

## White Paper

” Open  
Headcount  
Management “

# OPEN HEADCOUNT MANAGEMENT

Whether an organization leverages position based management or person-to-person reporting, the importance of having visibility into open positions across the organization along with KPIs to track critical areas of the organization is paramount. A key driver to successful workforce planning is understanding what open positions need to be filled and the time to fill metric for

key positions. Often organizations invest in applicant tracking systems to improve their time to hire (and time to fill) but many organizations do not have access to this basic information. While organizations may have a simple open position report, often this report does not include simple metrics or help the HR business unit understand the KPIs that will lead to a more efficiently run organization.

## An Org Chart Approach to Open Headcount Management

In order to help organizations more effectively manage their open positions, Ingentis has introduced a methodology based on their org.manager solution which leverages org chart/hierarchical based reporting along with providing additional data visualization services such as a sunburst chart, a dashboard view, and data export capabilities for table based reporting. The key to these visualizations is that they provide several key metrics by both span of control and individual org units departments, cost centers, business units, etc. along with visualization rules. This allows you to gather KPIs and spotlight key information to make more informed business decisions.

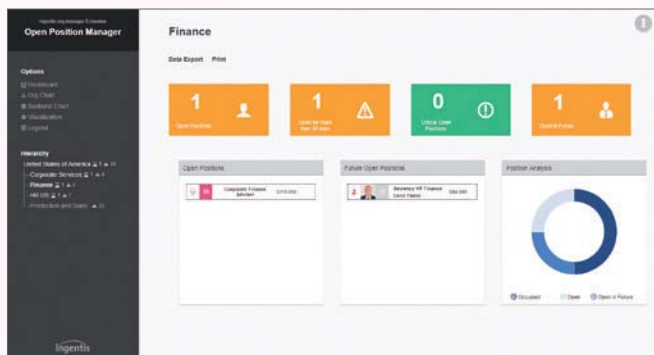


Figure 1: Dashboard View displays key metrics for selected org unit (Finance dept.). Metrics include open positions (today and in future), aging of open positions, critical open positions, and more).

## Key Metrics at your Fingertips

The following key metrics are provided to help an organization more effectively report on their open headcount and make more informed business decisions based on the current landscape of their workforce:

- Open headcount metrics by individual org unit or entire span of control
- Current open positions and future open
- Position count
- Aging of open positions (time to fill)
- Critical open positions
- Manager open positions

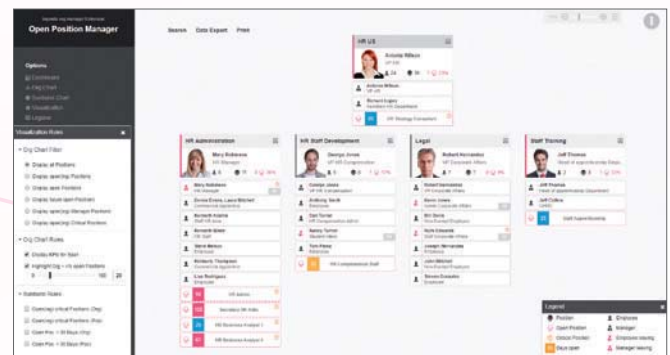


Figure 2: Org Chart View displays incumbents and positions open now and in the future. Aging of open positions is included with color coding. Note the visualization rules in the left pane allow one to focus on specific metrics only, such as "show only open Manager positions."

## Not all Metrics are Created Equal

### Critical positions

We have provided visibility into key metrics since not all open positions are created alike. For example, position based management allows the ability to mark positions as “Critical”. These are positions that are identified as key drivers to the organization. Therefore, it becomes crucial that critical open positions can be identified throughout an organization so long as the underlying data is supported.

### Manager open position

Even if an organization does not identify critical positions in their organization, there is a fundamental understanding that a manager-role position may carry a greater impact due to the direct relationship involving one or more direct reports. For this reason, open headcount visualization should help identify those open positions that involve manager-type positions. It’s essential for an organization to effectively fill these positions to ensure their employees have proper leadership and support within their span of control.



Figure 3: Sunburst Chart View guides the user on making informed business decisions based on the visualization rules selected. In this example, the red color indicates positions that have been open for more than 30 days. The green color indicates an org unit (dept.) with no open positions. The blue shade for remaining depts. indicates the number of open positions within the dept. -- the greater the number of open positions, the darker shade of blue.

### Open positions: Now and in the future

Visualizing current open positions is a basic staple to any headcount report. But in order to conduct more effective workforce planning (as well as succession or replacement planning), the ability to visualize future open headcount positions can help an organization anticipate and manage change. One of the key benefits of visualizing future open positions is that succession planning can be leveraged so named successors can be identified to fill the role (thus promoting internal employee growth and positive internal employee movement which greatly reduces the hiring and on-boarding costs for the organization). This metric is identified based on the future-dating of termination dates in the HR system of record. Dedicated visualizations are possible to focus on those positions that will be opening in the future (and how many days until they will open up).

