Headcount Planning Checklist

Proactive headcount planning is integral to your company's ongoing strategy, talent forecasting, and budget setting. And while every good hiring manager has a clear cut plan at the start of the year, it never seems to come to fruition. Use this checklist to ensure you've covered all your bases when planning for headcount in the coming year.

1. Evaluate business challenges and opportunities for growth

   **Consider:** Start with a high-level view. Ask yourself these questions: Where is your company now? Where do you want it to be? What challenges are keeping you from achieving all your goals? What new roles and skills do I need to hire for to solve these challenges?

2. Include all departments in the headcount plan

   **Consider:** Don't assume you know what every department head needs. Take the time to speak with each department individually to learn what they will need to remain successful as your company grows.

3. Request input from your recruiting team

   **Consider:** From applications to phone screens to interviews, how long does it take to get one hire? Consult with your recruiters about past hiring performance and manage expectations about the time to fill each role.

4. Request feedback from your recruiting team regarding compensation

   **Consider:** Recruiters have real-world, everyday experience about salaries and compensation within your target talent pools. Leverage their knowledge to stay competitive.

5. Include relocation costs in the budget

   **Consider:** The best person for the role likely isn’t down the street. When a hiring manager can’t hire the best person, it creates a bad experience for the candidate and hiring manager.

6. Include signing bonuses in the budget

   **Consider:** Especially for executive roles—a great candidate may not leave their current position without the additional compensation of a sign-on bonus.
7. Consider remote employees

**Consider:** Is working remotely an option with your firm? If it’s not, should it be? For specific types of talent, remote work is considered the norm.

8. Evaluate current employees who perform multiple roles.

**Consider:** We all love to hire overachievers who will do more than is required of their actual job description. Still, at some point, in order to grow, that person will need to focus on their primary responsibility, and you’ll need to hire someone new to manage the other role.

9. Include internal promotions and employee attrition in your headcount forecast.

**Consider:** Headcount planning doesn’t just account for “new” roles. Usually, roles will need to be backfilled due to attrition, promotions, and/or internal mobility.

10. Identify skill gaps.

**Consider:** Pay attention to in-demand skills and the skills you’ll need from your team as you continue to grow. Identify ‘high-value’ skills and nurture them at every level.

11. Define your metrics and focus on the data.

**Consider:** Your headcount decisions shouldn’t be based on your gut. Define the metrics necessary to determine where you’re staffed with the right people and stick to these numbers.

12. Align talent strategy with business strategy

**Consider:** When you align talent and business strategy, you can anticipate the ebbs and flows of your talent needs through periods of growth.

With well-rounded headcount planning, you minimize surprises. Your headcount plan connects business priorities, budgets, hiring, and succession planning with a strategic roadmap. Planning for an accurate headcount is challenging, and there’s always a lot to consider; it’s nearly impossible to nail down an exact number. But, by having a proactive approach and avoiding some common mistakes, you can create a plan destined for success. **Need more help? Contact us!**