



Resource Management

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Agenda

- Benefits and definitions
- Tips around defining Capacity vs. Demand
- Staffing Methods/Actors
- Time horizon impacts
- Overall Recommendations
- Reinventing resource allocation within CA PPM

Typical Resource Management



Why is Resource Management Important?

- Lower external consulting costs
- Enables alignment of resources to higher priority projects
- Provides resource capacity vs. demand functionality and reporting
- Reduction of risk and more accurate project dates

Resource Management Definitions (The 4 A's)

Availability: The number of hours a resource is available to work on any given day.

Allocation: The high level percent of a resource that is designated to perform work on an investment.

Assignments: The specific amount of hours within a time period that a resource is given a specific task to perform. Estimate to Complete (ETC).

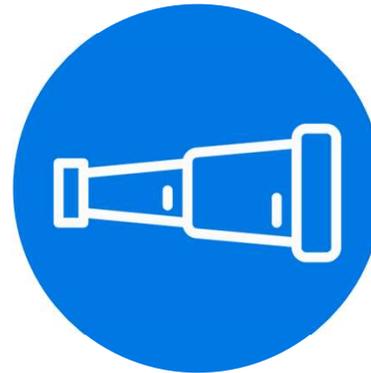
Actuals: The time tracked by a resource against an assignment within a given time period.

Initially, simplify Resource Management to two focus areas:

**Availability -
Defining Resource Capacity**



**Allocation –
Defining Resource Demand**



Resource Profile/Initial Setup

(Defining resource capacity)



- ✓ Resources loaded into PPM system (or other tracking methods)
- ✓ Availability defined
- ✓ Primary Roles defined and associated with resources
- ✓ Skills (As Needed)
- ✓ Resource Calendar (Non work days)

Other resource management factors: Department, Manager, Resource Pool

Primary Roles:



Each named resource should be associated with a single defined primary role that is carried into each investment to which he or she is allocated. Primary roles should be:

Recognizable: This helps groups collaborate and share information with other internal departments, business units and external labor providers. Examples: project manager, developer, business analyst

Stable: Limiting revisions due to cultural and/or organizational changes improves the ability to perform analysis over time.

Meaningful: Used for capacity planning and resource management, primary role definitions should represent the bulk of a resource's actual work

Skills (As Needed):



Guidelines:

- A rule of thumb is to not treat skills as a typical HR skills inventory but as a resource planning tool.
- Resource Skill Profiles should be reviewed and updated on a regular basis.
- For effective use, organizations should group skills by category by defining a 'parent skill'. Technical skills could serve as a group. Alternatively, groups could be defined by specific development languages or certifications.
- Non-technical groups might be defined by experience or area of expertise such as operational business unit expertise, application knowledge, industry and company knowledge related to business processes. Examples: benefits, claims, general ledger, admissions.

Resource Calendar:

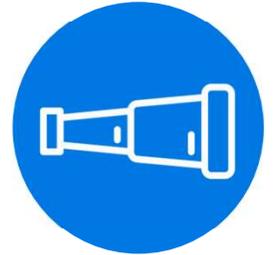


The Resource Calendar is used to determine the days the resource is available to perform project-related work. It takes into account:

- Weekends
- Corporate Holidays
- Vacation and long-term leave
- Non-Planned time off does not need to be retroactively entered

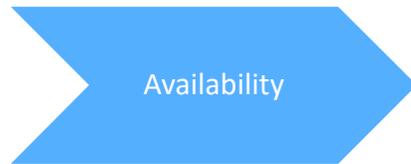
It is typical for organizations to choose not to manage the resource calendar outside of holidays and long-term leaves. The additional granularity into future planning “time off” is often not necessary to manage and schedule resources effectively.

Approach to defining Demand



- ✓ Maturity levels with Resource Management
- ✓ Resource Requisition Options
 - Role of the Project Manager
 - Role of the Resource Manager
- ✓ Time Horizon and granularity differences

Resource Management Maturity



- Complete Resource records
- Primary Role
 - Calendar
 - Skills as Required

How many resources?
What do they know?
When can they work?



