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The CHRO Insider's Workbook

Tested strategies for organizational success

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How to use this workbook

In HR, you stand at the intersection of your organization's most pressing challenges and its greatest opportunities. Whether you're catching up with an evolving DEI landscape, reimagining talent mobility, or building community in the workplace, your actions greatly impact the health of your organization. But the reality is, it can sometimes feel like you're doing it all on your own.

This workbook supplements SeekOut's CHRO Council Workshop Series, five webinars led by former CHROs to help you build talent strategies that enable workforce agility and business longevity. Each section is dedicated to a webinar, with key takeaways and an accompanying worksheet. The worksheets provide thought-provoking exercises that serve as a starting point to create strategic frameworks you can spur into action. The worksheets do not have to be completed in order—you can start with whichever topic resonates with you the most. Get ready to lay the groundwork for strategies that inspire change, create more inclusive workplaces, and build integrated talent roadmaps that drive business outcomes!

SeekOut's CHRO Council

Our CHRO Council advisors are seasoned leaders who now advise organizations through the complexities of creating holistic talent strategies that break down organizational silos. While their solutions are not a one-size-fits-all approach, they are invaluable in helping clear the fog to find a path forward. Their firsthand experiences and lessons learned have helped organizations transform their talent strategies and achieve meaningful results.

A note on the journey ahead

The content of this workbook is foundational and not meant as a quick fix. Each worksheet tackles distinct yet interconnected challenges whose strategies may require months to get off the ground and often take years to fully realize. True organizational transformation takes time, patience, and unwavering commitment. As you work through these exercises, remember that you're building a foundation for lasting change. While the results may not be immediate, the framework you develop here will guide your organization toward sustainable, long-term success.

Watch our CHRO webinar series on demand by following the links provided throughout this workbook.

Strategic workforce planning:
How to get the right people involved

Your expert advisor: Dermot O'Brien

Dermot is the former CHRO and Chief Transformation Officer at ADP. He has nearly 20 years of experience reporting to CEOs and led global teams for over 30 years.

Think of strategic workforce planning as a blend of art and science where organizations match the right talent to the right business priorities. HR's responsibility is working with stakeholders to extract meaning behind business objectives and translate that into an actionable plan.

"When the business is clear on detailing what they're trying to achieve, HR can play its role as experts to deliver on the needs of the business," says Dermot. "It's simple, but we tend to complicate things with too many processes and not getting the information we need ahead of time."

Why do organizations struggle with strategic workforce planning?

- **HR teams are separated from the business.** 72% of HR teams lack full integration with business planning processes. [1]

- **Talent acquisition isn't valued as a strategic partner.** 92% of TA teams aren't involved in workforce planning and mobility initiatives. [2]

- **Most hiring is ad hoc.** 66% of HR teams are stuck in basic headcount planning. [3]

Dermot's tips for breaking through these challenges

- **Bridge the silos**. When HR, finance, and business leaders plan together from the start, everyone wins. No department can do this alone.

- **Involve talent acquisition early.** Your talent team knows what's really happening in the market. Use their insights early to shape smarter decisions.

- **Think HR architected, business led.** Stop reacting, start planning. Your workforce strategy should drive business growth, not just fill empty seats.

Worksheet: Who's involved with workforce planning?

The questions in this worksheet are for your stakeholders to answer. Dermot suggests coming into these conversations with empathy, starting off with language such as, "I want to help you deliver on what's most important to you." People want to feel like you're on their side. They'll be more open with their needs, which allows you to drill down on the details you need for strategic planning.

Watch Dermot's webinar for more tips to align talent with business objectives.

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[1] Top 5 Priorities for HR Leaders in 2025 (Gartner)

[2] Why Is It So Hard to Be a CHRO? (The Josh Bersin Company)

[3] Top 5 Priorities for HR Leaders in 2025 (Gartner)

Who's Involved with Workforce Planning?

