

HR Business Partner

Ready-to-Use Templates

Strategic Workforce Planning Template

Helps HRBPs align workforce capabilities with current and future business goals. Use this template at the start of each planning cycle to establish a clear baseline and identify strategic people priorities.

Business Unit Information

Field	Details
Department / Business Unit	
HRBP Name	
Planning Period	
Business Leader	

Current Workforce Analysis

Metric	Current Status
Total Headcount	
Critical Roles	
Open Positions	
Attrition Rate	
Internal Mobility Rate	

Workforce Planning: Gap Analysis & Action Plan

Once you've captured the current state, use the sections below to identify future requirements, surface gaps, and define concrete action items with clear ownership and deadlines. This three-part structure ensures planning translates directly into execution.

Future Workforce Requirements

Future Skill Requirement	Priority Level	Timeline

Workforce Gap Analysis

Gap Identified	Impact on Business	Recommended Action

Action Plan

Action Item	Owner	Deadline	Status
Recruitment Plan			
Upskilling Initiative			
Succession Planning			

HRBP Stakeholder Mapping Template

Effective stakeholder management is a cornerstone of strategic HR partnership. This template helps HRBPs identify key stakeholders, assess their influence and interest levels, and design targeted engagement strategies. By proactively mapping stakeholders, HRBPs can prioritize relationships that drive the most business impact and ensure that HR initiatives receive the right level of sponsorship and support.

Stakeholder Mapping Matrix

Stakeholder	Role	Influence Level	Interest Level	Engagement Strategy
Business Leader		High / Medium / Low	High / Medium / Low	
Department Head				
Employees				
HR Team				

Stakeholder Communication Plan

Stakeholder	Communication Frequency	Preferred Method	Key Discussion Topics

Talent Review & 9-Box Matrix Template

The 9-Box Matrix is one of the most powerful tools in an HRBP's arsenal for succession planning and identifying high-potential employees. Use this template during talent review cycles to evaluate each employee across two dimensions — current performance and future potential — and assign the appropriate development or action pathway.

Employee Talent Review

Employee Name	Performance Rating	Potential Rating	Recommended Action

9-Box Quick Reference

Potential \ Performance	Low	Medium	High
High Potential	Future Potential	Growth Candidate	Future Leader
Medium Potential	Inconsistent Performer	Core Contributor	Strong Performer
Low Potential	Performance Concern	Stable Contributor	Specialist Contributor

Succession Planning Template

Ensuring leadership continuity is one of the most strategic contributions an HRBP can make to an organization. This template helps identify critical roles, evaluate potential successors, assess readiness levels, and build individualized development plans to accelerate readiness. Use during annual talent reviews or whenever a leadership transition risk is identified.

Succession Planning Tracker

Critical Role	Current Role Holder	Potential Successor	Readiness Level	Development Plan
			Ready Now / 1 Year / 2 Years	
			Ready Now / 1 Year / 2 Years	
			Ready Now / 1 Year / 2 Years	

Development Activities

Leadership Skills

Recommended Action:
Coaching

Business Acumen

Recommended Action:
Cross-functional Project

Custom Development Area

Recommended Action:

Employee Engagement Action Plan

Employee engagement is a leading indicator of retention, productivity, and culture health. This template provides a structured framework for HRBPs to diagnose engagement issues, identify root causes, and implement targeted improvements with measurable outcomes. Pair this template with survey data, exit interview findings, or focus group insights for maximum impact.

Engagement Improvement Plan

Engagement Issue	Root Cause	Recommended Action	Owner	Timeline
Low morale	Poor communication	Monthly townhall meetings	HRBP	30 Days

Engagement Metrics Tracker

Employee Satisfaction

Current Score → Target Score

eNPS

Current Score → Target Score

Retention Rate

Current Score → Target Score

HR Business Review Dashboard Template

This monthly dashboard gives HR and business leaders a consolidated view of workforce health across four critical dimensions: workforce composition, recruitment pipeline, employee engagement, and learning & development. Use this template to anchor monthly business reviews and surface trends that require leadership attention.

Workforce Metrics

KPI	Current Month	Previous Month	Trend
Headcount			
Attrition Rate			
Retention Rate			
Open Positions			

Recruitment Metrics

KPI	Result
Time to Fill	
Cost per Hire	
Offer Acceptance Rate	

Engagement Metrics

KPI	Result
eNPS	
Survey Participation Rate	
Employee Satisfaction	

Learning & Development Metrics

KPI	Result
Training Completion Rate	
Leadership Development Participation	
Internal Promotions	

Change Management Communication Plan

Organizational transformation succeeds or fails based on the quality of communication and stakeholder engagement. This template equips HRBPs to plan, track, and adapt communications throughout a change initiative — from initial announcement through adoption and stabilization. The resistance management section is especially critical for high-impact changes like restructurings, system implementations, or operating model shifts.

