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WORKFORCE PLANNING MASTERCLASS

Getting Heard

The second half of the planner’s job — turning a correct analysis into a decision someone acts on

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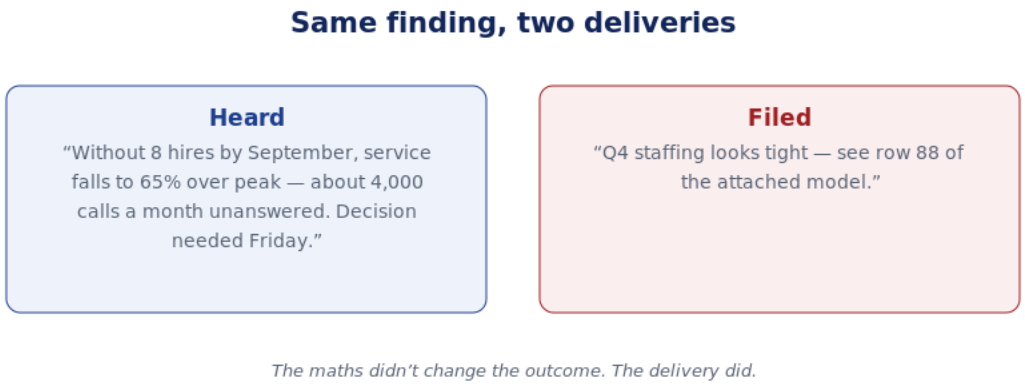
Contents

1. Being right is only half the job..... 3
2. Know your audience..... 3
3. Tell the story with numbers..... 4
4. Present the forecast as a recommendation..... 4
5. Saying no, and being wrong well..... 4

1. Being right is only half the job

Planners are hired for analysis and then judged on influence. The other half of the job — getting the work used — is the half the spreadsheets never taught you.

Every planner knows the feeling of “I told them this would happen,” watching a predicted problem arrive after the warning was ignored. Usually the issue was not the warning but the delivery: buried in a spreadsheet, hedged into mush, or aimed at the wrong person. The two halves of the job pull in opposite directions — analysis rewards precision, caveats and completeness; communication rewards clarity, confidence and brevity — so the habits that make a good analyst can make a poor communicator unless you consciously switch modes.



Analysis earns you the right to an opinion; communication is how that opinion changes a decision.

> *A correct forecast nobody acts on has failed. Influence is not a soft extra; it is the multiplier on everything else you do.*

2. Know your audience

“We’re 12 FTE short in Q4” means something different to a director, an operations manager and an agent. The **executive** cares about outcome, risk and money — lead with the “so what” and the decision you need. The **operations manager** cares about “what does this mean for my floor?” — which weeks, which skills, what it costs to ignore it. The **agent or team leader** cares about fairness and “how does this affect me?” — lead with the why and the respect, not the Erlang.

Across audiences you are adjusting three dials: how much detail, how much jargon, and what you put first. The question that drives all of it is simple — before any message, name the audience’s decision or action. Everything that serves it stays; everything else is your interest, not theirs.

3. Tell the story with numbers

A table of numbers is not an argument. A spreadsheet asks the reader to find the point; a story hands it to them. The core rule is one chart, one message, with the title as the message (“Q4 needs 12 more FTE,” not “Headcount vs requirement”). Lead with the conclusion and follow with the evidence, because a busy audience stops reading once convinced and a buried punchline never lands.

Strip everything that isn’t the point — gridlines, extra decimals, the legend you don’t need — and translate the abstract into something felt: “a 4% shrinkage error” lands weakly; “eight people missing every Monday” lands hard. Persuasive is not the same as misleading, though — truncated axes and cherry-picked windows win the meeting and lose your credibility, which is the planner’s most valuable asset.

4. Present the forecast as a recommendation

Nobody wants a number for its own sake; they want to know what to do about it. Open with the implication and the call you’re asking for, then show the forecast as the reason. Surface the two or three assumptions that matter before anyone asks, and state confidence as a range, not a point — “most likely 12, but 8–16 depending on the campaign” tells people how much to trust it and where the risk sits.

Own the recommendation rather than handing over a neutral data pipe, bring the obvious scenarios with you so the challenge is answered before it’s voiced, and use a reliable structure: recommendation, why, assumptions and confidence, then the ask — detail kept in your back pocket.

5. Saying no, and being wrong well

Planners are the bearers of constraints, and a flat “no” makes you the office pessimist. Reframe it as a costed choice: “we can, and here is what it costs or what gives.” Let the data do the disagreeing — “at this volume and AHT, 80/20 needs 14 more agents than we’re funded for” is arithmetic, not opinion — quantify the cost of the ask, and bring options rather than just objections. Be firm on the facts and warm with the people; when overruled, commit professionally and document the risk you flagged.

And handle challenge as a question, not an attack — meet it with curiosity, mine even a clumsy challenge for the fair point, and decide honestly whether to hold or update. When you are wrong, own it cleanly and move to the fix: “I got that wrong, here’s what happened and here’s what I’m changing” rebuilds trust faster than any excuse. A forecast miss is information, not a personal failing — treat it that way and even being wrong builds the credibility that makes you heard.

> *Trust is built in the hard moments. Own the miss, mine the challenge, and turn the refusal into a choice the business makes with open eyes.*

About the author

John Casey has spent more than 30 years in contact-centre workforce planning, including roles as a workforce-planning manager and operations director, and now writes and teaches at ccplanning.net. The views in this paper are his own. It represents general professional experience and is not affiliated with, nor does it represent, any current or former employer.

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