



# Ready to Bury Your Resource Management Spreadsheet?

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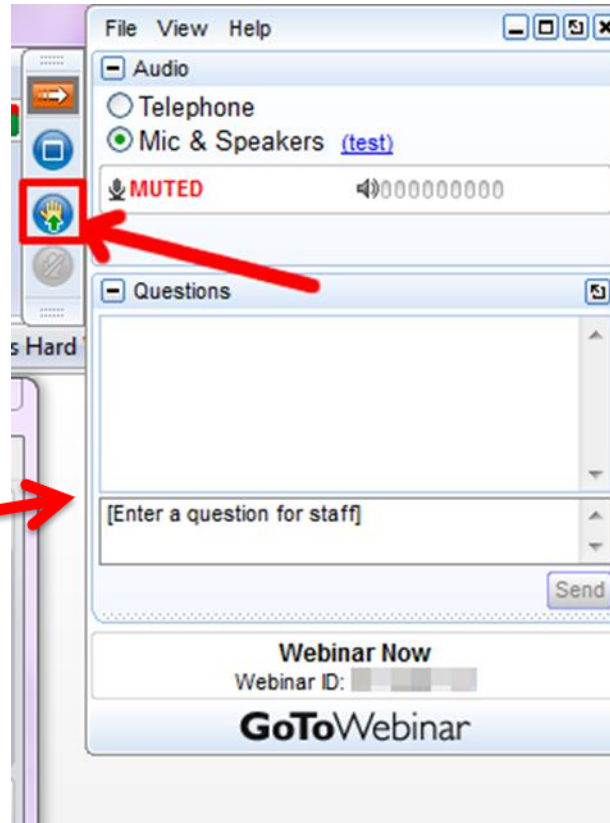
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# Objectives

- + Understand some of the challenges facing resource managers today
- + Learn about the fundamentals of a well-disciplined resource management process
- + Learn about the benefits of using an automation tool to manage resources

# Housekeeping

Type in your  
question here



Click Send

# Speakers



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## PROJECT & IT MANAGEMENT

*Manage your organization's projects, professional workforce and IT costs.*



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*Real time productivity optimization, collaboration, and functional automation across your organization's value chain.*



## DIGITAL ENGAGEMENT

*Effectively engage with your customers, prospects and community via the web and mobile technologies.*





Why do project-based organizations  
need to invest in resource  
management?

# Why Resource Management?

*No one says RM is easy to implement...*

The organization has adopted bits and pieces of resource management processes, but lacks a comprehensive approach

Data is either not available and/or not good enough to support effective staffing, forecasting and capacity planning