- Staff Resources and/or Roles to Investment Team
- Set Allocation (by period via percentage or hours)
- Define actors and responsibilities (PM vs. RM)
- Replace roles with specific resources (resource finder)
- Allocation to “Non-Project” work

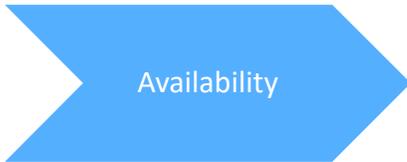
What projects resources are allocated to?
What % of time they are supporting the projects?
Role and Resource Demand vs.Capacity



- Develop detailed task level WBS
- Create resource task assignments
- Define estimate to complete (ETCs) for each task assignment
- Schedule WBS to evaluate and optimize dependencies/assignments
- Re-schedule to ensure accurate forecasting of uncompleted work

Forecasted amount of work effort remaining at a project Level/Task Level?

Resource Management Maturity



- Complete Resource records
- Primary Role
 - Calendar
 - Skills as Required

How many resources?
 What do they know?
 When can they work?



- Staff Resources and/or Roles to Investment Team
- Set Allocation (by period via percentage or hours)
- Define actors and responsibilities (PM vs. RM)
- Replace roles with specific resources (resource finder)
- Allocation to "Non-Project" work

Key Outputs to be Expected

What projects resources are allocated to?
 What % of time they are supporting the projects?
 Role and Resource Demand vs.Capacity



- Develop detailed task level WBS
- Create resource task assignments
- Define estimate to complete (ETCs) for each task assignment
- Schedule WBS to evaluate and optimize dependencies/assignments
- Re-schedule to ensure accurate forecasting of uncompleted work

Forecasted amount of work effort remaining at a project Level/Task Level?



Allocation vs Assignments for Demand:



	Investment Level Allocation	Assignment Based
Main characteristic	1 shot view to the project team and approved allocation	Enables the PM to detail its plan within Work Breakdown Structure
For whom is it needed?	Senior Management , Resource manager who requires a summarized view	For the project manager to list the detailed activities for executing the project
Communication with the Resource Manager	Facilitates a more simplified request process	There is no formal approval process if using only WBS.
Granularity	Low (Month/Weeks)	High (Days)
Maintenance	Low	Very High

Allocation Granularity:



	Pro	Con
Daily basis planning	Precise snapshot on where people are working	Very hard to maintain. Every 'not planned' event requires replanning.
Monthly (or weekly) basis planning	Top Managers\Resource manager have a view on what's going on with a monthly/weekly accuracy. It requires less maintenance for PMs and RMs. Higher probability that data is up to date.	Does not provide where resources are working on a particular day in the future.

Resource Staffing Methods



Manual Staffing

- Project Manager are able to add team members directly to the project.
- Could involve Resource Manager approval OUTSIDE of a system driven process.
- Resource Managers can view and identify issues within the system, but aren't the bottleneck for staffing.
- Typically a good starting approach for Resource Management, but could be all that is ever required for some groups within the organization.

System Requisition Process

- Project Manager submits formal request for resource to fill a role.
- Request routed to Booking Manager through CA PPM.
- Booking Manager determines best candidate and staffs to project via workflow.
- Another option is to give Project Mangers the ability to soft book resources, but require Booking Manager to hard book.
- Requires additional training
- Not required for most groups within an organization.

Combination/Modified

- Groups that require more control of resource assignments utilize a more formal process, but leave it open for manual staffing with most groups.
- Instead of formal workflow, it could be a modified approach where Conversations (within CA PPM) are used between Project Managers and Resource Managers.

Role of the Project Manager:

The project manager's primary focus is on the effective delivery of investments (on-time and on-budget) to meet the defined goals and objectives of the organization. Utilizing the right resources at the right time is critical to successful delivery of investments.

