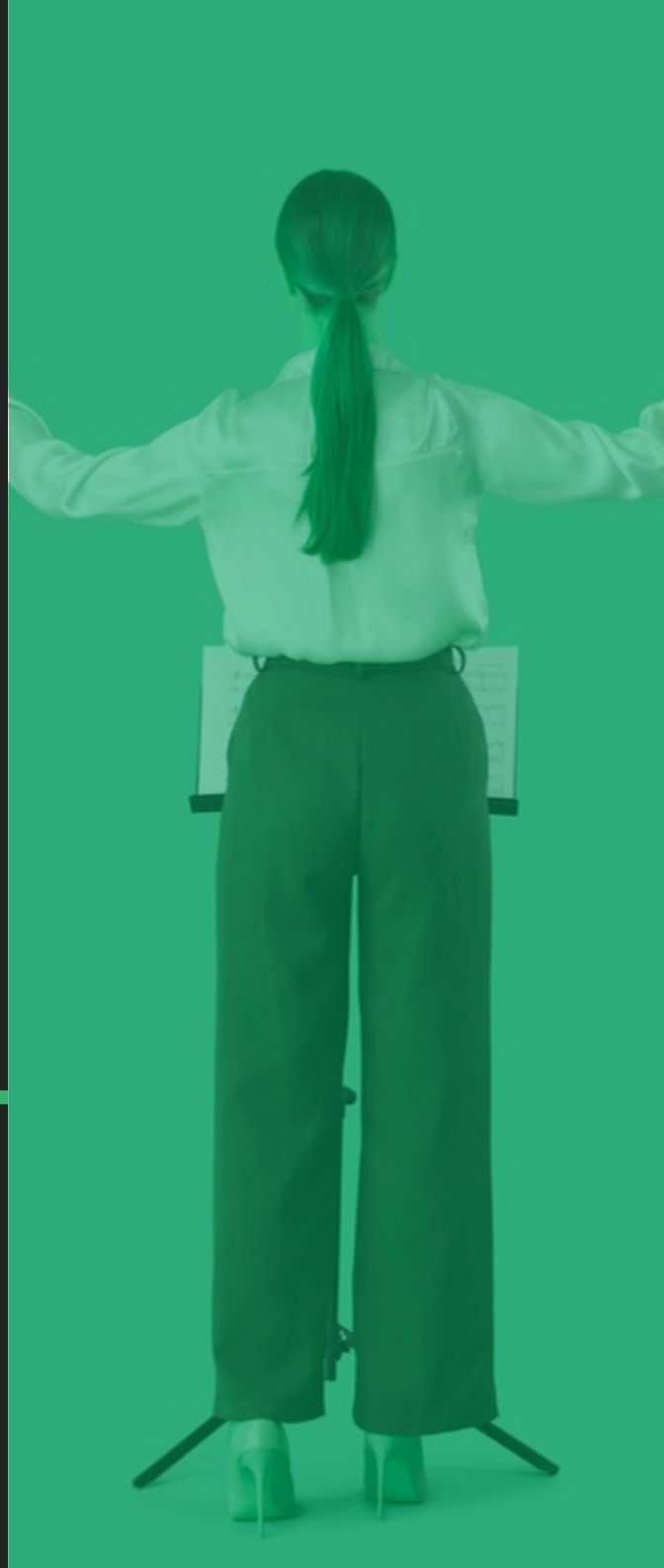
YOUR GUIDE

THE CONDUCTOR'S GUIDE

Conducting your workforce strategy in 2026

Retain



Introduction

Resource planning has outgrown the systems many firms still rely on.

Demand changes quickly, skills requirements evolve, and clients expect precision and speed. Meanwhile, leadership priorities are tightly focused on market share, retention, cost control, and profitability. Workforce strategy now sits directly alongside commercial strategy.

And yet, many organisations are still operating in reactive mode.

Scheduling happens in spreadsheets, skills data lives in a different system, and departments plan independently. All of which means visibility is partial. The result is misallocated time, overstretched high performers, underused specialists, and slower delivery.

This is why orchestration is so important.

In our recent webinar, we described workforce leaders as conductors. The role requires clarity, control, and confidence in aligning talent with demand in a constantly changing environment. Metaphor helps, but what firms need is a practical operating model.

In this guide, we introduce a structured framework built around five layers of workforce orchestration:

1. **Market intent** – What are we trying to win?
2. **Demand clarity** – What work is confirmed and forecasted?
3. **Capability intelligence** – What can our people truly do, and at what level?
4. **Deployment discipline** – How do we match skills to work with consistency and transparency?
5. **Performance feedback** – How do we continuously improve allocation, development, and outcomes?

The key is to step back and assess whether these five layers are aligned. When one becomes disconnected, coordination weakens and performance suffers.

