

Delivering value through Position Based Management

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Who are we?



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What we'll cover today

Three key takeaways:

1. Benefits of adopting Position Based FTE Management
2. Getting it right at source – quality of position data is essential
3. Changing the system is easy... changing behaviour and processes is challenging



Who is Genesis?

Powering a sustainable and thriving Aotearoa

We're helping to move **Aotearoa** to a low-carbon future, powered by renewable energy



Retail

Through our 2 retail brands, we provide energy services and innovative products to more than 650,000 residential and business customers across Aotearoa.



Generation

We operate a range of renewable and thermal generation sites across Aotearoa. The range of locations and generation types gives us great operating flexibility.



Position Based FTE Management

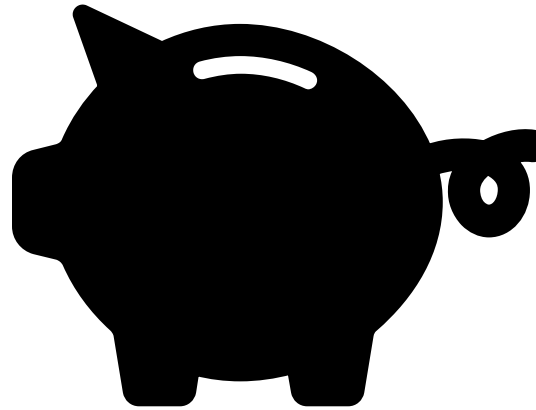
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The process of managing, reporting, and forecasting the employee and contingent workforce using **positions** instead of individuals.

The Why: Reason for change



Limited control and transparency of incremental positions resulting in continuous growth of FTEs and operating expenditure.



Inaccurate forecasting and reporting.
Multiple sources of the truth – inconsistent reporting of FTE and incorrect cost centres.



Manual time-consuming processes for Finance, HR and hiring managers.

Principles

New Position Approval

- New positions approved as part of the Operating Plan.
- New positions requested outside of the Operating Plan must be approved by the Executive responsible via automated workflow from SuccessFactors.

Reporting

- Monthly reporting of total workforce (employees and contractors).
- Monthly reporting of new positions.

Planning

- Automated forecasting of staff and contractor costs based on active positions in SuccessFactors using IBM Planning and Analytics, enabling high frequency low-touch rolling forecasts.
- Remuneration information per employee/contractor will not be visible. This requirement mitigates data privacy issues.

Benefits

- Proactive control of incremental positions and enhanced transparency of total workforce
- Automated forecasting and reporting, providing efficiency savings for Finance
- Reliable position hierarchy and a robust position approval process enable P&C to better support the business
- Mitigation of data privacy risks



Costs and Limitations

Implementation Costs:

- New workflow build in SuccessFactors
- New workforce forecasting model in IBM Planning and Analytics
- Data cleansing exercise
- Change management
- Training
- Process documentation

Limitations:

- The success of Position Based Management is reliant on compliance with a standard process. This removes the flexibility previously enjoyed by business and finance in hiring and forecasting
- Continuous control of data quality is required
- Individual salary information is no longer available to Finance

