scientific sampling of any kind. Dresner Advisory Services, LLC shall not be liable for the content of reports, study results, or for any damages incurred or alleged to be incurred by any of the companies included in the reports as a result of its content.

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## **Definitions**

### **Business Intelligence Defined**

Business intelligence (BI) is “knowledge gained through the access and analysis of business information.

Business Intelligence tools and technologies include query and reporting, OLAP (online analytical processing), data mining and advanced analytics, end-user tools for ad hoc query and analysis,” and “dashboards for performance monitoring.”

*Howard Dresner, The Performance Management Revolution: Business Results Through Insight and Action (John Wiley & Sons, 2007)*

### **Workforce Planning and Analysis Defined**

Workforce planning and analysis are the tools and processes that help align workforces with business goals, strategies, and workplace dynamics. It includes requirements, analysis, and forecasting for current and future needs and the development of plans to address imbalances to optimize human resources, reduce costs, and improve efficiency.

# 2024 Workforce Planning and Analysis Market Study

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## Introduction

As we mark the 17th anniversary of Dresner Advisory Services in 2024, we are pleased to present the second edition of this report.

We extend our sincere appreciation to our valued clients and partners for your consistent support and motivation. Since our inception in 2007, our focus has been on setting and surpassing high standards, driving innovation, and leading the market in providing increasing value each year.

In this second edition of the Workforce Planning and Analysis Market Study report, we underscore the expanding role of performance management across various business functions beyond the traditional scope of finance. Facing an array of external challenges in the upcoming year, a more holistic approach to performance management is essential for organizations to respond adaptively, make informed decisions, and execute strategies with precision.

We are confident that the insights in this report will be beneficial to your operations and strategic planning. It was a rewarding experience to develop this report, and we are enthusiastic about the opportunity to continue serving you in the future.

Our heartfelt thanks go to our clients, colleagues, and the broader community for your support, which is fundamental to our research efforts. We look forward to engaging with you further following your review of the study's findings.

Best,



Howard Dresner  
Chief Research Officer  
Dresner Advisory Services

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## Benefits of the Study

The Dresner Advisory Services Workforce Planning and Analysis Market Study provides a wealth of information and analysis, offering value to both consumers and producers of business intelligence technology and services.

## A Consumer Guide

As an objective source of industry research, consumers use the Dresner Advisory Services Workforce Planning and Analysis Market Study to understand how their peers leverage and invest in business intelligence and related technologies.

Using our unique vendor performance measurement system, users glean key insights into software supplier performance, enabling:

- Comparisons of current vendor performance to industry norms
- Identification and selection of new vendors

## A Supplier Tool

Vendor licensees use the Dresner Advisory Services Workforce Planning and Analysis Market Study in several important ways:

### External Awareness

- Build awareness for the market and supplier brand, citing Dresner Advisory Services Workforce Planning and Analysis Market Study trends and vendor performance
- Create lead and demand generation for supplier offerings through association with Dresner Advisory Services Workforce Planning and Analysis Market Study brand, findings, webinars, etc.

### Internal Planning

- Refine internal product plans and align with market priorities and realities as identified in Dresner Advisory Services Workforce Planning and Analysis Market Study
- Better understand customer priorities, concerns, and issues
- Identify competitive pressures and opportunities

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## About Howard Dresner and Dresner Advisory Services

The Dresner Advisory Services Workforce Planning and Analysis Market Study Report was conceived, designed, and executed by Dresner Advisory Services, LLC—an independent advisory firm—and Howard Dresner, its President, Founder and Chief Research Officer.

Howard Dresner is one of the foremost thought leaders in business intelligence and performance management, having coined the term “Business Intelligence” in 1989. He



published two books on the subject, *The Performance Management Revolution – Business Results through Insight and Action* (John Wiley & Sons, Nov. 2007) and *Profiles in Performance – Business Intelligence Journeys and the Roadmap for Change* (John Wiley & Sons, Nov. 2009). He lectures at forums around the world and is often cited by the business and trade press.

Prior to Dresner Advisory Services, Howard served as chief strategy officer at Hyperion Solutions and was a research fellow at Gartner, where he led its business intelligence research practice for 13 years.

Howard has conducted and directed numerous in-depth primary research studies over the past two decades and is an expert in analyzing these markets.

Through the Wisdom of Crowds® Business Intelligence market research reports, we engage with a global community to redefine how research is created and shared. Other research reports include:

- Wisdom of Crowds® Flagship BI Market Study
- AI, Data Science and Machine Learning
- Analytical Platforms
- Cloud Computing and Business Intelligence
- Data Engineering
- Data Governance
- Enterprise Performance Management
- ESG Reporting
- Financial Consolidation, Close Management, and Reporting
- Sales Performance Management
- Self-Service BI
- Supply Chain Planning and Analysis

You can find more information about Dresner Advisory Services at [www.dresneradvisory.com](http://www.dresneradvisory.com).



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## About Jim Ericson

Jim Ericson is VP and Distinguished Analyst with Dresner Advisory Services.

Jim has served as a consultant and journalist who studies end-user management practices and industry trending in the data and information management fields.

From 2004 to 2013 he was the editorial director at *Information Management* magazine (formerly *DM Review*), where he created architectures for user and industry coverage for hundreds of contributors across the breadth of the data and information management industry.



As lead writer he interviewed and profiled more than 100 CIOs, CTOs, and program directors in a program called “25 Top Information Managers.” His related feature articles earned ASBPE national bronze and multiple Mid-Atlantic region gold and silver awards for Technical Article and for Case History feature writing.

A panelist, interviewer, blogger, community liaison, conference co-chair, and speaker in the data-management community, he also sponsored and co-hosted a weekly podcast in continuous production for more than five years.

Jim’s earlier background as senior morning news producer at NBC/Mutual Radio Networks and as managing editor of MSNBC’s first Washington, D.C. online news bureau cemented his understanding of fact-finding, topical reporting, and serving broad audiences.

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## The Dresner Team

### About Elizabeth Espinoza

Elizabeth is Research Director at Dresner Advisory and is responsible for the data preparation, analysis, and creation of charts for Dresner Advisory reports.

### About Kathleen Goolsby

Kathleen is Senior Editor at Dresner Advisory ensuring the quality and consistency of all research publications.

### About Danielle Guinebertiere

Danielle is the Director of Client Services at Dresner Advisory. She supports the ongoing research process through her work with executives at companies included in Dresner market reports.

### About Michelle Whitson-Lorenzi

Michelle is Client Services Manager and is responsible for managing software company survey activity and our internal market research data.

## Survey Method and Data Collection

As with all our Wisdom of Crowds<sup>®</sup> Market Studies, we constructed a survey instrument to collect data and used social media and crowdsourcing techniques to recruit participants.

We include our own research community of over 7,000 organizations as well as crowdsourcing and vendors' customer communities.

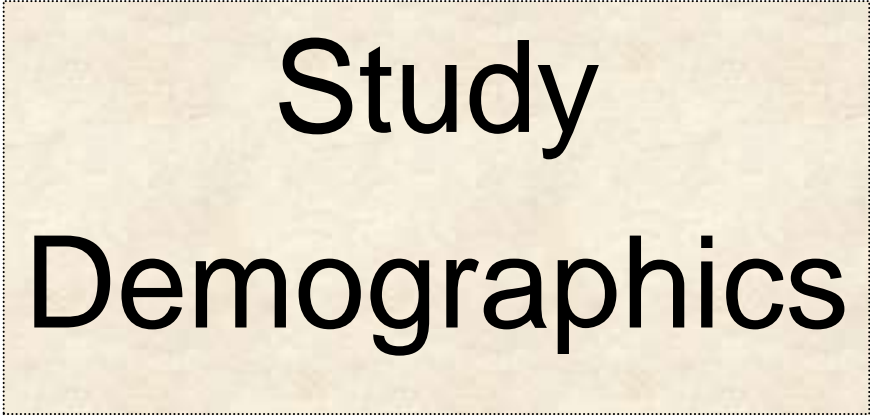
### Data Quality

We carefully scrutinized and verified all respondent entries to ensure that only qualified participants are included in the study.

# Executive Summary

## Executive Summary

- Workforce planning ranks 28<sup>th</sup> among 59 topics under our study. Forty-six percent say the topic is a *top priority for the overall business*. Overall, workforce planning importance slightly increased year over year, with ongoing mixed sentiment toward HR's role. Only 4 percent have *no plans* (fig. 4-11).
- Forty-six percent of respondents use workforce planning and analysis today, up from 42 percent in 2023. Another 24 percent plan to adopt workforce planning in the next 12 months. Current adoption is highest in North America. Excluding HR, *current use* is highest in *finance* and *sales and marketing* (fig. 12-16)
- Predictably, respondents say *human resources* is the *most likely primary user*, followed by *finance* and *operations*. Organizations of different sizes all report users in multiple roles (fig. 17-20).
- The two top planning capabilities are *workforce planning per employee* and *workforce compensation planning and scenario simulation*. *Healthcare* respondents are among the most interested (fig. 21-26). Industry support is very strong and near maturity (fig. 57).
- The top four analysis priorities are *compensation, headcount and core demographics, retention, and year-end projections and forecasting* (fig. 27-32). Industry support is strong (fig. 58).
- The most popular workforce data access and manipulation capability is *utilize and update multiple hierarchies*. Data access and manipulation is most practiced in larger organizations. Data access and manipulation correlates positively with success with BI (fig. 33-38).
- *The top* insight creation and sharing priorities are *customize or add new metrics or calculations, drill down to specific detail within the chart, standardized metric calculations, and build and share dashboards* (fig. 39-43).
- The top integration features are *export data to Excel, PDF; ability to integrate data from leading ERP systems; and integration with financial planning and budgeting applications* (fig. 44-48). Industry support is strong (fig. 59).
- The top additional features are *access control based on users and roles, support for reporting/dashboards, and Web user interface* (fig. 49-53). Industry support is very strong (fig. 60).
- The top deployment priorities are *multi-tenant, part of broader enterprise performance management solution, and public cloud* (fig. 54-56). Industry support is selectively adequate for all user priorities (fig. 61).
- Workforce planning and analysis vendor ratings are shown in fig. 62.



**Study  
Demographics**

## Study Demographics

Our second annual Workforce Planning and Analysis Market Study includes a cross-section of data across geographies, functions, organization size, and vertical industries. We believe that, unlike other industry research, this supports a more representative sample and a better indicator of true market dynamics. We construct cross-tab analyses using these demographics to identify and illustrate important industry trends.

## Geography

North America, which includes the U.S., Canada, and Puerto Rico, represents 61 percent of respondents (fig. 1). EMEA accounts for the next largest group (21 percent), followed by Asia Pacific (16 percent) and Latin America (2 percent).

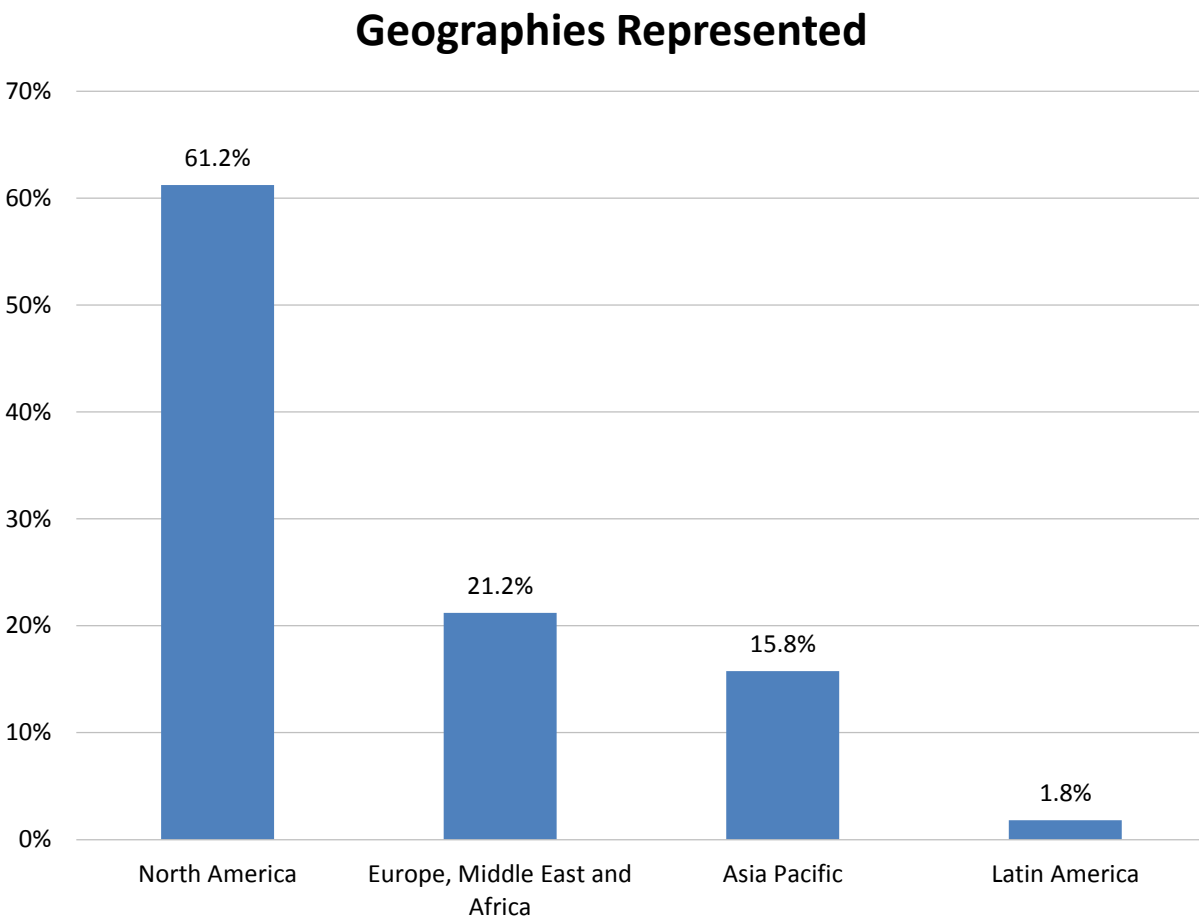


Figure 1 – Geographies represented

# 2024 Workforce Planning and Analysis Market Study

## Functions

Finance (about 28 percent) and IT (21 percent) are the functions most represented in our 2024 study sample (fig. 2). The business intelligence competency center (BICC) (13 percent) and executive management (9 percent) are the next most represented.

### Functions Represented

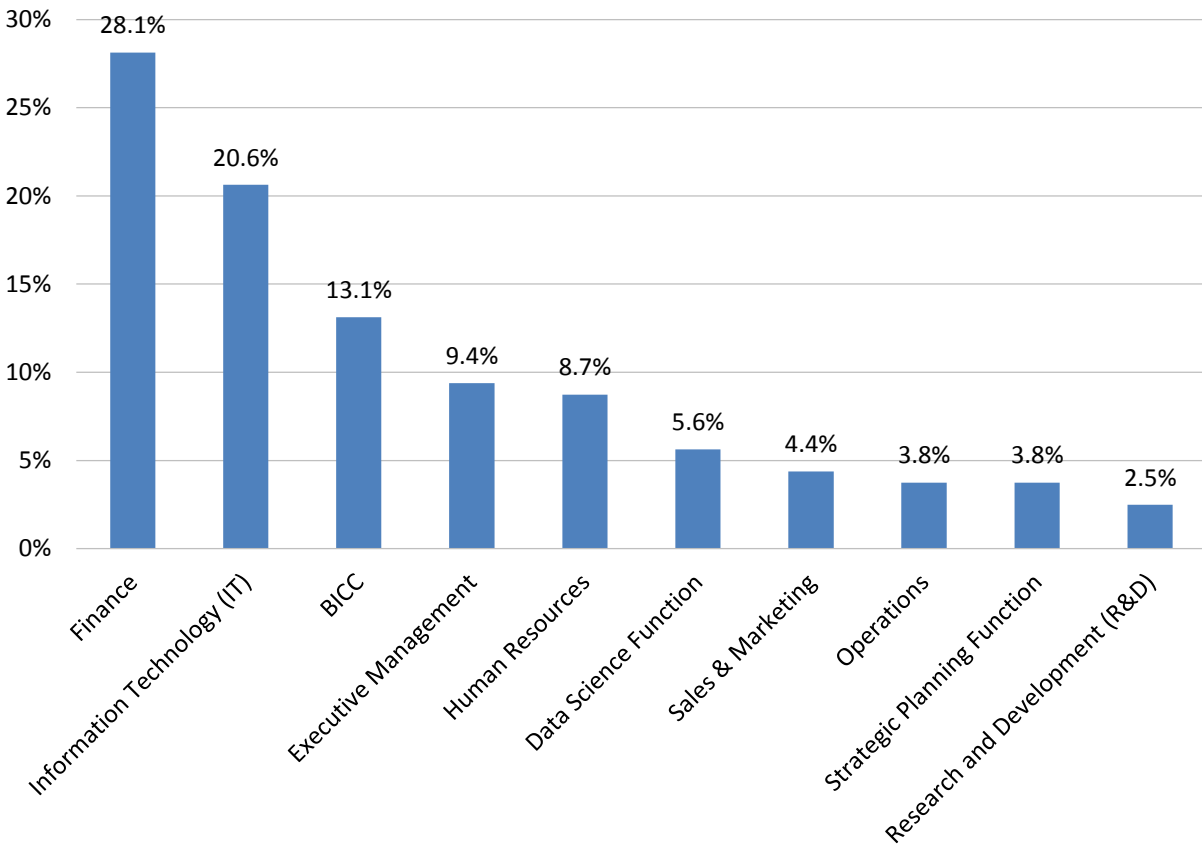


Figure 2 – Functions represented

## Vertical Industries

Respondents from *business services* (22 percent), *technology* (18 percent), *manufacturing* (16 percent), and *financial services* (15 percent) are the most represented in our study (fig. 3). *Consumer services* and *healthcare* are the next most represented. We include responses from consultants, who often have greater interaction with initiatives and deeper industry knowledge than many customer counterparts. This also yields insight into the partner ecosystem for BI vendors.

### Industries Represented

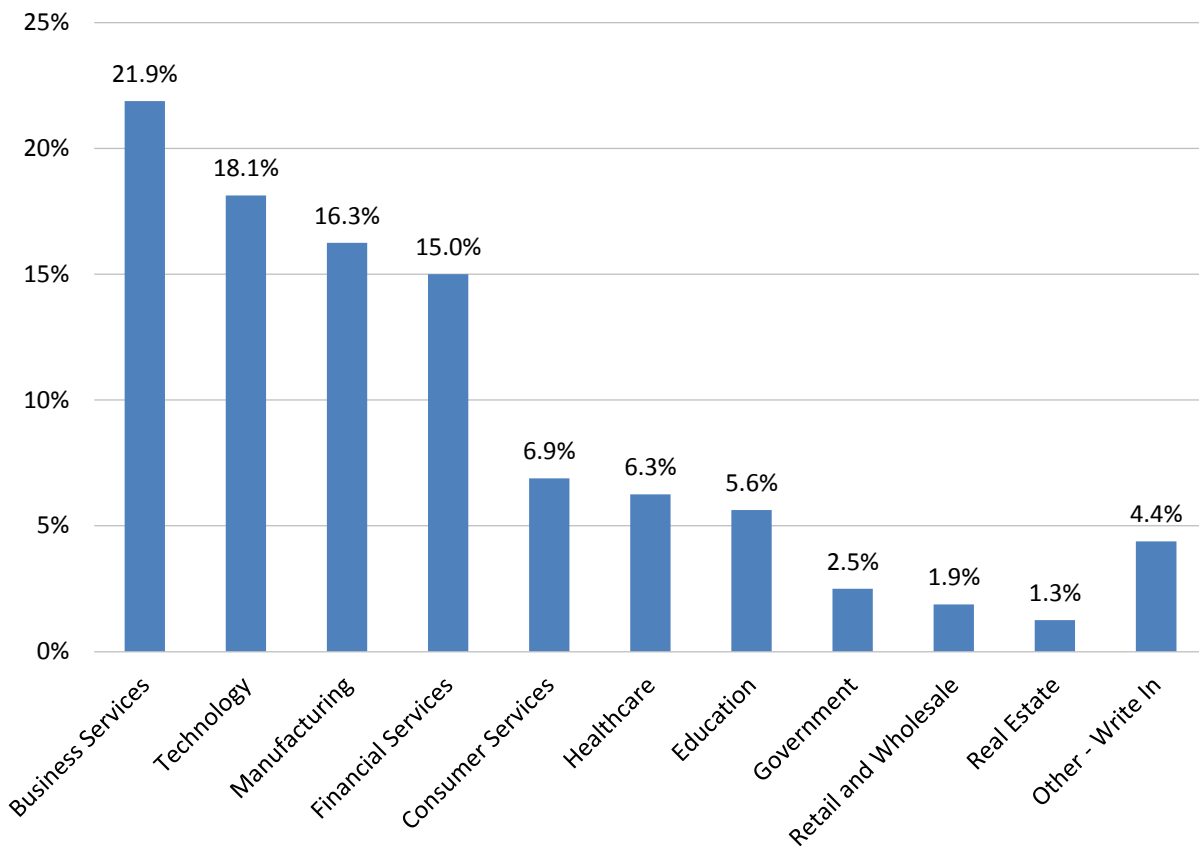


Figure 3 – Industries represented



## Organization Size

Respondents represent a mix of organizational sizes and structures (fig. 4). Small organizations of 1-100 employees represent about 23 percent of the sample. Midsize organizations account for 27 percent, and the remaining 50 percent of respondents are from large organizations with more than 1,000 employees.

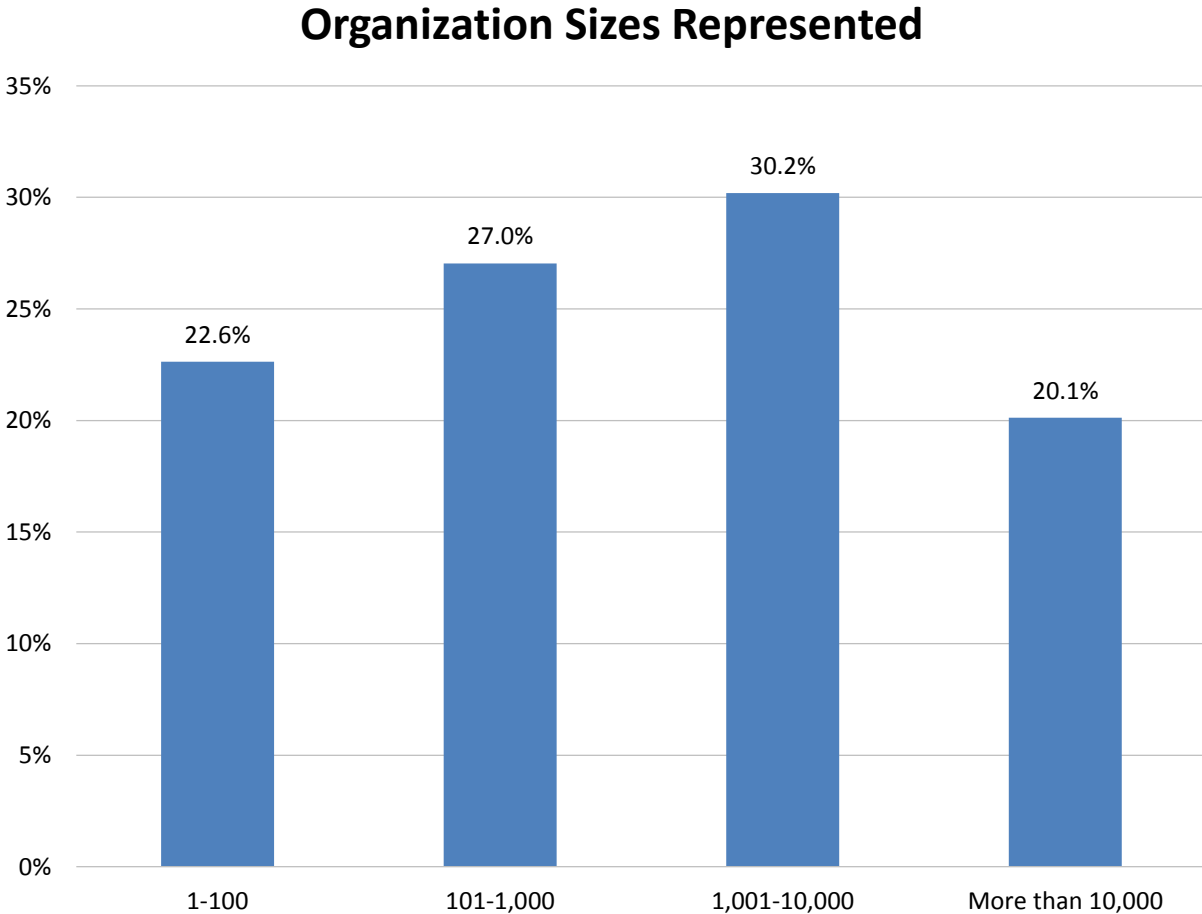


Figure 4 – Organization sizes represented

# Analysis and Trends

# 2024 Workforce Planning and Analysis Market Study

## Analysis and Trends

### Importance of Workforce Planning and Analysis

Workforce planning (HCM / People Analytics) ranks 28<sup>th</sup> among 59 topics under our study (fig. 5). As an overarching theme, the topic affects nearly all strategic technologies and initiatives.

### Technologies and Initiatives Strategic to Business Intelligence

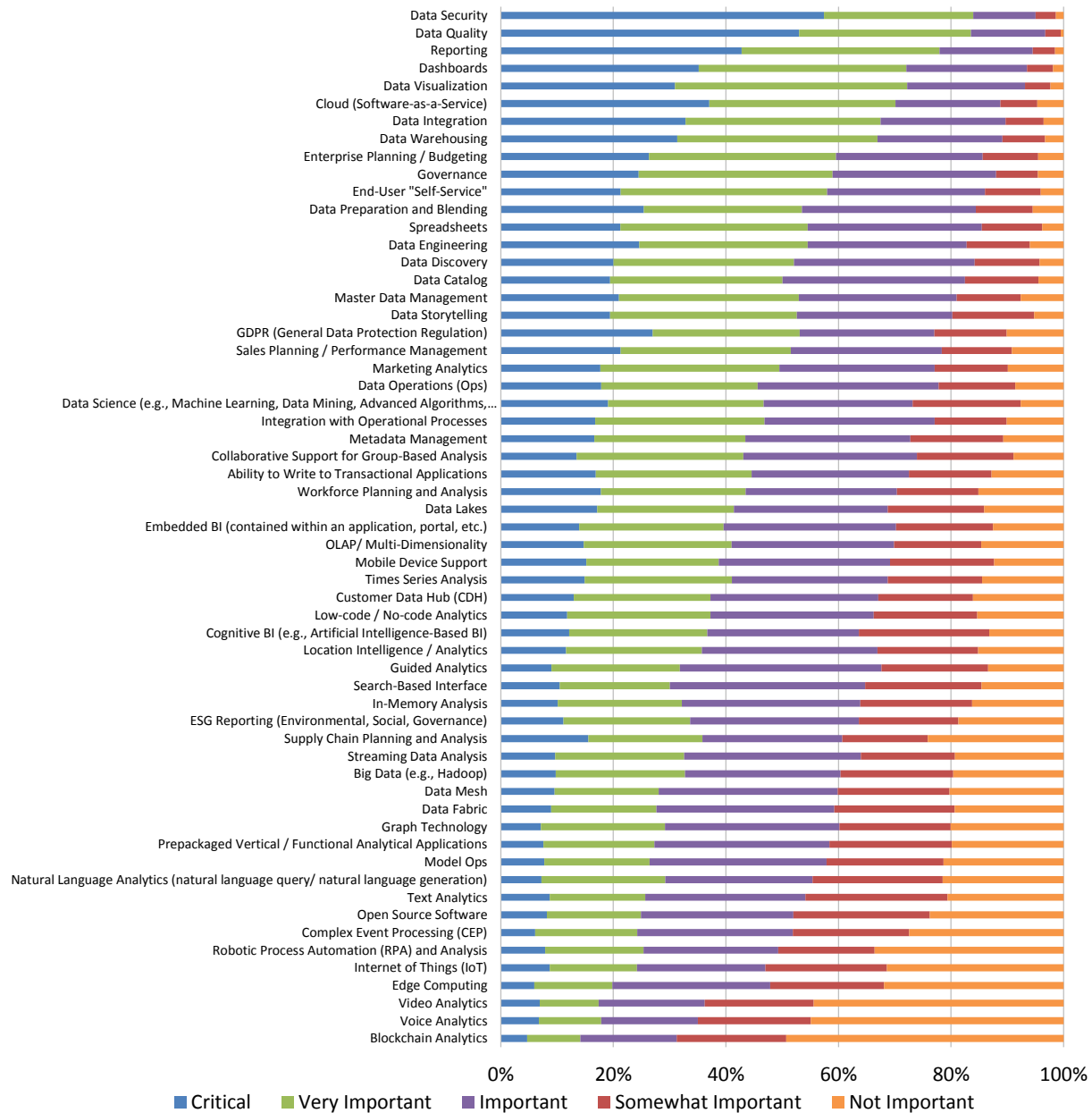


Figure 5 – Technologies and initiatives strategic to business intelligence

# 2024 Workforce Planning and Analysis Market Study

## Workforce Planning and Analysis Importance

We asked, “What is the importance of workforce planning and analysis within your organization?” We allowed survey respondents one of five choices shown in fig. 6. A plurality (46 percent) chose *top priority for the overall business* as their greatest urgency. Another 24 percent selected the next most popular choice, *top priority within HR*. Both top choices are slightly above 2023 levels. A third choice, *important to HR but not a top priority*, was selected by 26 percent of respondents, somewhat below 2023 levels. Overall, we conclude workforce planning importance slightly increased year over year, with ongoing mixed sentiment toward HR’s role. We also note that just 4 percent of respondents are *not considering* workforce planning and analysis in 2024.