This guide is designed to help you move from reactive scheduling to proactive orchestration, strengthening visibility, capability alignment, and commercial performance across your organisation.

Why orchestration is so important for resource management

If workforce strategy feels harder than it did a few years ago, that's because it is.

Leadership teams are being measured against growth targets, profitability thresholds, and retention benchmarks all at once. The expectation is to win more work, deliver it efficiently, and keep top talent engaged, without increasing overhead.

At the same time, the operating environment has become more complex:

- Hybrid working has expanded the available talent pool, but reduced informal coordination.
- Skill requirements are becoming more specialised.
- Clients expect faster mobilisation and consistent delivery across regions.
- Technology adoption is accelerating, raising the bar for both capability and adaptability.

Internally, firms are balancing competing priorities. Investment in reskilling and learning pathways must sit alongside cost control. Technology promises smarter decision-making, yet human judgment remains central. Resource leaders are expected to optimise allocation, protect wellbeing, and contribute to profitability, often with fragmented data.

You can see the problem here.

When planning is disconnected:

- Capacity is misallocated.
- High performers absorb disproportionate workload.
- Valuable skills remain underused.
- Decisions are made with incomplete information.

This creates operational drag. Teams spend more time coordinating than delivering. Staffing decisions become reactive. And leaders lack confidence in forward-looking forecasts.

Meanwhile, firms that adopt mature resource management practices see measurable improvement. Collaboration improves when everyone works from the same data. Time spent coordinating reduces. Utilisation increases. Project overruns decline. Retention improves when workloads are more balanced and expectations are clearer.

This brings us to the core idea: Workforce orchestration is about building the structural capability to align people, demand, and profitability under one coherent model.

Without that alignment, complexity increases. With it, firms gain control.

The three core practices of modern resource leadership

Orchestration sounds ambitious. In practice, it comes down to three disciplines. When we look at firms that manage complexity well, they consistently demonstrate strength in three areas. When these are weak, resource planning becomes reactive and fragmented.

#1. Aligning talent

Many organisations still allocate based primarily on availability. That approach is quick, but it overlooks capability depth, proficiency level, and recent experience.

It also creates dependency on a small group of "known performers," while others remain underused.

Aligning talent requires:

- A shared definition of skills across departments
- Visibility into proficiency levels and experience
- The ability to match based on capability
- Transparent reasoning behind assignment decisions

When skills are standardised and connected to planning, allocation becomes more deliberate, teams are built with intent, and career development becomes part of deployment, not an afterthought.

#2. Orchestrating visibility

Many firms operate with multiple systems tracking people, work, and performance. Data exists, but it's fragmented. Departments maintain their own versions of availability and central leadership lacks a unified operational view.

Orchestrating visibility means:

- One shared view of demand, supply, and skills
- Real-time insight into bookings, capacity, and utilisation
- Consistent reporting across departments
- The ability to model future scenarios confidently

When every department plans from the same data foundation, coordination improves. Cross-team staffing becomes practical. Leadership decisions are grounded in current information rather than assumptions.

#3. Creating operational harmony

This is where firms move along a maturity curve:

↪️ Firefighting and short-term scheduling
↪️ Spreadsheet coordination
↪️ Unified planning across departments
↪️ Forecasting based on demand trends
↪️ AI-supported matching and proactive optimisation

Creating operational harmony means embedding structured processes into everyday workflows:

- Clear ownership of resource decisions
- Standardised planning cadences
- Consistent use of skills-based matching
- Ongoing review of allocation performance

It also requires balancing technology with judgment. AI can recommend matches. Dashboards can highlight risk. But resource leaders remain accountable for the final decision.

Making orchestration operational

Instead of abstract principles, let's walk through how orchestration works in practice:

Step 1: Start with demand clarity
Every allocation decision begins with one question: What capability does this work genuinely require?
That means defining:

- Technical skills and level of proficiency
- Industry or client experience
- Leadership or collaboration requirements
- Capacity needed over time

The key is to slow down at the role-definition stage. Precision here reduces rework later.

Step 2: Match against capability and availability
Once demand is clearly defined, the next layer is capability intelligence.
Modern platforms allow you to:

- Filter by verified skills
- View proficiency levels
- See recency of experience
- Compare suitability across multiple candidates

Resource leaders can see why a recommendation appears, which skills align, and where trade-offs exist. This improves confidence in decision-making and reduces reliance on informal networks.

Step 3: Validate capacity and resolve conflicts
Capability alone isn't enough. Availability must still work. You need to be able to see:

- Current bookings
- Partial capacity
- Conflicts or overlaps
- Forecast impact on utilisation

This avoids a common problem: allocating a high-fit resource without realising their availability creates downstream strain.