The resource management solution should provide information necessary to answer questions such as:

- Have I obtained all the committed resources I need for the successful completion of my project?
- Who controls the resources/roles I require?
- When will key resources be available for my project?
- Where else are my resources assigned? Are there potential risks or dependencies I should be monitor?

Role of the Resource Manager:

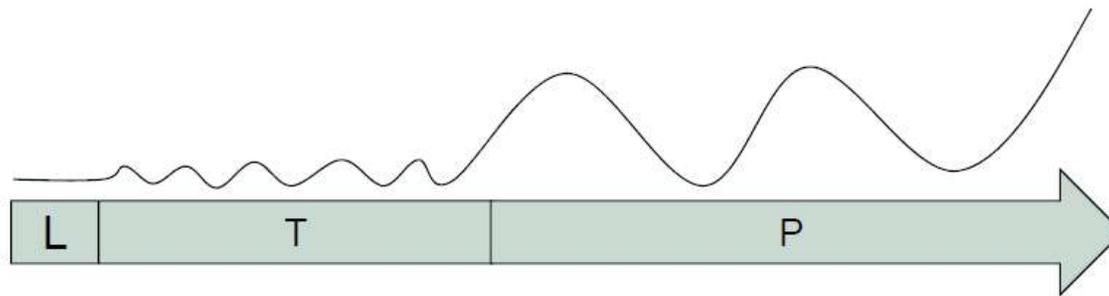
The resource manager's role is focused on the effective utilization of available resources. Equally important is his or her role in the development of existing resources to meet future demand as technology and the business changes.

The solution should provide the information necessary to answer questions such as:

- What are my team members current projects? How are team members performing against the estimated allocation?
- What is my team's current and future availability?
- What is my team's utilization?
- What roles are team members filling? What roles could they fill?
- What is the future demand for my team, by technical skill, area of expertise or experience?
- What skills do team members possess? What skills will they need in the future?



Time Horizon and Granularity:



	Locked	Trading	Planning
Time Zone	Next 2 weeks	2 - 8 weeks	8 weeks +
State	Level loaded	Level loaded	Not Level Loaded
Allocated Resource	Individual	Individual	Role
Allocation Time bucket	Weeks	Weeks	Month
Assignment to tasks	Full	Partial	None

Source: Rego Consulting, LLC)

Summary Recommendations

- Start with a meaningful number of primary roles, and limited and meaningful set of skills.
- Validate or revise your resource management process as needed; consider automating processes only after they have been proven to be accurate and reasonable level of adoption has achieved by the organization.
- Don't focus on being "exact" with resource management. Trying to reach perfection is counterproductive in most cases.
- Keep it simple! Define clear responsibilities for each actor in the process and try to prevent the bottlenecks that complexity often brings.

Why reinvent resource management?

- Overwhelming customer demand for addressing Staffing Issues.
 - Simple: Excel like, drag and drop
 - Practical: Simple approvals, conversations
 - Powerful: Quickly find and fix the problems

Resources

- Gain visibility into all work
- Excel paradigm using copy & paste
- Improved way to balance work and assign new staffing requests

CA PPM Hi, Derrick

Jan 31, 2017 FTE Forecast

Resources Investments -RESOURCE MANAGER- DERRICK JOSEPH Select Filters

	2017-01	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	TOTALS
	FTE							
PINNED (3) ALL	7.7	7.8	7.8	9.2	8.8	6.8	5.1	1.8
> Andy Cooper	2.0	1.0	0.9	0.6	0.5	0.6	0	0.2
> Brian Robinson	0.4	0.7	0.7	0.7	0.7	0.7	0.2	0.1
> Diane Durand	1.2	0.8	0.8	1.2	1.2	0.8	0.9	0.3
> Drew Davis	2.0	1.0	1.0	1.2	1.2	0.2	0.7	0.3
> Mike Jones	0.5	0.8	0.8	1.0	0.8	0.6	0.4	0.2
> Paul Pryor	0.2	0.2	0.2	1.0	1.0	1.0	1.0	0.2
> Peter Phillips	0.3	0.9	0.9	0.9	0.9	0.6	0.3	0.1
> Ray Fowler	0.5	0.7	0.7	0.7	0.7	0.4	0.6	0.2
> Sid Patel	0.5	0.8	0.8	1.0	0.8	1.0	1.0	0.3
> Tim Thone	0.2	1.0	1.0	1.0	1.0	1.0	0.2	0.2