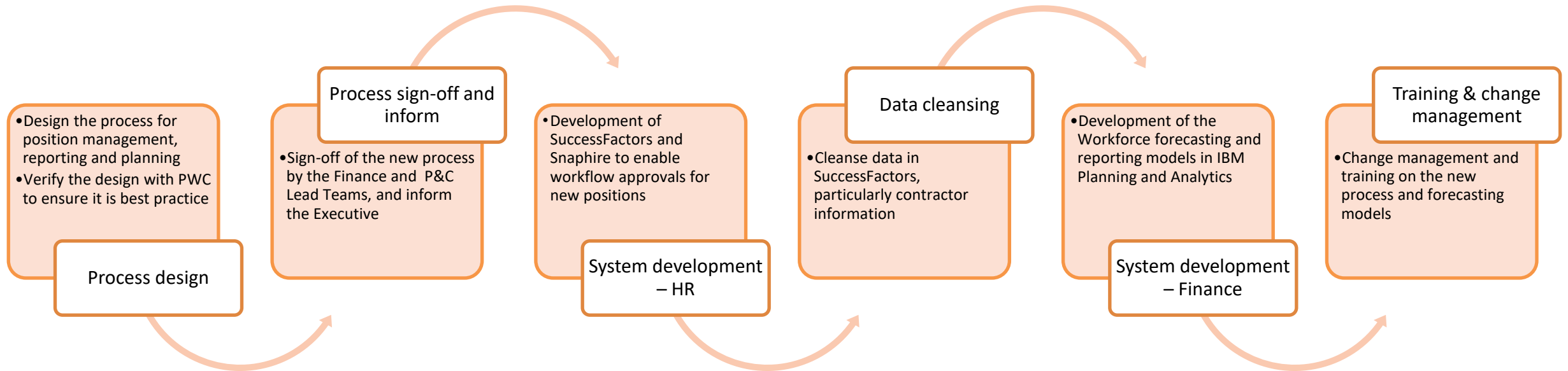


Training and Change Management

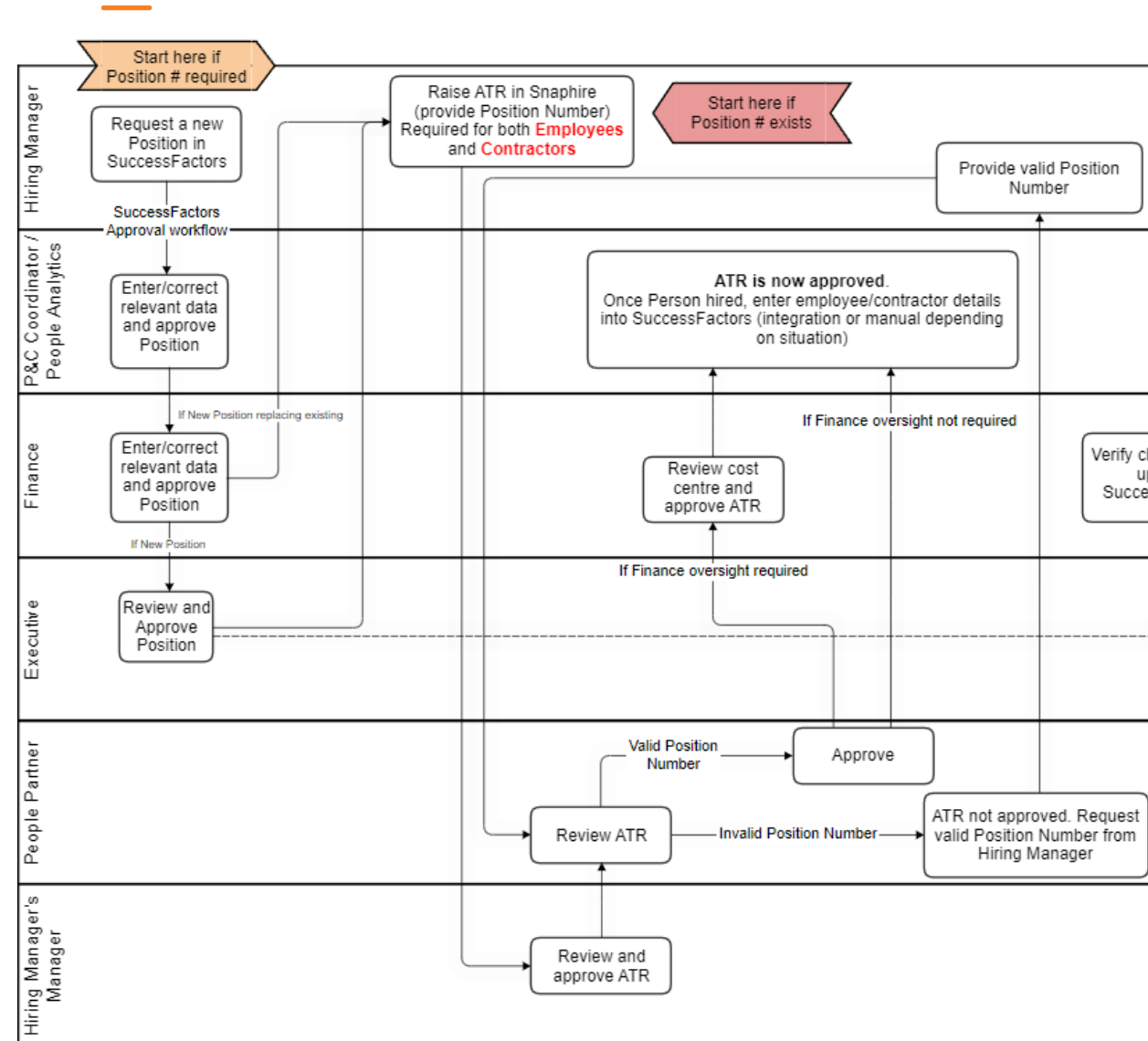
- Continuous engagement with Finance and HR over the course of the project.
- Users were involved in testing the design and providing feedback.
- Focus on users who were resistant to change.
- Creation of training guides for different roles (i.e. admin, people leader, finance, executive).
- Drop-in sessions for users.
- Parallel run for month prior to go-live to test results.