HR architected, business Led

This worksheet uses the RACI model (Responsible, Accountable, Consulted, Informed) to identify your key players and spark critical conversations throughout the strategic workforce planning process. Add names and tackle key questions for each role—from the leaders shaping the vision to the teams bringing it to life.

Responsible
Leaders and HR Business partners

Identifies business and people priorities (i.e., growth strategy)

1. What are your top business priorities, and how will they shape your workforce needs?
_____
_____

2. How can you better align your people strategy with business growth?
_____
_____

Accountable
Talent team

Designs and manages workforce plan

3. How do you assess current skill gaps and forecast future workforce needs?
_____
_____

4. What metrics and market intel would make your workforce planning more effective?
_____
_____

Consulted
Finance team

Sets financial goals, allocates budget, and approves expenses

5. How do you balance immediate budget needs with long–term workforce investments?
_____
_____

6. What data would improve your workforce budget decisions?
_____
_____

Informed
Organization leaders

Partners with Talent and HR Business partners to assess workforce skills and tools

7. How do you collaborate with HR to assess your team's skill gaps and future needs?
_____
_____

8. How could workforce analytics help you better anticipate and prepare for future talent needs?
_____

Building a holistic talent roadmap: How to break down silos

Your expert advisor: <u>Annie Rihn</u>

Annie is the former VP of Talent at Discord and Zillow. She has over 20 years of talent experience. Having spent time in various recruiting roles, she is a champion of cross-collaborative relationships at work.

A holistic talent strategy places skills at the center of all talent decisions, where capabilities are seamlessly identified, developed, and mobilized across the business. Organizations can better adapt to changing market conditions, increase retention, and plan critical skills ahead of demand. When talent initiatives work in concert, organizations maximize ROI and create a sustainable talent ecosystem.

"People leaders often do things in a vacuum, but getting the right people in the conversation early is the critical starting point to creating a holistic strategy," says Annie. "If you aren't unified, you end up with a lot of external hiring, expensive redundancies, and missed opportunities."

Why do you need a holistic talent strategy?

- **It mitigates talent shortages.** Organizations are 107% more likely to place talent effectively. [4]

- **Keep your best talent longer.** Organizations are 98% more likely to retain high performers and have a reputation as a great place to grow and develop. [5]

- **It's critical in achieving business returns.** Companies that centralize talent in their business strategy realize higher total shareholder returns than their competitors. [6]

Annie's tips to building your holistic talent roadmap

- **Pick one problem.** Start with a single business challenge that matters to all talent teams. Success comes from focused momentum, not trying to fix everything at once.

- **Connect your data.** Get your talent teams together to identify their "wish we had known" moments. These gaps show exactly where to start breaking down silos.

- **Identify your tools.** Integrate the data with the right tools to foster effective cross-collaboration.

Worksheet: Bridging your talent functions

You can't build a holistic talent strategy alone. This worksheet will help your talent teams reflect on needs and identify where you can help one another. You won't solve everything in one go, but you will start to understand the current state of your talent functions and identify how to work together to solve urgent challenges.

<u>Watch Annie's webinar</u> for more tips to create a seamless talent strategy rooted in agility.

[4] <u>2023 Global Human Capital Trends Survey (Deloitte)</u>

[5] <u>2023 Global Human Capital Trends Survey (Deloitte)</u>

[6] <u>Increasing Your Return on Talent, April 2024 (McKinsey & Company)</u>

Bridging Your Talent Functions

Have your talent teams address the questions in their respective columns to identify overlapping work and opportunities for collaborative decisions. Start with the team whose challenges resonate most strongly with you before exploring the others.

Goal: talent mobility
Right talent, right time, best outcomes

Talent acquisition	Talent management	Learning & development
Sourcing 1. How could workforce analytics help you better anticipate and prepare for future talent needs?	**Performance** 3. What learning metrics should inform our promotion readiness decisions beyond traditional performance data?	**Engagement** 5. How can we align learning opportunities with the future skills we need?
Workforce planning 2. What skills gaps in our current workforce should drive our decisions to build vs. buy?	**Career paths** 4. How do we bridge the gap between where employees want to grow and where our business needs them to grow?	**Measurement** 6. What insights can help measure learning impact?

