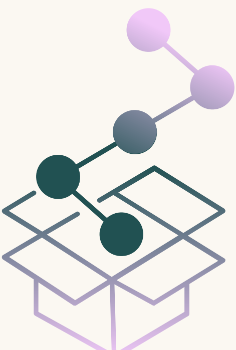
How to run an effective workforce planning meeting

Introduction

In construction, getting the right people, on the right job, at the right time can be the cornerstone to a project's success. Workforce planning, the process by which you decide how your teams will be allocated to projects, isn't just about filling vacant roles. It's about securing the best team for each project's unique challenges. Since workforce planning is vital to project success, virtually every contractor will have a weekly or monthly meeting dedicated to it. Since your people are your most expensive and valuable asset, it's crucial these meetings go well.

But how many times have you witnessed or been a part of a workforce planning meeting that felt chaotic, unproductive, or combative?



PICTURE TWO MEETINGS:

Meeting one:

- Operations leaders bring personal agendas.
- Data used is outdated or missing.
- Lack of clear discussion on forecasting labor for pursuits.
- Decisions are often delayed.
- Same issues resurface in subsequent meetings.
- Participants leave feeling frustrated or confused.

Meeting two:

- All participants come prepared.
- A clear agenda directs the flow of the meeting.
- Disagreements are resolved through strategic discussions.
- Staffing decisions are supported by real-time, accurate data.

Meeting two shouldn't be a dream but the standard.

That's why we wrote this guide to an effective workforce planning meeting. You'll discover five keys to transforming your workforce planning meetings from chaotic, time-consuming events into strategic, productive sessions.

1. The importance of the right software/systems

Action item → Transition from traditional methods like spreadsheets and whiteboards to specialized software. It will help you overcome inefficiencies and blind spots in staffing, and enhance collaborative decision-making and project management.

Construction is perceived as an industry resistant to digital transformation. This isn't true, the tech needed has to catch up to the complexity of the projects the industry undertakes. One component of project complexity is figuring out how to staff projects. It seems simple, just know what vacant roles you have and fill them, right? Wrong. You need to know if people are allocated to other work, if you'll need to recruit more people, if your pursuits will be staffed adequately if they're won, what the labor spend is on a project, how you're going to communicate changes, and how shifting timelines affect your plan on a daily, weekly, monthly, and even yearly basis. None of this is simple. It's more difficult when you factor in traditional methods of workforce planning. What are these methods? You're probably using them today: spreadsheets, whiteboards, pen and paper, or, at best, software not specialized for construction. These methods have been serviceable but riddled with inefficiencies.

They lack real-time updates, are prone to human error, and collaborative decision-making is difficult. This leads to blind spots as to where your people are and where they're going. It means lost opportunities, and inefficiently handling the opportunities you already have.

Did you know that 85% of contractors have bid on projects only to find they do not have the proper workforce, but only 12% cite workforce limitations as the most common reason for losing a bid.

Source: Bridgit Workforce Planning Survey

SPECIALIZED WORKFORCE PLANNING SOFTWARE

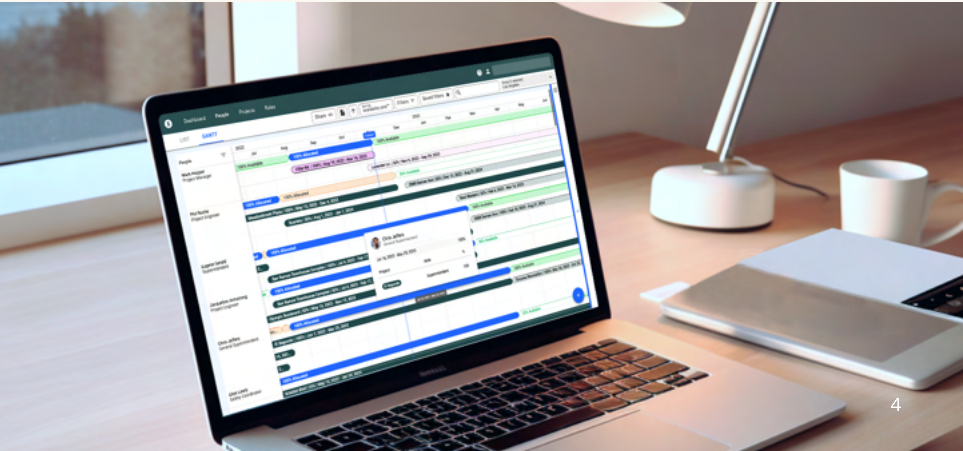
To have effective workforce planning meetings, you need a clear picture of your people, projects, and pursuits so you can talk strategically about your staffing decisions rather than doing data entry. Workforce planning platforms like Bridgit Bench are made specifically for the dynamic nature of the construction industry.