Change Management Plan

Change Initiative	Business Impact	Communication Strategy	Owner
HRMS Implementation	Process automation	Weekly updates	HRBP

Employee Communication Tracker

Audience	Method	Frequency	Status
Employees	Email	Weekly	
Managers	Meetings	Bi-weekly	

Resistance Management Plan

Resistance Area	Risk Level	Mitigation Action
Technology adoption	High	Conduct training sessions

Strategic Workforce Gap Analysis Template

Capability gaps are among the most significant risks to business performance. This template enables HRBPs to systematically compare current workforce capabilities against future requirements, quantify the gap, and recommend targeted solutions — whether through upskilling, hiring, or strategic partnerships. Align this analysis with annual business planning and talent review cycles for maximum strategic impact.

Workforce Gap Analysis

Current Capability	Required Future Capability	Gap Level	Recommended Solution
Data Analysis	Advanced Analytics	High	Upskilling Program

Critical Skills Tracker

Skill	Current Availability	Future Demand	Priority
Leadership Skills	Medium	High	High

i Tip: Prioritize gaps rated "High" for both current unavailability and future demand. Address these in the next 90-day planning cycle to prevent business disruption.

HRBP Quarterly Business Review Template

The quarterly business review is the HRBP's most visible opportunity to demonstrate strategic value. This template structures a comprehensive review covering business performance, talent health, employee experience, and forward-looking recommendations. Populate each section with current data and lead with insights rather than metrics to drive meaningful leadership dialogue.

Business Summary

- Business performance overview
- Workforce updates
- Key people challenges

Talent Summary

Area	Status
Hiring Progress	
Succession Readiness	
Critical Talent Risks	

Employee Experience

Metric	Current Status
Engagement Score	
Attrition Rate	
Internal Mobility	

HRBP Recommendations

1. Recommendation 1
2. Recommendation 2
3. Recommendation 3

Leadership Coaching Discussion Template

HRBPs play a critical role in developing managerial and leadership capability through structured coaching conversations. This template provides a consistent framework for coaching sessions — ensuring that discussions cover the key dimensions of leadership effectiveness and translate into concrete, time-bound development actions. Use before and after each coaching session to document progress and maintain accountability.

Session Information

Leader Name
Department
Coach / HRBP
Session Date

Discussion Areas

- Leadership effectiveness
- Team engagement
- Communication challenges
- Performance management
- Employee retention concerns

Agreed Action Plan

Development Area	Action	Timeline
Communication Skills	Leadership workshop	60 Days

- ☐ Schedule a follow-up session 30 days after the action plan launch to review progress and recalibrate priorities as needed.

HRBP Risk Assessment Template

Proactive risk management is an essential but often underutilized HRBP capability. This template provides a structured HR Risk Register to identify, assess, and mitigate workforce-related risks before they materialize into business disruptions. Review this register quarterly and update risk levels in response to changes in the business environment, workforce data, or organizational changes.

HR Risk Register

HR Risk	Business Impact	Risk Level	Mitigation Plan
High attrition	Productivity loss	High	Retention strategy

Common HR Risk Categories



Leadership Gaps



Compliance Risks



Talent Shortages



Burnout & Disengagement



Skill Shortages

Organizational Restructuring Planning Template

Organizational restructuring requires meticulous planning, clear communication, and compassionate execution. This template helps HRBPs coordinate all aspects of a restructuring initiative — from scoping the affected areas and understanding employee impact to sequencing transition activities and ensuring the right support is available. Align closely with legal, finance, and senior leadership before initiating any communications.

Restructuring Plan

Area Affected	Change Required	Employee Impact	Communication Plan
Sales Team	Reporting structure update	Medium	Manager meetings

Transition Activities



HRBP Meeting Notes Template

Consistent, well-structured meeting notes are a hallmark of a high-performing HRBP. This template ensures that every business meeting produces clear documentation of discussion topics, decisions made, and action items with owners and deadlines. Use these notes as the foundation for follow-up communications and to track progress between meetings. Sharing a clean summary with business partners after each meeting builds credibility and trust.

