

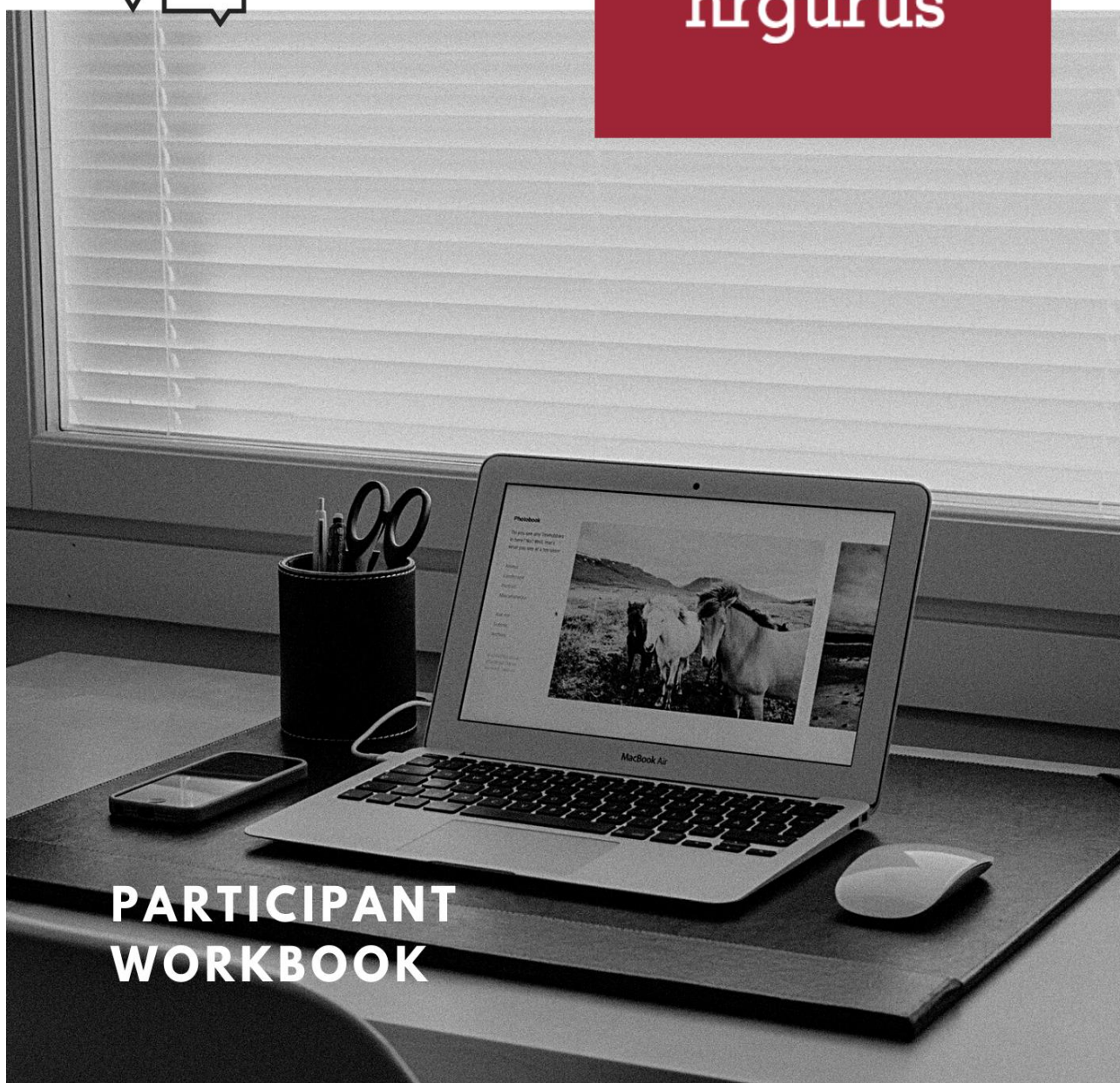
**ONLINE TRAINING
SESSION
MANAGING
EMPLOYEE
TERMINATIONS,
REDUNDANCY &
RESTRUCTURING**