Create communication cadences

Monthly Assess talent gaps	**Quarterly** Align on career paths	**Yearly** Measure mobility trends

What's up with DEI? How to find clarity in a changing landscape

Your expert advisor: Betty Thompson

Betty is the Chair of SHRM's Board of Directors and the former CHRO at Booz Allen. With decades of experience in HR, executive leadership, and board positions, she has directed human capital strategy and human resource functions for large

Over the last several years, organizations have attempted to address diversity and inclusion but made less progress than expected despite significant resources and good intentions. The fundamental barrier to success lies in repeating ineffective approaches rather than addressing the core organizational culture.

"It's time for a reset," says Betty, noting that organizations should prioritize nurturing an inclusive culture to start making real progress. "Inclusion is the harder part because you have to change the behaviors that compound over time and contribute to what I call 'invisible barriers,' such as recognizing who isn't speaking in meetings."

To support behavioral changes, organizations should shift to skills-based hiring, which focuses on what candidates can do rather than where they come from. Betty encourages teams to adopt AI-driven analytics to forecast talent needs while ensuring DEI objectives are met through more data-informed decision-making processes.

Reality check: The DEI landscape today

- 97% of organizations say they've made changes that are improving DEI outcomes... [7]

- But only 37% of workers strongly agree on progress. [8]

- 70% of enterprises will need to shift to adaptive AI strategies to advance DEI goals by 2029. [9]

Betty's tips for revitalizing your DEI initiatives

- **Inclusion comes first.** Hiring diverse talent only goes so far if your culture, behaviors, and daily decisions don't support their success.

- **Track micro-decisions.** Real inclusion happens in everyday moments, such as who gets high-visibility projects and who gets mentored.

- **Use AI as a flashlight, not a filter.** AI should help you discover hidden talent and create new pathways, not reinforce old obstacles.

Worksheet: Navigating DEI in 2025

This worksheet breaks down three focus areas that support successful DEI initiatives and offers sample questions for relevant organization leaders. You'll gather insightful data to build a business case for adopting skills-based hiring and AI tools that support inclusivity.

Watch Betty's webinar for more tips on prioritizing inclusion to make meaningful change.

[7] 2024 Global Human Capital Trends (Deloitte)

[8] 2024 Global Human Capital Trends (Deloitte)

[9] How to Advance AI Without Sacrificing Diversity, Equity and Inclusion (Gartner)

Navigating DEI in 2025

Create a more inclusive workplace in the year ahead by focusing on the three key areas below. Use the thought–starter questions to chart your path toward a fair and respectful workplace.

1. Talent reimagined
Skills–based hiring

Business case: Education

1. What metrics will we use to measure the effectiveness of skills–based hiring on DEI outcomes?

2. What partnerships could expand our talent pipeline?

3. How will we ensure job descriptions focus on skills rather than credentials?

Enablement: Tools

1. How will we ensure our tech stack supports skills–based hiring?

2. How will we ensure our tools don't create new forms of bias?

3. What training will recruiters need to effectively use these tools?

2. Leveling the game
Culture of inclusion

Equity and belonging: Leadership

1. What accountability measures exist for inclusive leadership behaviors?

2. How are we tracking promotion velocity across different demographics?

3. Do we have survey data to track progress?

Learning and development: Employee skills

1. How do we identify and remove barriers to skill development?

2. Is there clarity around what skills are necessary for career paths?

3. What resources are available internally and externally for develop-ment opportunities?

3. AI for everyone
Org readiness

Build, buy, borrow, bot: Workforce planning

1. How are we identifying skills gaps and forecasting future needs?

2. How will we audit AI systems for potential bias?

3. How are we preparing for AI's impact on different workforce segments?

Culture of mobility: Employees

1. How are we enabling employees to reskill and upskill?

2. How are we equipping managers to lead through these changes?

3. What feedback mechanisms will capture concerns about AI?

The business case for talent mobility: How skills intelligence strengthens retention and agility

Your expert advisor: <u>Jeff Diana</u>
Jeff is the former CHRO at Calendly, Atlassian, and SuccessFactors. He is a seasoned HR executive known for his leadership in scaling global businesses. He is currently a consultant for high-growth companies.