### Workforce Planning and Analysis Importance 2023-2024

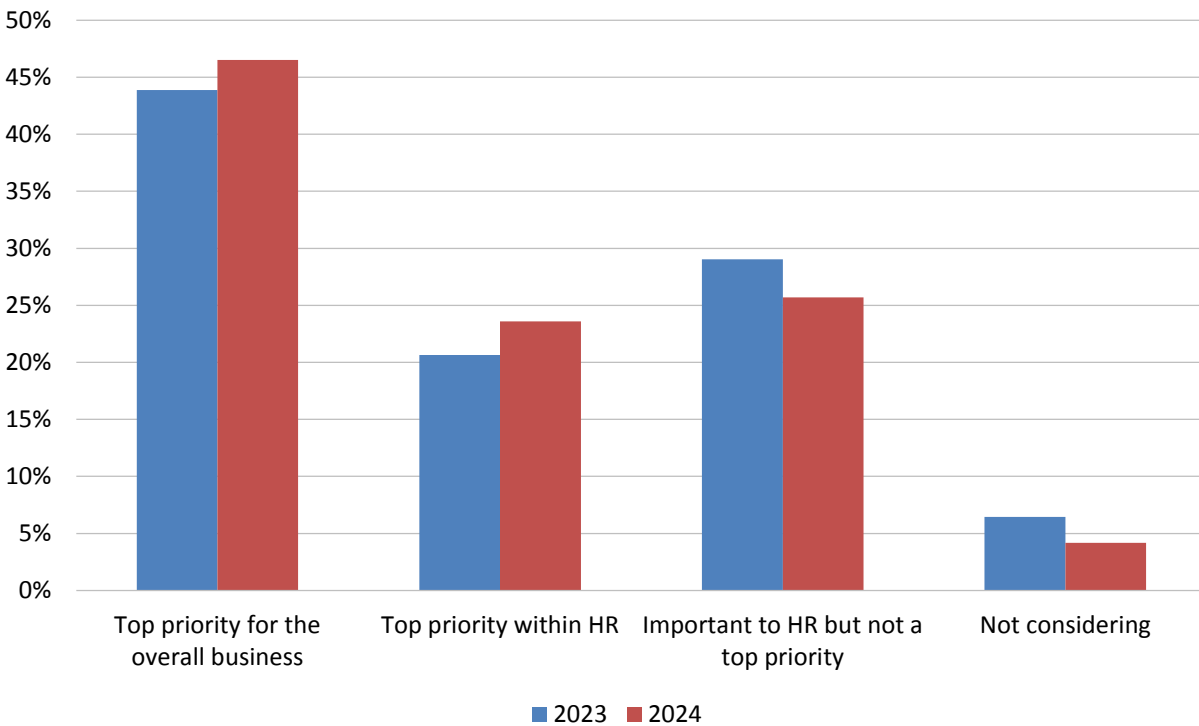


Figure 6 – Workforce planning and analysis importance 2023-2024

## 2024 Workforce Planning and Analysis Market Study

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The perceived importance of workforce planning and analysis varies by geography, with Asia Pacific and North America sentiment reporting noticeably higher sentiment than reported by EMEA respondents (fig. 7). This year, EMEA respondents are least likely (31 percent) to select *top priority for the overall business*, compared to 54 percent in Asia Pacific and 49 percent in North America. When we include the top three importance choices (excluding *not considering*), the results flatten somewhat, indicating broad global awareness and variable regional attention specifically to the human resources function.

### Workforce Planning and Analysis Importance by Geography

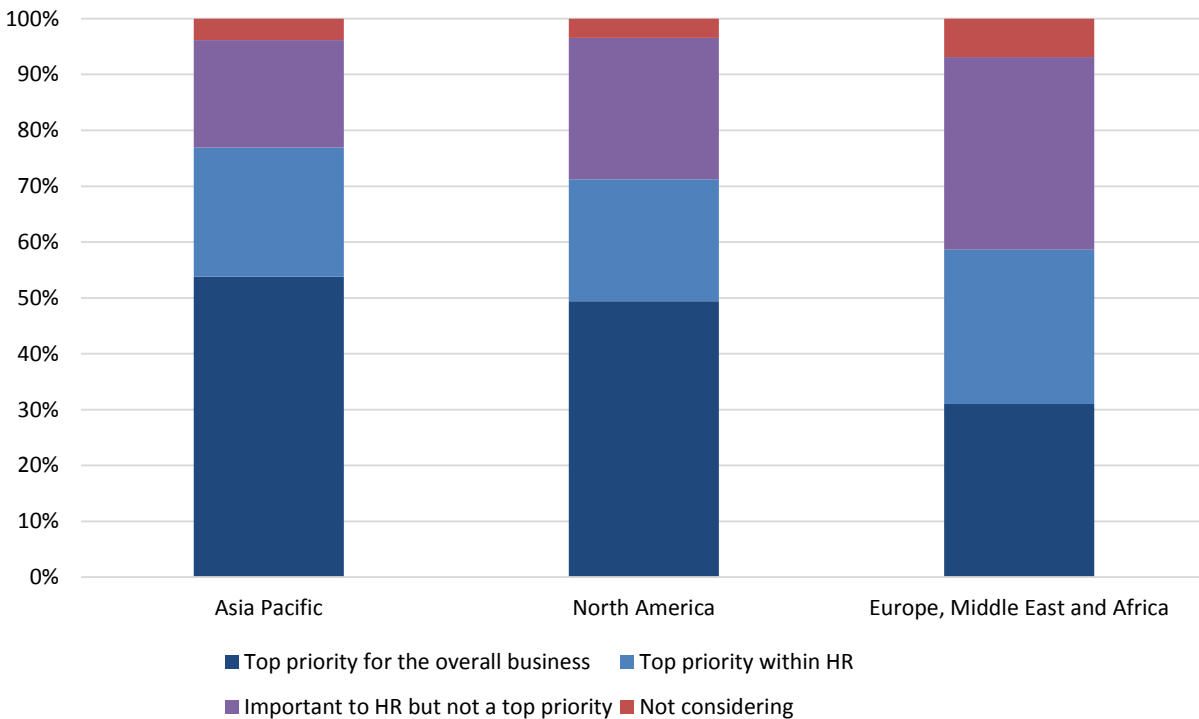


Figure 7 – Workforce planning and analysis importance by geography

## 2024 Workforce Planning and Analysis Market Study

Attitudes toward workforce planning and analysis vary according widely to industry in 2024 (fig. 8). *Financial services, healthcare, and technology* respondents (industries with varieties of uniquely skilled, high-demand workforce requirements), are 56-60 percent likely to say workforce planning and analysis is a *top priority for the overall business*. *Healthcare* respondents are especially likely to assert overall importance and also prioritize focus within HR. By comparison, respondents in *education, business services, and manufacturing* are more likely to assert workforce planning and analysis importance in the hands of human resources.

### Workforce Planning and Analysis Importance by Industry

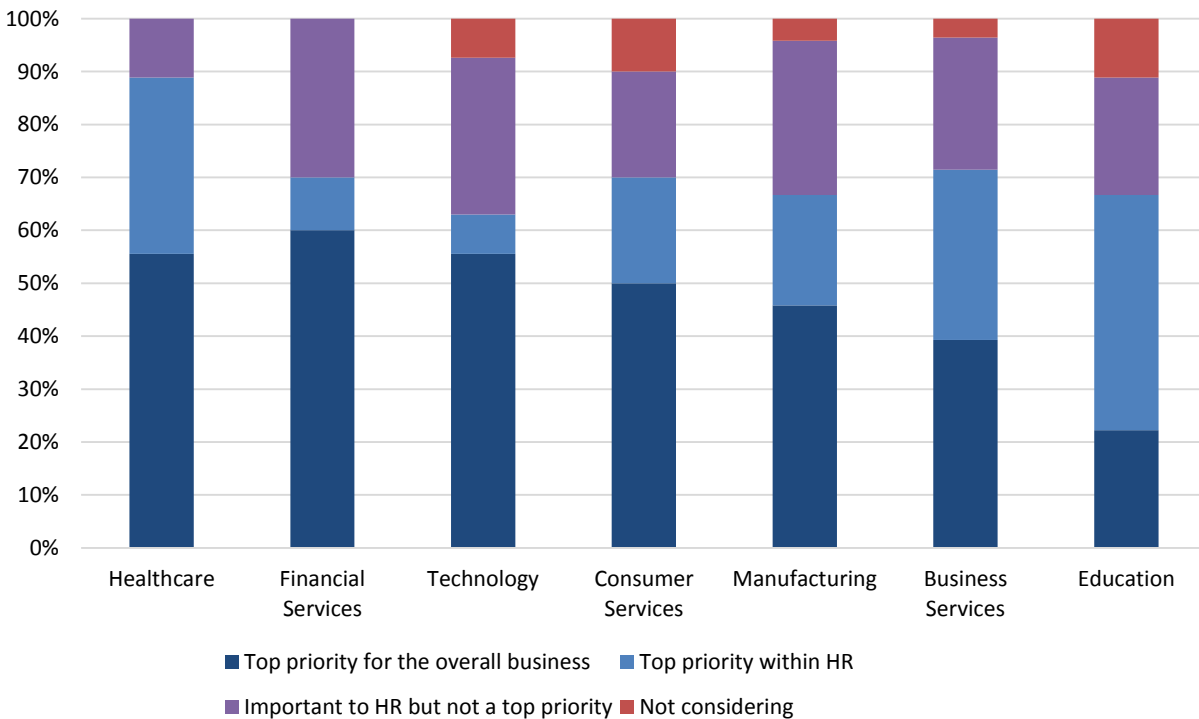


Figure 8 – Workforce planning and analysis importance by industry

## 2024 Workforce Planning and Analysis Market Study

The importance of workforce planning and analysis can be concentrated according to function and suggest different possible attitudes and drivers (fig. 9). On one hand, respondents in *sales and marketing*, *executive management*, and *finance* are most likely to view workforce planning as an *overall execution priority for the business*. Some specialized functions including *data science function* and the *BICC* are most likely to see criticality delegated to the HR function. *Operations* respondents might also see workforce planning concentrated in HR, perhaps in a more commoditized role. *Strategic planning* respondents are also likely to see workforce planning as important for the overall business but are perhaps least likely to consider it as an internal or overall business priority. In sum, functional attitudes might reflect the urgency and supply for localized workforce needs and the proper source for planning and managing requirements.

### Workforce Planning and Analysis Importance by Function

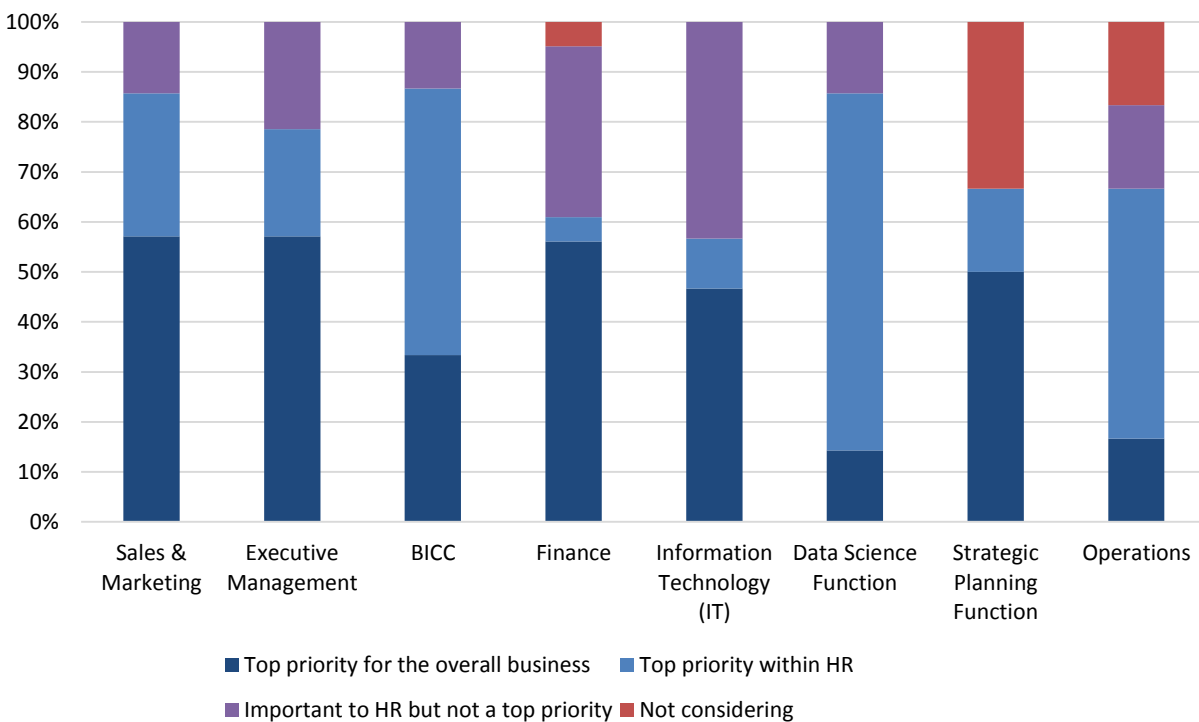


Figure 9 – Workforce planning and analysis importance by function

## 2024 Workforce Planning and Analysis Market Study

The importance of workforce planning and analysis correlates to organization size in 2024 (fig. 10). In an interesting contrast, *very large* organizations (> 10,000 employees) are least likely (35 percent) to consider workforce planning and analysis a *top priority for the overall business* (compared to 45-55 percent of smaller peers). But larger organizations report higher combined scores of *top priority for the overall business* and *top priority within HR*. One possible implication of this contrast is that larger organizations are more likely to have more comprehensive or mature HR practices than smaller peers. Another inference might be that smaller organizations assign a broader or shared organizational emphasis on workforce planning and analysis.

### Workforce Planning and Analysis Importance by Organization Size

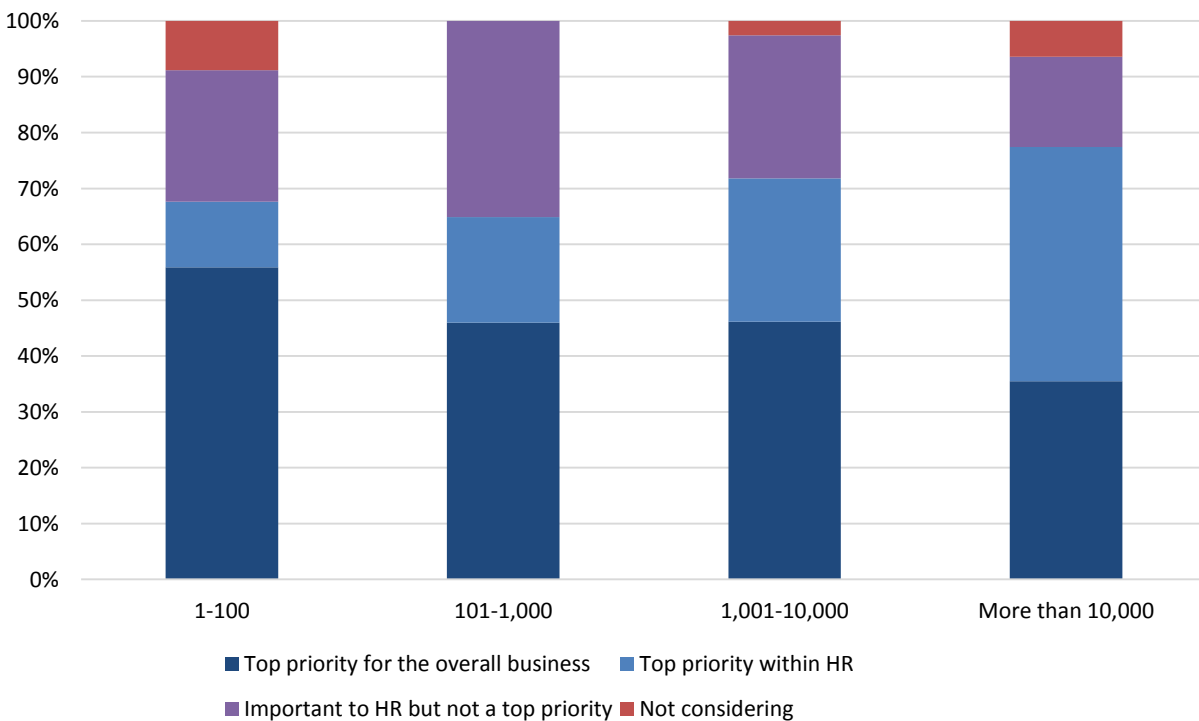


Figure 10 – Workforce planning and analysis importance by organization size



## 2024 Workforce Planning and Analysis Market Study

The importance of workforce planning and analysis correlates in part to company age in 2024 (fig. 11). For example, older organizations of 11-16 or 16 or more years are most likely (57 and 47 percent respectively), to say workforce planning and analysis is a *top priority for the overall business*. The youngest organizations of less than five years are 44 percent likely to consider the topic an *overall priority for the business*, as are 31 percent of organizations five to 10 years old. Perhaps a clearer correlation is in combined responses of *top priority for either the overall business or top priority within HR*, where an increasing progression of importance is visible with increasing company age.

### Workforce Planning and Analysis Importance by Company Age

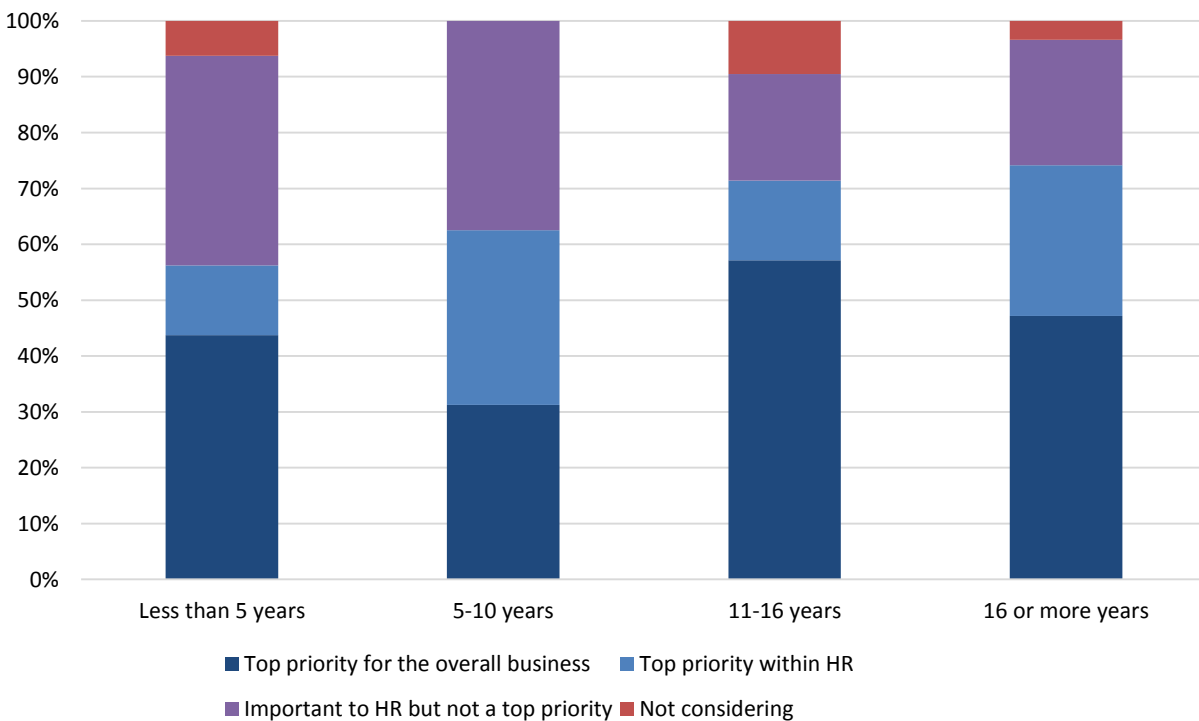


Figure 11 – Workforce planning and analysis importance by company age

## Workforce Planning and Analysis Adoption

We asked organizations about their current use and future plans for workforce planning and analysis adoption (fig. 12). In 2024, a plurality (46 percent) of respondents say they are using workforce planning today, up from 42 percent in 2023. About 24 percent say they will adopt workforce planning in the next 12 months (compared to about 30 percent in 2023), and another 12 percent say they will adopt in 24 months (compared to 15 percent in 2023). Although about 18 percent have *no plans*, our overall assessment of current use and planned adoption of workforce planning and analysis sentiment is very strong.

### Workforce Planning and Analysis Adoption 2023-2024

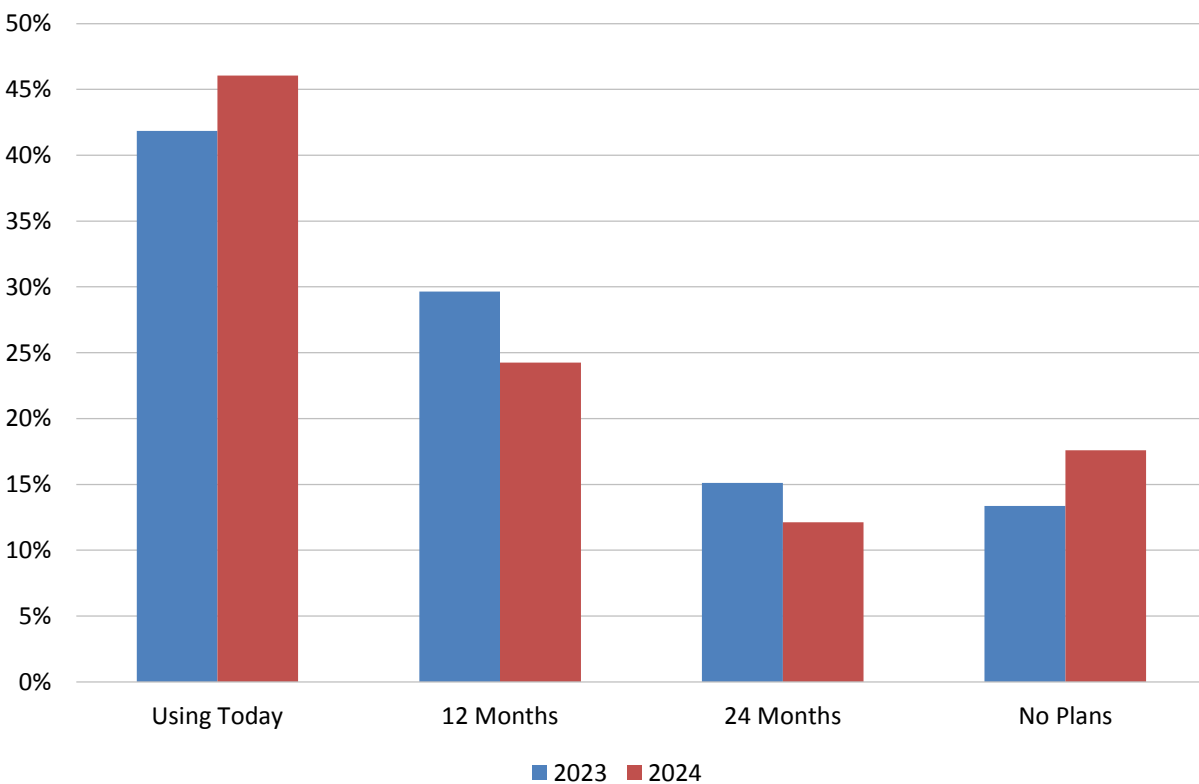


Figure 12 – Workforce planning and analysis adoption

## 2024 Workforce Planning and Analysis Market Study

Current use and future plans for workforce planning and analysis vary by geography, with overall activity strongest in North America and Asia Pacific (fig. 13). This year, current use is by far highest in North America (60 percent), followed by Asia Pacific (31 percent) and EMEA (20 percent). Planned 12-month adoption, an indicator of incipient or budgeted demand, is highest in Asia Pacific (50 percent), followed by EMEA (31 percent) and North America (14 percent). Twenty-six percent of EMEA respondents report “no plans” to use workforce planning and analysis.

### Workforce Planning and Analysis Adoption by Geography

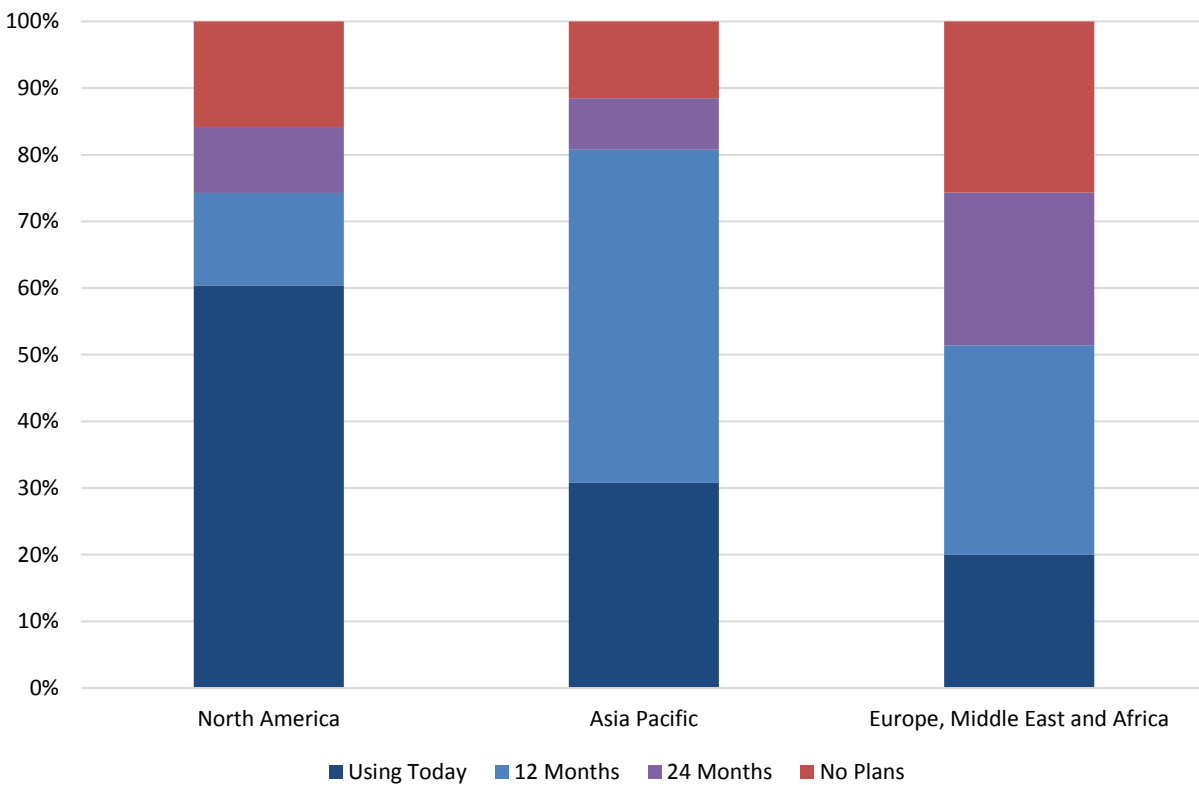


Figure 13 – Workforce planning and analysis adoption by geography

## 2024 Workforce Planning and Analysis Market Study

Rankings for workforce planning and analysis adoption vary noticeably by industry vertical in 2024 (fig. 14). This year, *business services* respondents report the highest level of *current use* (55 percent), followed by *financial services* (46 percent), *technology* (45 percent), and *education* respondents (44 percent). Twelve-month adoption plans are strongest in *consumer services* (36 percent), *manufacturing* (31 percent), and *healthcare* (30 percent). Current use plus 12-month plans for adoption is very consistent (70-72) percent across respondents in *business services*, *technology*, *consumer services*, *financial services*, and *healthcare*.

### Workforce Planning and Analysis Adoption by Industry

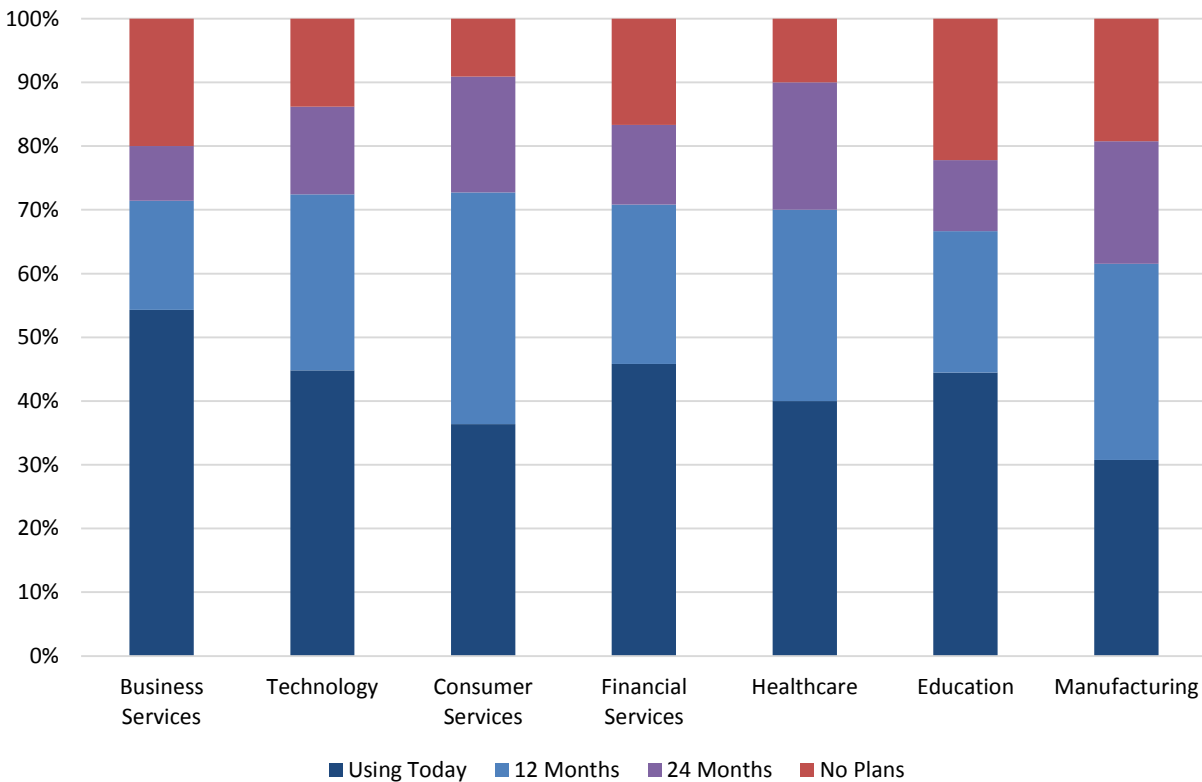


Figure 14 – Workforce planning and analysis adoption by industry

# 2024 Workforce Planning and Analysis Market Study

The use of workforce planning and analysis varies rather widely by function (fig. 15). In our 2024, our small contingent of *HR* respondents is easily most likely to be *current users* (75 percent). Excluding *HR*, *current use* is highest in *finance* (58 percent), *sales and marketing* (57 percent), *operations* (50 percent), and the *BICC* (48 percent). Another interesting finding is that 40 percent of *executive management* respondents are *current users*, and another (sample-high) 40 percent plan to *adopt in 12 months*. Twelve-month adoption plans are next highest in *IT* (36 percent) and *operations* (33 percent).