Requests -REQUESTED MANAGER- DERRICK JOSEPH Select Filters

	2017-01	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	TOTALS
	FTE							
	0.0	0.0	0.0	1.5	1.1	1.5	1.5	0.2
> Business Architect	0	0	0	1.0	1.0	1.0	1.0	0.1
> Systems Analyst	0	0	0	0.5	0.1	0.5	0.5	0.1

Staffing

- Focus on my people
- Drill to each team members work
- Easily address staffing requests
- Approve “Soft Booked” (Light Blue)

		2017-01	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	TOTALS
		FTE							
Resources Investments <small>RESOURCE MANAGER</small> DERRICK JOSEPH × Select Filters ×		7.7	7.8	7.8	9.2	8.8	6.8	5.1	1.8
× PINNED (3) ALL									
★ > Andy Cooper		2.0	1.0	0.9	0.6	0.5	0.6	0	0.2
> Brian Robinson		0.4	0.7	0.7	0.7	0.7	0.7	0.2	0.1
★ > Diane Durand		1.2	0.8	0.8	1.2	1.2	0.8	0.9	0.3
★ > Drew Davis		2.0	1.0	1.0	1.2	1.2	0.2	0.7	0.3
∨ Mike Jones		0.5	0.8	0.8	1.0	0.8	0.6	0.4	0.2
B2B Enhancements ×		0.2	0.4	0.4	0.4	0.2	0.2	0.2	0.1
Industry Trade Show ×		0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.1
Marketing Campaign ×		0.2	0.2	0.2	0.2	0.2	0.2	0	0.0
Streamline BU Processes ×					0.2	0.2	0	0	
Vacation Time ×		0	0	0	0	0	0	0	0
> Paul Pryor		0.2	0.2	0.2	1.0	1.0	1.0	1.0	0.2
∨ Peter Philline									0.1
Requests <small>REQUESTED MANAGER</small> DERRICK JOSEPH × Select Filters ×									
		FTE							
		0.0	0.0	0.0	1.5	1.1	1.5	1.5	0.2
> Business Architect		0	0	0	1.0	1.0	1.0	1.0	0.1
> Systems Analyst		0	0	0	0.5	0.1	0.5	0.5	0.1

Collaboration

- RM and PM collaborate to discuss role or staffing request on a team allocation.

CA PPM
Hi, Derrick

Jan 31, 2017

 FTE
 Forecast

Resources Investments -RESOURCE MANAGER-
DERRICK JOSEPH Select Filters

	2017-01	2017-02	2017-03	2017-04
	FTE	FTE	FTE	
PINNED (3)	7.7	7.8	7.8	
> Andy Cooper	2.0	1.0	0.9	
> Brian Robinson	0.4	0.7	0.7	
> Diane Durand	1.2	0.8	0.8	
> Drew Davis	2.0	1.0	1.0	
Mike Jones	0.5	0.8	0.8	
B2B Enhancements	0.2	0.4	0.4	
Industry Trade Show	0.2	0.2	0.2	
Marketing Campaign	0.2	0.2	0.2	
Streamline BU Processes				
Vacation Time	0	0	0	
> Paul Pryor	0.2	0.2	0.2	
> Peter Philline				

Requests -REQUESTED MANAGER-
DERRICK JOSEPH Select Filters

	2017-01	2017-02	2017-03	2017-04
	FTE	FTE	FTE	
	0.0	0.0	0.0	
> Business Architect	0	0	0	
> Systems Analyst	0	0	0	

Mike Jones
B2B Enhancements (PR1086)

DETAIL **CONVERSATIONS**

Start a conversation...