Internal mobility turns your existing workforce into your competitive advantage, moving people and their skills where needed while creating career growth opportunities that support employee retention. Historically, HR hasn't had access to the right information to make agility possible. This is no longer an excuse given the sophistication of AI tools available today that can leverage the talent intelligence we need to make smart decisions.

"The quality of having people in the most impactful jobs with the most impactful skill sets has never been more critical in the history of business," says Jeff. "Your business will not perform if you don't do this well."

Why is talent agility gaining momentum?

- **Career paths fail to meet modern workforce needs.** 86% of HR leaders believe career paths at their organization are unclear for many employees. [10]

- **Talent intelligence has become more important than ever.** 84% of CHROs said talent intelligence was a top priority for 2024. [11]

- **A perfect storm of opportunity and urgency.** 79% of CHROs say they're hiring fewer new employees compared to 12 months ago, yet 67% of employees would switch jobs for learning opportunities. [12]

Jeff's tips for achieving successful business outcomes with talent agility

- **Find strategic alignment to business priorities.** Dig into your company business strategy and why each goal was determined. Learn about your competitors and the workforce at large.

- **Integrate your talent tech stack.** You'll get a complete view of both your team's skills and the job market, so you can make smarter, faster decisions to fill gaps.

- **Foster a culture of mobility.** You'll maximize the capabilities of your people by deploying the right skills to the right work at the right time. And it starts by setting clear career paths that employees can follow.

Worksheet: How does your organization's talent agility stack up?

It's quiz time! Ask yourself the following questions and tally your score. These questions are designed to help you not only gauge your organization's agility as it stands today but also serve as a guide on how to find your path to agility if your score is low.

<u>Watch Jeff's webinar</u> to learn more about the necessity of skills intelligence for business survival.

[10] <u>Where HR will focus in 2024 (Gartner)</u>

[11] <u>Demystifying Talent Intelligence: Unlocking the Potential with Skills & AI (Aptitude Research)</u>

[12] <u>Workforce Transformation Survey 2024 (PwC)</u>

Talent **Agility** WORSHEET

How Does Your Organization's Talent Agility Stack Up?

A talent agility plan can be stacked into three layers. Start with a base of **Strategic Alignment**, harness the right **Technology and Data**, and top it off with a **Culture of Mobility**. Establishing these layers in order ensures your talent function impacts top business objectives.

Rate your company's agility strategy. Start with question 1 at the bottom of this page using the following scale:

- **1** — Not really: Little to no understanding or practice
- **5** — Yes: But we could do better
- **9** — Absolutely: We're leading the way

ARR Growth

Profitability

Share Price

Culture of mobility

6. Are employees provided the insights and opportunities to grow and develop?

1   5   9

5. Do you offer incentives to managers to avoid talent hoarding?

1   5   9

Technology and data

4. Can you create alignment across HR to seize opportunities from those insights?

1   5   9

3. Does your tech infrastructure provide skills analysis and market insights to inform your talent strategy?

1   5   9

Your agility score

43+
Your company agility is strong. Great work.

32–42:
You're on the right path toward agility. Keep it going.

<33:
There's plenty of room to improve. Onward and upward!

Strategic alignment

2. Do you know the opportunities to outmaneuver your competitors?

1   5   9

1. Do you understand the operating plan and multi-year growth strategy of the business?

1   5   9

The most exciting chapter for HR: How to inspire change across organizations

Your expert advisor: David Landman, Ph.D.

David is the former talent leader at Goldman Sachs and has over 20 years of experience as an HR executive. He dedicates his time helping companies, innovators, and investors redefine what it means to thrive at work.