Key benefits of specialized software include:

- Centralized data, ensuring everyone operates from a single source of truth
- Real-time updates add value
- Communication features making it easy to signal changes to your team
- Project spend reports add value
- Strategic forecasting your staffing needs months and years in advance
- Pursuit planning add value

While all of this is hypothetically possible in a spreadsheet, it's unnecessarily complicated, requires an expert in spreadsheet and formula management, and even then any changes made will outdate your staffing plan until you reenter the information in your next meeting.

Workforce planning software won't staff your projects for you, but it can certainly help make sure you're putting your best foot forward with every project team. Great workforce planning software should feel like the Alfred to your Batman, providing everything you need to get the job done right.



2. Be prepared ahead of time

Action item → Prioritize data hygiene through up-to-date information on role vacancies, project timelines, and workforce allocations before the meeting starts.

Effective preparation is the backbone that supports the entire decision-making process when it comes to planning how to use your workforce. Being ill-prepared can have rippling effects throughout an entire construction project.

Here's what can go wrong:

- **Wasted time:**
  Stakeholders spend precious time waiting for information, seeking clarity, or sifting through outdated data.
- **Inaccurate decisions:**
  Basing decisions on outdated or missing information can lead to staffing mismatches, inefficient resource allocation, and project delays.
- **Frustration and confusion:**
  A lack of clarity and direction can lead to disagreements, overlapping conversations, and a general sense of chaos.
- **Loss of credibility:**
  Regularly conducting ill-prepared meetings can erode trust in the process and the leaders responsible for it.

So what does effective preparation for your workforce planning meeting look like?

HYGIENIC DATA

The shifting and slippery nature of construction timelines means that staffing information gets outdated quickly. Data hygiene should be a top priority for the people making the changes in your workforce planning system. This could be the VP of Operations, Project Executives, Operations Managers, and Project Managers. Whoever it is should have data hygiene done before the meeting begins so you won't spend valuable (and expensive) time doing data entry.

> Our meetings are less about getting the information into the system and more about strategy. We strategize on how to fill vacant roles on a project or where there might be pockets in our business where someone isn't fully utilized. We can grab onto them and avoid hiring another person since we can see that someone has the capacity to take on some more work".
>
> **Jeremy Moe,** Operations Manager at Boldt

Here's what you should be on the lookout for:

- **Up-to-date role vacancies:** Knowing exactly which positions are open—and for how long—allows for targeted discussions around immediate staffing needs. This ensures that projects aren't left hanging due to unanticipated personnel shortages.
- **Updated project timelines and potential delays:** Projects can get delayed due to unforeseen circumstances, such as weather, supply chain issues, or other external factors. A clear view of these changes lets teams pivot efficiently, reallocating resources as needed.
- **Current workforce allocations:** Understanding where each member of the team is currently deployed is essential. This information prevents over-allocation, matches skills to project needs, and highlights potential areas of concern.

CRAFTING THE RIGHT AGENDA

An agenda can act as the roadmap for your meetings and sets the tone for subsequent meetings. Crafting it thoughtfully can steer the direction of the entire discussion.