### Time to fill

Workforce planning can benefit with the understanding of the average time to fill certain positions. This is one of the key metrics provided, and allows one to focus on those positions that remain open and are aging beyond 30 or 60 days. For those using an application tracking system, understanding the age of open positions is also a key driver in setting priorities for successfully filling open positions. Workforce planning can also benefit in having access to this key metric so that realistic business planning can be conducted (often times, companies don’t consider or simply don’t know the time to fill certain positions). By allowing one to evaluate time to fill for positions by department, this helps an organization to identify areas where greater efficiency goals should be established.

The cost of unfilled positions (whether based on “good” or “bad” turnover) can have an adverse impact on a company from multiple perspectives:

- Revenue costs
- Management costs
- Team costs
- Competitive advantage costs
- Customer costs
- Personnel costs

## Enabling Informed Business Decisions

The key approach to creating the reports, views, and visualization filters and options for org.manager were based on consultation with organizations of all sizes. This solution is meant to support the following basic use cases to help drive informed business decisions:

- What is the percentage of open positions for each department?
- What current positions have not been filled for more than 60 days?
- Where are there open Supervisor positions?
- Where are the critical open positions?
- What positions will be opening in the future that require filling?
- How can I generated a simple report that shows all open positions across the organization or by specific org unit (dept, division, cost center, etc.)?
- How can I create a simple visualization to present a PowerPoint slide deck of open positions to the management team?

All of the above use cases can be easily addressed based on the org.manager solution (per some of the screenshots provided). Additional use cases can be supported if the appropriate information is provided – for example, Good vs. Bad Turnover based on termination codes, or Successors assigned to positions that are vacated or will be vacated in the future.

## Want to learn more?

For more information on how org.manager can help your organization with Open Headcount Management, including those organizations that find person-to-person based reporting a challenge to accomplish this, please feel free to contact us directly.

For more information... please visit [www.ingentis.com](http://www.ingentis.com) or use our service hotline +1 800 518 1942.

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Object ID	Org Description	Position ID	Position Description	Open for Days	Critical	Leaves in Days
4	34000147 HR Administration	24012173	Secretary HR Adm.	102	1	0
7	34014697 Call Center	24014697	Call Center Agent	302	0	0
11	34000147 HR Administration	24000057	HR Admin	96	1	0
14	34014697 Call Center	24014696	Call Center Agent	96	0	0
23	34000566 Finance	24000103	VP Finance	85	0	0
26	34014697 Call Center	24014695	Call Center Agent	85	1	0
27	34000568 Internal Operations	24000038	Reception	68	0	0
28	34014697 Call Center	24014692	Call Center Agent	68	0	0
34	34000147 HR Administration	90000019	HR Business Analyst 2	67	1	0
44	34000005 Finance	90000003	Corporate Finance Advisor	65	0	0
82	34000000 United States of America	90000002	Corporate Strategy Advisor	55	1	0
87	34000572 Asset Accounting	24000107	VP Equipment Accounting	45	1	0
88	34014697 Call Center	24014693	Call Center Agent	45	1	0
113	34000200 Corporate Services	90000004	Assistant	44	0	0
114	34000568 Internal Operations	24000037	Reception	36	1	0
115	34014697 Call Center	24014691	Call Center Agent	36	0	0
138	34000148 HR Staff Development	24000059	HR Compensation Staff	33	0	0
139	34014697 Call Center	24014690	Call Center Agent	33	0	0
140	34001001 HR US	90000001	HR Strategy Consultant	25	1	0
141	34000147 HR Administration	90000018	HR Business Analyst 1	25	1	0
142	34014178 Staff Training	24014180	Staff Apprenticeship	25	0	0
143	34000568 Internal Operations	24000034	Facility Manager	25	0	0
144	34014697 Call Center	24014690	Call Center Agent	25	0	0
145	34000572 Asset Accounting	24000108	Equipment Accountant	12	1	0
146	34014697 Call Center	24014694	Call Center Agent	12	0	0

Export HR data to Excel and view all open headcount positions with key metrics in a table-based report.

Export your Headcount Report on an automated schedule to Managers as a PDF document featuring a table of contents and navigation links for offline viewing.

### About the author

John Kranz is based out of Dallas, Texas with 12 years of product management experience in Talent Management, HCM Reporting, Analytics and Org Charting solutions.  
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### About Ingentis

Ingentis is the software house for HR add-ons and business applications. It was established in Nuremberg in 1997. We advocate fair, reliable business relationships and develop our software in collaboration with our customers. More than 1.600 companies worldwide count on this honest, successful approach.