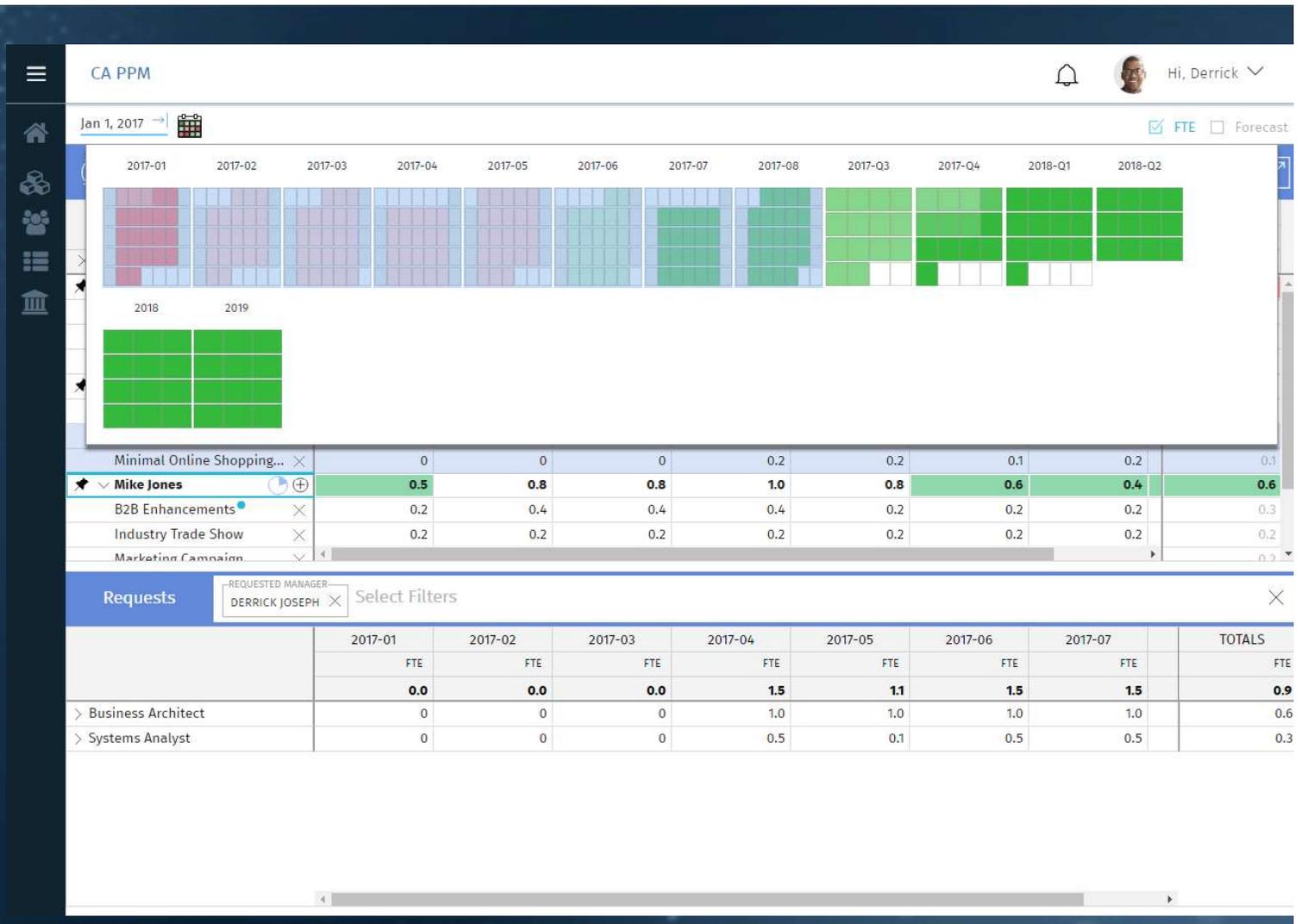
Barb Feb 14, 2017 1:03 am
He's the only person left that seems to know anything about the financial routine.