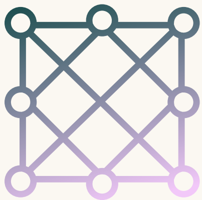
Start with an overview, highlighting the primary objectives of the meeting so every attendee knows the purpose and stays aligned throughout the discussion.

Break the meeting into clear segments, such as reviewing previous decisions, discussing current challenges, and planning for upcoming projects. This structure keeps the conversation focused and organized, addressing all critical concerns.

3. Short-term reaction, long-term planning

Action item → In your next workforce planning meeting, begin by reviewing and discussing current and upcoming project needs, then develop a detailed staffing forecast that includes specific roles and skills needed in the short and long term, matched against current staff capabilities and potential new hires.

When it comes to workforce planning, you're navigating a maze of shifting priorities, trying to balance short-term reactivity with long-term strategies. This dynamic spectrum of priorities is what makes construction one of the most complex activities human beings do.



The various factors in this spectrum are as follows:

- **Immediate response needs:**
  At the bottom of this spectrum lie the pressing challenges that demand swift action. Think of them as the reactive component of workforce planning. It addresses urgent staffing shortages, unforeseen project delays, or sudden shifts in project dynamics.
- **Operational priorities:**
  A step above is the operational goals which ensure the smooth running of projects daily. This involves the strategic allocation of resources and effective collaboration between teams.
- **Strategic ambitions:**
  Now we're past reacting and into setting up your team in the medium to long term. This is about future staffing needs, nurturing talent, and preparing the workforce for upcoming challenges.
- **Corporate vision:**
  At the top is the corporate vision, the long-term roadmap guiding every decision. It embodies the company's aspirations, from expanding its market footprint to diversifying its project portfolio. When making workforce decisions, this vision provides the compass, aligning short-term actions with broader goals.

Remember, this spectrum is dynamic, which means shifting priorities can cause tension and challenges. For example, at the top of the hierarchy, you have your company vision. This means every staffing choice, every project allocation, every pursuit, and your recruiting strategy is supposed to support that. But the reality is more complicated. Each project has an owner, a person in your organization who's tasked with completing a project on time, on budget, and with the utmost quality. They serve as the bridge between the boots on the ground and what the boardroom says. In some cases, their priorities may not align.

Project owners have a vested interest in the success of their projects. Their performance, reputation, and professional progression hinge on their ability to deliver immediately.

From a workforce planning perspective, the project owner is fixated on getting the right team for their project. In an ideal world, they will, but in reality, your company may have won a new project that takes precedence over everything else, including their project. Having systematic ways of staffing projects when it comes to these shifting priorities is essential to making sure project owners are integrated with the broader corporate strategy.

This ties into our previous points about setting up systems and preparation for your workforce planning meetings. To communicate effectively you need to argue with data so conflicting workforce priorities can be resolved instead of swept under the rug, which breeds defensiveness and resentment.

Even better, you might be able to have your cake and eat it too. By forecasting staffing needs well in advance, especially for pursuits you'll be able to put together recruiting strategies so you don't experience staffing crunches in the first place. In an industry riddled with labor shortages, being proactive about recruiting is even more important.

70% of respondents plan workforce allocations 2 months in advance or less, while 64% usually don't have enough time to hire staff for new projects.

Source: Bridgit Workforce Planning Survey

NURTURING INDIVIDUAL CONTRIBUTORS

Along with aligning project goals with corporate goals, another thing that should be discussed in your workforce planning meetings is how individual contributors are being used and developed. Addressing their needs and aspirations is a strategic imperative to sustainable growth in construction.