Step 4: Feed performance back into the system
Here's where orchestration compounds over time.
After delivery:

- Skills used are logged
- Experience deepens
- Performance indicators inform future matching
- Forecast accuracy improves

Deployment decisions strengthen the underlying capability intelligence. Meanwhile, leadership gains insight into:

- Frequently requested skills
- Emerging capability shortages
- Overdependence on certain individuals
- Training and hiring priorities

This creates a continuous improvement loop between demand, deployment, and development.



A practical scenario

Imagine a cross-border advisory project requiring regulatory expertise, sector knowledge, and client-facing experience.

With fragmented planning, this might involve:

- Emailing department heads
- Reviewing multiple spreadsheets
- Negotiating availability
- Manually reconciling conflicts

With orchestrated planning:

- Requirements are defined precisely
- Suitable resources are ranked
- Capacity and suitability are visible together
- Forecasts update immediately

What previously required days of coordination can be completed in minutes with stronger alignment and clearer reasoning. This is the operational difference between coordination and orchestration.



“This is the operational difference between coordination and orchestration.”

The 90-day orchestration plan

We've structured the 90-day orchestration plan into three focused phases:

Phase 1 (days 0–30): Diagnose reality
Before introducing new processes or technology, understand where you are. Start by asking:

- How many systems are currently used to plan people and projects?
- Do departments share a common skills language?
- Can leadership see cross-team capacity in one view?

Then look at utilisation variance across teams. Identify repeated overbooking of high performers. And track how long it takes to staff a project.

Phase 2 (days 30–60): Standardise foundations
Once you understand the current state, focus on alignment. Key priorities, include:

1. **Define a shared skills framework:** Standardise terminology across departments, agree on skill levels, and remove duplicate role definitions.
2. **Establish a unified planning cadence:** Align forecasting cycles, clarify ownership of allocation decisions, and define escalation paths.
3. **Reduce tool fragmentation:** Move toward one operational view of demand, capacity, and skills. Even if full consolidation takes longer, establish a single source of truth.

Phase 3 (days 60–90): Activate and embed
Now you operationalise. Introduce structured, skills-based matching into everyday workflows.
Ensure allocation decisions are visible and explainable.
Connect capacity updates directly to forecasts.

At this stage, track measurable indicators:

- Time to staff new work
- Variance in utilisation across teams
- Frequency of last-minute reassignments
- Overruns linked to misaligned capability

Even when you've hit early improvements, discipline matters. Embed review cycles. Revisit skill definitions quarterly. Evaluate forecast accuracy.

What success looks like after 90 days

- Leadership can see demand and capacity in one place.
- Skills definitions are consistent across departments.
- Staffing decisions are based on suitability and availability together.
- Forecast conversations are grounded in data rather than instinct.

From there, you are ready to layer in more advanced forecasting, predictive matching, and long-term capability planning.

Measuring maturity

To understand how mature your approach is we recommend assessing maturity across five dimensions.:

1. Skills intelligence
Ask:

- Do we have a standardised skills framework across departments?
- Are proficiency levels defined and consistently applied?
- Can we see recency of experience?
- Are skills directly linked to project delivery?

2. Demand & capacity visibility
Consider:

- Can leadership see demand and supply across the entire organisation?
- Are bookings, availability, and utilisation visible in one operational view?
- Can we model future scenarios confidently?

3. Deployment discipline
Evaluate:

- Are roles defined precisely before staffing begins?
- Is suitability considered alongside availability?
- Are allocation decisions explainable?
- Do we review performance data post-delivery?

4. Cross-team collaboration
Ask:

- Can teams staff across departments easily?
- Is there friction when reallocating resources between business units?
- Do departments share the same data foundation?

5. Executive confidence
Finally:

- Do senior leaders trust the workforce data they see?
- Can resource leaders confidently support growth decisions?
- Is workforce strategy discussed alongside financial strategy?

A simple scoring approach
Rate each dimension from 1 to 5:

1: Reactive and fragmented
2: Some coordination, heavy manual effort
3: Standardised processes, partial visibility
4: Unified data foundation, structured matching
5: Predictive and continuously optimised

This exercise often reveals uneven maturity. One department may operate at level four, while another remains at level two. That imbalance limits enterprise performance.

From resource orchestration to commercial impact

At this point, the question now is: what does this change commercially? Workforce orchestration is not an operational upgrade alone. It influences revenue growth, margin control, talent retention, and client outcomes. Let's break that down.

Faster mobilisation, stronger delivery
When skills, capacity, and demand sit within one operating model, staffing accelerates. Projects launch with:

- Clearly defined role requirements
- Suitability-ranked candidates
- Visibility into conflicts before they escalate

The impact is measurable: less time coordinating, fewer last-minute reallocations, reduced project overruns, and more consistent delivery quality. Clients experience stronger alignment from day one.