Derrick Feb 14, 2017 1:08 am
Barb Hudson Don't I know it? He's swamped with the new feature stack, but let me ask him if he'll have some time next week.

Barb Feb 14, 2017 1:03 am
Hey **Derrick Joseph** -- Need to find out if Mike is available to help clean up an escalation on this old B2B system.

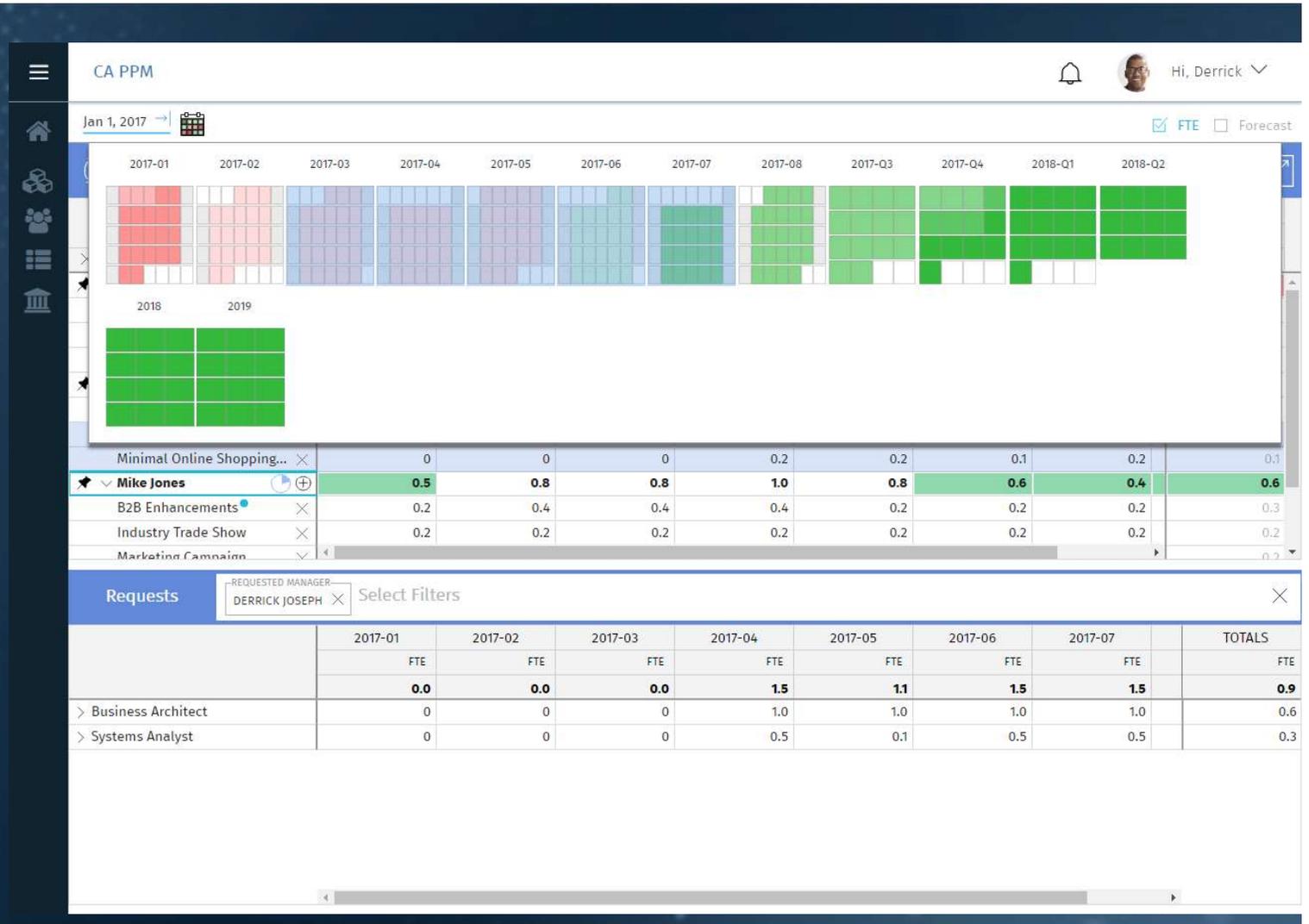
Telescoping

- View entire time horizon to spot resource issues
- Focus on a time period to resolve