Automation has not yet displaced the use of ad-hoc spreadsheets

*...but it is essential to your organization*

**Single biggest cost line item for service providers**

**Primary driver of project performance and customer service**

**Need more discipline behind our most strategic asset - People!**



# Beyond the Spreadsheet

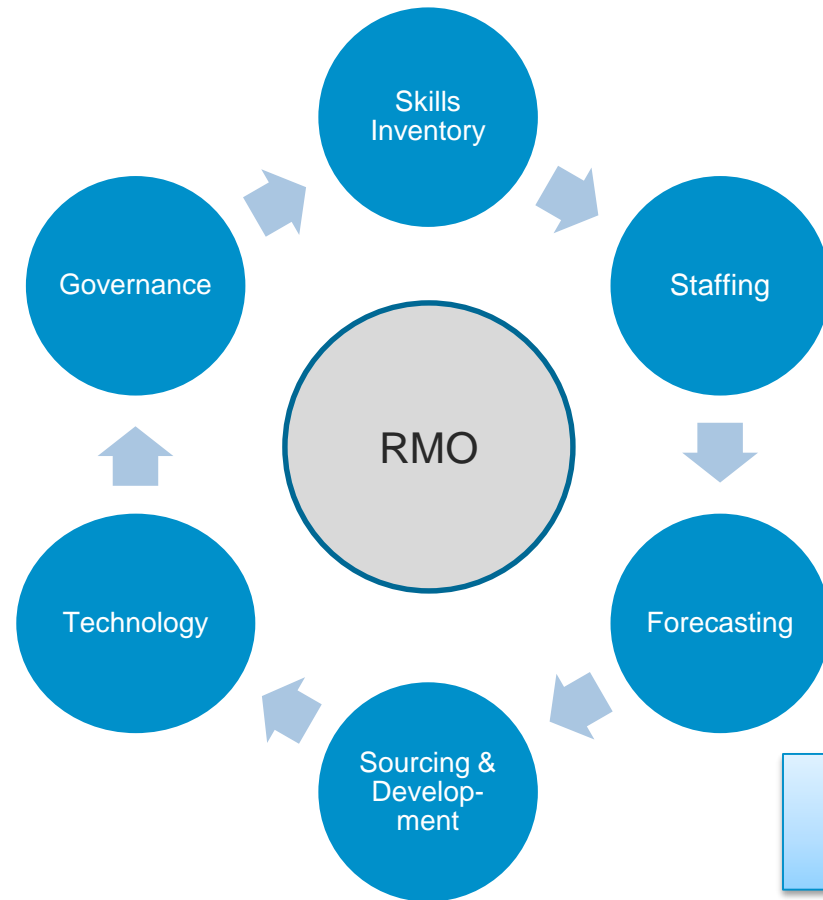
- + People are the most important asset in project-centric organizations
- + Improving resource management will impact internal stakeholders and customer success
- + Technology is the vehicle for a comprehensive approach
- + Single source of the truth
- + No such thing as “one size fits all”





Organizations struggle with getting  
the most out of their resources.  
What are some of the best practices?

# Resource Management: Just-in-Time Resourcing®



- Characterizing Supply and Demand
  - Resource Skills Inventory
  - Process Staffing requests
  - Forecasting future needs
- Managing Talent
  - Sourcing & Development
- Enabling / Automating GRM Processes
  - Technology
- Ensuring Compliance
  - Governance

Just-in-Time Resourcing® (JITR) is the capability to facilitate getting the Right Person in the Right Place at the Right Time