## Workforce Planning and Analysis Adoption by Function

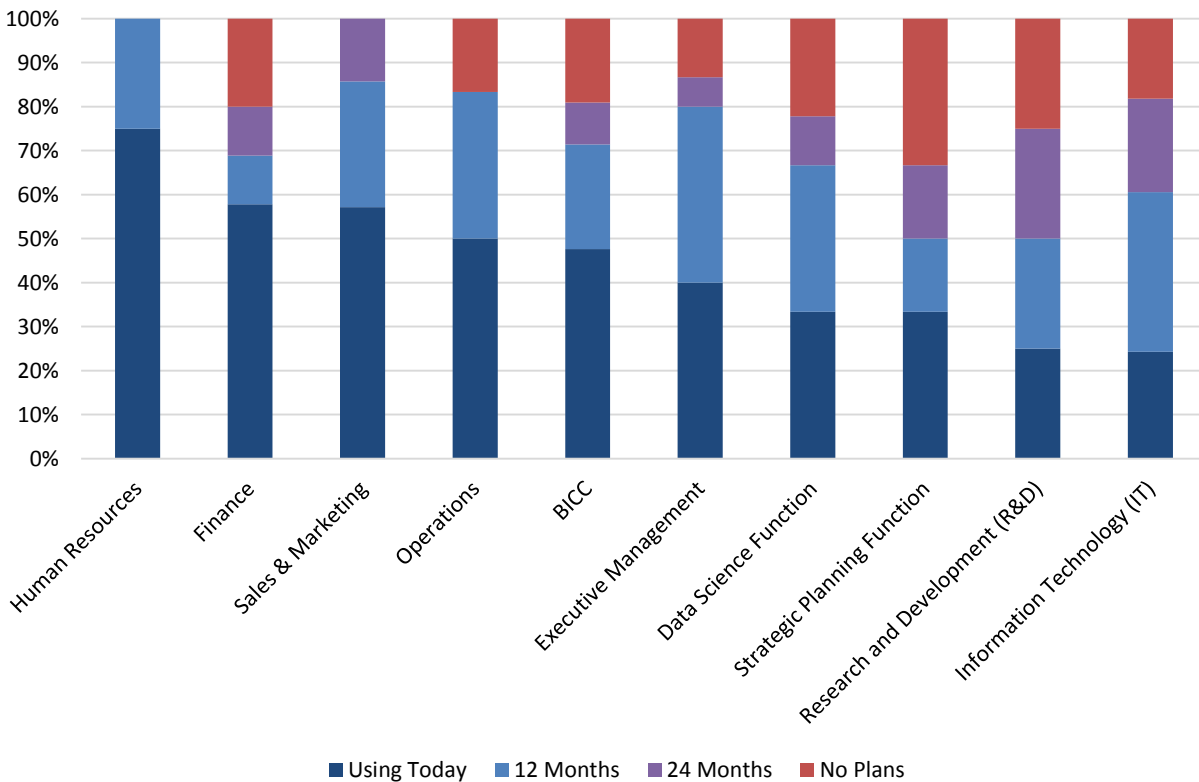


Figure 15 – Workforce planning and analysis adoption by function

## 2024 Workforce Planning and Analysis Market Study

Current use and future plans for workforce planning and analysis varies and does not correlate obviously to organization headcount in 2024 (fig. 16). This year, *very large organizations* (>10,000 employees) and midsize organizations (101-1,000 employees) report the highest *current use* (50 and 53 percent respectively). Intuitively, *small organizations* (1-100 employees) are least likely to be current users (39 percent), while large organizations (1,001-10,000 employees) report 42 percent current use. Small organizations are 22 percent likely to have *no plans*. All larger peers are 80-90 percent likely to report current use or future 12 to 24-month plans to adopt.

### Workforce Planning and Analysis Adoption by Organization Size

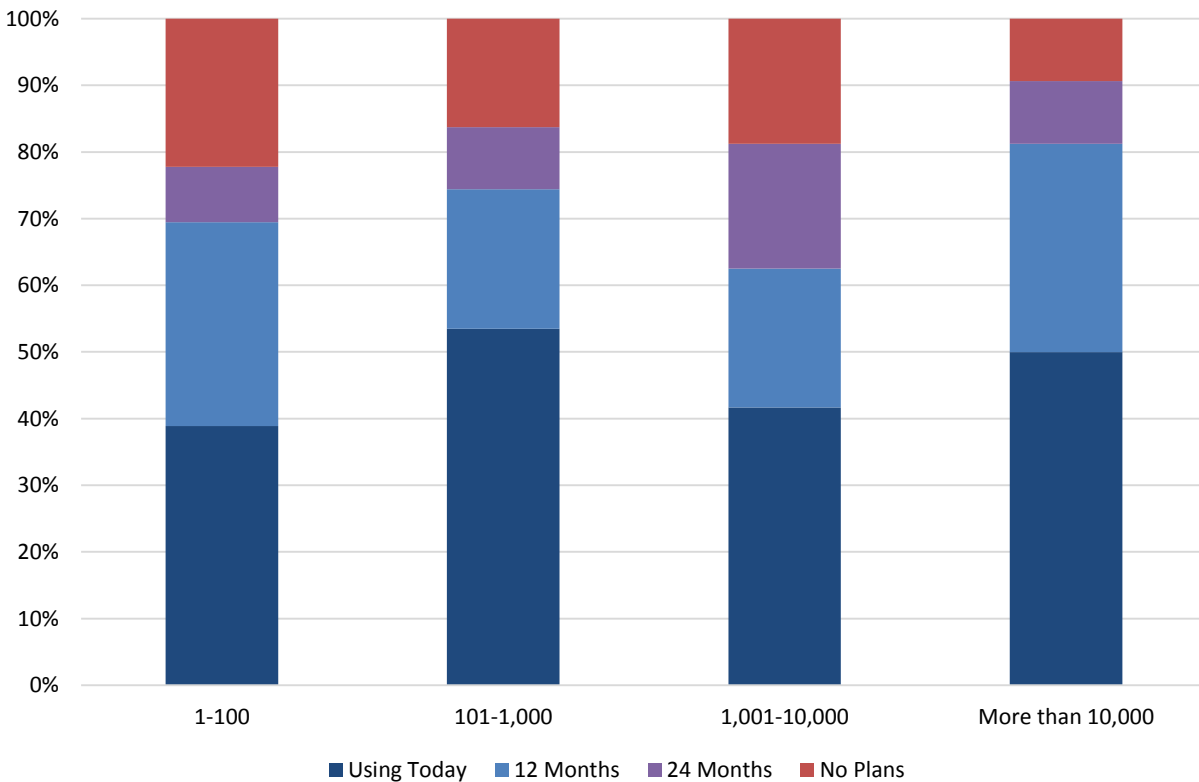


Figure 16 – Workforce planning and analysis adoption by organization size

# 2024 Workforce Planning and Analysis Market Study

## Workforce Planning and Analytics Users

We asked respondents, “Who are / will be the users of workforce planning and analysis?” using a weighted scale reflecting *primary* use, *secondary* use, or *will not use*. Quite predictably, respondents say *human resources* is the *most likely primary user*, followed by *finance* and *operations* (fig. 17). We also observe use penetration rates increasing year over year for these top three functions. Workforce planning and analysis is also an area of likely periodic high importance in all measured multiple functions, including *sales*, *customer service*, *marketing*, *supply chain*, and *manufacturing*. Overall user rankings are also unchanged year over year

### Workforce Planning and Analysis Users 2023-2024

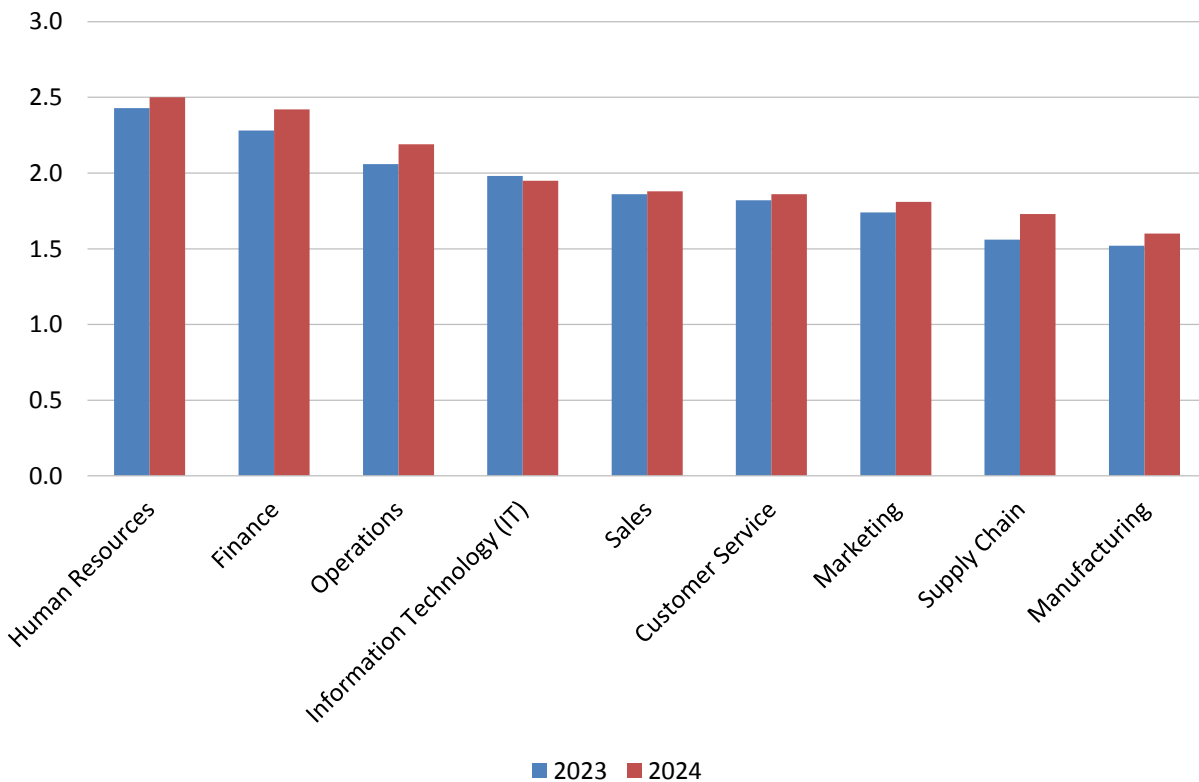


Figure 17 – Workforce planning and analysis users 2023-2024

# 2024 Workforce Planning and Analysis Market Study

Users of workforce planning and analysis vary broadly by geographic region in 2024 (fig. 18). This year, users in *human resources* and *finance* are the most tightly clustered globally. Where Asia Pacific *HR* users slightly outnumber those in North America, the opposite is true for *finance* users, which are slightly more prevalent in North America. Lower-ranked functional users of workforce planning and analysis are much more distributed by region. Invariably, Asia Pacific respondents are most likely to be regional users in roles such as *operations*, *sales*, *customer service*, *marketing*, *supply chain*, and *manufacturing*. EMEA respondents are the next most likely to be users among lower-ranked functions not confined to *HR* or *finance*.

## Workforce Planning and Analysis Users by Geography

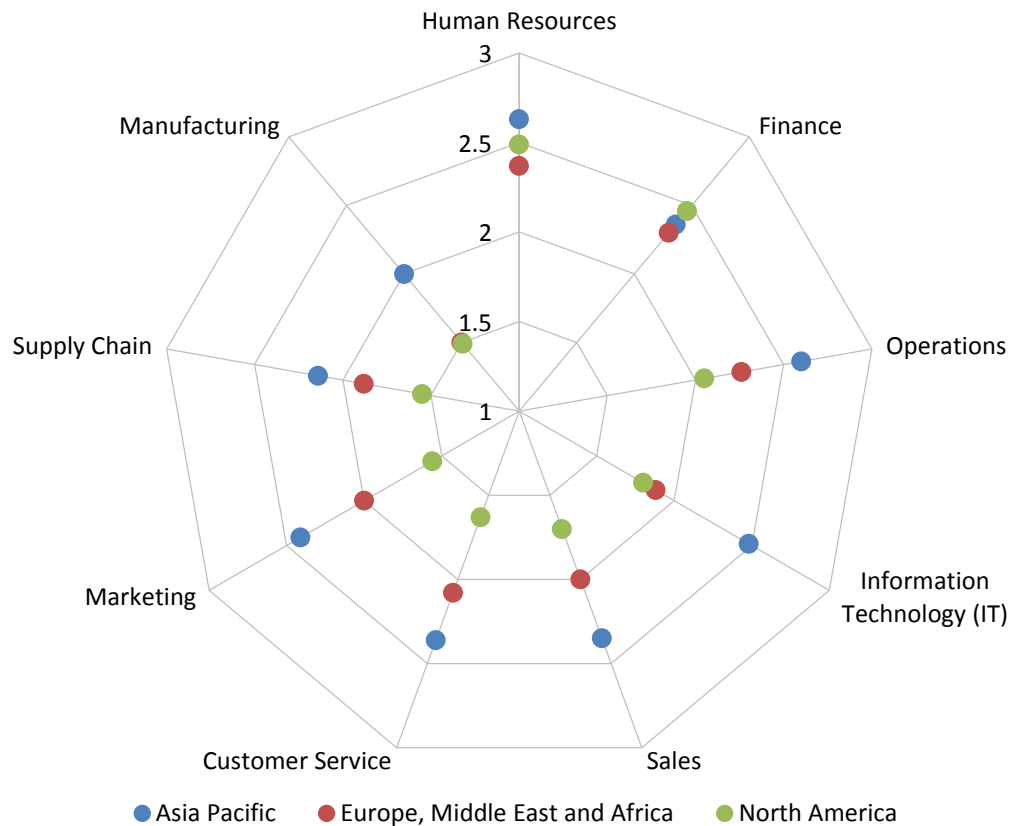


Figure 18 – Workforce planning and analysis users by geography



# 2024 Workforce Planning and Analysis Market Study

The users of workforce planning and analysis in 2024 vary by industry, with some patterns of use observable (fig. 19). This year, for example, *healthcare* is the clear leading user in *HR, operations, sales, and customer service*, and narrowly most likely to be users in *IT, marketing, and supply chain*. *Finance* users of workforce planning and analysis are most often found in *business services*, followed by *healthcare*. *Consumer services* and *education* respondents are often least likely to identify workforce planning and analysis users in all roles. In sum, multiple industries report users in multiple functions throughout the enterprise.

## Workforce Planning and Analysis Users by Industry

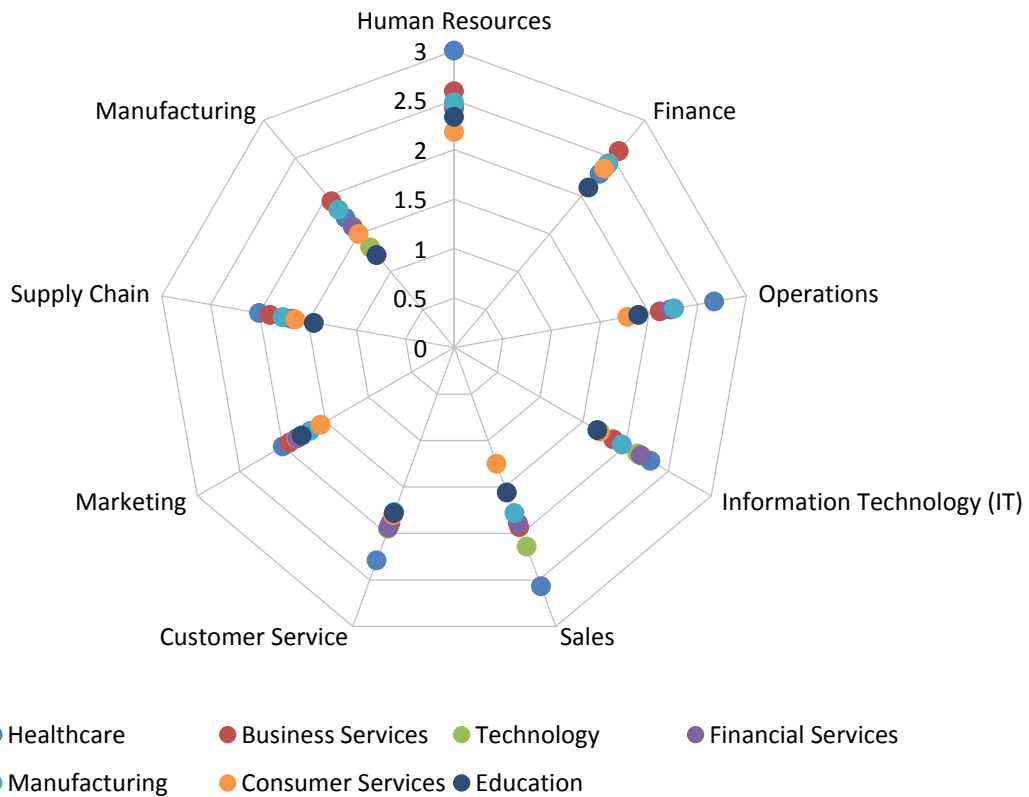


Figure 19 – Workforce planning and analysis users by industry

# 2024 Workforce Planning and Analysis Market Study

Organizations of any size are similarly likely to report users of workforce planning in multiple roles (fig. 20). The use of workforce planning and analysis clusters most tightly and universally in the *finance* function, even more than in the *HR* function (though our HR sample is admittedly small). This might indicate that dedicated workforce planning and analysis tools are more likely seen as attuned to budgeting and planning cycles than to HR-oriented employee management and recruiting. Outside of *finance*, users in multiple functions tend to aggregate most in very large organizations (> 10,000 employees) and large organizations (1,001-10,000 employees).

## Workforce Planning and Analysis Users by Organization Size

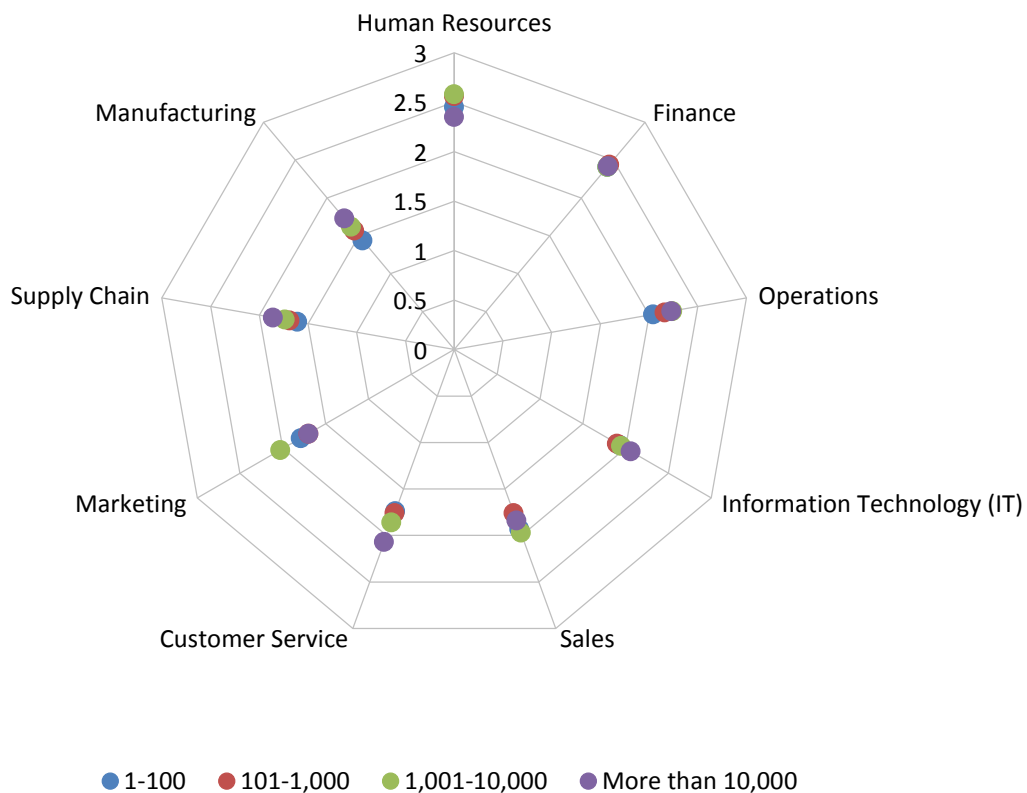


Figure 20 – Workforce planning and analysis users by organization size

# 2024 Workforce Planning and Analysis Market Study

## Workforce Planning Capabilities

We asked respondents to “assign the importance associated with” a list of 17 workforce planning capabilities on a scale ranging from “not important” to “critical” (fig. 21). In 2024, the top two features by weighted-mean score, *workforce planning per employee, organization and vacancy* (4.0) and *workforce compensation planning and scenario simulation* (3.8), hold cumulative criticality at or near the level signifying *very important*. The next three most important capabilities, *workforce costing*, *workforce resource planning*, and *workforce forecasting and pipeline management*, score 3.5-3.6, a level about midway between *important* and *very important*. In sum, all but the three lowest-ranked capabilities are at least *important* in 2024. Additionally, all capabilities except *retention planning* are marginally or significantly more important in 2024 compared to our inaugural 2023 study.

## Workforce Planning Capabilities 2023-2024

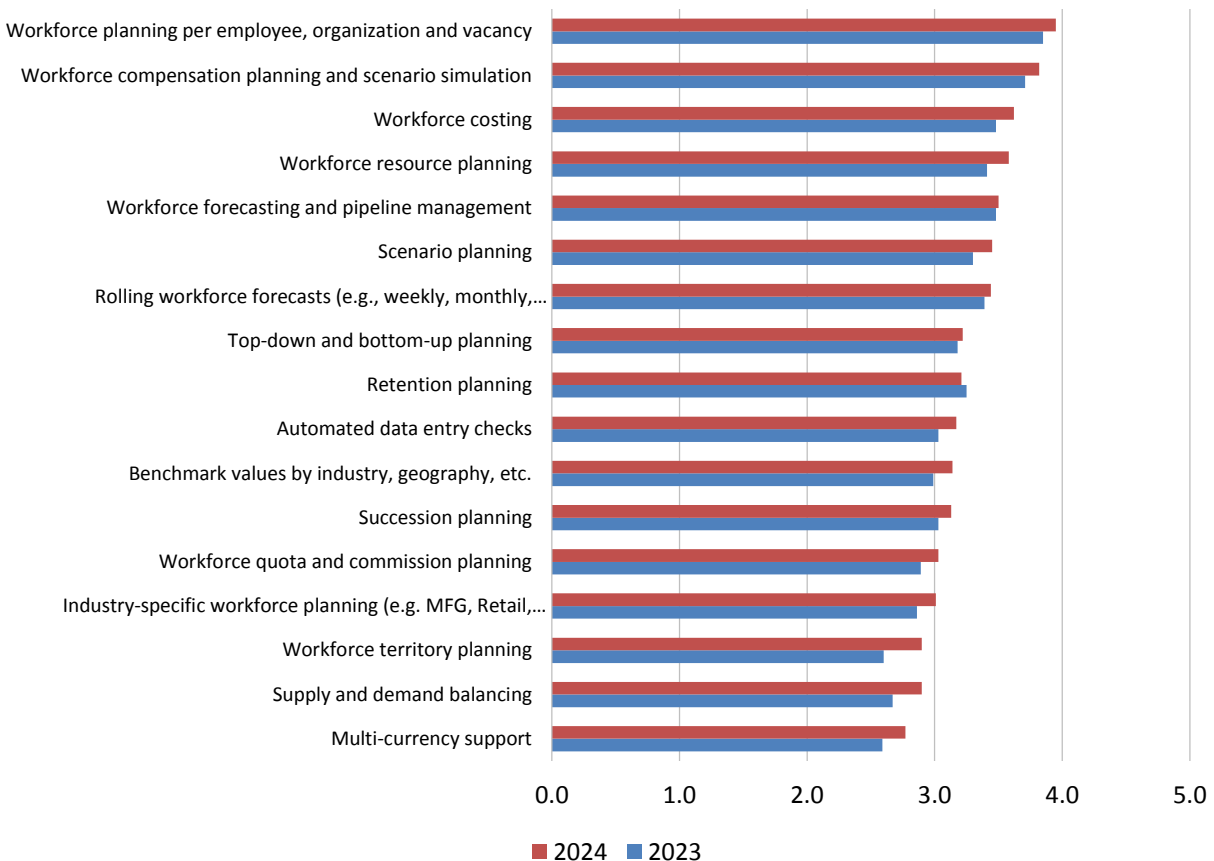


Figure 21 – Workforce planning capabilities 2023-2024

# 2024 Workforce Planning and Analysis Market Study

Viewed by geography, workforce planning capabilities reveal breakouts of interest that are nearly always highest in Asia Pacific (fig. 22). This year, the top three features, *workforce planning per employee, organization, and vacancy*; *workforce compensation planning and scenario simulation*; and *workforce costing* are among the most clustered by geography. Even though capability interest declines among users in North America and EMEA, the top nine ranked workforce planning and analysis capabilities are at least *important* to respondents in all regions. Despite relatively strong North America adoption (fig. 13), both North America and EMEA respondents most often post below-average interest in workforce planning capabilities.

## Workforce Planning Capabilities by Geography

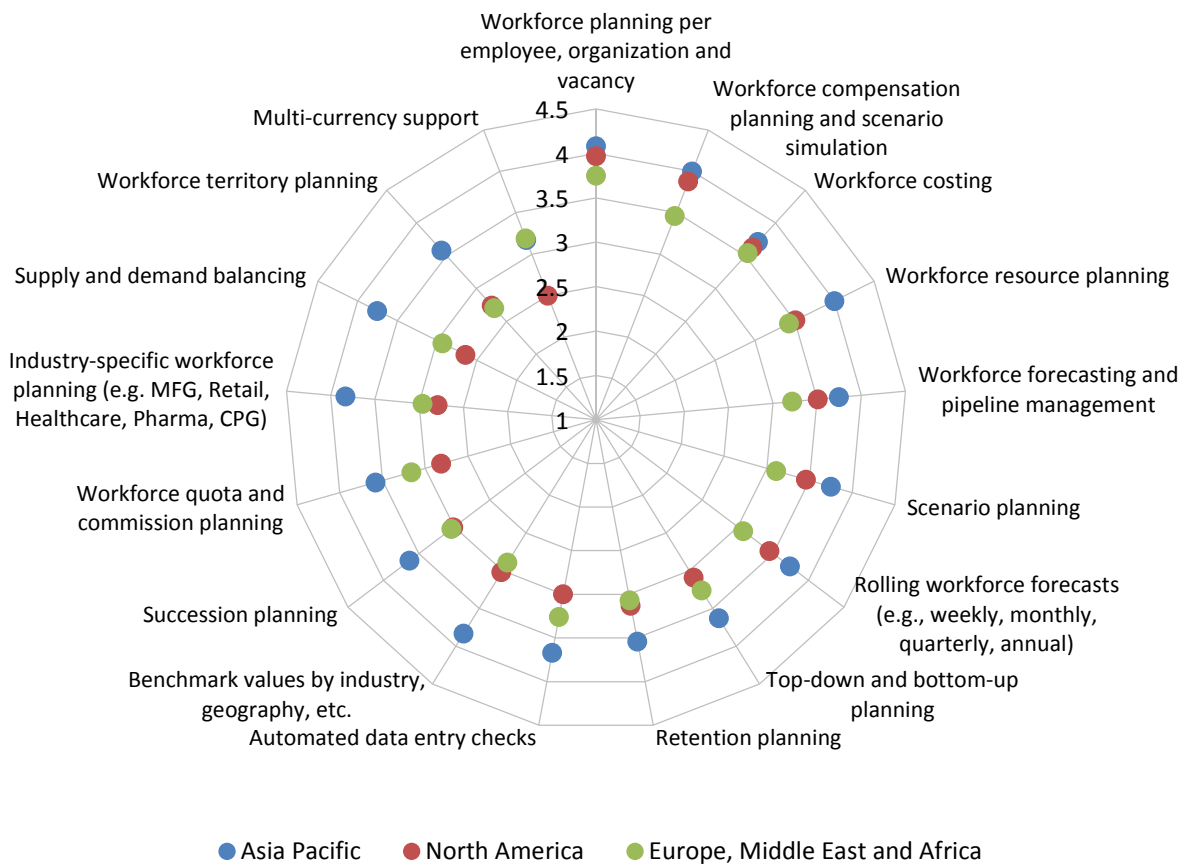


Figure 22 – Workforce planning capabilities by geography

# 2024 Workforce Planning and Analysis Market Study

Interest in workforce planning capabilities varies by industry in 2024 but shows some patterns (fig. 23). This year, for example, respondents in *healthcare* report the highest or near-highest interest in many or most capabilities, including some stand-out results in discrete areas including *retention planning*, *succession planning*, *industry-specific workforce planning*, and *supply and demand balancing*. Among other interesting observations, respondents in *technology* and *education* organizations report higher-than-average interest in multiple capabilities, while *manufacturing* and *financial services* (which may more often rely on industry-specific solutions) tend to be least interested by industry.