Telescoping

- Select the time period to focus based on telescope colors



Telescoping

- Focus now on 5 periods

CA PPM Hi, Derrick

Jan 1, 2017 FTE Forecast

Resources Investments Select Filters

	2017-03	2017-04	2017-05	2017-06	2017-07	TOTALS
	FTE	FTE	FTE	FTE	FTE	FTE
3.5	3.8	3.5	2.0	1.3	2.8	
Andy Cooper	1.9	1.6	1.5	0.6	0	1.1
Collaboration Enhancem...	0.5	0.5	0.5	0.5	0	0.4
Industry Trade Show	0.4	0	0	0	0	0.1
Personalized online shop...	1.0	1.1	1.0	0.1	0	0.6
Diane Durand	0.8	1.2	1.2	0.8	0.9	1.0
Collaboration Enhancem...	0.5	0.5	0.5	0.5	0.5	0.5
Industry Trade Show	0.3	0.5	0.5	0.2	0.2	0.3
Minimal Online Shopping...	0	0.2	0.2	0.1	0.2	0.1
Mike Jones	0.8	1.0	0.8	0.6	0.4	0.7
B2B Enhancements	0.4	0.4	0.2	0.2	0.2	0.3
Industry Trade Show	0.2	0.2	0.2	0.2	0.2	0.2
Marketing Campaign	0.2	0.2	0.2	0.2	0	0.2

Requests REQUESTED MANAGER: DERRICK JOSEPH Select Filters

	2017-03	2017-04	2017-05	2017-06	2017-07	TOTALS
	FTE	FTE	FTE	FTE	FTE	FTE
0.0	1.5	1.1	1.5	1.5	1.5	1.1
> Business Architect	0	1.0	1.0	1.0	1.0	0.8
> Systems Analyst	0	0.5	0.1	0.5	0.5	0.3

“Pinning” Resources

- Select specific team members to “Pin”
- Resolve one issue at a time

CA PPM Hi, Derrick

Jan 31, 2017

Resources Investments FTE Forecast

RESOURCE MANAGER: DERRICK JOSEPH Select Filters

	2017-01	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	TOTALS
	FTE							
PINNED (3) ALL	7.7	7.8	7.8	9.2	8.8	6.8	5.1	1.8
> Andy Cooper	2.0	1.0	0.9	0.6	0.5	0.6	0	0.2
> Brian Robinson	0.4	0.7	0.7	0.7	0.7	0.7	0.2	0.1
> Diane Durand	1.2	0.8	0.8	1.2	1.2	0.8	0.9	0.3
> Drew Davis	2.0	1.0	1.0	1.2	1.2	0.2	0.7	0.3
> Mike Jones	0.5	0.8	0.8	1.0	0.8	0.6	0.4	0.2
> Paul Pryor	0.2	0.2	0.2	1.0	1.0	1.0	1.0	0.2
> Peter Phillips	0.3	0.9	0.9	0.9	0.9	0.6	0.3	0.1
> Ray Fowler	0.5	0.7	0.7	0.7	0.7	0.4	0.6	0.2
> Sid Patel	0.5	0.8	0.8	1.0	0.8	1.0	1.0	0.3
> Tim Thone	0.2	1.0	1.0	1.0	1.0	1.0	0.2	0.2

Requests REQUESTED MANAGER: DERRICK JOSEPH Select Filters

	2017-01	2017-02	2017-03	2017-04	2017-05	2017-06	2017-07	TOTALS
	FTE							
	0.0	0.0	0.0	1.5	1.1	1.5	1.5	0.2
> Business Architect	0	0	0	1.0	1.0	1.0	1.0	0.1
> Systems Analyst	0	0	0	0.5	0.1	0.5	0.5	0.1