# Services Use Case

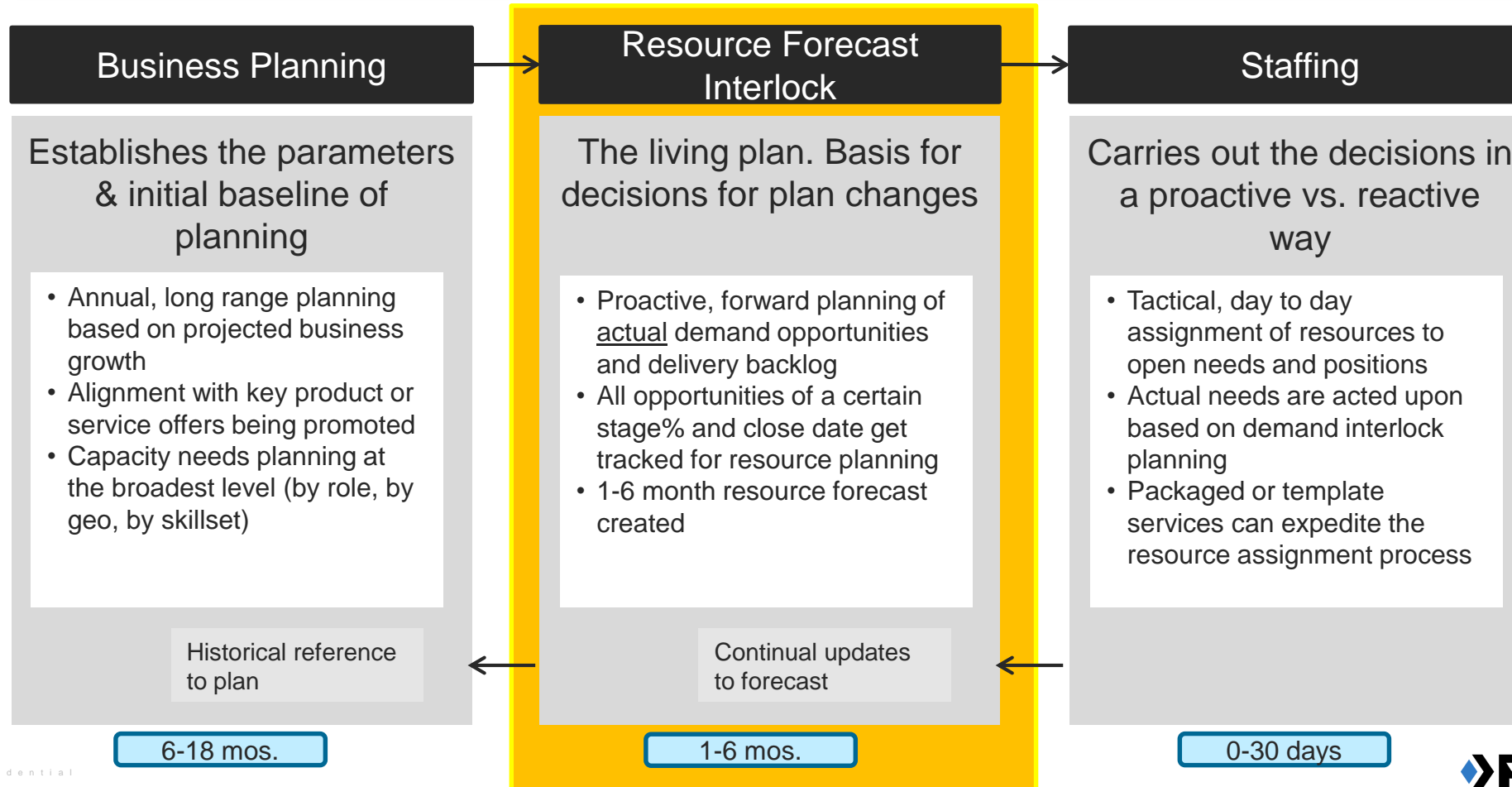
- + Resource Management best practices need to adapt to different use cases
- + For example for a PSO:
  - + Flexibility to provide bottom up and top down resource planning
  - + Booking of resources is critical at the project level to maximize utilization
  - + Engagement is often independent from a detailed project schedule
  - + Actual time still needs to be detailed



What's the difference between  
planning, forecasting and staffing?

# Forecasting & Capacity Planning

Leading delivery organizations have a **three part approach** to forecasting & capacity planning to meet the dynamic needs of the business.



# PMO Use Case

- + Mature PPM solutions need to adapt to short term, mid term and long term forecasting
- + For example for a PMO:
  - + Long term – 30K Ft view of resource needs to tied into business priorities
  - + Mid term – Feet on the ground planning and execution
  - + Short term – Tactical response to daily changes



How can organizations forecast their  
resource supply and demand?



# Forecasting

Forecasting is an essential and critical function. Here are keys to success

## Get the Demand Data Right

- Baseline & normalize the demand
- Manage and analyze the data
- Primary roles, win %, start/end date, allocation.

## Know your Supply (Data)

- Baseline rosters
- Normalize the team and resource profiles
- Resource profile info and assignments

## Supporting Infrastructure

- Enable access to data needed
- Support/empowerment by Management
- Meetings/processes/policies to govern it all

## Reporting Infrastructure

- Ability to report on/compare supply and demand by key attributes and details
- Ability to search RM data/build reports