Meeting Details

Meeting Date
Participants
HRBP
Location / Format

Key Discussion Points

- Workforce updates
- Hiring needs
- Performance concerns
- Employee engagement
- Organizational changes

Action Items

Action Item	Owner	Deadline

- ✔ Best practice: Send meeting notes within 24 hours of the session to keep momentum and accountability high.

HRBP Employee Retention Action Plan

Voluntary turnover is costly, disruptive, and often preventable. This template gives HRBPs a structured approach to diagnosing the root causes of attrition within their business unit and building targeted retention strategies. Combine quantitative data (attrition rates, tenure analysis) with qualitative insights (stay interviews, exit surveys) to build a retention plan grounded in evidence rather than assumption.

Retention Strategy Plan

Retention Issue	Root Cause	Recommended Solution	Timeline
High voluntary exits	Limited growth opportunities	Career development plans	90 Days

Retention Metrics Tracker

<p>Attrition Rate</p> <p>Current: Target:</p>	<p>Retention Rate</p> <p>Current: Target:</p>	<p>Internal Promotions</p> <p>Current: Target:</p>
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Diversity, Equity & Inclusion (DEI) Action Plan

Building an inclusive workplace is both the right thing to do and a proven driver of innovation, employee engagement, and business performance. This template enables HRBPs to translate DEI commitments into measurable goals and accountable action plans. Ensure DEI goals are embedded within business unit planning — not treated as separate HR initiatives — to drive genuine organizational change and create a culture of belonging at every level.

DEI Action Plan

DEI Goal	Action Item	Owner	Timeline
Improve gender diversity	Inclusive hiring practices	HRBP	6 Months

DEI Metrics Tracker

1

Diversity Ratio

Current: Target:

2

Inclusive Hiring Rate

Current: Target:

3

Engagement by Demographic

Current: Target:

i DEI metrics should be reviewed at minimum quarterly. Disaggregate engagement and retention data by demographic group to surface inequities that aggregate data may mask.

HRBP Monthly Reporting Template

Monthly reporting is the HRBP's primary vehicle for maintaining visibility with leadership and demonstrating the business impact of HR activity. This template provides a concise, executive-ready format covering workforce composition, strategic highlights, and risk flags. Tailor the level of detail to your audience — senior leaders need insights and implications, not raw data tables. Always lead with the "so what" behind each metric.

Workforce Summary

Metric	Current Month	Previous Month
Headcount		
Hires		
Exits		
Open Positions		

Strategic HR Highlights

- Key workforce challenges
- Leadership updates
- Engagement initiatives
- Training progress

Risks and Recommendations

Risk	Recommendation
Risk 1	Recommendation 1

Employee Pulse Survey Template

Pulse surveys are one of the most efficient tools available to HRBPs for continuously monitoring employee sentiment between formal engagement survey cycles. Short, frequent, and focused — pulse surveys enable rapid identification of emerging issues so that HRBPs and business leaders can respond before problems escalate. This template provides a ready-to-deploy format with quantitative ratings and a critical open-ended question for qualitative depth.

Pulse Survey — Rating Scale

Statement	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
I feel supported by leadership					
Communication is transparent					
I have growth opportunities					
I feel valued at work					

Open Feedback Question

"What is one improvement you would recommend?"

- ❑ Keep pulse surveys to 5 questions or fewer and deploy monthly or bi-monthly. Always close the feedback loop by sharing high-level results and actions taken with survey participants.

HRBP Strategic Action Plan Template

The Strategic Action Plan is the capstone document of the HRBP toolkit — translating all planning, analysis, and insight into a single, integrated view of HR priorities aligned to business objectives. Use this template to communicate HR's strategic agenda to leadership, track initiative progress, and demonstrate the people function's contribution to organizational performance. Review and refresh this plan quarterly to stay aligned with evolving business priorities.

Strategic HR Action Plan

Strategic Goal	HR Initiative	Business Impact	Timeline	Status
Improve retention	Leadership development	Reduced turnover	6 Months	

01

Define Strategic Goals

Align HR priorities to business OKRs and leadership agenda

02

Identify HR Initiatives

Select programs and actions with direct business impact

03

Assign Ownership & Timelines

Ensure every initiative has a clear owner and deadline

04

Track & Report Progress

Review quarterly with business leaders and adjust as needed

✔ This toolkit covers 18 core HRBP templates. For best results, integrate these templates into your regular HR operating rhythm — monthly, quarterly, and annually — to build a consistent, data-driven HR practice.



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