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**PARTICIPANT
WORKBOOK**

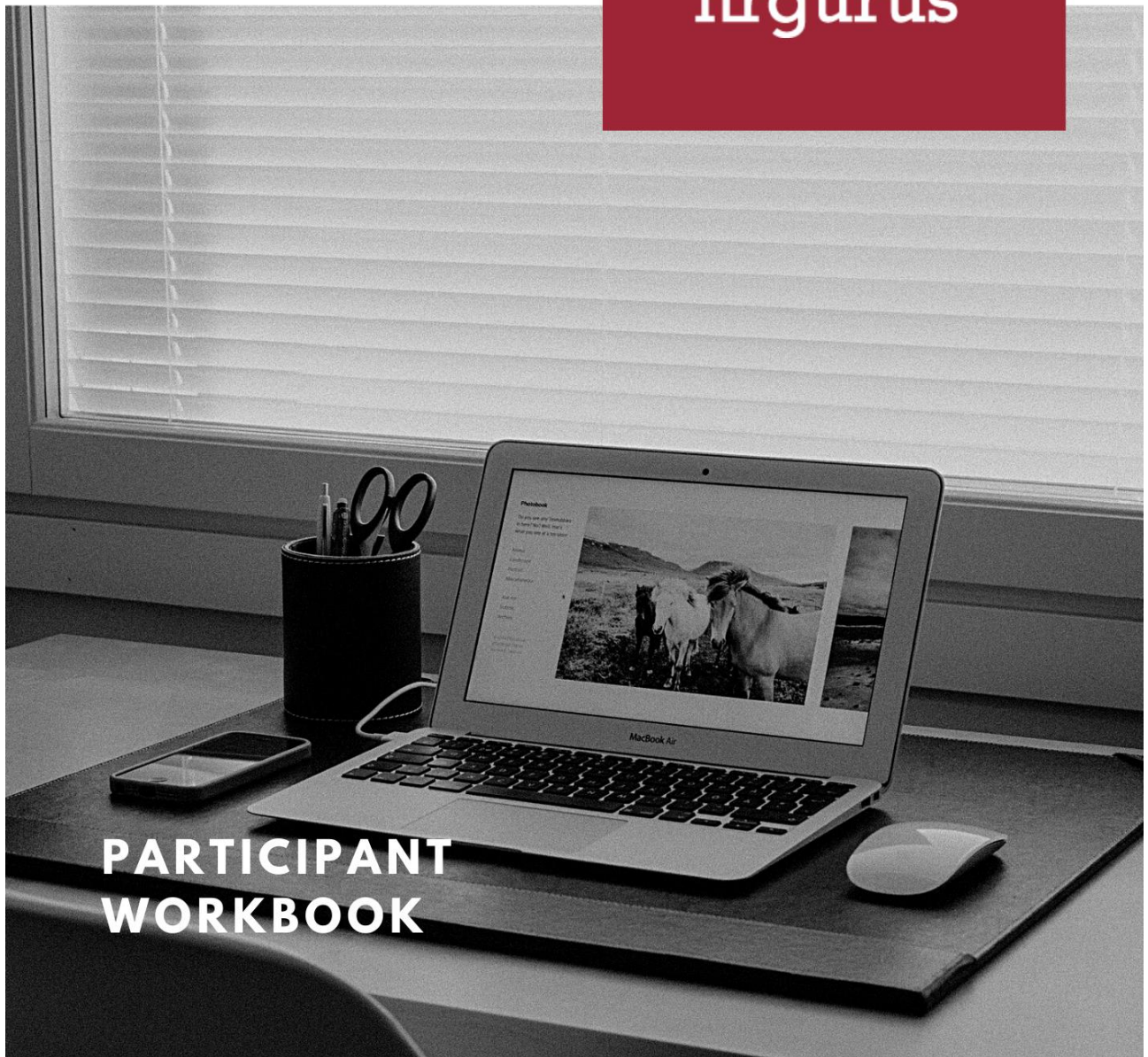


**ONLINE TRAINING
SESSION 1
UNDERSTANDING
THE STRATEGY**



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**PARTICIPANT
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WELCOME

Thank you and congratulations for signing up for this training course. We are excited to embark on this important learning journey with you.

The purpose of this training is to be and interactive and practical as possible. You will be provided with a variety of templates and documents to assist you in your learning and to supplement this guide.

PREWORK

Have a read of this guide to give you an overview of what we will be covering in the first session. The development of a strategy and business case are the most important steps in setting your restructure up for success.

Please complete the Restructure Business Case template as if you were going to restructure a department in your current organisation. If you have a potential upcoming restructure happening use this as an example.

Don't worry if you don't understand everything, we will be discussing this in detail in the first session. This is really about you "having a go" so you can bring any specific questions to the first session of the training.

Please reach out if you have any questions before the training on the 31st of August.