## Workforce Planning Capabilities by Industry

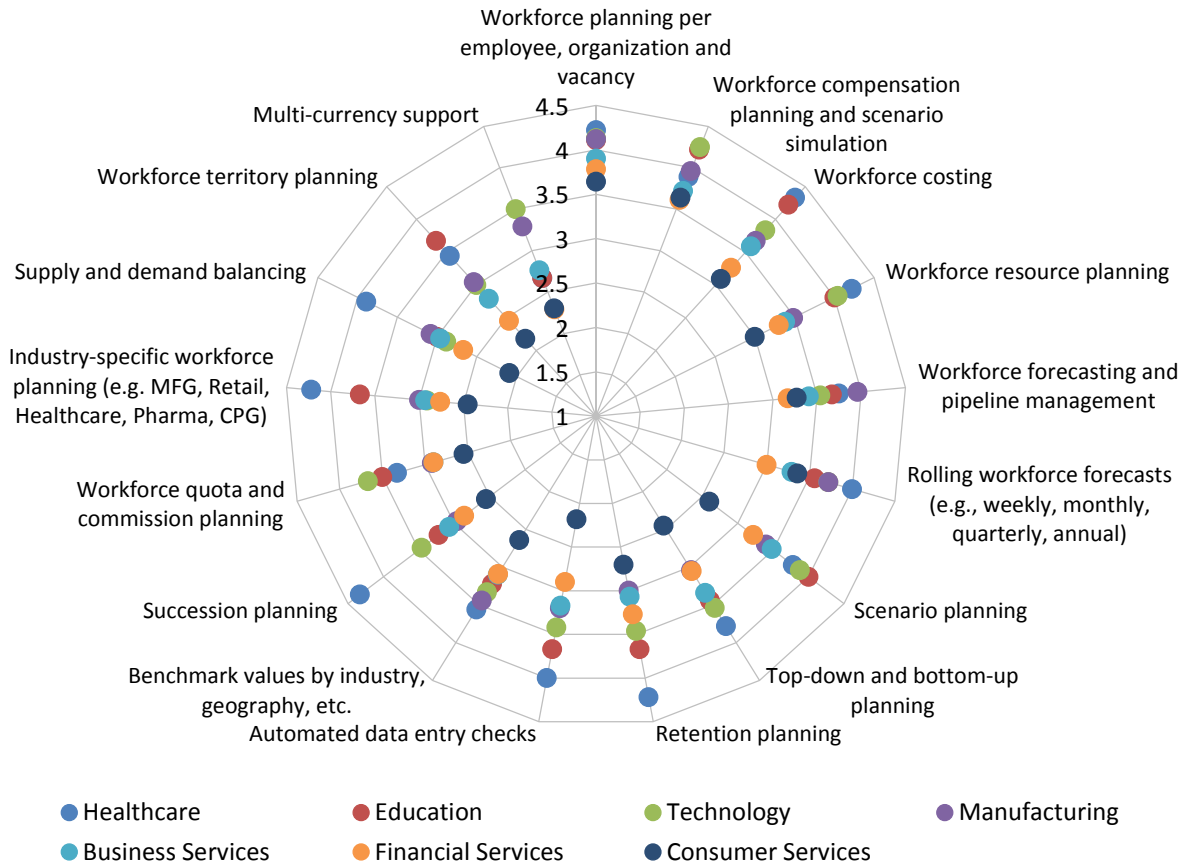


Figure 23 – Workforce planning capabilities by industry

# 2024 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning capabilities show specific areas of interest by function in 2024 (fig. 24). This year, while *HR* expectedly shows the strongest or equally strongest interest in at least nine capabilities, other areas of focus are of interest. For example, in an indication of in-house development priorities, *R&D* respondents post high or near-high scores for multiple capabilities including top-ranked *workforce planning per employee, workforce resource planning, scenario planning, workforce quota and commission planning, and industry specific workforce planning*. Among other interesting findings, *sales and marketing* respondents report high marks in multiple capabilities, with relatively keen interest in *workforce compensation planning, top-down and bottom-up planning, benchmark values by industry, workforce quota and commission planning, and supply and demand balancing*. The strongest area of interest among *finance* respondents is *rolling workforce forecasts*.

## Workforce Planning Capabilities by Function

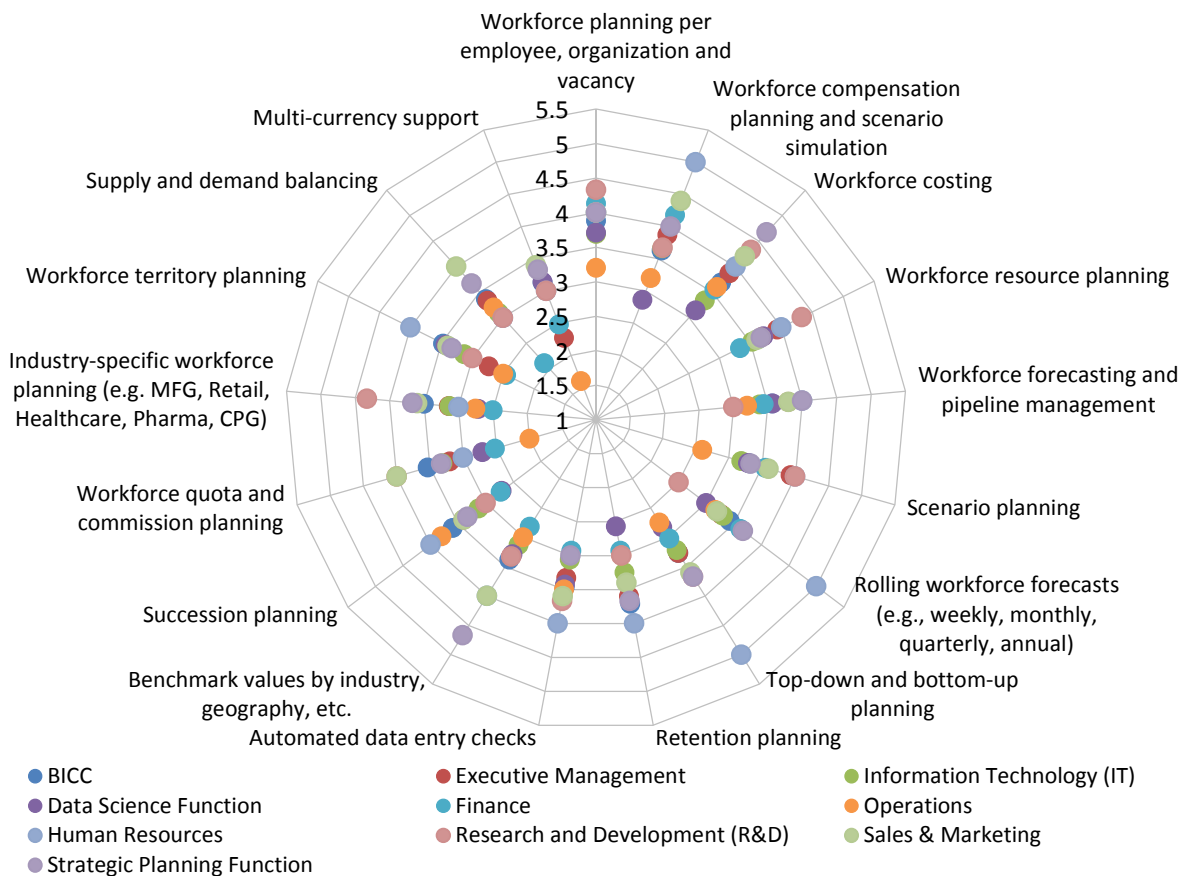


Figure 24 – Workforce planning capabilities by function

# 2024 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning capabilities often but not always correlates to organization size in 2024 (fig. 25). For example, while very large organizations (> 10,000 employees) post high scores in areas including top-ranked *workforce planning per employee*, all smaller peers actually report somewhat higher scores for second-ranked *workforce compensation planning and scenario simulation* and *scenario planning*. Generally, midsize organizations (101-1,000 employees), followed by small organizations (1-100 employees), report the lowest interest in workforce planning capabilities. That said, interest in capabilities often rather closely ranks according to organization size, with the top five capabilities particularly clustered.

## Workforce Planning Capabilities by Organization Size

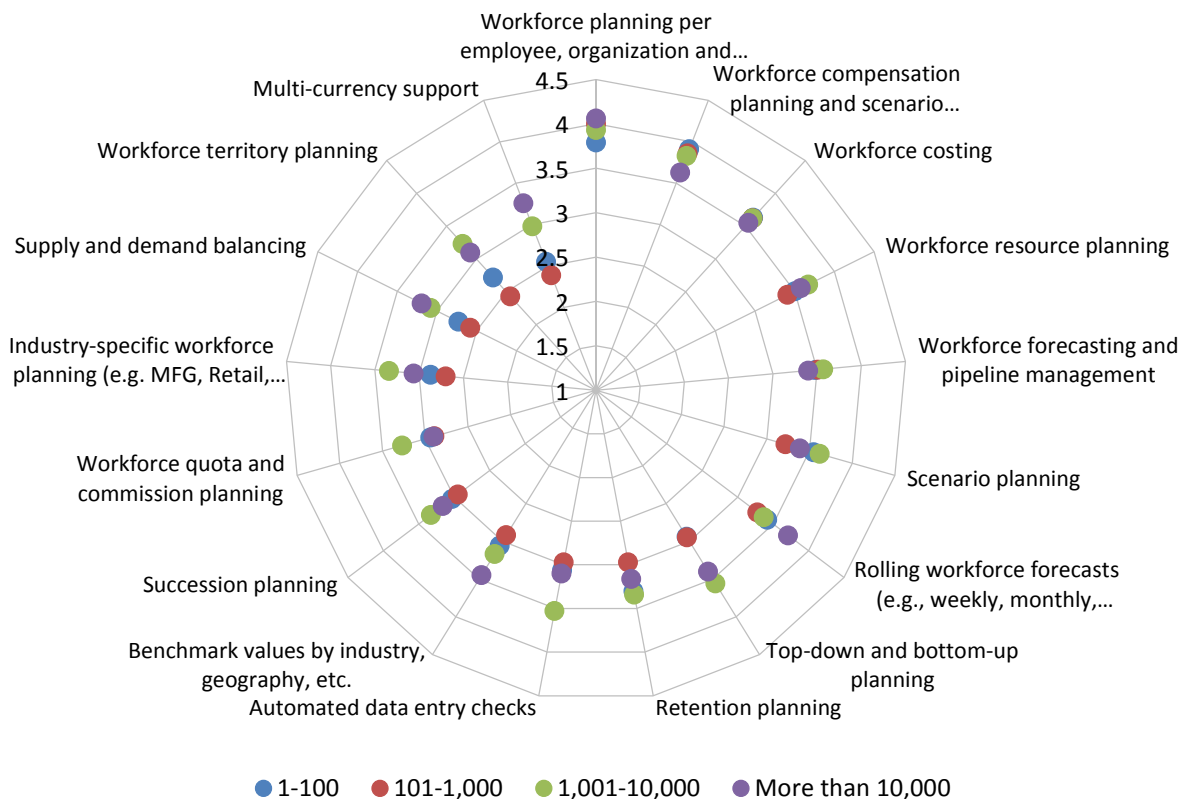


Figure 25 – Workforce planning capabilities by organization size

# 2024 Workforce Planning and Analysis Market Study

Sentiment toward specific workforce planning capabilities varies according to company age in 2024, with some emergent patterns (fig. 26). Most visibly, the oldest organizations (16 or more years), in nearly every case apply the lowest importance scores to all capabilities, possibly indicating a non-integrated approach (fig. 26). Also interesting, the youngest organizations of five years or less give below-average scores to many capabilities, including those highest ranked. But they apply the highest scores to certain other capabilities including *retention planning*, *automated data-entry checks*, and *succession planning*. Organizations of 11-16 years report possibly the highest overall scores, possibly marking a timeline of the onset of interest and the emergence of enterprise workforce planning capabilities.

## Workforce Planning Capabilities by Company Age

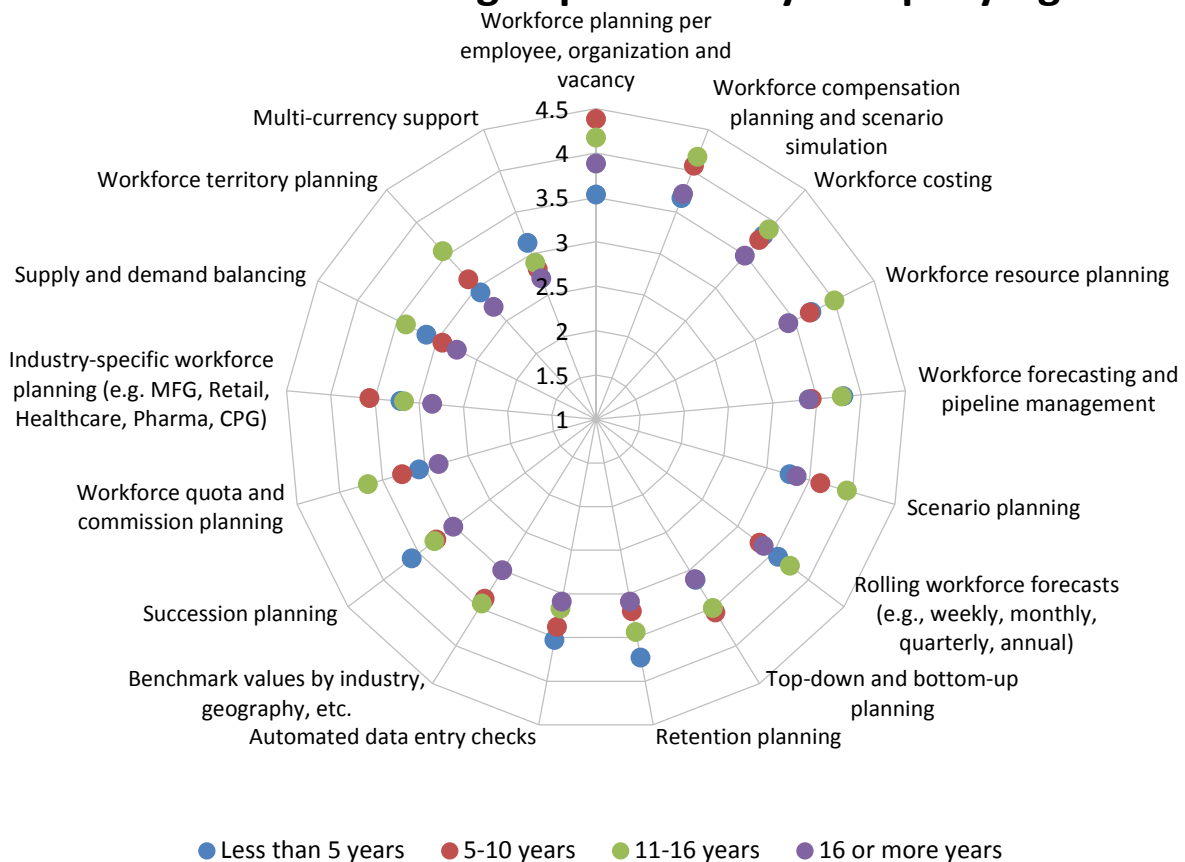


Figure 26 – Workforce planning capabilities by company age



# 2024 Workforce Planning and Analysis Market Study

## Workforce Analysis Priorities

We asked respondents to “assign the importance associated with” a list of 23 workforce analysis capabilities (fig. 27). This year, the top four priorities (*compensation, headcount and core demographics, retention, and year-end projections and forecasting*) are all above a weighted-mean score midway between *important* and *very important*. (In likely signs of resource competition, the area of *retention* moved from fourth to third place in 2024, while *performance and succession* also improved rank year over year.) Among lower ranked priorities, *predictive workforce forecasting* and *pre-configured dashboards and reports* gain the most momentum year over year, while *employee experience, skills, and learning* decline most noticeably. Interestingly, *individual productivity* is the lowest scored priority, though it still earns a score near *important* in 2024.

## Workforce Analysis Priorities 2023-2024

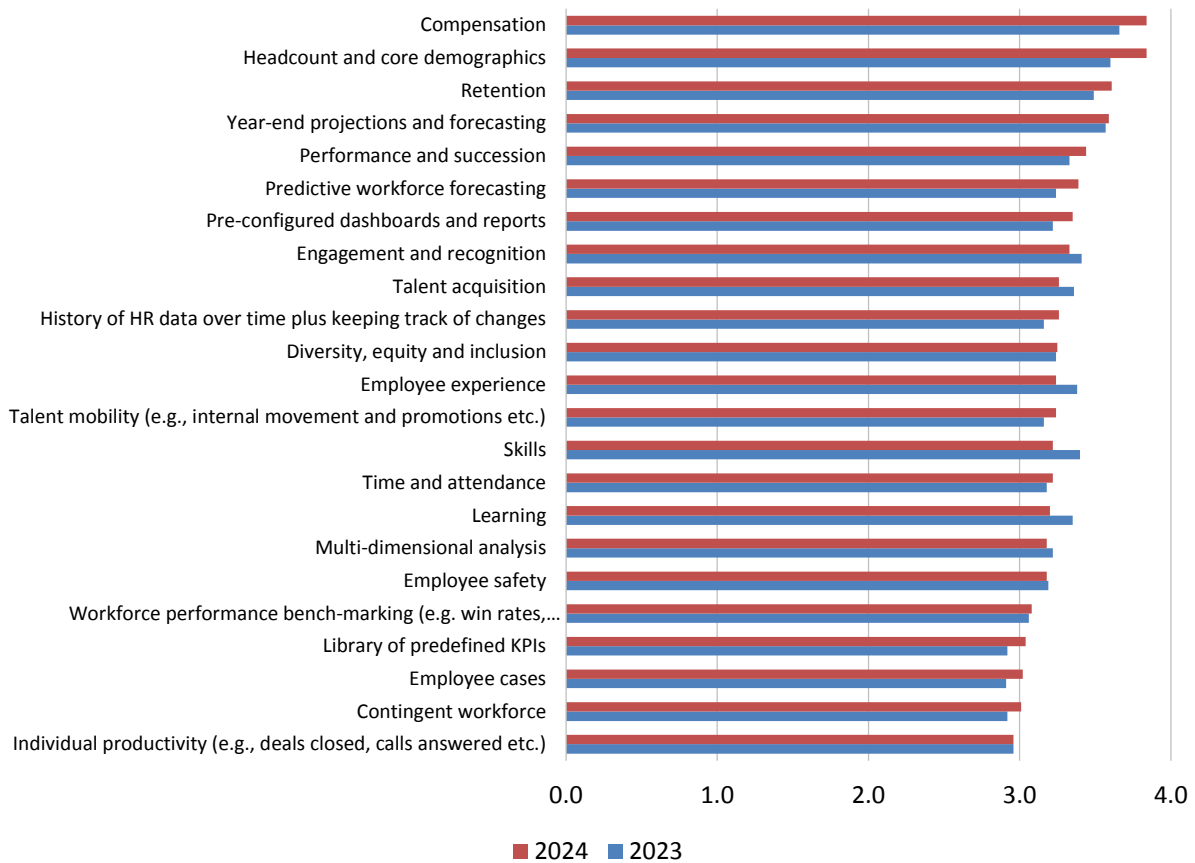


Figure 27 – Workforce analysis priorities 2023-2024

# 2024 Workforce Planning and Analysis Market Study

Viewed by geography, the top four workforce analysis priorities are most important to respondents in North America and Asia Pacific (fig. 28). In contrast, all priorities below the top four always receive the highest relevance scores by respondents in Asia Pacific, usually by a significant margin. By comparison, respondents in EMEA are never most interested in any given priority, though they sometimes show more interest than North America peers.

## Workforce Analysis Priorities by Geography

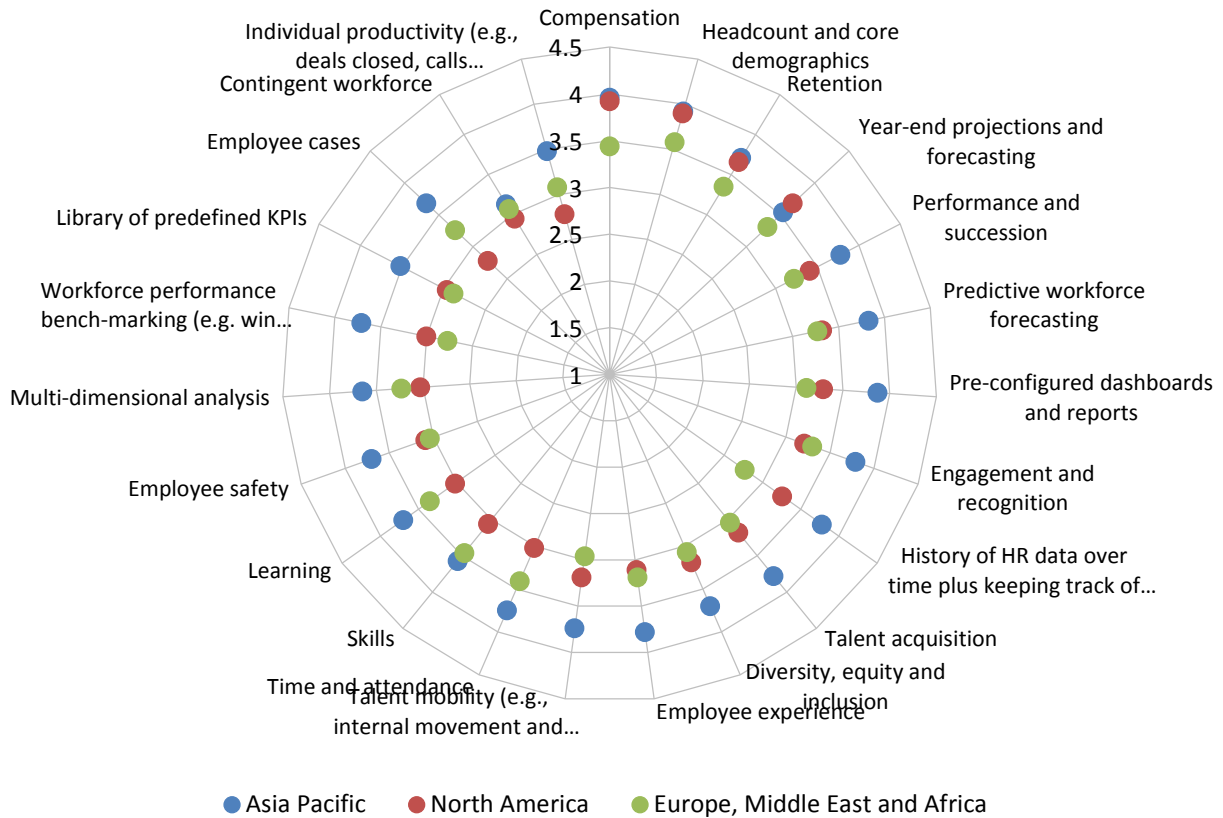


Figure 28 – Workforce analysis priorities by geography

# 2024 Workforce Planning and Analysis Market Study

Sentiment toward workforce analysis capabilities varies according to industry in 2024, though one clear leader is *healthcare* (fig. 29). This year, respondents in *healthcare* organizations lead interest in at least 11 of the top 13 analysis priorities, led by *headcount and core demographics*; *retention*; *performance and succession*; *predictive workforce forecasting*; *preconfigured dashboards and reports*; *engagement and recognition*; *history of HR data*; and *diversity, equity and inclusion*. Many trailing priorities also get high or near-high scores from *healthcare*. Exceptions include *compensation*, where *real estate* respondents post high scores, and *year-end projections and forecasting*, where *education* respondents post high scores and also emphasize *multi-dimensional analysis*. *Government* respondents post the highest scores for *time and attendance*.

## Workforce Analysis Priorities by Industry



Figure 29 – Workforce analysis priorities by industry

# 2024 Workforce Planning and Analysis Market Study

Interest in embedded workforce analysis priorities varies unevenly by function in 2024, with sentiment strongest in *HR* but sometimes led or followed closely by respondents in *sales and marketing* (fig. 30). *R&D* interest, likely indicative of internal development of workforce analysis, is strong in certain areas including *predictive workforce forecasting*, *employee experience*, *multi-dimensional analysis*, *library of pre-defined KPIs*, and *employee cases*. *Executive management* reports the highest importance for *pre-configured dashboards and reports*. Interestingly, respondents in *finance* and *operations* most often post below or well below average interest in workforce analysis capabilities.

## Workforce Analysis Priorities by Function

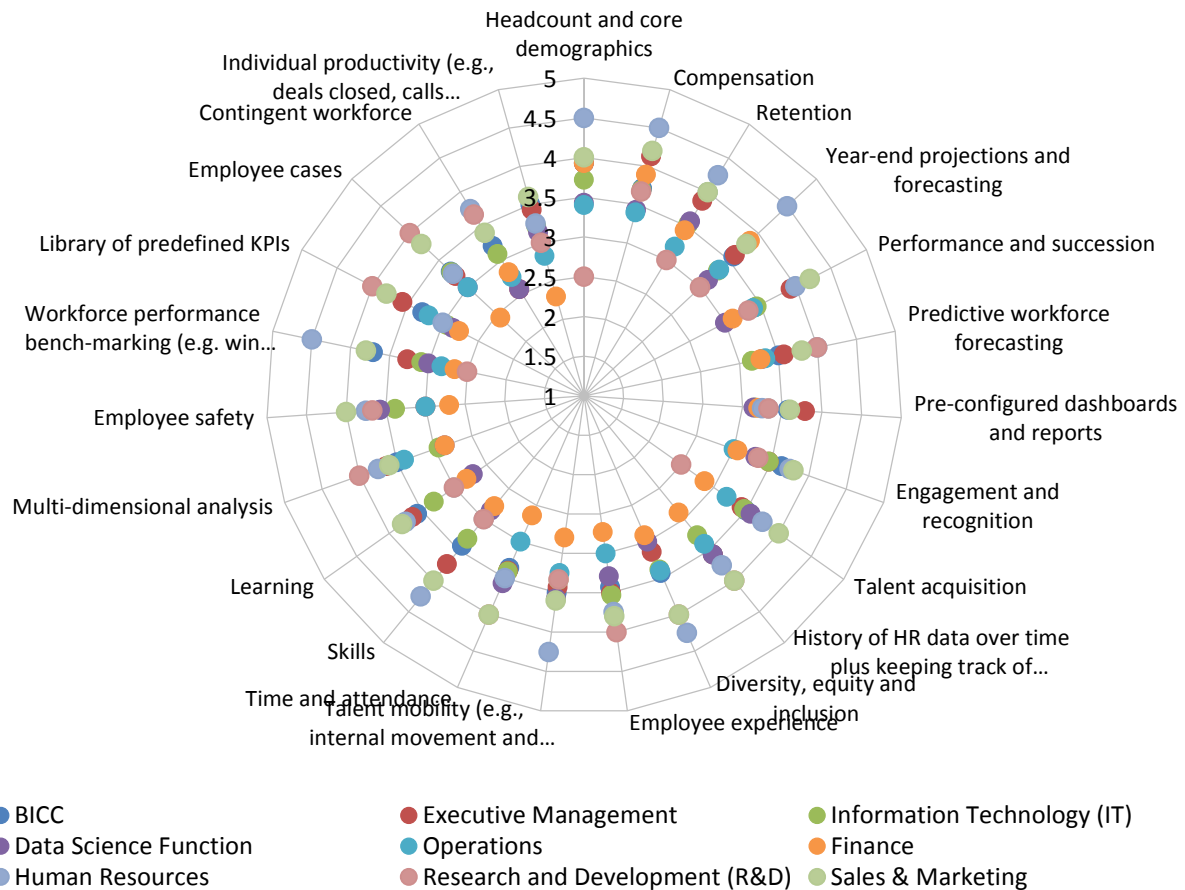


Figure 30 – Workforce analysis priorities by function

# 2024 Workforce Planning and Analysis Market Study

Viewed by organization size, interest in workforce planning and analysis often but not always increases with organization size (fig. 31). Some closely clustered areas, such as *compensation* and *year-end-forecasting*, are led by small (1-100 employees) and midsize (101-1,000) organizations, respectively, albeit narrowly. Interest in the great majority of workforce analysis priorities is nonetheless at least somewhat highest in either *very large* (>10,000 employees) or *large* (1,001-10,000 employees) organizations. The top eight priorities are at least *important* to all organizations regardless of size.