Healthier utilisation
Uneven workload distribution erodes performance over time. With structured orchestration:

- Overdependence on a small group becomes visible
- Underused capability is easier to redeploy
- Capacity planning improves across business units

Utilisation increases not because people work more hours, but because allocation becomes more precise. This strengthens profitability without adding headcount.

Improved retention through intentional deployment
Talent leaves when assignments feel misaligned or repetitive. Skills-based matching allows firms to:

- Assign stretch opportunities deliberately
- Diversify experience across departments
- Align development pathways with business demand

Career progression becomes embedded in deployment decisions, reducing burnout risk.

Strategic workforce planning
When orchestration is mature, workforce discussions evolve: Instead of asking: "How do we fill next month's bookings?" Leaders ask:

- Which capabilities are in high demand?
- Where are we overexposed?
- What should we hire for next year?
- Which skills require targeted development?

Sustained orchestration
Even when you've established unified visibility and structured matching, discipline must continue.

Orchestration is strengthened through:

- Quarterly skills reviews
- Forecast recalibration
- Ongoing process refinement
- Continuous improvement in deployment logic

Final thought: Conduct with confidence

Complex organisations will always face competing priorities. Demand will fluctuate, skills will evolve, and technology will advance.

The difference lies in whether those forces are coordinated or left to compete internally.

When market intent, demand clarity, capability intelligence, deployment discipline, and performance feedback operate in alignment, complexity becomes manageable.

Workforce leaders move from reactive schedulers to confident conductors.

The overture sets the direction.

The discipline of orchestration sustains the performance.
If you're ready to assess your current maturity and identify your next priority, the next step is simple:

Book a demo and see how your workforce strategy performs under structured review.



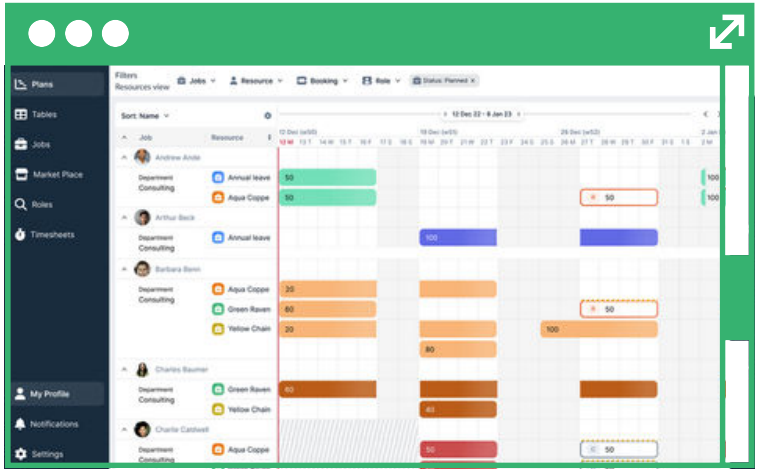
Request your demo now

Technology for resource orchestration

Workforce complexity isn't going away. Demand will continue to fluctuate, skills will continue to evolve, and clients will continue to expect speed, precision, and consistency. So if you want to conduct that complexity with confidence — without overloading your top performers or leaving capability underused — you need a system that connects skills, demand, and deployment in one operational view.

This is where Retain comes in.

Retain Cloud is built to support workforce orchestration at scale. It brings together skills intelligence, real-time visibility, and structured matching into one unified platform — so resource leaders can move from reactive coordination to deliberate alignment.



With Retain, you can:

Strengthen capability intelligence:
- Build a standardised skills framework across departments
- Match people to work based on verified skills and proficiency
- Surface hidden expertise across regions and business units

Create one shared view of demand and capacity:
- See bookings, availability, and utilisation in real time
- Identify overallocations before they become delivery risks
- Model future scenarios with confidence

Deploy with discipline and transparency:
- Rank resource suitability alongside availability
- Reduce time spent coordinating staffing
- Support consistent, explainable allocation decisions

Integrate seamlessly:
- Connect with HR, ERP, PSA, and financial systems
- Sync project, performance, and workforce data
- Avoid fragmented reporting across departments

Measure and monitor:
- Track utilisation and profitability
- Monitor delivery risk indicators
- Use data to guide hiring, training, and strategic planning

By providing structured visibility and skills-powered matching, it allows you to conduct your workforce with clarity rather than compromise. If orchestration is the goal, Retain is the platform that makes it practical.

Retain

NEXT STEPS

Explore how Retain can help you to effectively allocate resources, cost management, and financial projections.

To learn more visit:
https://www.retaininternational.com

If you're ready for that next step, you can book a demo here.