MY PERSONAL LEARNING OUTCOMES ARE:

LEARNING OUTCOMES

AT THE END OF THIS COURSE

1. Understanding the strategy of the restructuring process
2. Redundancies – the legal implications – the How to plan
3. Redundancies – The process or “how to”
4. Understand how to manage poor performance
5. Understand the principles behind managing employee terminations to minimise risk
6. Understand the changes to the Fair Work Act & Awards around JobKeeper & Jobkeeper enabled directions

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ACTIVITY ONE:

I hoping to get the following out of the training:

SESSION 1 – UNDERSTANDING THE STRATEGY OF THE RESTRUCTURING PROCESS

In the current economic climate businesses need to prepare for whatever the future may hold. COVID-19 has impacted every single business, no matter the industry or size, and its now time to revisit your strategy and future proof your business. This may start with assessing your organisational structure

LEARNING OUTCOMES

AT THE END OF THIS SESSION YOU SHOULD UNDERSTAND:

- The benefits of right-sizing your organization
- Workforce planning and linking it to long term strategy
- A template and system to conduct a restructure
- Developing a business case and options for consideration
- Assessing and preparing for legal risks including meeting Fair Work Act 2009 obligations, modern awards and enterprise agreements, contracts of employment, avoiding unfair dismissal or constructive termination claims
- Conducting restructuring consultations the right way

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ACTIVITY TWO:

What is the difference between rightsizing and downsizing?

KEY DIFFERENCES BETWEEN RIGHTSIZING AND DOWNSIZING ARE:

Contrary to popular belief, organisational rightsizing is not a more friendly synonym for downsizing. While the two concepts are related and have some similarities, they are different in their overarching goals.

Downsizing involves reducing the number of employees a company has to increase profitability and reduce redundancies. On the other hand, rightsizing is about more than reducing the number of employees. It's about getting the organisation to the right size for its new business objectives.

In addition to making some employee's redundant, an organisation that is rightsizing may then hire additional employees who have new skills and levels of expertise that the company is missing. They may also shift certain employees to new roles to better use their in-house knowledge and functional expertise in other areas. Rightsizing may add a new layer of management to increase guidance or reduce vertical layers to improve communication flow. Sometimes, rightsizing may result in larger departments to increase deliverable output. It can also look like streamlined functional or project-based teams working on new initiatives.

WHY USE RIGHTSIZING:

Rightsizing

WHY WE DO IT...

- Strategic Process**
It's critical to align the organisation's human resources to its strategic direction. Particularly when your strategic direction has changed.
- Organisational Audit**
Should assess whether you have the right roles and the right people within your organisation to deliver on your strategic plan.
- Future Focused**
Involves looking at the future trends in your industry. Even when they haven't happened yet. It's about being ahead of the game.
- Is about retention**
Ensures you can engage your team and A Grade performers in the assessment and job diagnostic process.

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WORKFORCE PLANNING

Workforce planning allows an organisation to reach its goals by training executives to proactively acquire or develop the talent they need, rather than react as issues arise. Strategic planning helps businesses anticipate future needs based on market changes, growth potential, staff retirement, and other changes. It is a systematic approach to aligning your workforce with the strategic direction of your organisation. Having the right people in the right roles will help any business run smoothly. Workforce planning can help determine employee potential, develop staff to move into future roles, address changing business priorities, and resolve gaps in employee skills and competencies.

One aspect of workforce planning is scenario planning, which involves imagining future scenarios that may impact your business, such as regulatory changes, new technologies, an uncertain political climate, or a natural disaster. Assessing the impact that these scenarios might have on a business can help you prepare for such events and determine what impact they might have on your workforce needs. After identifying potential scenarios (which may be based on internal or external changes), prioritise them based on the impact they would have on your workforce and the level of uncertainty they carry. Then, analyse the scenarios that present the most impactful and unpredictable challenges and develop strategic resolutions. This is a complex process, but it can provide vital information to help mitigate future issues.



The infographic is split into two main sections. The left section has a dark red background and contains white text. At the top right of this section, it says 'WHY WE NEED' above a horizontal line. Below this is the title 'WORKFORCE PLANNING' in large, bold, white letters. Underneath the title are four bullet points, each starting with a '#' symbol, explaining the benefits of workforce planning. At the bottom left of this section is the 'hrgurus' logo in white. The right section of the infographic features a photograph of a bald man in a white shirt and pink tie, looking upwards with a thoughtful expression. In the foreground, a large, black, round analog clock is visible, showing the numbers 11, 12, and 1. The background of the photo is dark with some faint floral patterns.