Some of the things you want to track and discuss are:

- **Career pathing:**
  Clear career pathing, with defined roles, responsibilities, and progression criteria, gives individual contributors a roadmap. It motivates them and helps retain top talent.
- **Recognition and rewards:**
  Talent thrives in environments where it's recognized and rewarded. Whether it's through performance bonuses, awards, or even simple acknowledgments in team meetings, recognizing top performers is crucial.
- **Strength-based roles:**
  Identifying an individual's strengths and assigning roles that play to those strengths, can improve productivity and job satisfaction. For instance, a meticulous planner might be better suited for a role that requires attention to detail, while a good communicator might thrive in client-facing roles.
- **Constructive feedback and support systems:**
  Weaknesses aren't flaws; they're growth opportunities. Outlining plans with Operations and HR managers like feedback sessions, where strengths are acknowledged, and areas of improvement are discussed, are essential for expanding the skills of your team.

4. Establishing a clear escalation path: from disputes to decisions

Action item → Create a protocol for resolving disputes, clearly defining the stages of escalation, roles responsible at each stage, and criteria for objective decision-making. This will help you quickly resolve conflicts as they arise.

In an environment where projects intertwine with broader company objectives and individual aspirations, disagreements are expected and completely normal. It's not the disagreements themselves that determine the quality of your workforce planning meetings, but how they're managed and resolved. A well-defined escalation path alleviates contention and streamlines decision-making. Whether it's allocation of resources, project timelines, or strategic direction, the multi-dimensional nature of a project presents numerous points of potential disagreement.

In a workforce planning meeting, people get defensive, they feel like their priorities aren't being taken seriously, and they get possessive of their staff. You can systematically handle disputes just like anything else. Before any steps are taken, leaders need to encourage an environment where team members feel comfortable voicing their concerns and opinions without fear of retribution. Open dialogue can transform a confrontation into a brainstorming session.

After this is established there are several dispute resolution pillars you can implement:

- **Focus on objectives:**
  While discussions may revolve around varied approaches, keeping the end goal—whether it's project completion, client satisfaction, or company growth—in focus redirects confrontational energy toward problem-solving.
- **Objective decision-making:**
  Emotions can run high in disagreements, making it easy to deviate from the core issue. By grounding discussions in data, decisions get anchored in facts rather than feelings.
- **Who steps in?:**
  Disagreements vary in scale and nature. Some are resolved at the project team level, others need intervention from higher up. Establishing a clear protocol on who steps in at which stage helps address disputes by those best equipped to handle them.
- **Who has the final word?:**
  While collaborative decision-making is encouraged, there will be times when a decisive call needs to be made. Defining who has the final say —be it a project lead, a department head, or executive leadership— eliminates ambiguity ensuring decisions are made quickly, and prevents project stagnation.

5. Continuous learning & iteration

Action item → Commit to establishing a system for documenting decisions and outcomes through channels like surveys or review meetings to evaluate how effective your workforce planning meetings are.

At this point we've outlined the systems you use to run your workforce planning meetings through how decisions are made in the meeting. But what about a system as to how you think about workforce planning meetings more generally? The lessons, decisions, and outcomes of each meeting measure your effectiveness.

It's easy to let daily operations sweep you from meeting to meeting without a second thought. To improve over time, you'll need to take the time to document decisions and their outcomes. This creates a reference point, facilitating better understanding and more informed decisions in the future.

You'll need to have structured feedback channels—be it surveys, feedback forms, or dedicated review meetings—that ensure feedback is organized, actionable, and not lost in the daily hustle.

Along with feedback, collecting data over time like workforce allocations, successful projects, and strong teams, you can start to identify patterns. These patterns, whether they indicate consistent successes or recurring challenges, provide a roadmap for future workforce planning meetings. Continuous learning and iteration are a commitment. A commitment to never settle, to constantly seek better ways of doing things, and to view every experience, good or bad, as a growth opportunity.

Conclusion

The tools you use and the data you rely on are a part of the dynamic nature of construction. Getting swept up in the daily reactivity of projects and client needs is easy. It's important to understand that these strategies aren't prescriptions, but rather a way to think about your specific context and how to create effective systems within it.

Since the heart of project delivery is your people, effective workforce planning is the way you get the heart pumping properly. By planning well you'll build great projects and have an environment where talent thrives.

To learn more about the leading construction workforce planning platform, visit **gobridgit.com**