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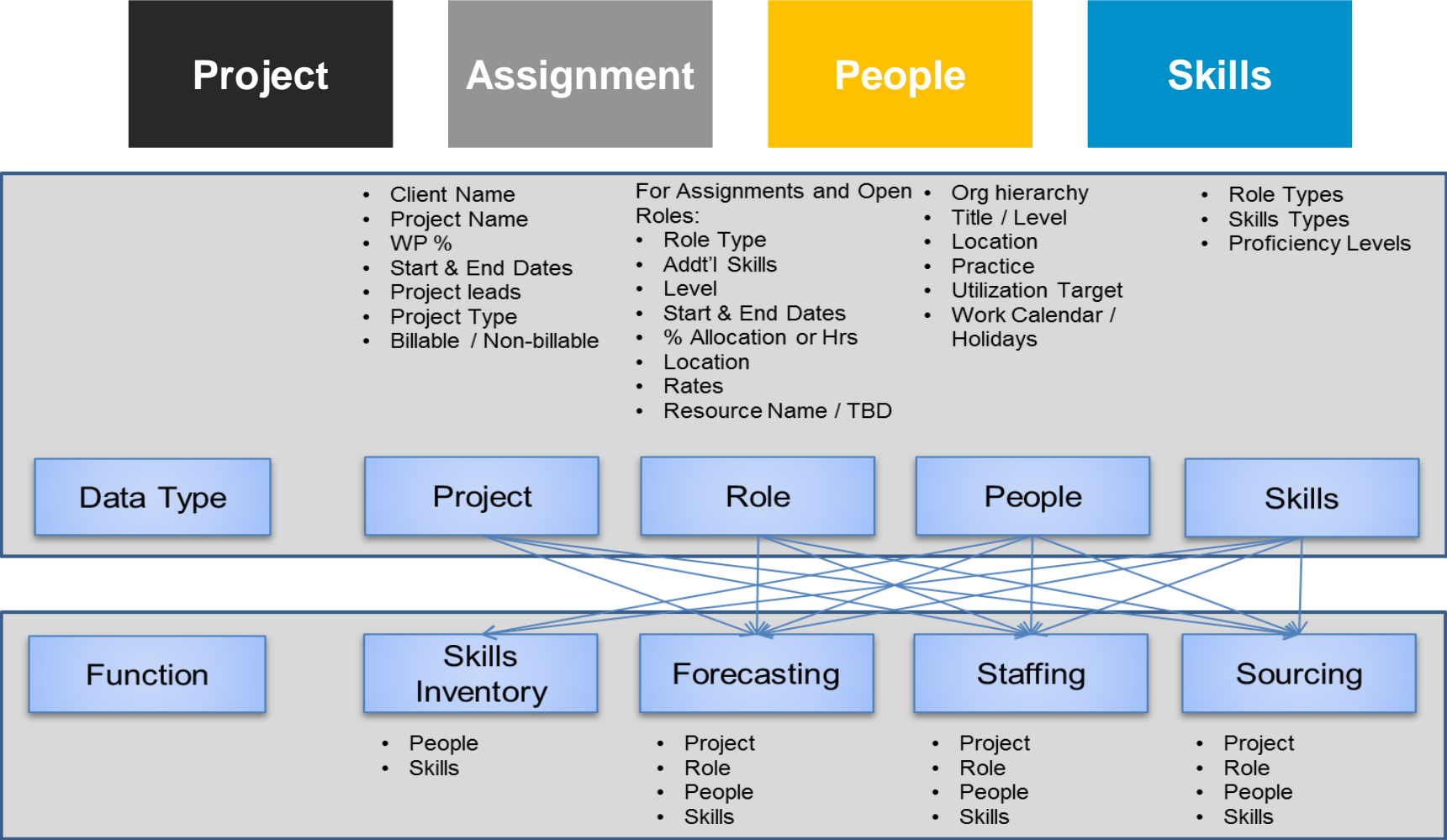


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Can you comment on the limitations  
around spreadsheets for resource  
management?

# Automation



# PM Use Case

- + Centralization of resource allocations when planning projects
- + For example for a PM:
  - + Single resource pool across all plans
  - + Instant feedback when planning a single project
  - + Keeping everyone on the same page

# Q & A



# Thank you for joining us!



Submit a request for more info!

<http://info.uplandsoftware.com/Upland-RTMC-Resource-Mgt-Webinar-Request-MoreInfo-LPRegistration.html>

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Complimentary White Paper from RTMC

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