## Workforce Analysis Priorities by Organization Size

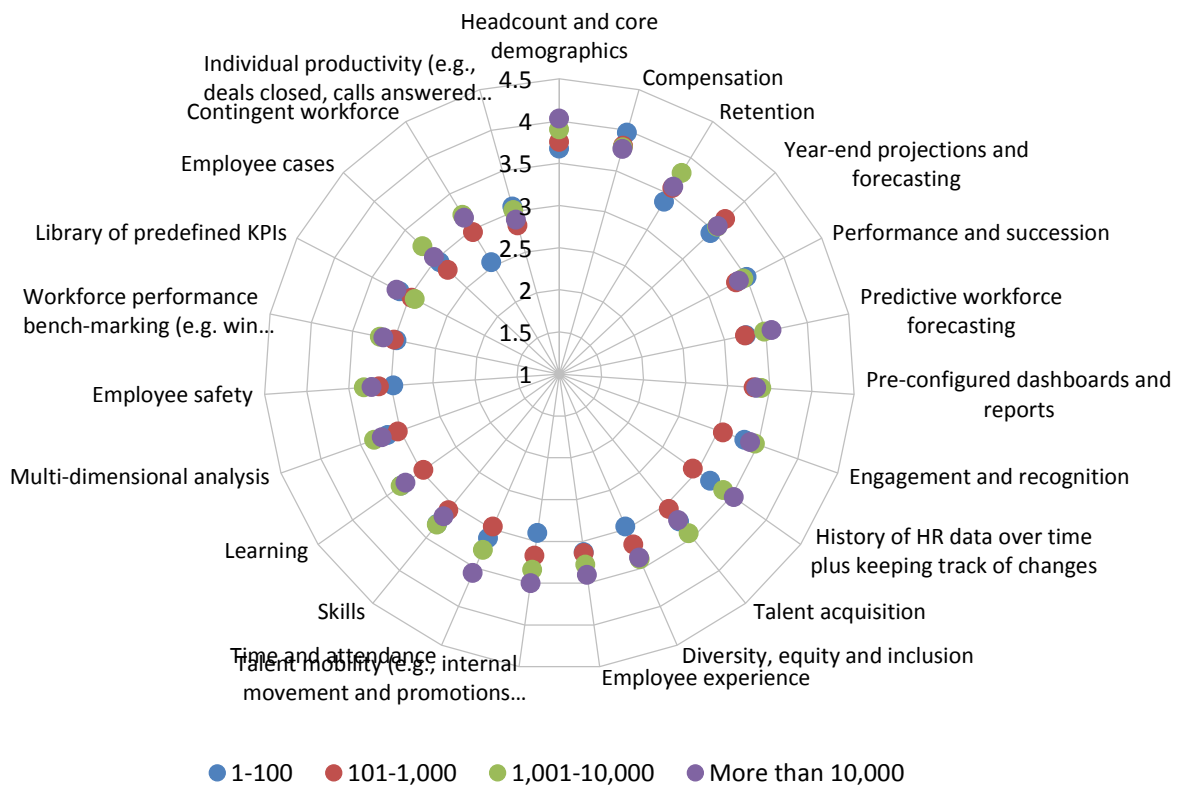


Figure 31 – Workforce analysis priorities by organization size

# 2024 Workforce Planning and Analysis Market Study

The oldest organizations of *11-16 years* (that are most likely to have entrenched legacy workforce practices), are less likely to have high sentiment and interest toward workforce analysis priorities (fig. 32). Interestingly, the youngest organizations of *five years or less* are also less likely than average to post high scores for most priorities in most cases. Often, organizations in the middle quadrants of *five to 10 years* or *11-16 years* place a higher priority upon applications for workforce analysis. While results also vary with industry and function, we would expect that *older organizations* are more likely to concentrate legacy workforce analysis in practices in HR, strategic planning, or finance.

## Workforce Analysis Priorities by Company Age



Figure 32 – Workforce analysis priorities by company age

# 2024 Workforce Planning and Analysis Market Study

## Embedded Workforce Data Access and Manipulation

We asked respondents to “assign the importance associated with” a list of seven workforce data access and manipulation capabilities in 2024 (fig. 33). The most popular, *utilize and update multiple hierarchies*, receives a weighted-mean score of 3.7, approaching the level signifying *very important*. The next most important, *unify data from multiple source systems*, gets a weighted-mean score of 3.4, approaching midway between *important* and *very important*. All seven measures receive greater than 3.0 (> *important*) scores. We also note that five of seven measures increase slightly in importance year over year, while two, *cleanse and transform raw data* and *pipe people data into other components*, slightly decline in importance in 2024.

### Workforce Data Access and Manipulation 2023-2024

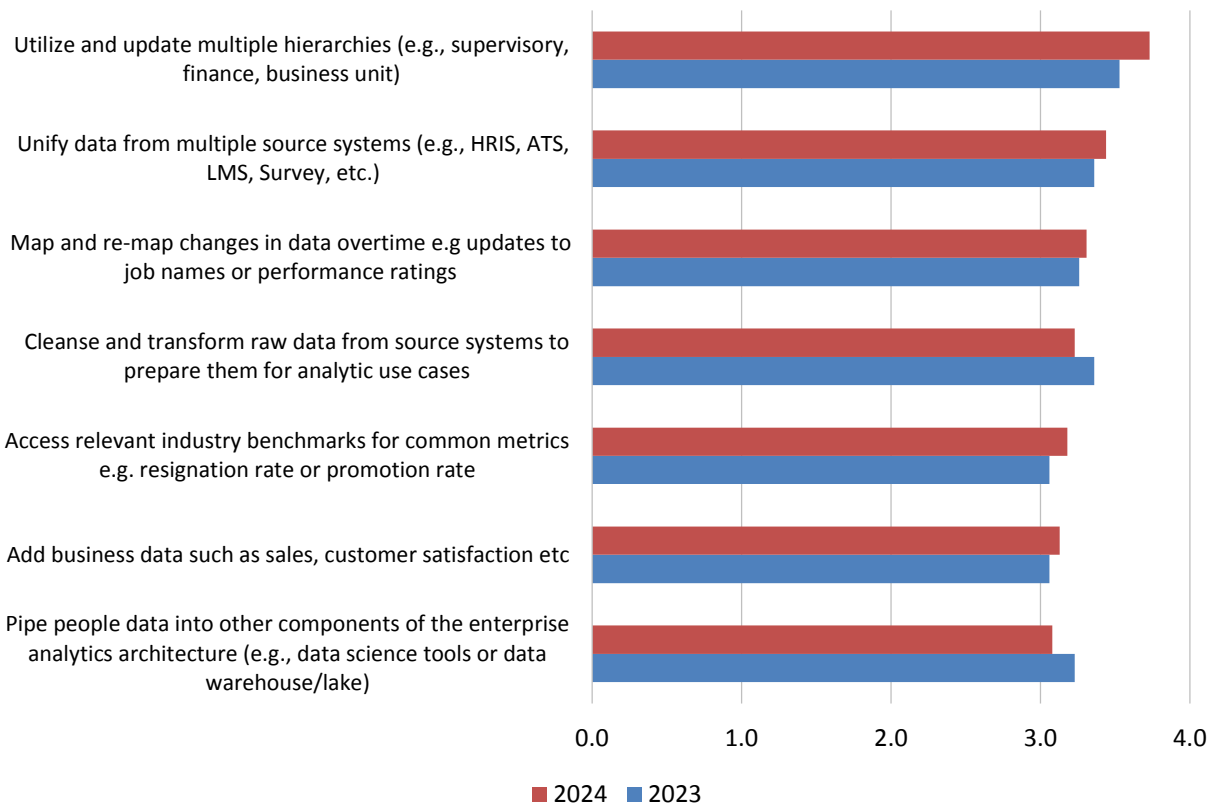


Figure 33 – Workforce data access and manipulation 2023-2024

# 2024 Workforce Planning and Analysis Market Study

Viewed by geography, sentiment toward workforce data access and manipulation capabilities somewhat clusters and is strongest among respondents in Asia Pacific (fig. 34). Asia Pacific respondents give high or near-high scores well above the level of *important* to all seven manipulation priorities. North America respondents narrowly lead sentiment toward *unify data from multiple source systems*. All regions assign scores of *important* or higher to the top four priorities: *utilize and update multiple hierarchies*, *unify data from multiple source systems*, *map and re-map changes*, and *cleanse and transform raw data*. EMEA respondents report the lowest overall interest by weighted mean.

## Workforce Data Access and Manipulation by Geography

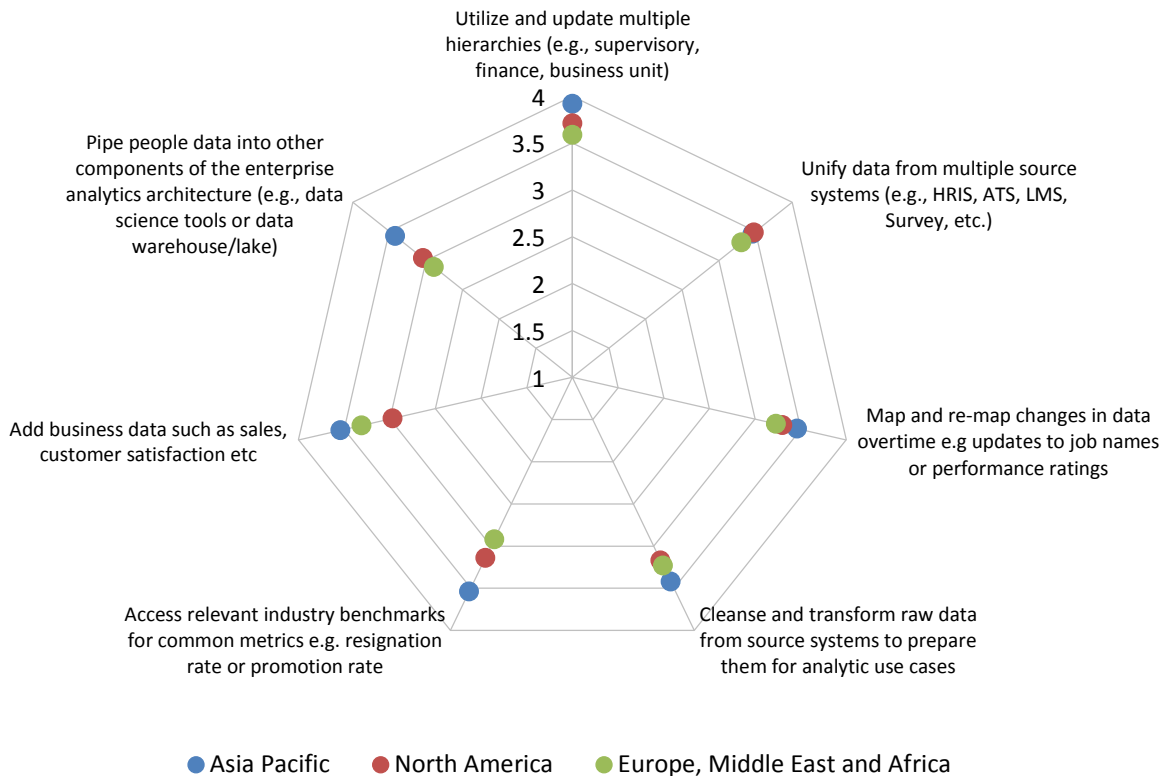


Figure 34 – Workforce data access and manipulation by geography



# 2024 Workforce Planning and Analysis Market Study

Interest in workforce data access and manipulation capabilities varies by industry, led in five of seven priorities by respondents in *education* organizations (fig. 35). Among several interesting findings, *retail and wholesale* respondents narrowly lead interest in *unify data from multiple source systems* but report below-average interest in most other areas. Respondents in *healthcare* report high or well above-average interest in multiple priorities including *cleanse and transform raw data*, *access relevant industry benchmarks*, *add business data*, and *pipe people data into other components*. In total, multiple industries report strong interest in multiple data access and manipulation components.

## Workforce Data Access and Manipulation by Industry

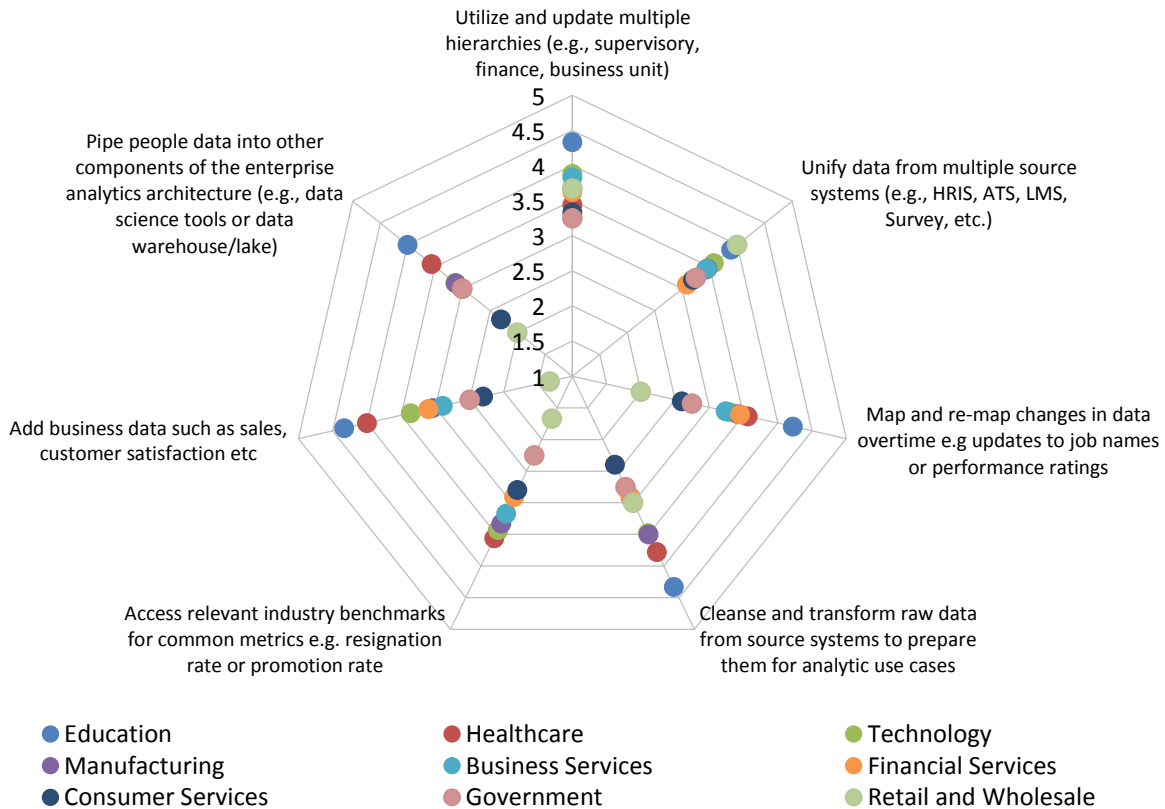


Figure 35 – Workforce data access and manipulation by industry

# 2024 Workforce Planning and Analysis Market Study

2024 interest in workforce data access and manipulation capabilities varies by function with some predictable patterns emerging (fig. 36). This year, respondents in HR respondents give the highest scores to six of seven priorities, with the lone exception being *add business data such as sales, customer satisfaction, etc.*, where R&D respondents show distinctly stronger positive sentiment. *Finance* respondents also give well above-average scores to *utilize and update multiple hierarchies, map and re-map changes in data over time*, and *cleanse and transform raw data*. Interest among *data science function* respondents is average or lower in all areas except *map and re-map changes in data over time*. Sentiment toward workforce data access and manipulation is weakest overall in *finance* and *operations*.

## Workforce Data Access and Manipulation by Function

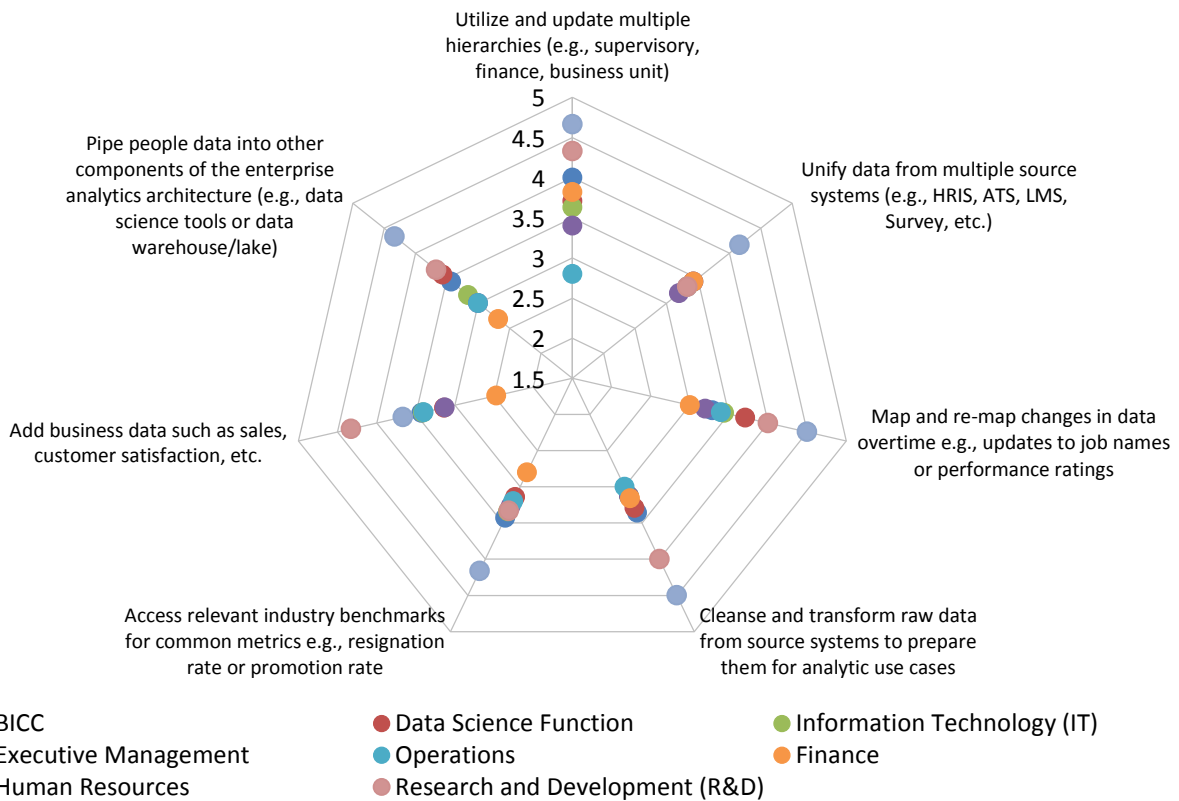


Figure 36 – Workforce data access and manipulation by function

Interest in data access and manipulation capabilities correlates positively with increasing global headcount and is always strongest in *very large* (>10,000 employees) or *large* (1,001-10,000 employees) organizations (fig. 37). Only the top feature, *utilize and update multiple hierarchies*, scores midway between *important* and *very important* or higher among all organizations. Interest in small (1-100 employees) and midsize (101-1,000 employees) organizations is lowest in every case.

## Workforce Data Access and Manipulation by Organization Size

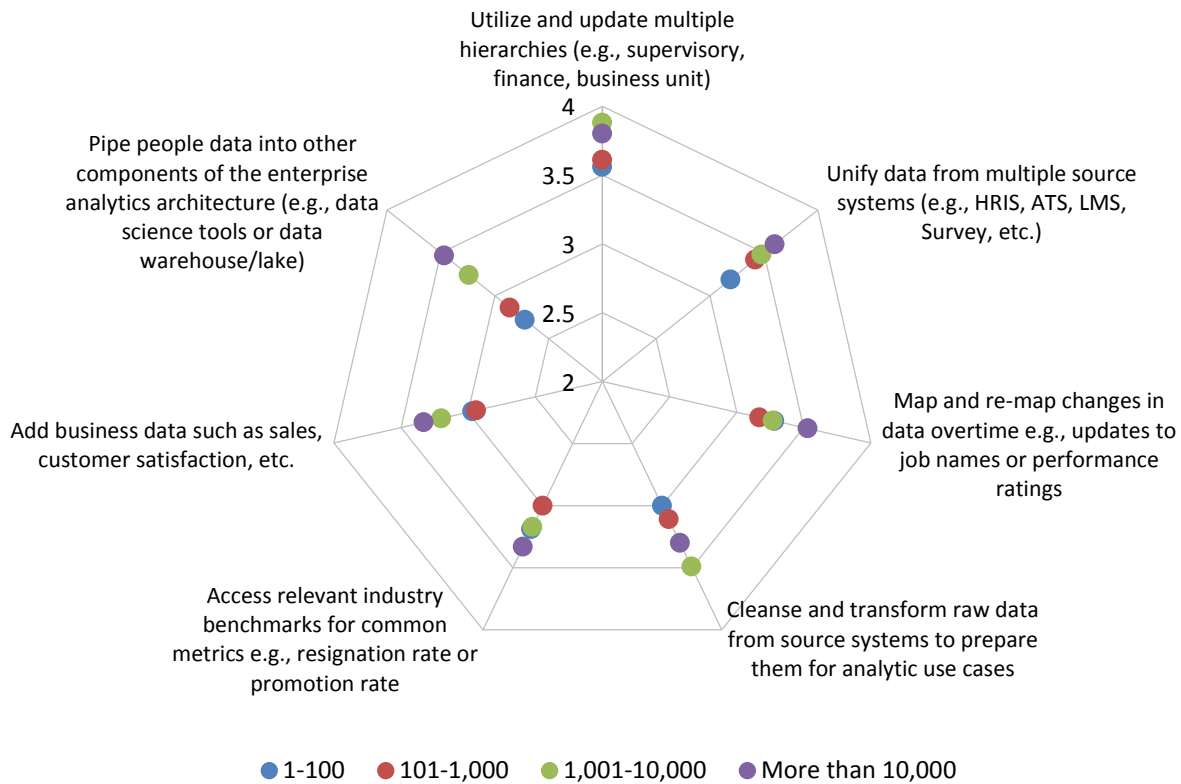


Figure 37 – Workforce data access and manipulation by organization size

# 2024 Workforce Planning and Analysis Market Study

The importance of workforce data access and manipulation capabilities correlates strongly and positively with success with business intelligence in 2024 (fig. 38). Areas of strongest correlation (most skewed) include *utilize and update multiple hierarchies*; *cleanse and transform raw data from source systems*; *access relevant industry benchmarks*; and *add business data such as sales, customer satisfaction, etc.* The least-skewed area related to success with BI is *map and re-map changes in data over time*.

## Workforce Data Access and Manipulation by Success with BI

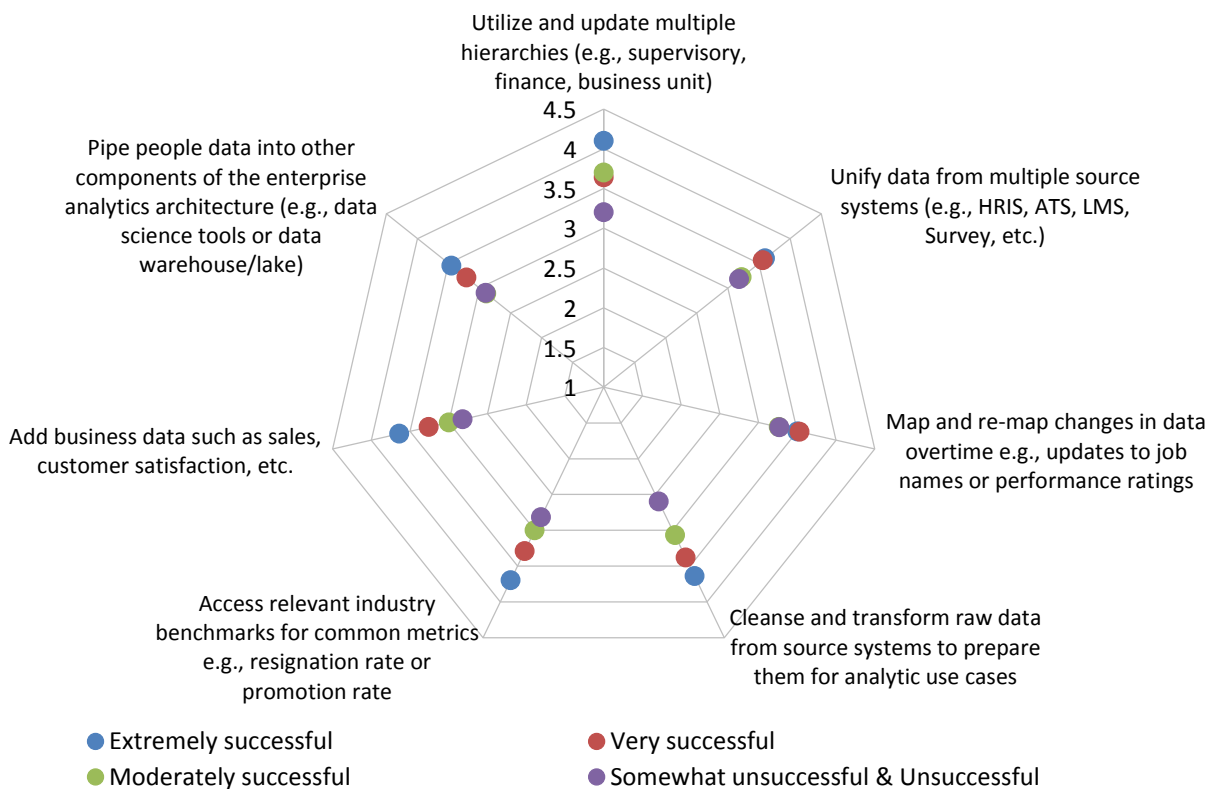


Figure 38 – Workforce data access and manipulation by success with BI

# 2024 Workforce Planning and Analysis Market Study

## Workforce Insight Creation and Sharing

We asked respondents to “assign the importance associated with” a list of 16 workforce data insight creation and sharing capabilities in 2024 (fig. 39). This year, the top four features (*customize or add new metrics or calculations, drill down to specific detail within the chart, standardized metric calculations, and build and share dashboards*) are near or above the midway point between *important* and *very important*. Priorities that gained the most momentum year over year include *customize or add new metrics or calculations* and *share data securely to HRBPs, BU leaders and line managers*. Priorities that lost momentum include *guide users to interpretation of the data* and *predict the probability of key events*. In sum, the full breadth of workforce insight creation and sharing features are relevant and important to a majority of respondents.

## Workforce Insight Creation and Sharing 2023-2024



Figure 39 – Workforce insight creation and sharing 2023-2024

# 2024 Workforce Planning and Analysis Market Study

Viewed by geography, sentiment toward workforce data access and manipulation capabilities clusters somewhat, with interest variably highest in different regions (fig. 40). This year, by narrow to greater margins, Asia Pacific interest is highest for the majority of features. EMEA interest is narrowly highest for three features including the top two: *drill down to specific detail* and *customize or add new metrics*, along with *ad-hoc analysis on any piece of shared content*. North America scores are narrowly highest only in the case of *build and share dashboards*.

## Workforce Insight Creation and Sharing by Geography

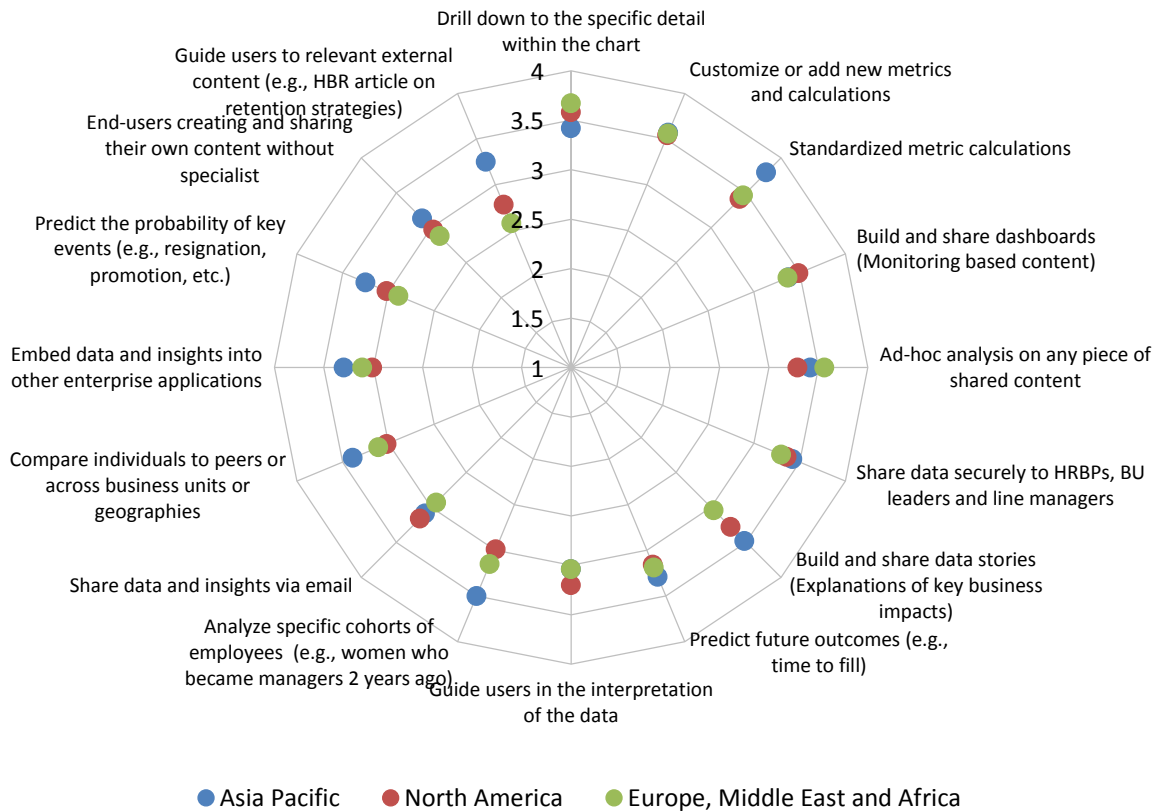


Figure 40 – Workforce insight creation and sharing by geography

# 2024 Workforce Planning and Analysis Market Study

Sentiment toward workforce data access and manipulation capabilities varies by industry in 2024 with some leaders or first movers emergent (fig. 41). This year, *healthcare* interest is highest for priorities including *build and share dashboards*, *share data securely*, *build and share data stories*, *predict future outcomes*, *embed data and insights*, *predict the probability of key events*, and *guide users to relevant external content*. Respondents in *education* organizations also report high or near-high scores in almost all areas, particularly *share data and insights via email* and *end users creating and sharing their own content*. *Consumer services* and *financial services* are among industries least interested in workforce insight creation and sharing.