Transformative change happens through authentic networking—how you understand your audience and show up to these conversations. These opportunities happen within your organization and across your professional connections. Networking with purpose in both circles builds a deep connection through trust and community that leads to long-lasting business success.

"The power of having connection and community within your company opens the aperture to understand different experiences and perspectives of the people you serve," says David. "Externally, community is where challenges and lessons learned are exchanged so you can gather intelligence to support your role as an HR leader when driving change forward."

David emphasizes a critical mindset shift for today's fast-evolving HR tech landscape: successful HR leaders acting as shepherds, not dictators. HR leaders should go beyond technical expertise to listen and learn so they can guide their organizations through digital transformation and create solutions that work for everyone.

What top CHRO must do in 2025

- **Lead with empathy.** In a recent survey of 3,000 HR professionals, one-third felt empathy was lacking at the top of their organizations. [13]

- **Lead the charge to find solutions.** 74% of HR leaders report relying on IT to some extent for identifying new digital technologies for their most critical digital initiative. [14]

- **Lean on your community to learn what tech is right for your business goals.** Eight out of 10 HR software buyers experience regret. [15]

David's tips for networking your way to transformative change

- **Practice active listening.** Lead with curiosity by asking questions and seeking to understand others' experiences and emotions before proposing solutions.

- **Check your ego.** Be willing to compromise and adapt. Prioritize getting 70% of your great ideas implemented over holding onto 100% of a perfect, unshared concept.

- **Make real connections.** To connect authentically, introduce yourself as a human first, not just a title. Focus on what gives you joy and purpose, and use that to create meaningful, vulnerable connections with your stakeholders and peers/colleagues.

Worksheet: Find your purpose to network with purpose

This worksheet offers a moment of reflection. Your goal is to first rediscover what brings you meaning and joy. Your answers will take time to develop but take a first pass and use it as a north star to then guide your networking efforts and stakeholder conversations going forward.

Watch David's webinar for tips on becoming a community-oriented CHRO.

[13] Talent Acquisition Trends 2024 (Korn Ferry)

[14] How CHROs Can Guide High-Impact Technology Decisions (Gartner)

[15] Boost Win Rates by Involving the CHRO in HR Tech Buying (Gartner)

Networking WORKSHEET

Find Your Purpose to Network with Purpose

Meaningful change starts with self-awareness and developing a genuine connection with others. This worksheet will help uncover your core motivations so you can bring your authentic self to any conversation—whether you're digging into stakeholder needs or chatting with a mentor over coffee.

1

Exploring your purpose

Start by answering questions about who you are and what sparks joy.

1. What gives you energy?

2. What mark do you want to make on this world?

3. How can you make a meaningful difference?

Answers from step 1 are your foundation for conversations in steps 2 and 3.

2

Understanding your network

Empathize with your audience by learning what matters most to them.

1. What's your biggest priority right now?

2. What keeps you up at night, and what gets you out of bed?

3. What's your ideal way to connect and collaborate?

3

Having authentic conversations

Practice active listening and approach each interaction with curiosity.

1. What's standing in your way?

2. What support would be most valuable?

3. Who would you love to meet from my network?

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SeekOut's Talent Intelligence Platform helps thousands of organizations of all sizes and industries hire, grow and retain great talent. Founded in 2017 by a team of enterprise software veterans, SeekOut is backed by leading investors at Tiger Global Management, Madrona Venture Group, Mayfield and Founders Circle Capital. SeekOut has two primary product offerings—Recruit, for identifying new talent, and Grow, for maximizing a company's existing internal talent. Leading companies, including Peraton, Experian and Northrup Grumman, rely on SeekOut to unify their talent acquisition, talent management, and talent analytics in a single people-first platform.

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Ready to learn more about SeekOut?
Request a demo to see how SeekOut can provide you with a competitive advantage in understanding your talent needs and recruiting hard-to-find and diverse candidates.