Project phasing



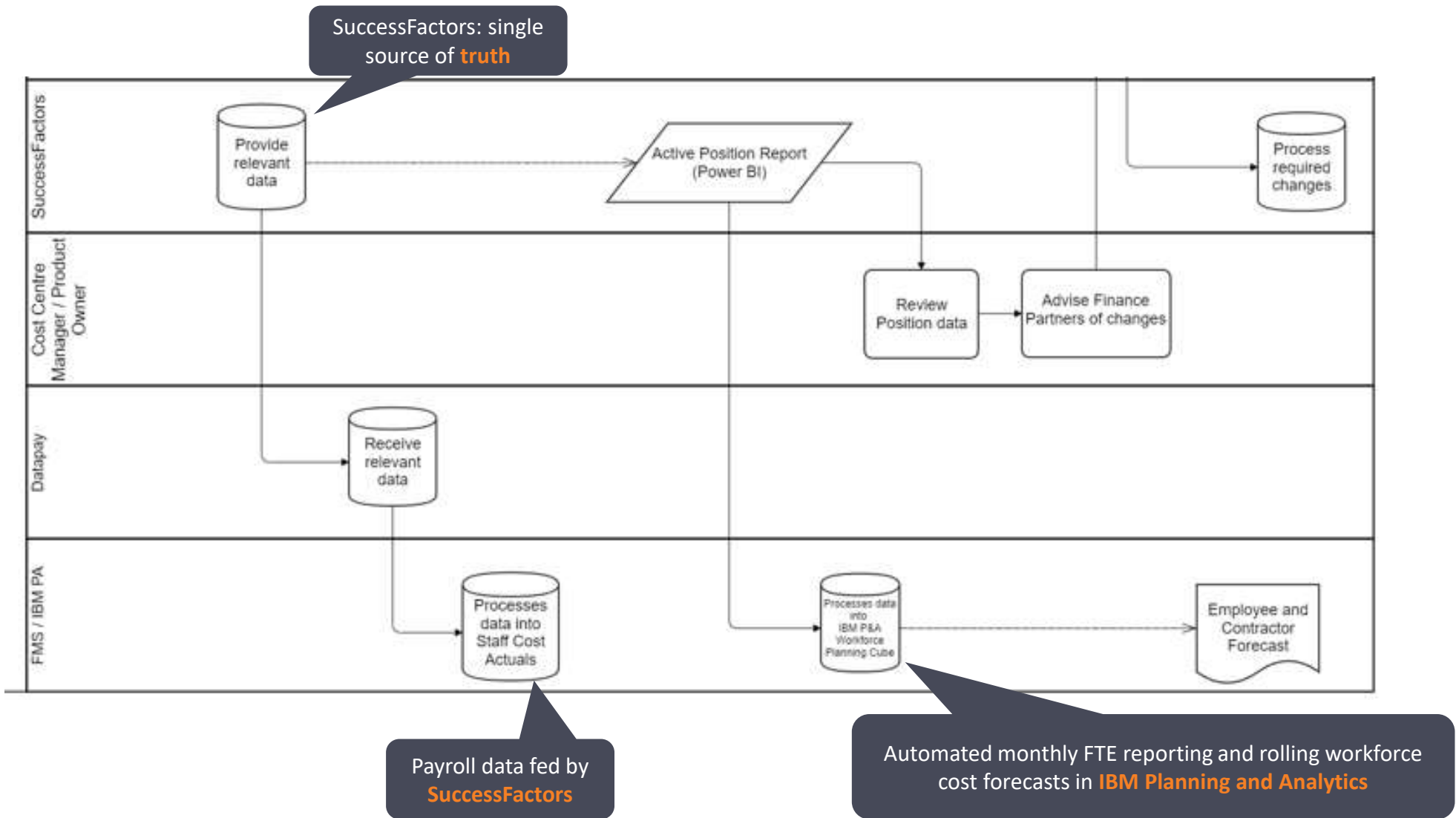
New Process – Position Creation



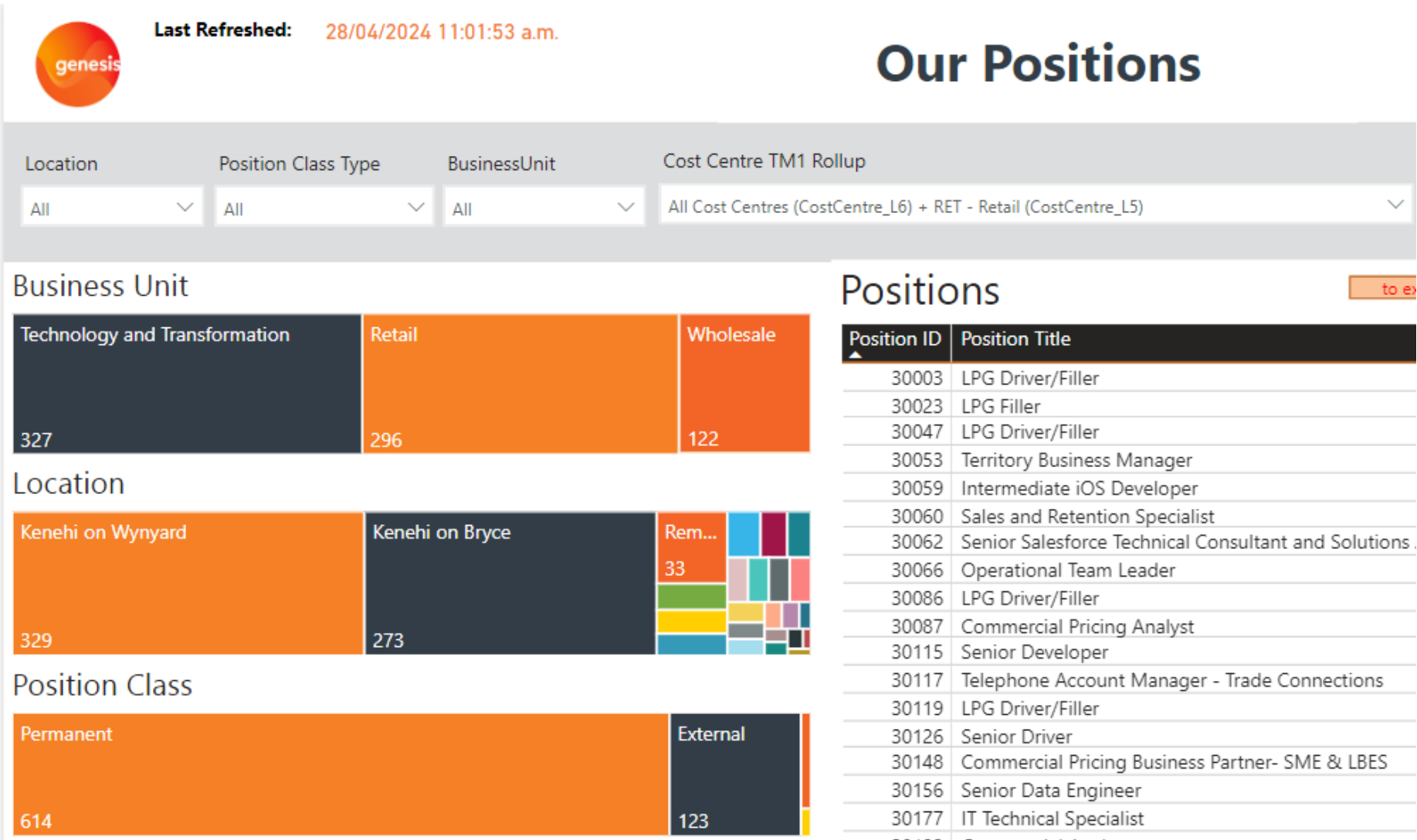
Three possible scenarios

1. I want to hire a replacement person for an **existing** vacant (or soon to be) position.
2. I want to hire a person for a **brand-new position**.
3. I want to hire a person for a **new position that is replacing an existing position** (e.g. repurposing of headcount budget).