## Workforce Insight Creation and Sharing by Industry

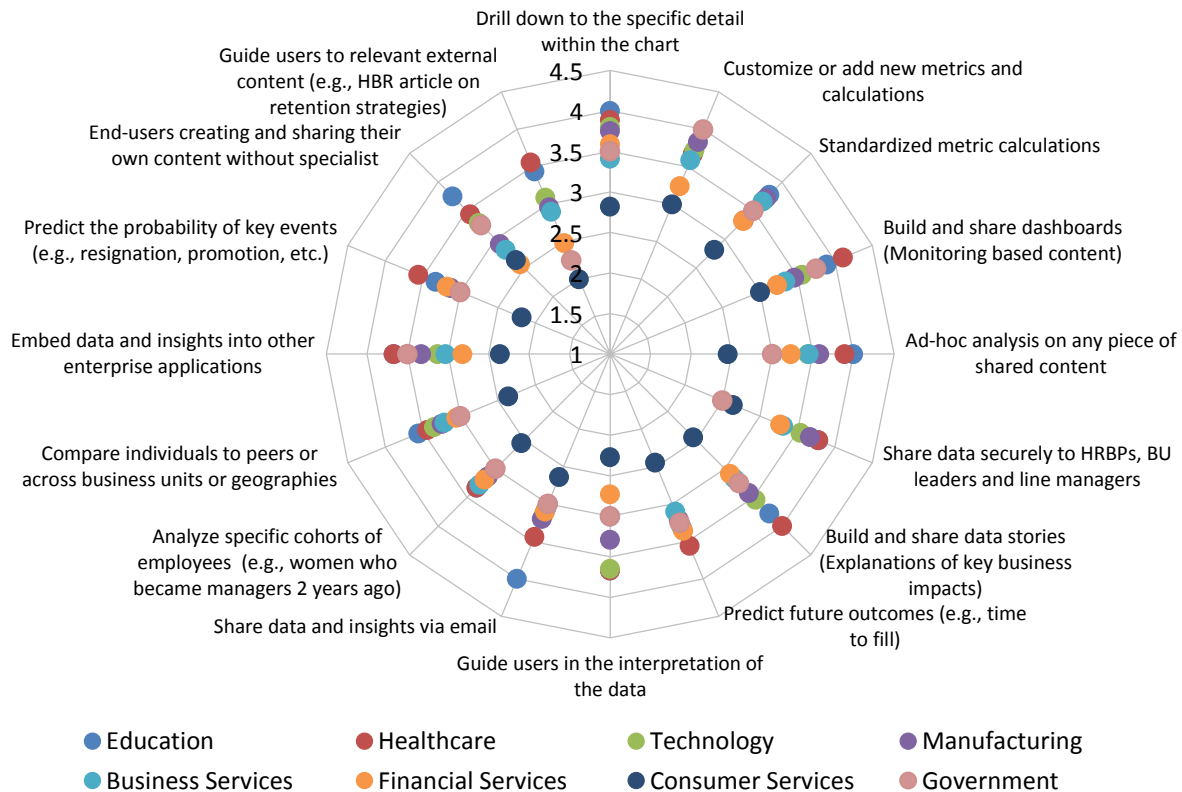


Figure 41 – Workforce insight creation and sharing by industry

# 2024 Workforce Planning and Analysis Market Study

In 2024, interest in workforce data access and manipulation capabilities varies by function, with some patterns emerging (fig. 42). *HR* respondents give high or well above-average scores to most all priorities but do not lead interest in every case. This year, respondents in *sales and marketing* give the highest marks to *share data securely to HRBPs, predict future outcomes, and predict the probability of key events*. *R&D* respondents report very high scores in most priorities, indicating strong internal participation in development of workforce insight creation and sharing.

## Workforce Insight Creation and Sharing by Function

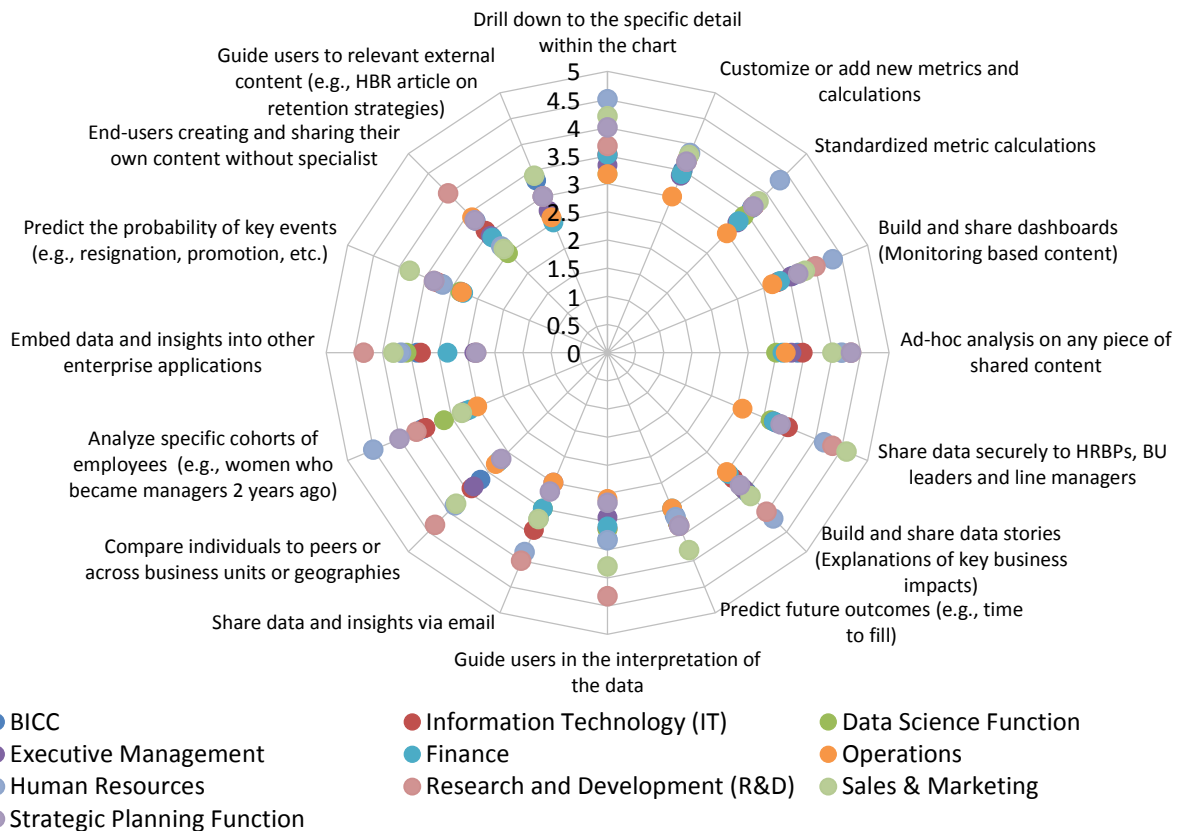


Figure 42 – Workforce insight creation and sharing by function



# 2024 Workforce Planning and Analysis Market Study

2024 interest in workforce data access and manipulation capabilities is always highest in either *very large* (>10,000 employees) or *large* (1,001-10,000 employees) organizations (fig. 43). Two areas of common (clustered) interest by size are also the top priorities overall: *drill down to the specific detail within the chart* and *customize of add new metrics and calculations*. The top eight of 16 priorities are at least *important* to all organizations regardless of size.

## Workforce Insight Creation and Sharing by Organization Size

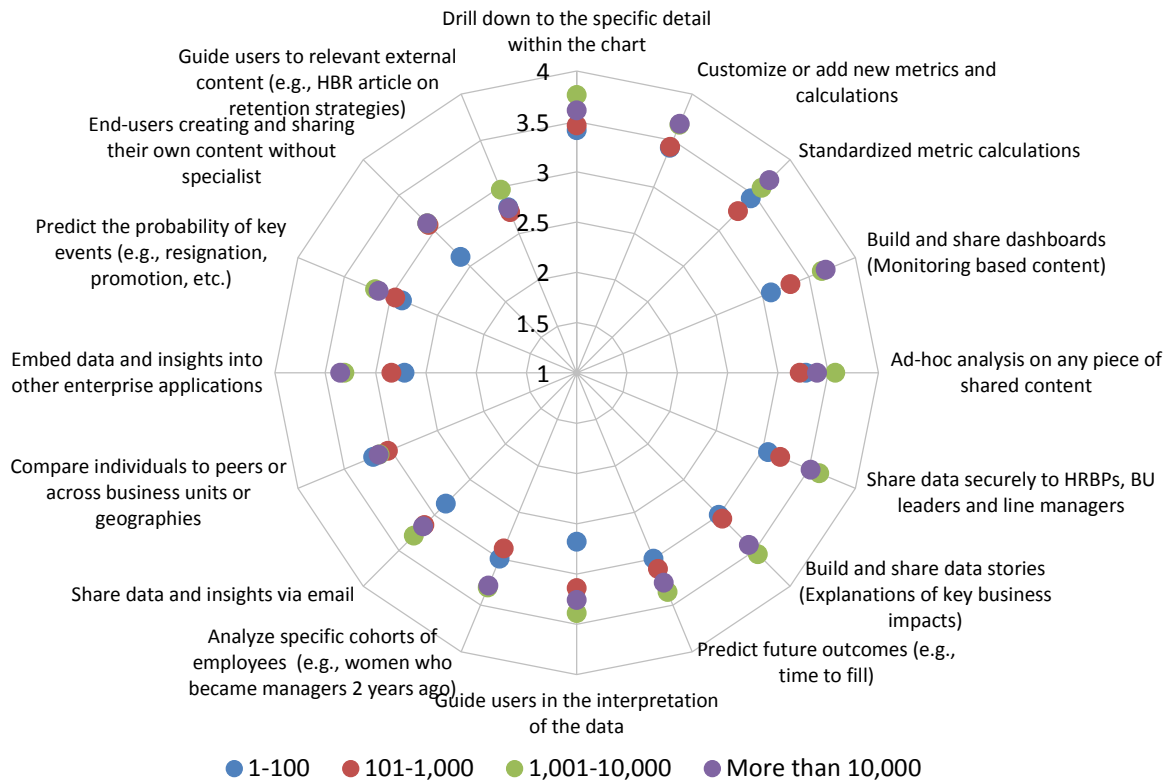


Figure 43 – Workforce insight creation and sharing by organization size

# 2024 Workforce Planning and Analysis Market Study

## Workforce Planning and Analysis Integration Features

We asked respondents to “assign the importance associated with” a list of eight workforce planning and analysis integration features in 2024 (fig. 44). This year, the top three features are *export data to Excel, PDF*; *ability to integrate data from leading ERP systems*; and *integration with financial planning and budgeting applications*. These three features receive weighted-mean scores between 3.7 and 4.1, close to or above a level signifying *very important*. A second tier of *ability to integrate data from HRIS systems* and *integration with compensation management systems* scores well above the level of *important* in 2024. We also observe that all eight priorities receive sentiment scores slightly higher in 2024 compared to 2023.

### Workforce Planning and Analysis Integration Features 2023-2024

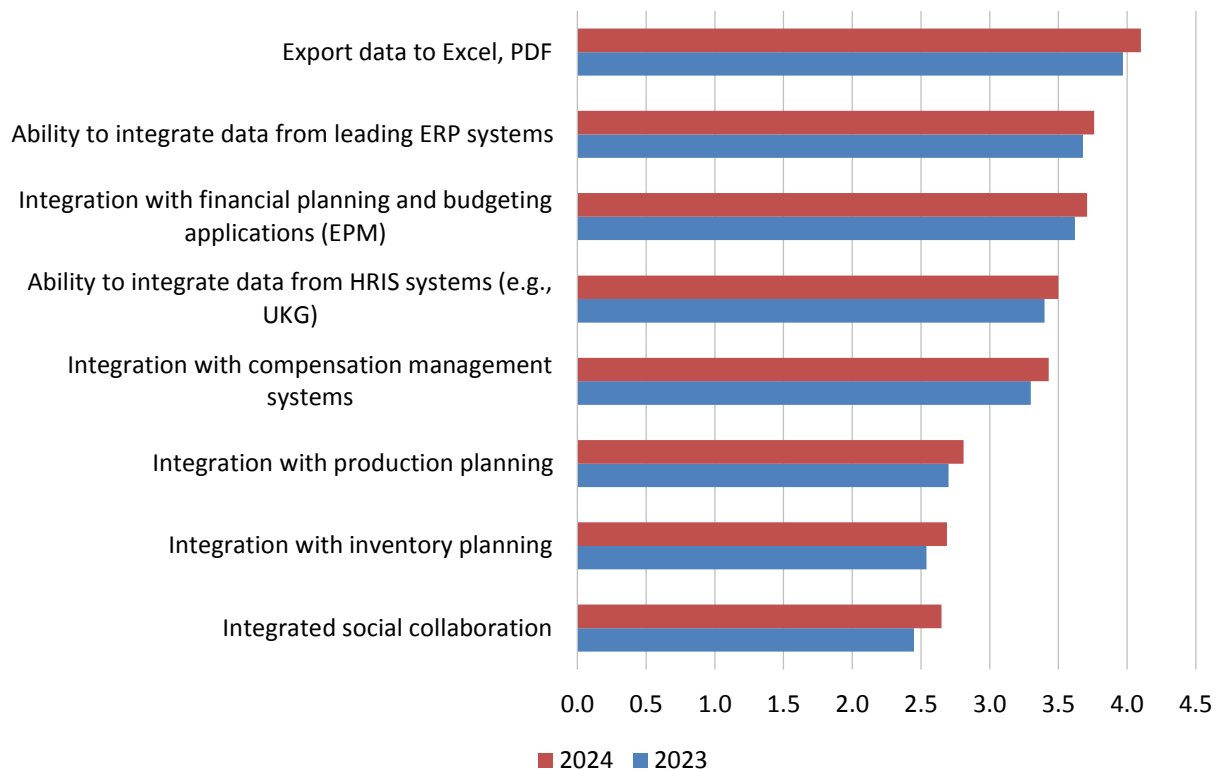


Figure 44 – Workforce planning and analysis integration features 2023-2024

## 2024 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning and analysis integration features varies by geography for individual features, with importance scores most often highest among respondents in *Asia Pacific* (fig. 45). This year, the most clustered and universally important feature is *export data to Excel, PDF*, which all geographies score close to or greater than the level of *very important*. North America respondents' strongest affinity is to *export data to Excel, PDF* and also to *integration with financial planning and budgeting applications (EPM)*. EMEA respondents most often report the lowest scores by region for all workforce planning and analysis features except *integrated social collaboration*.

### Workforce Planning and Analysis Integration Features by Geography

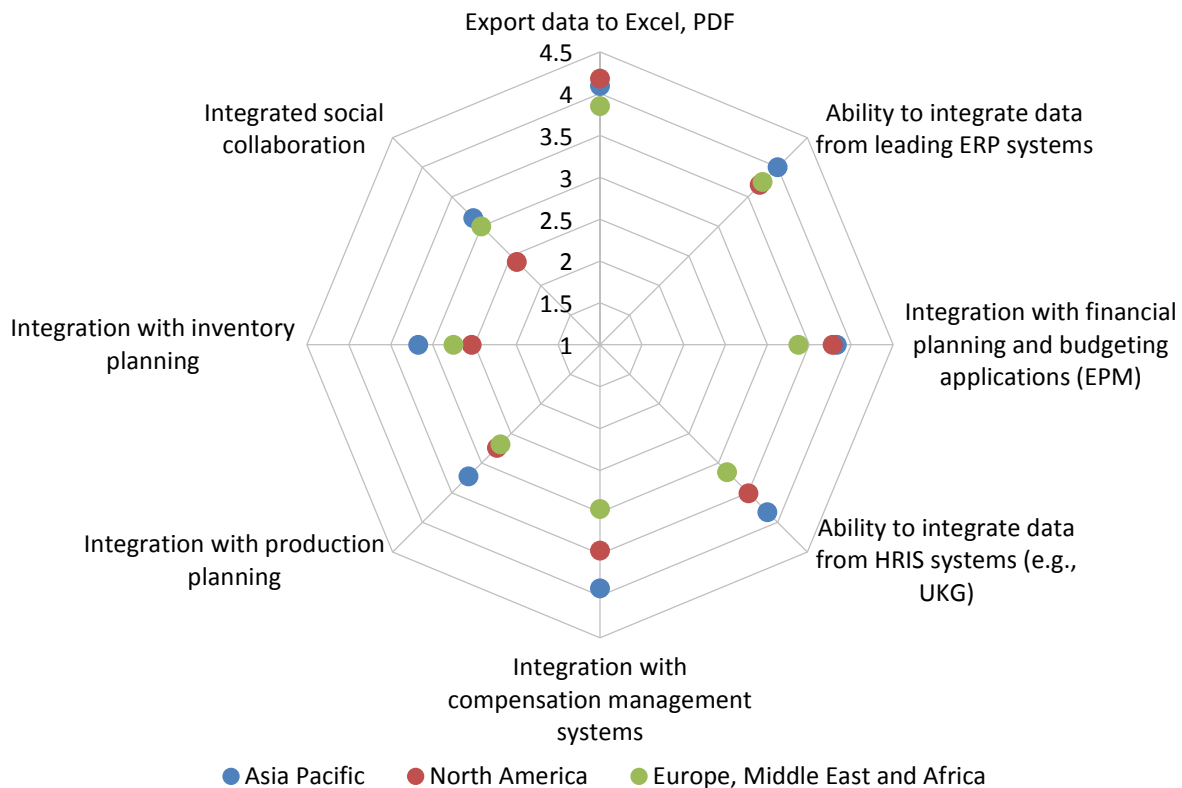


Figure 45 – Workforce planning and analysis integration features by geography

# 2024 Workforce Planning and Analysis Market Study

Workforce planning and analysis integration feature interest varies by industry in 2024 (fig. 46). Interest is greatest and clusters across all industries for *export data to Excel, PDF*, with cumulative scores near or above the level of *very important*. Among many visible industry preferences, *retail and wholesale* respondents report the highest scores for *ability to integrate data from leading ERP systems*. Respondents in *manufacturing* have the highest affinity toward *integration with financial planning and budgeting applications* and *integration with inventory planning*. Resource competitive *technology* industry respondents give the top score to *ability to integrate data from HRIS systems*. *Education* and *consumer services* respondents give high marks in several areas including *integration with compensation management systems*

## Workforce Planning and Analysis Integration Features by Industry

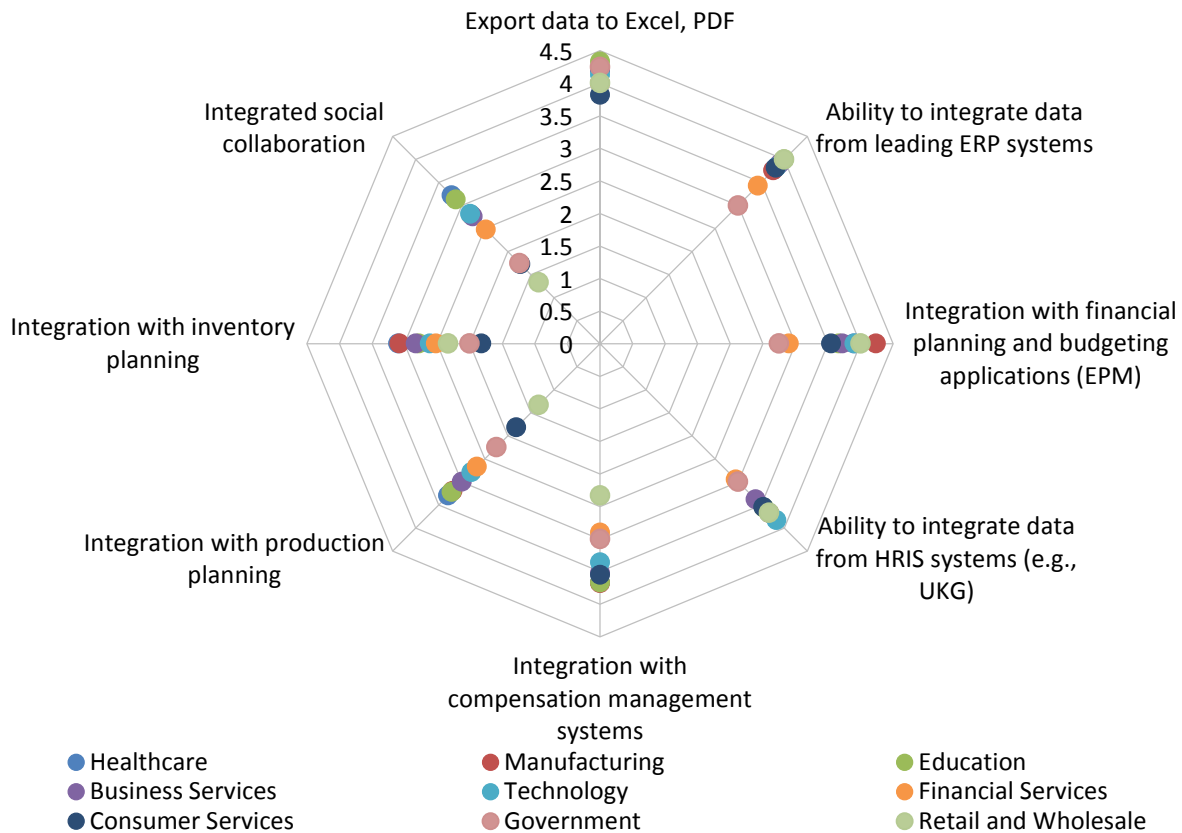


Figure 46 – Workforce planning and analysis integration features by industry

# 2024 Workforce Planning and Analysis Market Study

Interest in workforce planning and analysis integration features varies broadly and in detail by function in 2024 (fig. 47). As expected, *HR* respondents give high or near-high scores to most features, including top-ranked *export to Excel, PDF and ability to integrate data from leading ERP systems*. *Both sales and marketing and strategic planning* post above-average scores to nearly all features polled. This year, the *data science function* reports only average or lower scores for integration features. *Operations* is the least interested function in the case of every feature sampled.

## Workforce Planning and Analysis Integration Features by Function

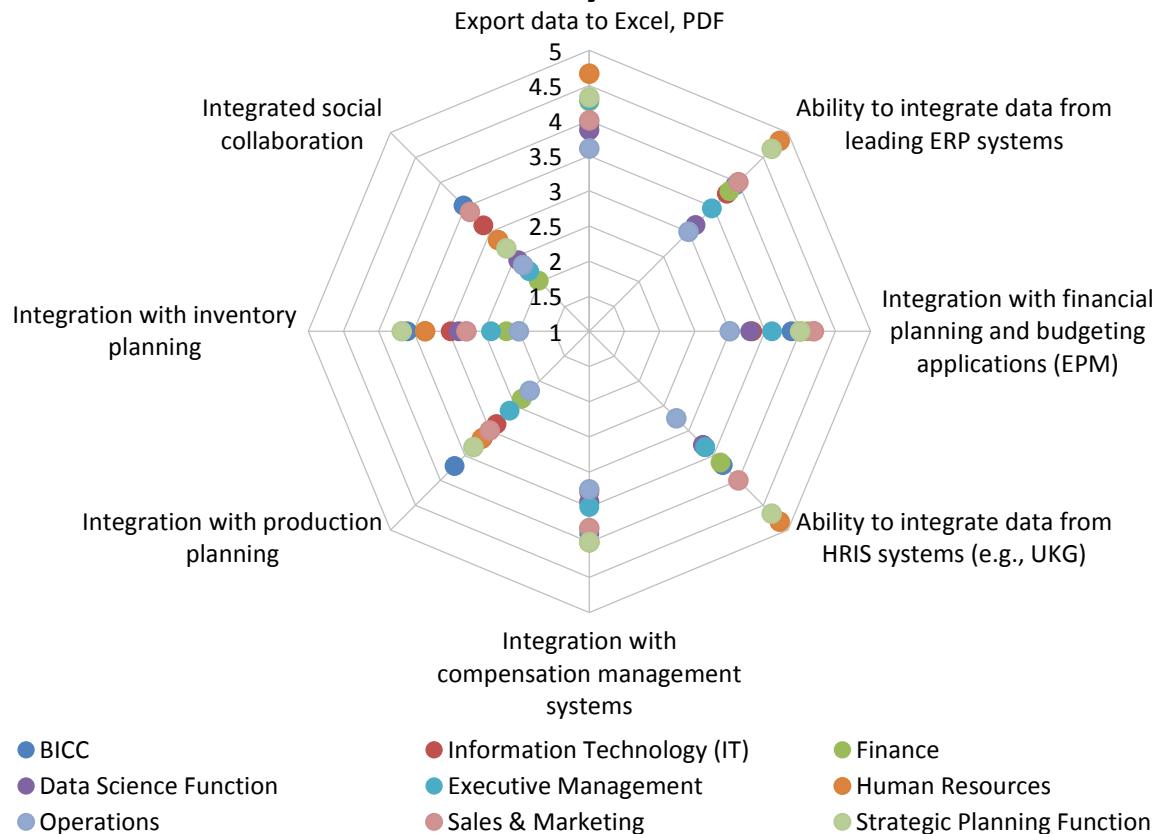


Figure 47 – Workforce planning and analysis integration features by function

# 2024 Workforce Planning and Analysis Market Study

As we might expect, interest in workforce planning and analysis integration features increases with organization size and is most often highest in either *very large* (>10,000 employees) or *large* (1,001-10,000 employees) organizations (fig. 48). That said, interest in many integrations features clusters tightly or somewhat, especially in the case of top-ranked *export to Excel, PDF; integration with financial planning and budget applications; and integrated social collaboration*. The top five integration features are at least *important* to all organizations regardless of size.

## Workforce Planning and Analysis Integration Features by Organization Size

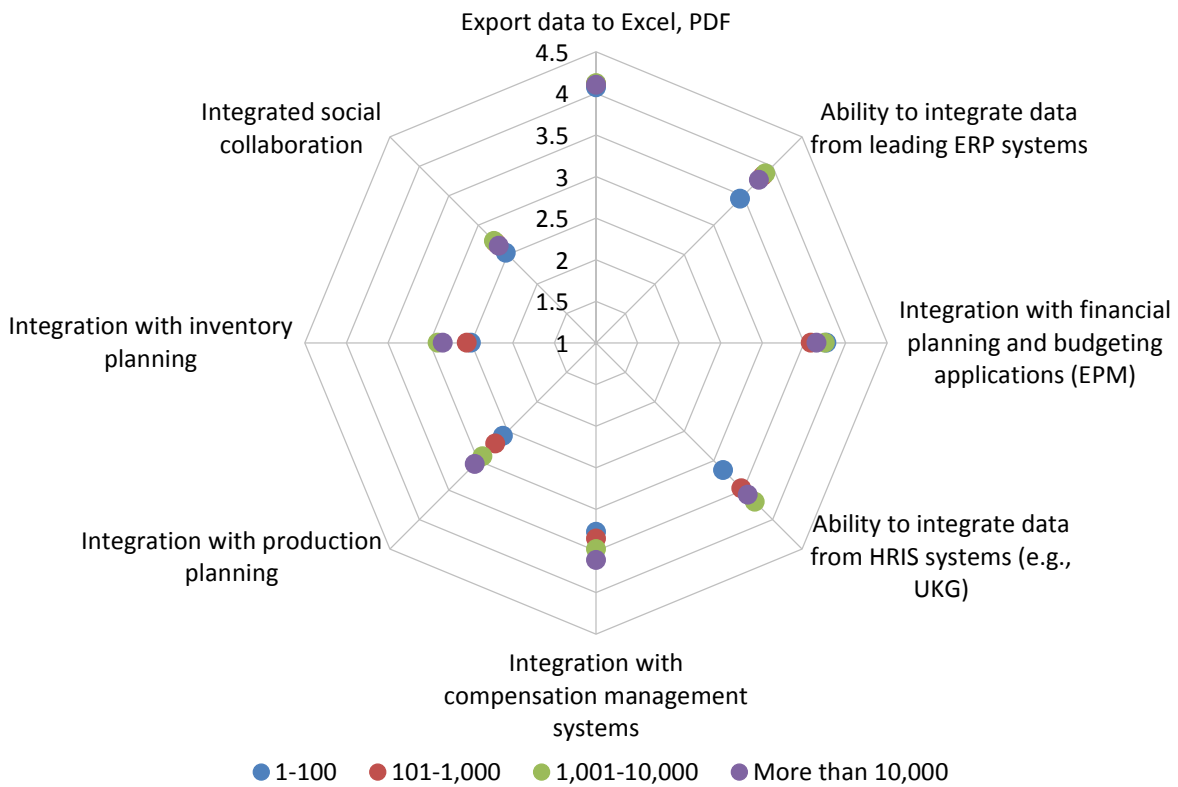


Figure 48 – Workforce planning and analysis integration features by organization size

# 2024 Workforce Planning and Analysis Market Study

## Workforce Planning and Analysis Additional Features

We asked respondents to “assign the importance associated with” a list of 13 additional features in 2024 (fig. 49). This year, interest in additional features grows “across the board” year over year, with rankings nearly identical to our 2023 inaugural study. For a second year, the top three features are *access control based on users and roles*, *support for reporting/dashboards*, and *Web user interface*, all of which approach or exceed the 4.0 score signifying *very important*. *Automated alerts and notifications* and *workflow for reviews and approvals* form a second tier of criticality about midway between *important* and *very important*. In all, nine of 13 additional features are at least *important* to respondents in 2024.