WHY WE NEED

WORKFORCE PLANNING

- # PROACTIVELY ACQUIRING OR DEVELOPING THE TALENT YOU NEED RATHER THAN BEING REACTIVE
- # ENSURES YOU HAVE THE CAPABILITIES AND SKILLS REQUIRED TO ANTICIPATE FUTURE NEEDS BASED ON MARKET CHANGES
- # SYSTEMATIC APPROACH TO ALIGNING YOUR WORKFORCE WITH THE STRATEGIC DIRECTION OF YOUR BUSINESS
- # HELPS DETERMINE EMPLOYEE POTENTIAL, DEVELOPS STAFF TO MOVE INTO FUTURE ROLES, ADDRESS CHANGING BUSINESS PRIORITIES, AND RESOLVE GAPS IN EMPLOYEE SKILLS AND COMPETENCIES.

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THE 6 STAGES OF WORKFORCE PLANNING

Whether you are focusing on a particular issue that you need to address, such as projected budget cuts or market changes, or using workforce planning as an ongoing method for ensuring that your workforce is on track for meeting business objectives, the process usually involves six stages:

1. **Organisational Strategy:** This is an opportunity to clarify the direction in which your organisation is heading in the next three to five years and looks closely at strategic drivers. What are the short and long-term goals? How are market trends shifting, and what is your competition doing? What policy, economic, or workforce challenges will the organisation be facing? This stage serves two purposes: to clarify the broader organisational strategy to make sure that HR strategy aligns with it, and to identify issues that may impact your workforce.
2. **Workforce Supply Analysis:** Examining your current workforce situation and projected changes over time involves creating staff profiles and compiling employee characteristics, such as age, location, salary, employment type, skills and competencies, worker satisfaction, turnover rates, numbers of employees at different levels, and pending retirees. The goal is to understand how well your workforce currently supports your business strategy, what skills it has to offer, and how you expect it to grow or decrease in the near future.
3. **Demand Analysis:** The information in a demand analysis consists of what type and amount of work an organisation performs and what kind of changes it anticipates. Here are some questions to ask when analysing workload demand: How much work do you expect to have each year? How many employees do you need to execute that work? What is driving the work changes — increased efficiency or other changes? Does the current workforce supply match the forecasted demand?
4. **Workforce Gap Analysis:** A gap analysis identifies the gaps between your current workforce supply and the future demand. After identifying the gaps, such as skills, workforce numbers, or new roles needed, you can decide which ones take top priority based on how critical they are to reaching strategic goals. Creating an action plan for addressing gaps occurs in the next stage of planning.
5. **Formulating Solutions:** Now you are ready to find solutions for closing the critical gaps you have found. There may be several gaps that you need to resolve, leading to a multifaceted approach. As you formulate a plan, consider what variables might affect success, such as policies or financial resources. Create a timeline for implementation that includes specific activities for addressing the gaps, such as training employees to increase skill levels or hiring new talent.
6. **Monitoring Progress:** Once you have implemented a workforce plan, how will you measure progress? Determine what metrics you will track, and which factors you will use to indicate success. As time passes and changes continue, you will need to revise the workforce plan accordingly. Indicate how your staff should handle revisions so that they can smoothly record and implement those changes to the plan.

WHY WE USE A BUSINESS CASE TO SUPPORT THE PROCESS:

BUSINESS CASE

- Need to ensure you create a record of your decision to restructure and remove or add roles
- Need to communicate your decision with your employees
- Decide on the approach i.e. spill and fill or redundancies or both
- Do the cost analysis of the restructuring process ensure this is included in your workforce planning strategy & business case
- This all protects you from a legal standpoint



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FIRST STEP TO ASSESSING YOUR LEGAL RISKS:

Assess Legal Risks

YOU NEED TO CHECK ALL YOUR INDUSTRIAL INSTRUMENTS TO DETERMINE YOUR APPROACH AND RISK LEVELS

- FWA Obligations**
Need to assess and ascertain genuine redundancies in eyes of FWA, including your process.
- Modern Award Coverage**
Need to look at redundancy provisions within each Award also consider Small Business Exemptions.
- Contractual Obligations**
Need to check what your contracts of employment & policies say around notice, consultation and redundancy.
- Enterprise Agreements**
If you are covered by EA need to check redundancy provisions as well as consultation obligations and contact Unions if relevant.

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