New Process – Planning and Reporting

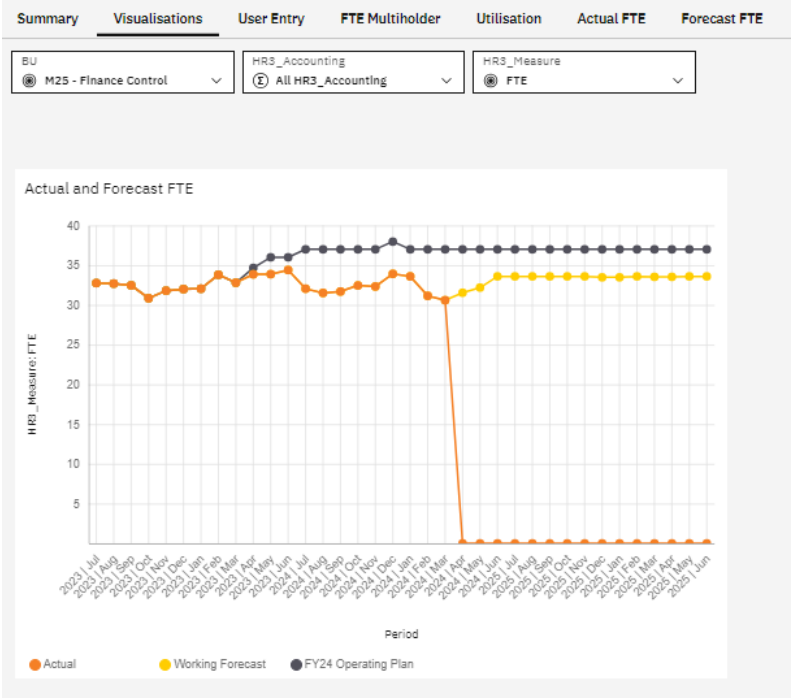


Power Bi – Position Report

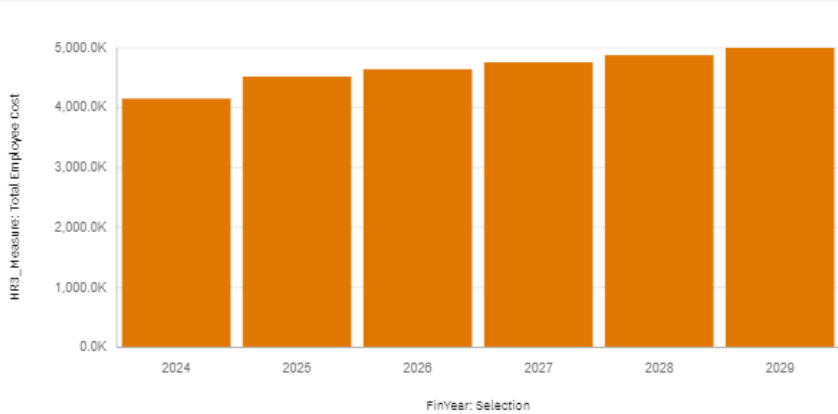


Planning and Forecasting – IBM P&A

- Staff costs are automatically forecast in IBM P&A based on information in SuccessFactors.
- No manual input required but can update end dates and estimated start dates for vacant positions.
- No individual salary information is displayed. All calculations are done in the back-end models. This eliminates data privacy issues.



		2024					
		Jul		Aug		Sep	
		FTE	FTE_PeriodEnd	FTE	FTE_PeriodEnd	FTE	FTE_PeriodEnd
▼ All HR3_Accounting	> All HR3_Position	3.00	3.00	3.00	3.00	3.00	3.00
Salaries	▼ All HR3_Position	3.00	3.00	3.00	3.00	3.00	3.00
	30753 - Pricing Specialist	1.00	1.00	1.00	1.00	1.00	1.00
	33042 - Senior Pricing Implementation Specialist	1.00	1.00	1.00	1.00	1.00	1.00
	33110 - Pricing Operations Manager	1.00	1.00	1.00	1.00	1.00	1.00
	33991 - Pricing Data and Analytics Manager	0.00	0.00	0.00	0.00	0.00	0.00
	34272 - Pricing Transformation Analyst	0.00	0.00	0.00	0.00	0.00	0.00
	34389 - Platform Owner - Pricing	0.00	0.00	0.00	0.00	0.00	0.00



System changes

Position org chart
available org-wide

Revamp 'change
reason' field

Add new field 'position
number being replaced'

New RBP for new roles
in process

8 new workflows for
various scenarios

2 new workflow groups

Updates to existing RBP

Add 'SuccessFactors
Position Number' field
into our ATS

New workflow emails
to keep process
participants updated

Weekly file from
SuccessFactors HRIS to
Finance IBM Planning
and Analytics

3 new business rules on
the Position object

Additional tile for
guides and helpful
shortcuts

Watch-Outs

- Clear business rules around “replacement positions” versus “repurposed positions”.
- Tight control of vacant positions. Process for regular review of vacant positions and closing of positions that not required.
- Treatment of multiple holder positions for roles such as Call Centre staff and LPG drivers where there are multiple people in one position and target FTE is seasonal.
- Business rules around allowing multiple holders of positions (e.g. cross over in a position for a replacement person while the existing person works out notice period, secondments and periods of unpaid leave).
- Change management – ensure the business takes ownership for the accuracy of data at source, especially for cost centres.
- Change management challenges – compliance with processes (Stopping “back-door” urgent requests for positions).
- Finance reluctance to lose visibility of salary data and to accepting that forecasts are now fully automated (i.e. they can’t manually put through manual adjustments)



Got questions?

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