## Workforce Planning and Analysis Additional Features 2023-2024

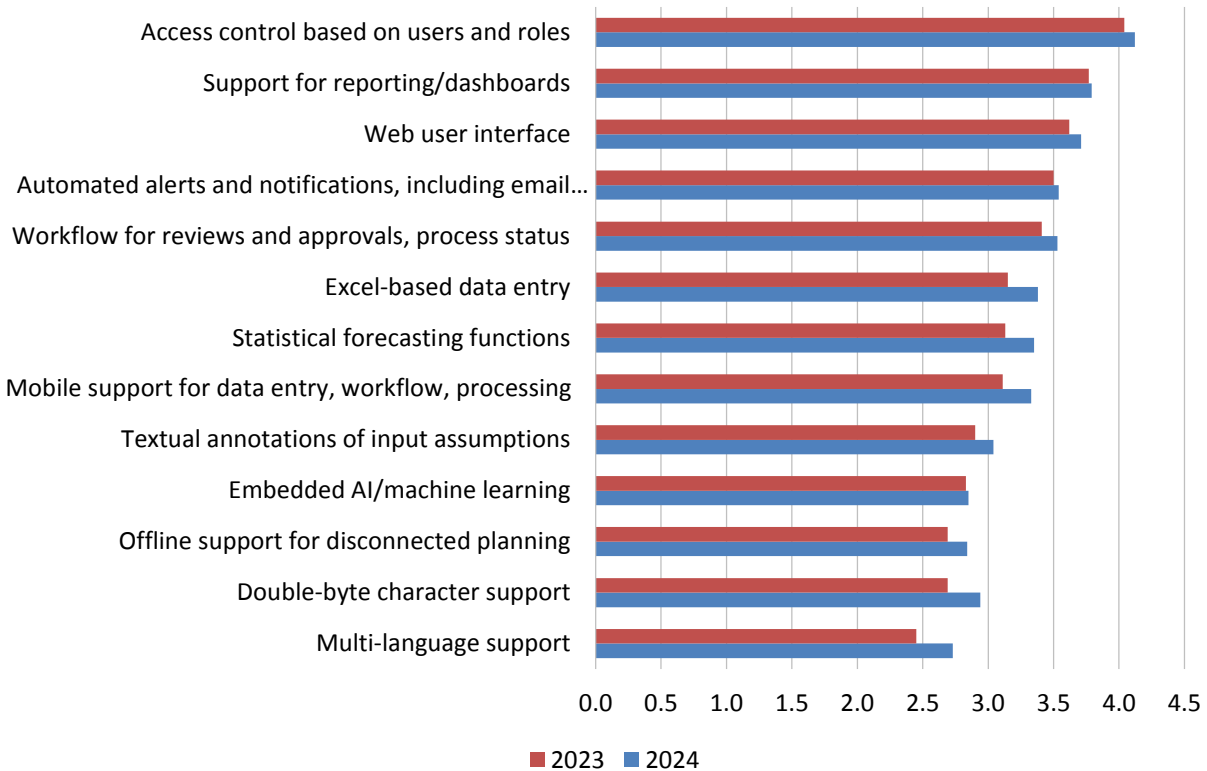


Figure 49 – Workforce planning and analysis additional features 2023-2024

# 2024 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning and analysis additional features varies by geography, though five of the six top features (*access control based on user and roles*, *support for reporting/dashboards*, *Web user interface*, *workflow for reviews*, and *Excel-based data entry*) cluster tightly and are of similar importance across all geographies (fig. 50). All remaining additional features get top scores from respondents in Asia Pacific. The top feature, *access control based on users and roles*, is the only feature to receive *very important* scores from respondents in all regions. The top eight additional features are at least *important* to respondents in all regions.

## Workforce Planning and Analysis Additional Features by Geography

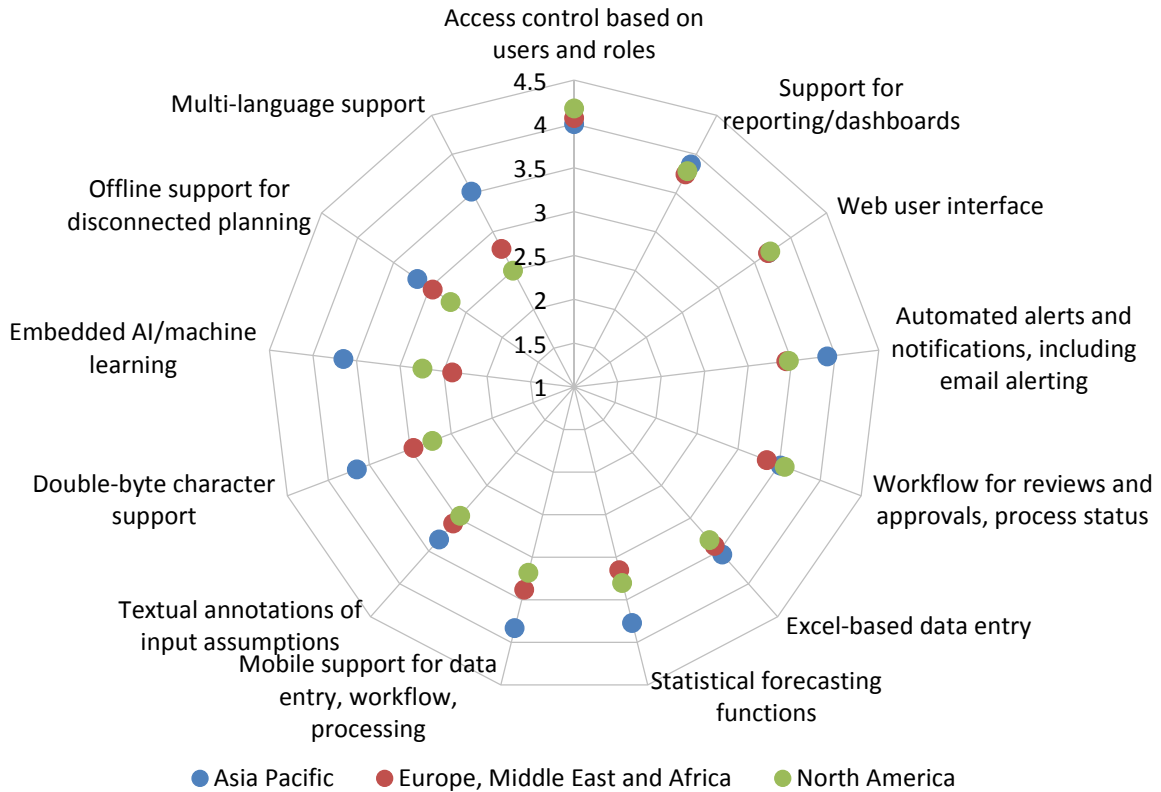


Figure 50 – Workforce planning and analysis additional features by geography



# 2024 Workforce Planning and Analysis Market Study

Industry sentiment toward workforce planning and analysis additional features is simultaneously high across multiple and seemingly diverse industries in 2024 (fig. 51). For example, nine industries, most especially *real estate*, *education*, *technology*, and *government*, assign scores greater than *very important* to the top feature: *access control based on users and roles*. This year, the most multiple high additional feature scores tend to come from respondents in *education*, *healthcare*, and *technology*, while many average or below-average scores are posted by respondents in *consumer services* and *retail and wholesale*. Even so, we observe exceptions and pockets of unique interest that are more easily observed in raw data than in a compressed multi-column chart representation.

## Workforce Planning and Analysis Additional Features by Industry

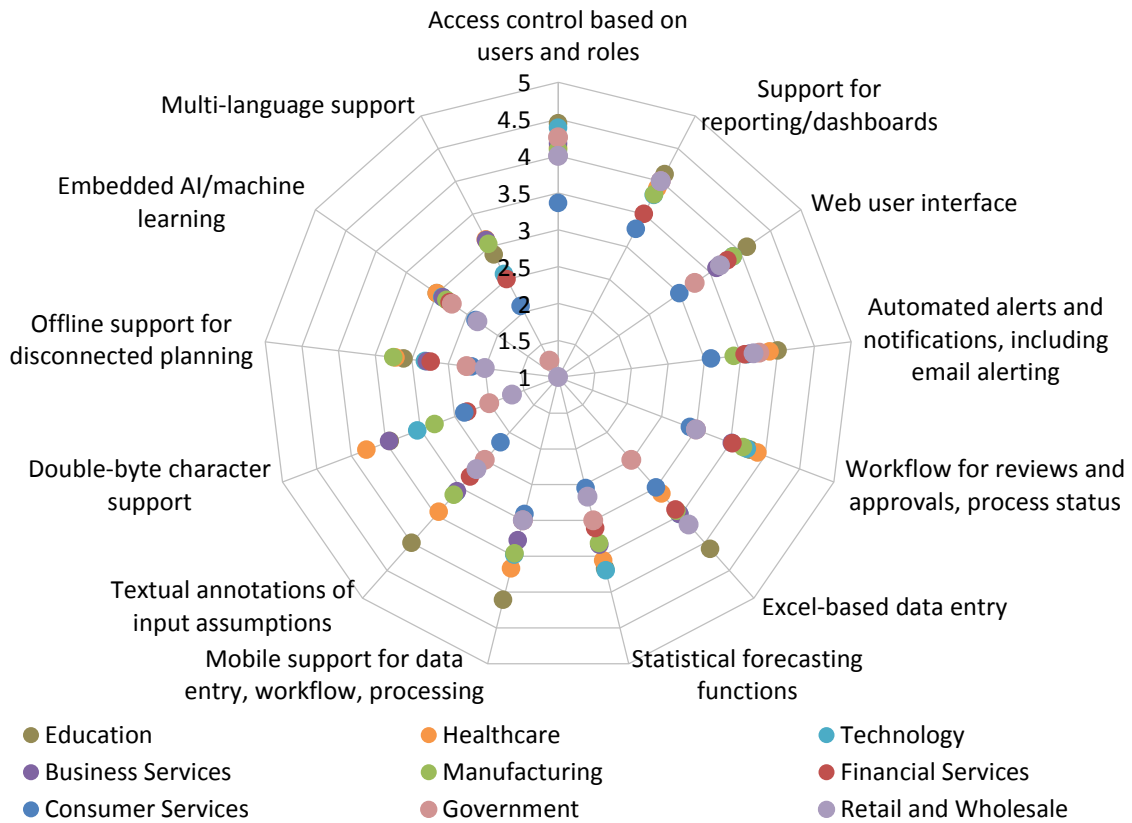


Figure 51 – Workforce planning and analysis additional features by industry

## 2024 Workforce Planning and Analysis Market Study

2024 interest in workforce planning and analysis additional features varies by function, with interest often highest among respondents in *HR, sales and marketing, strategic planning, and R&D* (fig. 52). These four functions assign the highest importance to top-ranked *access control based on users and roles*. *Executive management, R&D, and strategic planning* report narrowly highest interest in *support for reporting/dashboards*. *Web user interface* is most important in *HR and strategic planning*. Interest in *finance* tends to drop off after the top-three-ranked additional features, while *R&D, sales and marketing, R&D, IT, and BICC* show more consistently high interest in most or all additional features.

### Workforce Planning and Analysis Additional Features by Function

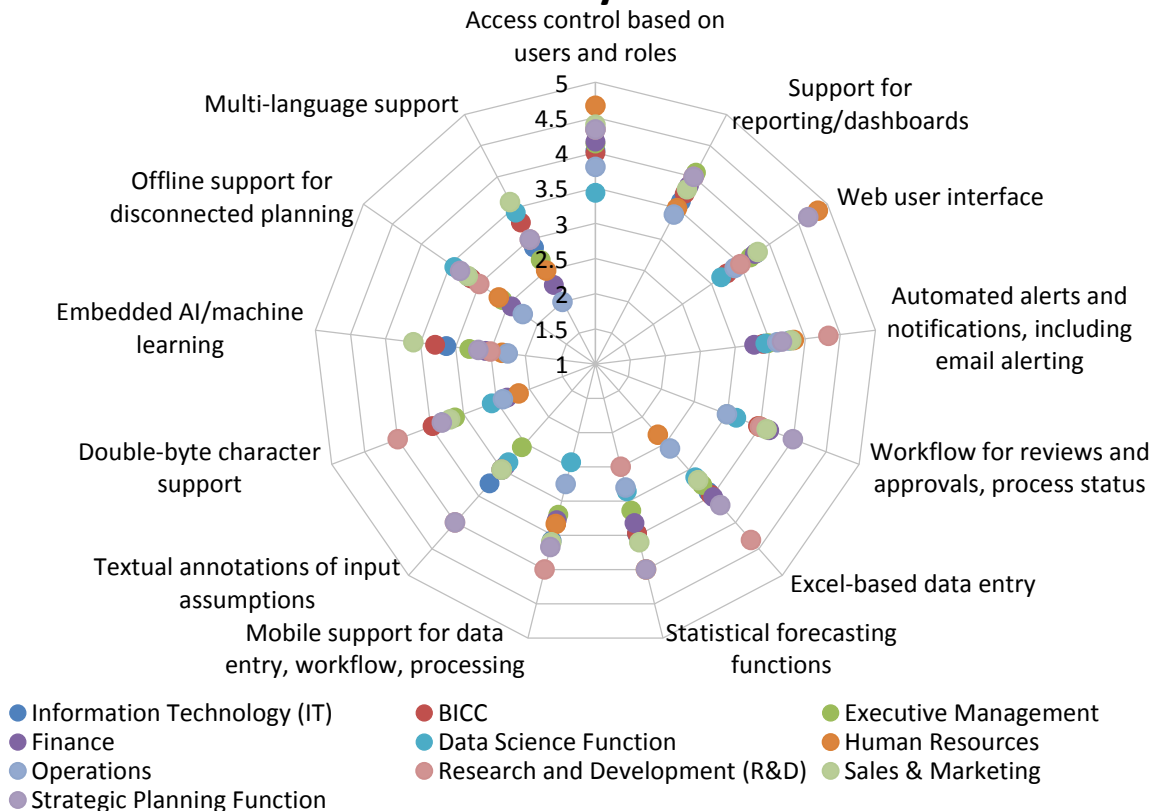


Figure 52 – Workforce planning and analysis additional features by function

# 2024 Workforce Planning and Analysis Market Study

Interest in workforce planning and analysis integration features generally increases with organization size and is most often highest in either *very large* (>10,000 employees) or *large* (1,001-10,000 employees) organizations (fig. 53). Interest in top features (*access control based on users and roles*, *support for reporting/dashboards*, and *Web user interface*, along with *Excel-based data entry*) are among the most clustered additional features of universal interest to organizations of any size. Scores for lower-ranked features more noticeably decline with smaller organization headcount. The top seven features are at least *important* to all organizations of any size. We also note that in 2024, *embedded AI / machine learning* is the second-lowest ranked of 13 additional features.

## Workforce Planning and Analysis Additional Features by Organization Size

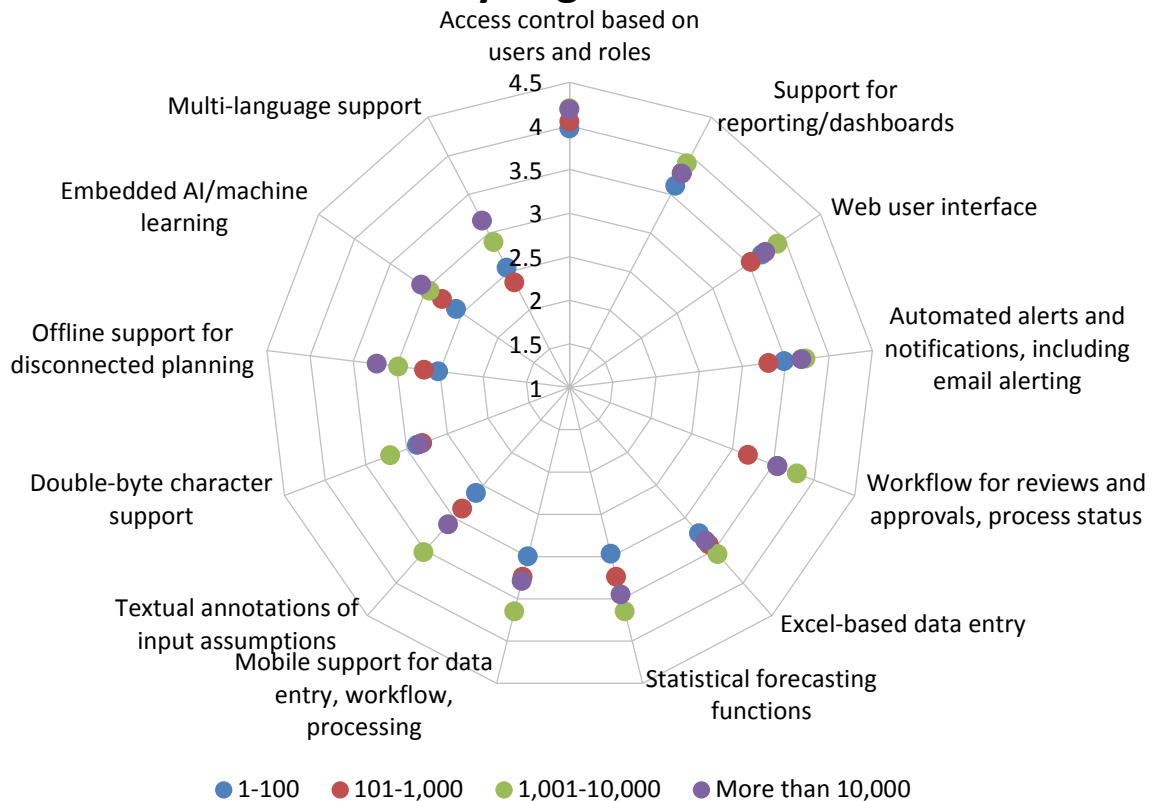


Figure 53 – Workforce planning and analysis additional features by organization size

# 2024 Workforce Planning and Analysis Market Study

## Workforce Planning and Analysis Deployment Priorities

We asked respondents to “assign the importance associated with” a list of six workforce planning and analysis deployment priorities in 2024 (fig. 54). The three leading options, *multi-tenant*, *part of broader enterprise performance management solution*, and *public cloud*, all receive scores above the level of *important*. We also observe that the second pick, *part of broader enterprise performance management solution*, gained significant year-over-year traction and moved slightly ahead of *public cloud* as a workforce planning deployment priority. Other rankings are steady year over year, though all options gather greater importance in 2024, even traditional *on-premises deployment*.

### Workforce Planning and Analysis Deployment Priorities 2023-2024

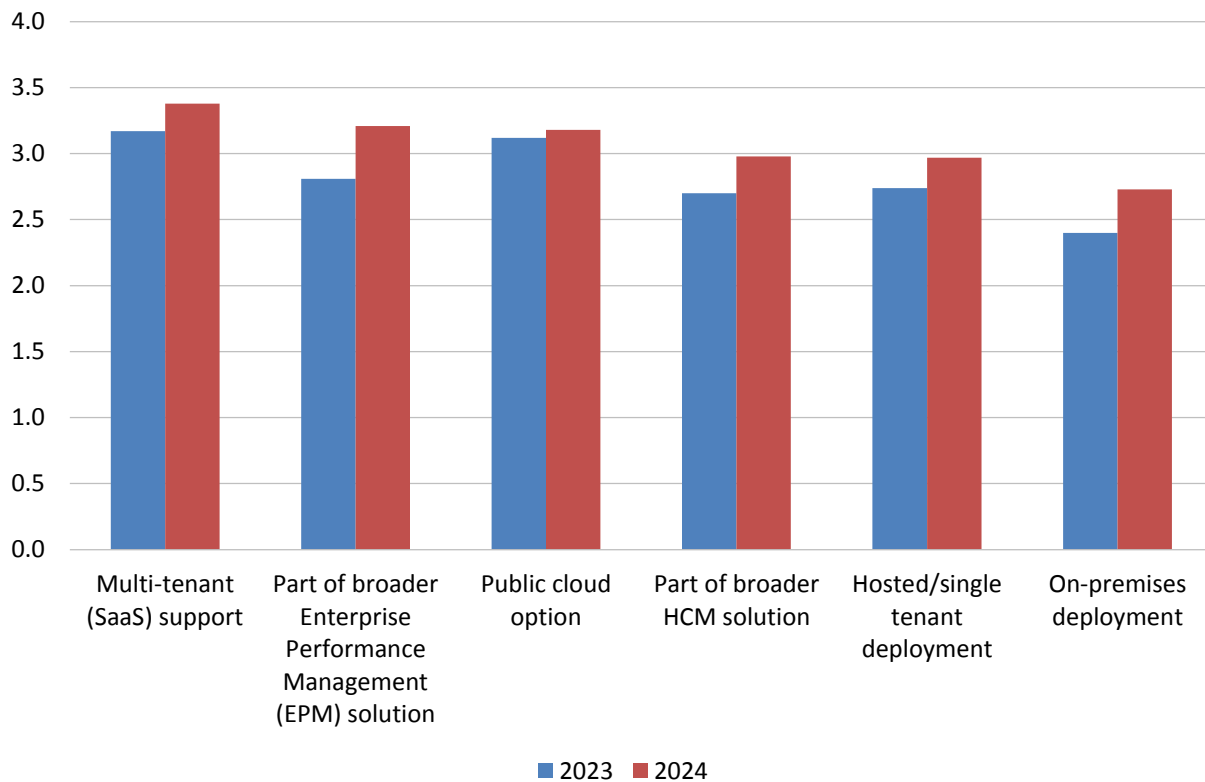


Figure 54 – Workforce planning and analysis deployment priorities 2023-2024

# 2024 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning and analysis deployment priorities varies by geography in 2024, but with interest that is consistently highest in Asia Pacific (fig. 55). Among all deployment options, *public cloud* clusters most and is of similar importance across geographies. Among more skewed results, *on-premises deployment* is distinctly least relevant to respondents in North America, while *part of a broader HCM solution* is distinctly most popular among respondents in Asia Pacific. The top three options are at least *important* to all respondents regardless of geography.

## Workforce Planning and Analysis Deployment Priorities by Geography

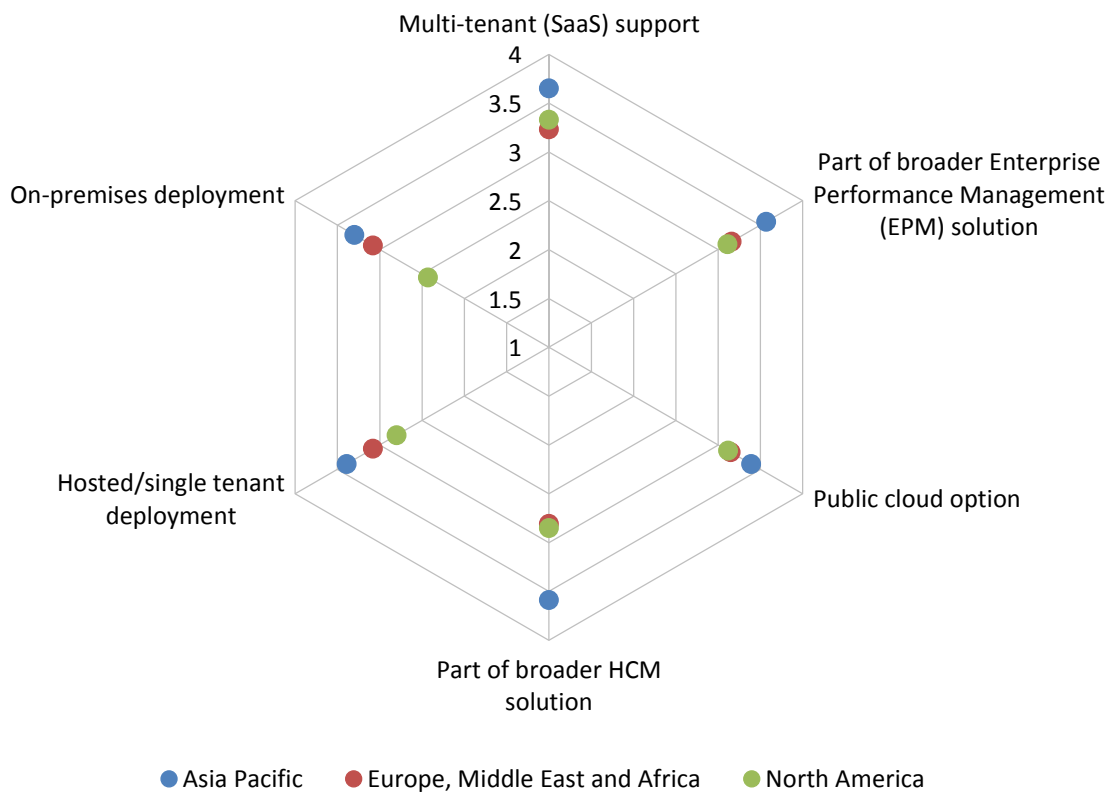


Figure 55 – Workforce planning and analysis deployment priorities by geography

# 2024 Workforce Planning and Analysis Market Study

Sentiment toward workforce planning and analysis deployment priorities varies by function, though individual roles find multiple options acceptable in 2024 (fig. 56). For example, respondents that work in *strategic planning* are by far the strongest supporters of both *part of a broader EPM solution* and *part of a broader HCM solution*. *HR* respondents post the highest score for only one deployment option, *multi-tenant (SaaS) support*. *BICC* respondents most prefer *public cloud option*, while *IT* respondents most support *hosted/single tenant deployment* and *on-premises deployment*.

## Workforce Planning and Analysis Deployment Priorities by Function

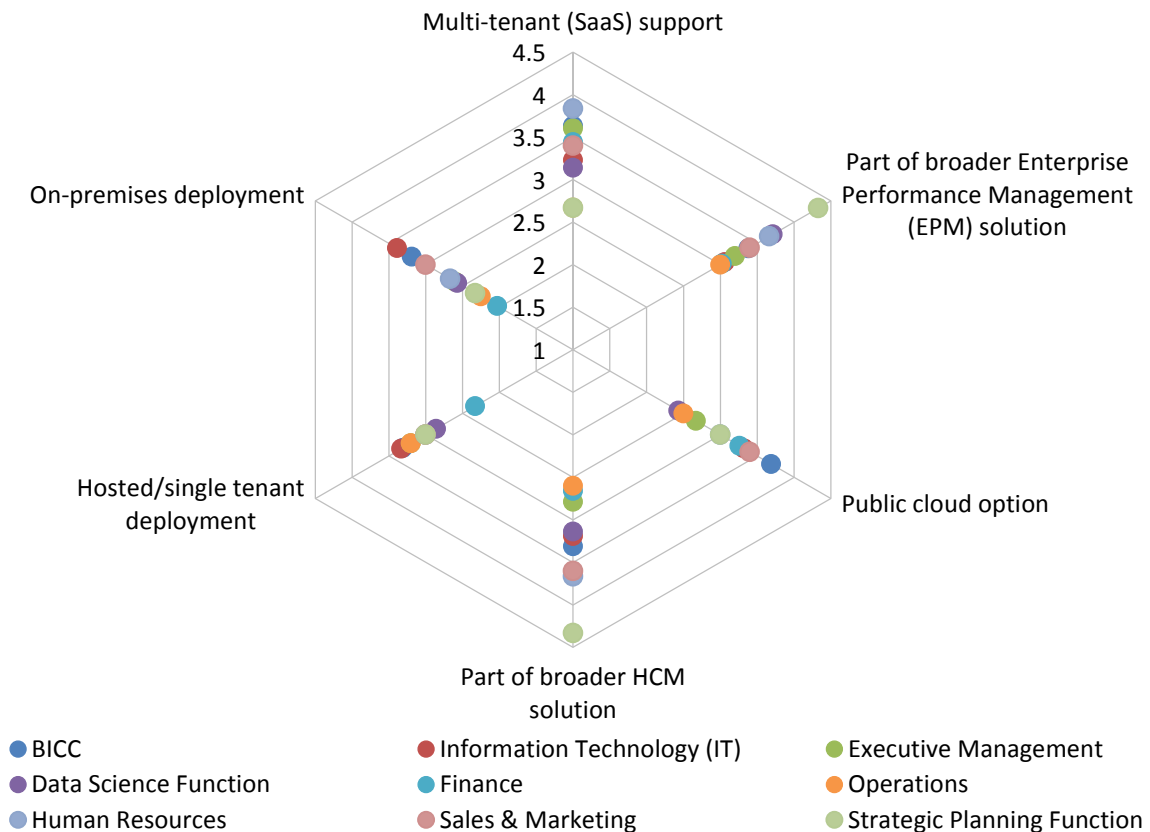



Figure 56 – Workforce planning and analysis deployment priorities by function



# Industry and Vendor Analysis

## Industry and Vendor Analysis

### Industry Workforce Planning Feature Support

We asked industry respondents to identify all the workforce planning features that are currently available or planned in their solution in 2024 (fig. 57). This year, among 17 features sampled, we find support very strong and near maturity. The top seven features are 100 percent supported today. The top 10 features are projected to have 100 percent support in 12 months. Among remaining features, future development plans are strongest for *supply and demand balancing*, *succession planning*, and *retention planning*. We believe this well supports user measures of workforce planning capability importance in 2024 (see fig. 21).

### Industry Workforce Planning Feature Support

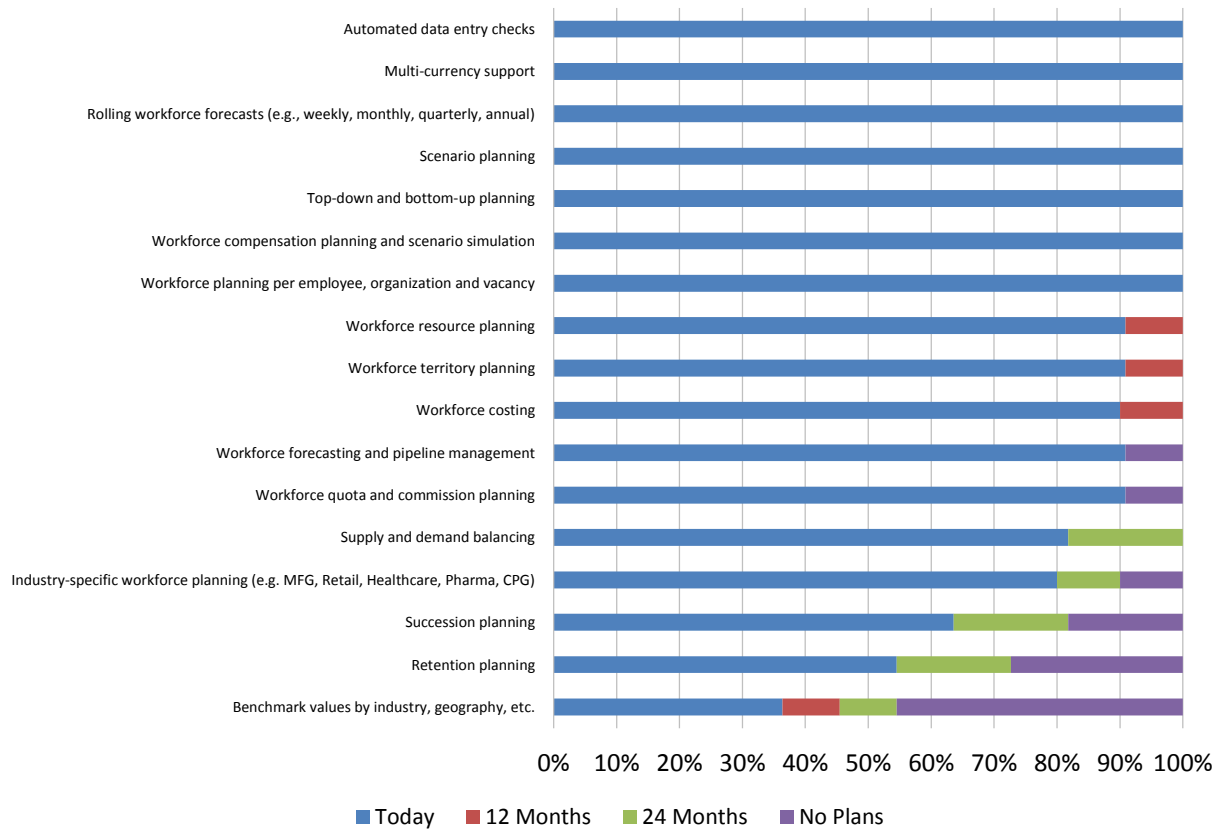


Figure 57 – Industry workforce planning feature support



# 2024 Workforce Planning and Analysis Market Study

## Industry Workforce Analytics Domains Support

Industry support for workforce analytics domains is strong in 2024, with 12 of 23 domains currently supported by half or more respondents (fig. 58). The top four domains, *compensation, headcount and core demographics, multi-dimensional analysis, and year-end projections and forecasting*, are 100 percent supported today. The greatest 12-month development plans target *pre-configured dashboards and reports*. Current industry support levels are likely adequate when compared to current user workforce analysis demand (see fig. 27).

