

## Ready to Bury Your Resource Management Spreadsheet?

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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

- Audio Telephone Mic & Speakers (test) **№ MUTED** 4)0000000000 Questions [Enter a question for staff] Webinar Now Webinar ID: **GoTo**Webinar

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## Speakers



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## PROJECT & IT MANAGEMENT



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# 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.

#### Resource Forecast **Business Planning** Staffing Interlock Establishes the parameters The living plan. Basis for Carries out the decisions in & initial baseline of decisions for plan changes a proactive vs. reactive planning way Annual, long range planning Proactive, forward planning of Tactical, day to day based on projected business actual demand opportunities assignment of resources to growth and delivery backlog open needs and positions Alignment with key product or All opportunities of a certain Actual needs are acted upon service offers being promoted stage% and close date get based on demand interlock Capacity needs planning at tracked for resource planning planning the broadest level (by role, by 1-6 month resource forecast Packaged or template geo, by skillset) services can expedite the created resource assignment process Historical reference Continual updates to plan to forecast 6-18 mos. 1-6 mos. 0-30 days ◆ RTMC

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

## Automation

**Project** Assignment People **Skills** For Assignments and Open • Org hierarchy · Client Name Role Types Roles: · Title / Level Project Name · Skills Types • WP % Role Type Location · Proficiency Levels Addt'l Skills Practice Start & End Dates · Project leads Level Utilization Target Start & End Dates Work Calendar / Project Type % Allocation or Hrs · Billable / Non-billable Holidays Location Rates · Resource Name / TBD Project People Data Type Role Skills Skills **Function** Forecasting Staffing Sourcing Inventory Project · People · Project · Project Skills Role Role Role People People People Skills Skills Skills



### 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

http://www.rtmconsulting.net/improving-utilizationcan-enhance-your-business-performance

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