“Pinning” Resources

- View only “Pinned” team members
- Balance work, satisfy resource requests on the selected team members

CA PPM Hi, Derrick

Sep 1, 2016 FTE Forecast

Resources Investments Select Filters

	2017-01	2017-02	2017-03	2017-04	2017-Q2	2017-Q3	2017-Q4	TOTALS
	FTE							
<input checked="" type="checkbox"/> PINNED (3) <input type="checkbox"/> ALL	5.2	2.8	2.7	3.0	2.5	1.3	0.7	1.6
★ Andy Cooper	2.0	1.0	0.9	0.6	0.6	0	0	0.4
Collaboration Enhancem...	1.0	0.5	0.5	0.5	0.5	0	0	0.2
Industry Trade Show	1.0	0.4	0.4	0	0	0		0.1
Personalized online shop...	0	0.1	0.0	0.1	0.1	0		0.0
★ Diane Durand	1.2	0.8	0.8	1.2	1.1	0.8	0.3	0.6
Collaboration Enhancem...	1.0	0.5	0.5	0.5	0.5	0.5	0.3	0.4
Industry Trade Show	0.2	0.3	0.3	0.5	0.4	0.2		0.2
Minimal Online Shopping...	0	0	0	0.2	0.2	0.1		0.1
★ Drew Davis	2.0	1.0	1.0	1.2	0.9	0.6	0.3	0.6
Collaboration Enhancem...	1.0	0.5	0.5	0.6	0.4	0.5	0.3	0.4
Minimal Online Shopping...	1.0	0.5	0.5	0.6	0.5	0.1		0.2

Requests REQUESTED MANAGER: DERRICK JOSEPH Select Filters

	2017-01	2017-02	2017-03	2017-04	2017-Q2	2017-Q3	2017-Q4	TOTALS
	FTE							
	0.0	0.0	0.0	1.5	1.3	1.0	0.0	0.5
> Business Architect	0	0	0	1.0	1.0	0.7	0	0.3
> Systems Analyst	0	0	0	0.5	0.3	0.3	0	0.1

Forecasting

- Toggle on forecast
- Model your plan to meet your budget

CA PPM Hi, Derrick

Sep 1, 2016 FTE Forecast

Resources Investments RESOURCE MANAGER: DERRICK JOSEPH Select Filters

	2017-01		2017-02		2017-03		TOTALS	
	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
ALL	7.7	164,952	7.8	157,120	7.8	180,544	4.4	1,440,396
> Andy Cooper	2.0	42,240	1.0	18,240	0.9	20,832	0.4	116,544
> Brian Robinson	0.4	9,840	0.7	16,800	0.7	19,320	0.3	121,200
> Diane Durand	1.2	25,344	0.8	15,360	0.8	17,664	0.6	193,632
> Drew Davis	2.0	42,240	1.0	19,200	1.0	22,080	0.6	193,632
> Mike Jones	0.5	13,800	0.8	19,200	0.8	22,080	0.4	157,260
> Paul Pryor	0.2	4,864	0.2	5,120	0.2	5,888	0.4	166,400
> Peter Phillips	0.3	4,400	0.9	14,400	0.9	16,560	0.4	89,880
> Ray Fowler	0.5	9,200	0.7	10,400	0.7	11,960	0.4	94,840
> Sid Patel	0.5	8,800	0.8	12,800	0.8	14,720	0.6	147,840
> Tim Thone	0.2	4,224	1.0	25,600	1.0	29,440	0.4	159,168

Requests REQUESTED MANAGER: DERRICK JOSEPH Select Filters

	2017-01		2017-02		2017-03		TOTALS	
	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST	FTE	FORECAST
	0.0	0	0.0	0	0.0	0	0.5	173,184
> Business Architect	0	0	0	0	0	0	0.3	130,800
> Systems Analyst	0	0	0	0	0	0	0.1	42,384



Thank You.