## Industry WorkForce Analytics Domains Support

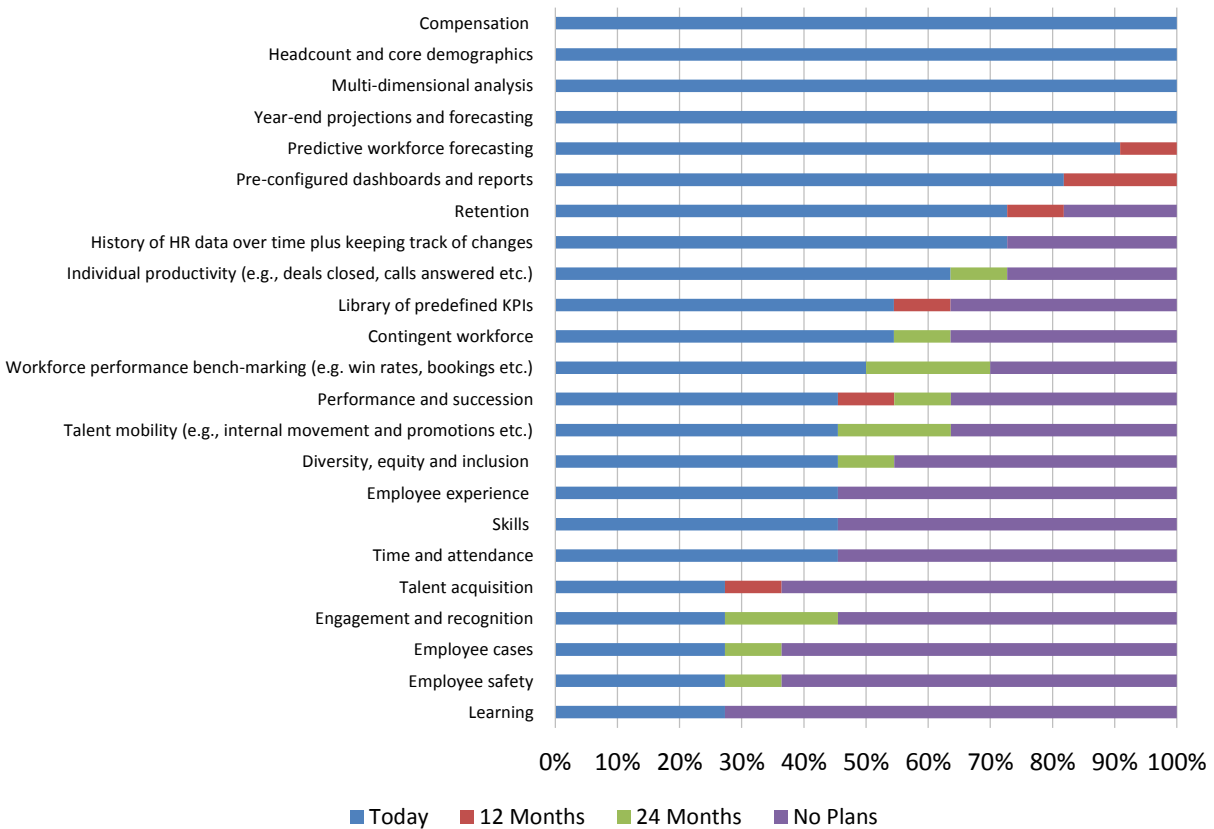


Figure 58 – Industry workforce analytics domains support

## Industry Workforce Planning and Analysis Integration Support

There is strong industry support for a range of workforce planning and analysis integration capabilities in 2024 (fig. 59). The top six of eight capabilities, *ability to integrate data from HRIS systems; ability to integrate data from leading ERP systems; export data to Excel, PDF; integration with compensation management systems; integration with financial planning and budgeting applications; and integration with inventory planning*, are fully supported today. Only *integrated social collaboration* is currently supported by less than 91 percent of the industry sample. Industry support aligns with and well ahead of user requirements (see fig. 44).

### Industry Workforce Planning and Analysis Integration Support

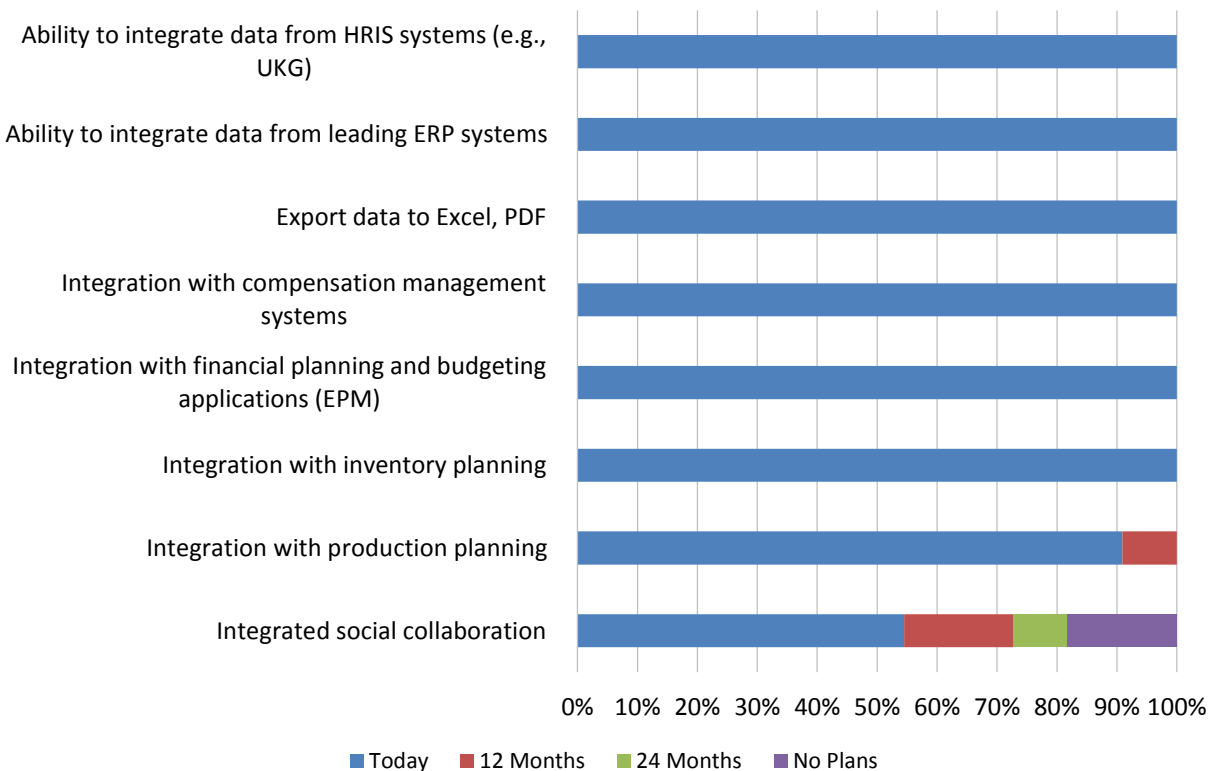


Figure 59 – Industry workforce planning and analysis integration support

# 2024 Workforce Planning and Analysis Market Study

## Industry Workforce Planning and Analysis Technology Support

Industry support for workforce planning and analysis technology support is very strong in 2024 and mostly complete with minor future investment (fig. 60). The top seven features (*access controls based on users and roles, automated alerts and notifications, Excel-based data entry, support for reporting/dashboards, textual annotation of input assumptions, Web user interface, and workflow for reviews and approvals*) are 100 percent currently supported. Vendors project *mobile support* to have 100 percent support within 12 months. Of particular note, they project support for generative AI features to increase from 27 percent currently to 82 percent support within 12 months. Industry support is more than adequate for user requirements in 2023 (see “workforce planning and analysis additional features,” fig. 49).

## Industry Workforce Planning and Analysis Technology Support

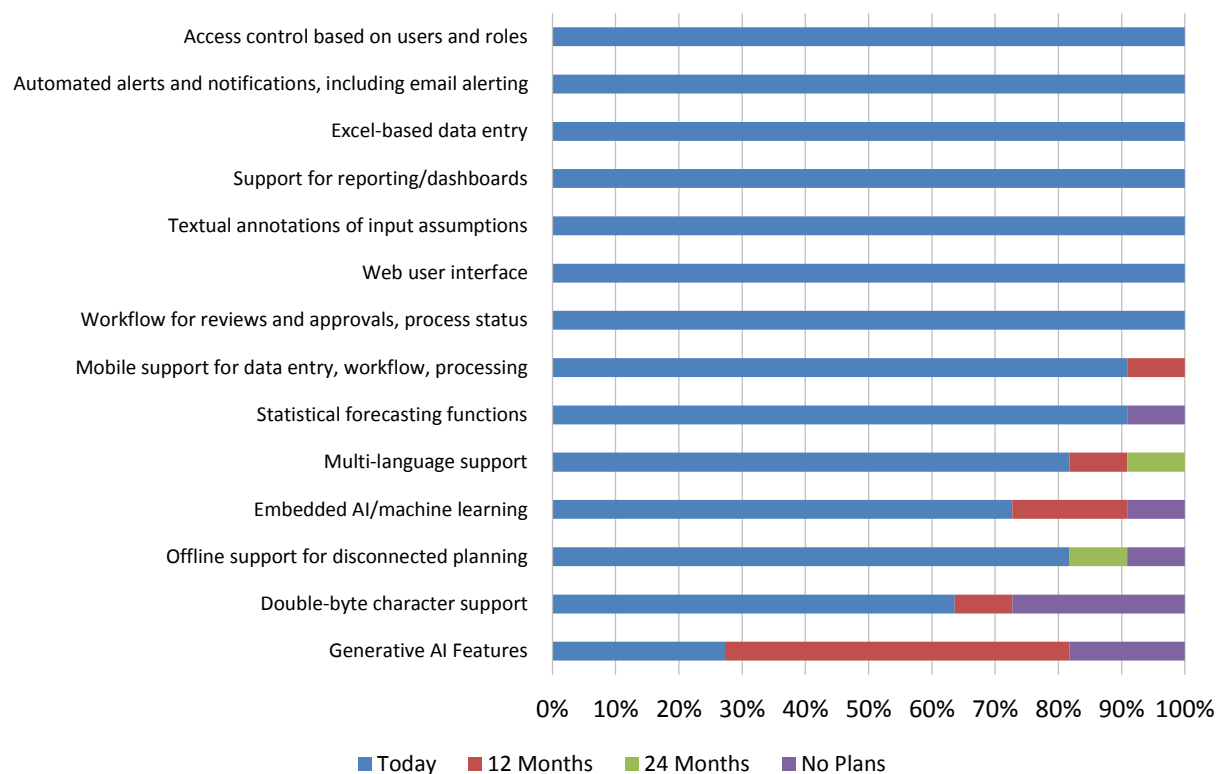


Figure 60 – Industry workforce planning and analysis technology support

# 2024 Workforce Planning and Analysis Market Study

## Industry Workforce Planning and Analysis Packaging and Deployment Support

Industry support for various workforce planning and analysis packaging deployment options is somewhat broad and mostly mature (fig. 61). Our 2024 industry sample most supports *multi-tenant, part of broader EPM solution, and public cloud option* (all at 91 percent). *Hosted/single tenant deployment* is currently the next most supported (82 percent), with future support expected to exceed 90 percent. Of our industry sample, 46 percent offer *HCM solution* inclusion. *On-premises* deployment is available from 36 percent of this year's industry sample. Our 2024 industry deployment options are otherwise mature and selectively strong enough to support most, if not all user preferences (see fig. 54).

### Industry Workforce Planning and Analysis Packaging and Deployment Support

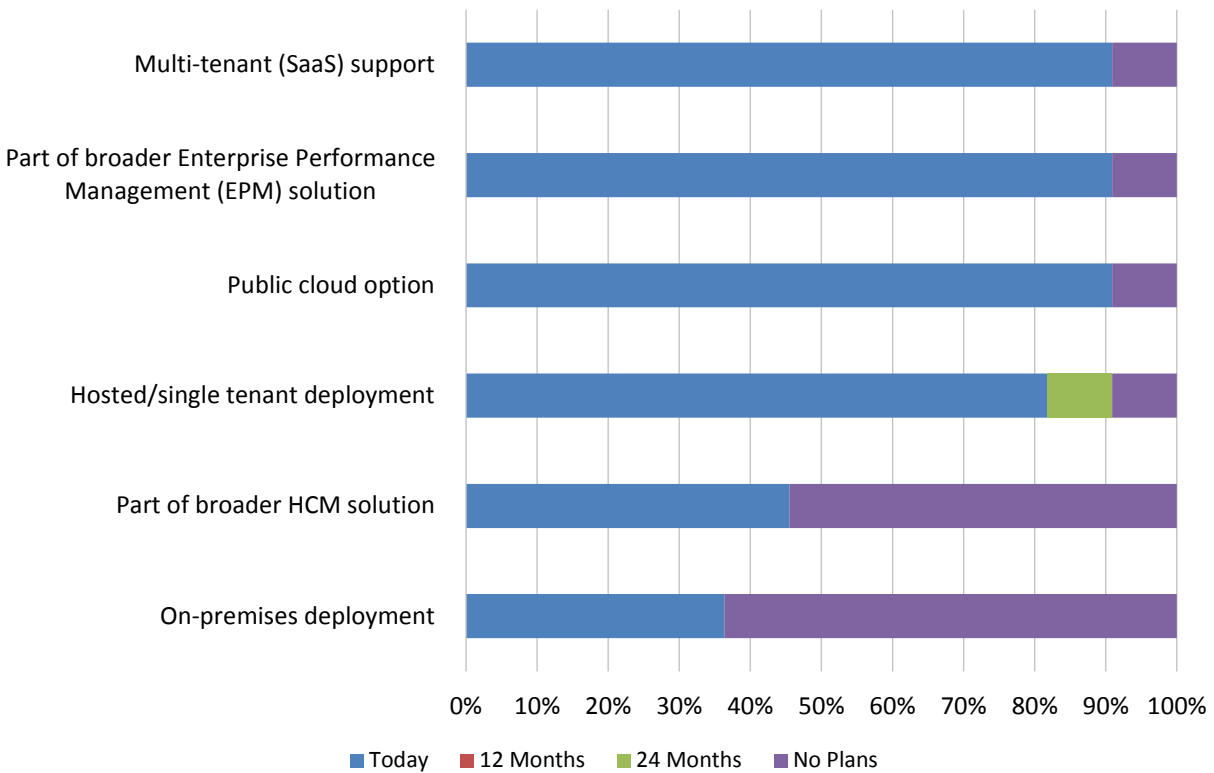


Figure 61 – Industry workforce planning and analysis packaging and deployment support

# 2024 Workforce Planning and Analysis Market Study

## Workforce Planning and Analysis Vendor Ratings

In rating the vendors, we considered a number of criteria across planning, analytics, integration, technology, and deployment capabilities.

Top rated vendors include Unit4 (1<sup>st</sup>), Workday (1<sup>st</sup>), Board (2<sup>nd</sup>), Vena (3<sup>rd</sup>), Anaplan (4<sup>th</sup>), CCH Tagetik (5<sup>th</sup>) and Visier (5<sup>th</sup>).

## Workforce Planning and Analysis Ratings

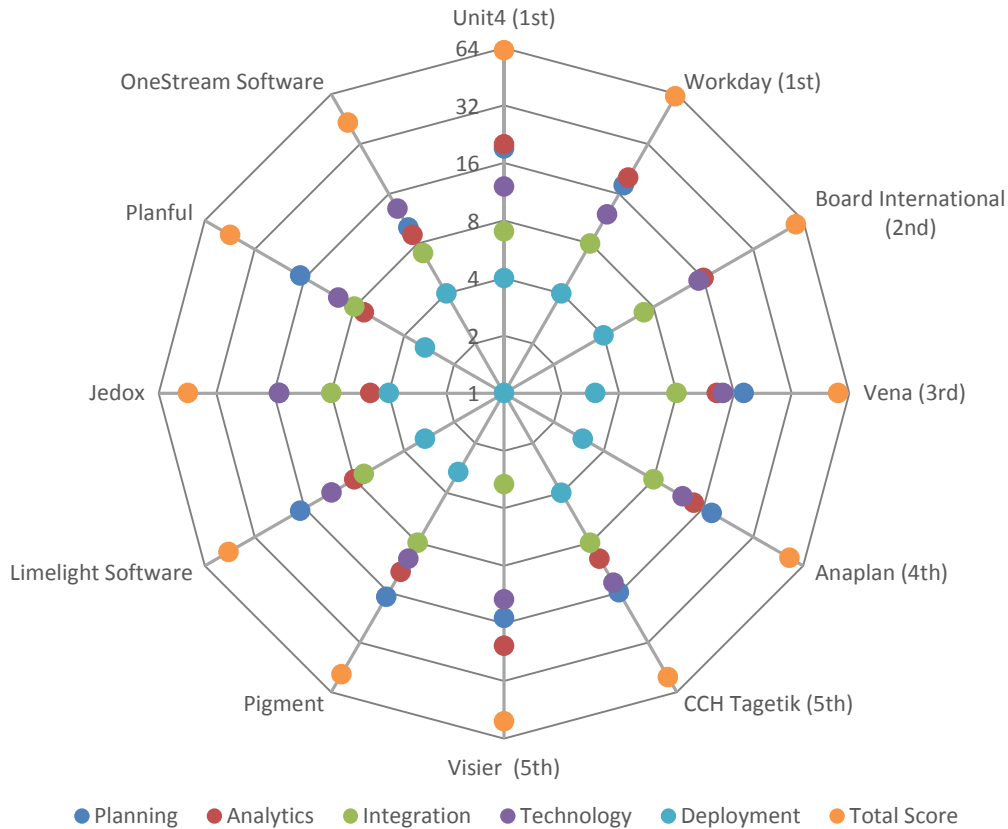


Figure 62 – Industry workforce planning and analysis vendor ratings

## Other Dresner Advisory Services Research Reports

- Wisdom of Crowds® “Flagship” Business Intelligence Market Study
- AI, Data Science, and Machine Learning
- Analytical Data Infrastructure
- Analytical Platforms
- Cloud Computing and Business Intelligence
- Data Catalog
- Data Engineering
- Data Governance
- Embedded Business Intelligence
- Enterprise Performance Management
- ESG Reporting
- Financial Consolidation, Close Management and Reporting
- Guided Analytics®
- Master Data Management
- ModelOps
- Sales Performance Management
- Self-Service Business Intelligence
- Small and Midsize Enterprise Business Intelligence
- Small and Midsize Enterprise Performance Management
- Supply Chain Planning and Analysis

# 2024 Workforce Planning and Analysis Market Study

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## Appendix: Workforce Planning and Analysis Study Survey Instrument

Name: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Country: \_\_\_\_\_

Email Address: \_\_\_\_\_

Major Geography

- Asia/Pacific
- Europe, Middle East and Africa
- Latin America
- North America

What is your current title?

\_\_\_\_\_

What function are you a part of?

- Business intelligence competency center
- Executive management
- Finance
- Information Technology (IT)
- Manufacturing
- Marketing

## 2024 Workforce Planning and Analysis Market Study

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- Project/program management office
- Sales
- Research and development (R&D)
- Other - Write In: \_\_\_\_\_

Please select an industry

- Advertising
- Aerospace
- Agriculture
- Apparel and accessories
- Automotive
- Aviation
- Biotechnology
- Broadcasting
- Business services
- Chemical
- Construction
- Consulting
- Consumer products
- Defense
- Distribution & logistics
- Education
- Energy
- Entertainment and leisure



## 2024 Workforce Planning and Analysis Market Study

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- Executive search
- Federal government
- Financial services
- Food, beverage and tobacco
- Healthcare
- Hospitality
- Gaming
- Insurance
- Legal
- Manufacturing
- Mining
- Motion picture and video
- Not for profit
- Pharmaceuticals
- Publishing
- Real estate
- Retail and wholesale
- Sports
- State and local government
- Technology
- Telecommunications
- Transportation
- Utilities
- Other - Write In: \_\_\_\_\_

## 2024 Workforce Planning and Analysis Market Study

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How many employees does your company employ worldwide?

- 1-100
- 101-1,000
- 1,001-2,000
- 2,001-5,000
- 5,001-10,000
- More than 10,000

What are your plans for employing workforce planning and analysis?\*

- Using Today
- 12 Months
- 24 Months
- No Plans

What is the importance of workforce planning and analysis within your organization?

- Top priority for the overall business
- Top priority within HR
- Important to HR but not a top priority
- Not considering
- Don't know

Workforce Planning and Analytics Products

Which vendor/product are you using for workforce planning and analysis?:

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How satisfied are you with your vendor and product for workforce planning and analysis?

## 2024 Workforce Planning and Analysis Market Study

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- Extremely satisfied
- Mostly satisfied
- Somewhat satisfied
- Somewhat unsatisfied
- Unsatisfied

Who are / will be the users of workforce planning and analysis?

	Primary	Secondary	Will not use
Sales	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Human Resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information Technology (IT)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Manufacturing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Marketing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supply Chain	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

64) Please assign the importance associated with the following workforce planning capabilities

## 2024 Workforce Planning and Analysis Market Study

	Critical	Very Important	Important	Somewhat Important	Not Important
Workforce compensation planning and scenario simulation	()	()	()	()	()
Workforce planning per employee, organization and vacancy	()	()	()	()	()
Benchmark values by industry, geography, etc.	()	()	()	()	()
Industry-specific workforce planning (e.g. MFG, Retail, Healthcare, Pharma, CPG)	()	()	()	()	()
Multi-currency support	()	()	()	()	()
Rolling workforce forecasts (e.g., weekly, monthly, quarterly, annual)	()	()	()	()	()
Workforce	()	()	()	()	()

## 2024 Workforce Planning and Analysis Market Study

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costing					
Workforce forecasting and pipeline management	( )	( )	( )	( )	( )
Workforce quota and commission planning	( )	( )	( )	( )	( )
Workforce resource planning	( )	( )	( )	( )	( )
Workforce territory planning	( )	( )	( )	( )	( )
Scenario planning	( )	( )	( )	( )	( )
Supply and demand balancing	( )	( )	( )	( )	( )
Top-down and bottom-up planning	( )	( )	( )	( )	( )
Automated data entry checks	( )	( )	( )	( )	( )
Succession planning	( )	( )	( )	( )	( )
Retention planning	( )	( )	( )	( )	( )

## 2024 Workforce Planning and Analysis Market Study

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65) Please assign the importance associated with the following workforce analysis capabilities

	Critical	Very Important	Important	Somewhat Important	Not Important
Headcount and core demographics	()	()	()	()	()
Retention	()	()	()	()	()
Engagement and recognition	()	()	()	()	()
Diversity, equity and inclusion	()	()	()	()	()
Compensation	()	()	()	()	()
Performance and succession	()	()	()	()	()
Talent mobility (e.g., internal movement and promotions etc.)	()	()	()	()	()
Employee experience	()	()	()	()	()
Employee cases	()	()	()	()	()
Employee safety	()	()	()	()	()

## 2024 Workforce Planning and Analysis Market Study

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Time and attendance	( )	( )	( )	( )	( )
Talent acquisition	( )	( )	( )	( )	( )
Learning	( )	( )	( )	( )	( )
Skills	( )	( )	( )	( )	( )
Contingent workforce	( )	( )	( )	( )	( )
Individual productivity (e.g., deals closed, calls answered etc.)	( )	( )	( )	( )	( )
History of HR data over time plus keeping track of changes	( )	( )	( )	( )	( )
Library of predefined KPIs	( )	( )	( )	( )	( )
Multi-dimensional analysis	( )	( )	( )	( )	( )
Pre-configured dashboards and reports	( )	( )	( )	( )	( )
Predictive workforce forecasting	( )	( )	( )	( )	( )

## 2024 Workforce Planning and Analysis Market Study

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Year-end projections and forecasting	()	()	()	()	()
Workforce performance benchmarking (e.g. win rates, bookings etc.)	()	()	()	()	()

How important are the following data access and manipulation capabilities?

	Critical	Very Important	Important	Somewhat Important	Not Important
Utilize and update multiple hierarchies (e.g., supervisory, finance, business unit)	()	()	()	()	()
Unify data from multiple source systems (e.g., HRIS, ATS, LMS, Survey, etc.)	()	()	()	()	()
Access relevant industry benchmarks for common metrics e.g. resignation rate or promotion rate	()	()	()	()	()



## 2024 Workforce Planning and Analysis Market Study

Add business data such as sales, customer satisfaction etc	( )	( )	( )	( )	( )
Map and re-map changes in data overtime e.g updates to job names or performance ratings	( )	( )	( )	( )	( )
Pipe people data into other components of the enterprise analytics architecture (e.g., data science tools or data warehouse/lake)	( )	( )	( )	( )	( )
Cleanse and transform raw data from source systems to prepare them for analytic use cases	( )	( )	( )	( )	( )

How important is the ability to create / share the following business insights?

	Critical	Very Important	Important	Somewhat Important	Not important
Standardized metric calculations	( )	( )	( )	( )	( )

## 2024 Workforce Planning and Analysis Market Study

Customize or add new metrics and calculations	( )	( )	( )	( )	( )
Analyze specific cohorts of employees (e.g., women who became managers 2 years ago)	( )	( )	( )	( )	( )
Ad-hoc analysis on any piece of shared content	( )	( )	( )	( )	( )
Drill down to the specific detail within the chart	( )	( )	( )	( )	( )
Predict the probability of key events (e.g., resignation, promotion, etc.)	( )	( )	( )	( )	( )
Predict future outcomes (e.g., time to fill)	( )	( )	( )	( )	( )
Compare individuals to peers or across business units or	( )	( )	( )	( )	( )

## 2024 Workforce Planning and Analysis Market Study

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geographies					
Share data securely to HRBPs, BU leaders and line managers	( )	( )	( )	( )	( )
Share data and insights via email	( )	( )	( )	( )	( )
Embed data and insights into other enterprise applications	( )	( )	( )	( )	( )
Guide users in the interpretation of the data	( )	( )	( )	( )	( )
Build and share dashboards (Monitoring based content)	( )	( )	( )	( )	( )
Build and share data stories (Explanations of key business impacts)	( )	( )	( )	( )	( )
Guide users to relevant external content (e.g.,	( )	( )	( )	( )	( )

## 2024 Workforce Planning and Analysis Market Study

HBR article on retention strategies)					
End-users creating and sharing their own content without specialist	()	()	()	()	()

How important are the following integration features for a workforce planning and analysis solution?

	Critical	Very Important	Important	Somewhat Important	Not important
Ability to integrate data from HRIS systems (e.g., UKG)	()	()	()	()	()
Ability to integrate data from leading ERP systems	()	()	()	()	()
Export data to Excel, PDF	()	()	()	()	()
Integration with compensation management systems	()	()	()	()	()
Integration with financial planning and	()	()	()	()	()

## 2024 Workforce Planning and Analysis Market Study

budgeting applications (EPM)					
Integration with inventory planning	( )	( )	( )	( )	( )
Integration with production planning	( )	( )	( )	( )	( )
Integrated social collaboration	( )	( )	( )	( )	( )

How important are the following additional features for a workforce planning and analysis solution?

	Critical	Very Important	Important	Somewhat Important	Not important
Access control based on users and roles	( )	( )	( )	( )	( )
Automated alerts and notifications, including email alerting	( )	( )	( )	( )	( )
Double-byte character support	( )	( )	( )	( )	( )
Excel-based data entry	( )	( )	( )	( )	( )
Support for reporting/dashboards	( )	( )	( )	( )	( )

## 2024 Workforce Planning and Analysis Market Study

Mobile support for data entry, workflow, processing	( )	( )	( )	( )	( )
Multi-language support	( )	( )	( )	( )	( )
Offline support for disconnected planning	( )	( )	( )	( )	( )
Statistical forecasting functions	( )	( )	( )	( )	( )
Textual annotations of input assumptions	( )	( )	( )	( )	( )
Web user interface	( )	( )	( )	( )	( )
Workflow for reviews and approvals, process status	( )	( )	( )	( )	( )
Embedded AI/machine learning	( )	( )	( )	( )	( )

How important are the following deployment features for a workforce planning and analysis solution?

	Critical	Very Important	Important	Somewhat Important	Not important
Public cloud option	( )	( )	( )	( )	( )
Multi-tenant (SaaS) support	( )	( )	( )	( )	( )

**2024 Workforce Planning and Analysis Market Study**

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Hosted/single tenant deployment	( )	( )	( )	( )	( )
On-premises deployment	( )	( )	( )	( )	( )
Part of broader Enterprise Performance Management (EPM) solution	( )	( )	( )	( )	( )
Part of broader HCM solution	( )	( )	( )	( )	( )