



regoUniversity

NASHVILLE • 2022

Best Practice Use of Clarity for Resource Management

Your Guides:

Josh Childers and Michelle Merriam-Day

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards



Agenda

- Overview
- Fundamentals
- Best Practices

Open Mic

- What is the value proposition of resource management?
- What are the characteristics of successful resource management?
- What are the barriers to successful resource management?

Overview

- What is Resource Management?

- Capturing data to understand WHO is working on WHAT
- Understanding capacity and demand to forecast gaps
- For some organizations, planning is done at the level of Individual Resources. For other organizations, planning is done at the Team level

- Resource Management can also incorporate a business process to create and fulfill Staffing Requests

Capacity vs. Demand by Role		Allocation by Month (Hours)												
Role		Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Total
Architect	Capacity	1,408.00	1,280.00	1,408.00	1,408.00	1,344.00	1,408.00	1,472.00	1,344.00	1,408.00	1,408.00	1,344.00	1,472.00	16,704.00
	Demand	910.80	871.42	1,667.75	1,290.20	951.40	1,200.80	1,472.00	867.30	934.72	940.81	788.41	733.20	12,628.80
	Remaining Capacity	497.20	408.58	-259.75	117.80	392.60	207.20	0.00	476.70	473.28	467.19	555.59	738.80	4,075.20
Business Analyst	Capacity	1,584.00	1,440.00	1,584.00	1,584.00	1,512.00	1,584.00	1,656.00	1,512.00	1,584.00	1,512.00	1,512.00	1,656.00	18,792.00
	Demand	738.80	688.00	1,603.24	1,341.80	1,593.40	1,734.80	1,241.20	926.10	904.11	912.81	703.40	1,641.20	14,028.85
	Remaining Capacity	845.20	752.00	-19.24	242.20	-81.40	-150.80	414.80	585.90	679.89	671.19	808.60	14.80	4,763.15
DBA	Capacity	528.00	480.00	528.00	528.00	504.00	528.00	552.00	504.00	528.00	528.00	504.00	552.00	6,264.00
	Demand	528.40	480.00	528.00	528.00	504.00	528.00	552.00	504.00	528.00	528.00	504.00	27.60	5,738.00
	Remaining Capacity	1.60	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	524.40	526.00
Developer	Capacity	1,936.00	1,760.00	1,936.00	1,936.00	1,848.00	1,936.00	2,024.00	1,848.00	1,936.00	1,936.00	1,848.00	2,024.00	22,968.00
	Demand	1,631.20	1,588.96	1,497.64	2,705.20	2,251.61	1,705.19	1,649.80	894.60	902.76	858.19	1,822.60	714.80	18,222.55
	Remaining Capacity	304.80	171.04	438.36	-769.20	-403.61	230.81	374.20	953.40	1,033.24	1,077.81	25.40	1,309.20	4,745.45
Network Engineer	Capacity	1,232.00	1,120.00	1,232.00	1,232.00	1,176.00	1,232.00	1,288.00	1,176.00	1,232.00	1,232.00	1,176.00	1,288.00	14,616.00
	Demand	377.61	335.04	435.86	344.69	938.80	830.60	713.39	494.90	499.60	375.60	208.81	1,202.40	6,757.31
	Remaining Capacity	854.39	784.96	796.14	887.31	237.20	401.40	574.61	681.10	732.40	856.40	967.19	85.60	7,858.69
Project Manager	Capacity	2,288.00	2,080.00	2,288.00	2,288.00	2,184.00	2,288.00	2,392.00	2,184.00	2,288.00	2,288.00	2,184.00	2,392.00	27,144.00
	Demand	1,560.03	1,567.04	2,520.10	2,200.73	2,226.01	3,806.99	3,914.00	2,979.20	3,064.00	3,008.01	1,944.03	1,736.00	30,526.14
	Remaining Capacity	727.97	512.96	-232.10	87.27	-42.01	-1,518.99	-1,522.00	-795.20	-776.00	-720.01	239.97	656.00	-3,382.14
Test Engineer	Capacity	1,760.00	1,600.00	1,760.00	1,760.00	1,680.00	1,760.00	1,840.00	1,680.00	1,760.00	1,760.00	1,680.00	1,840.00	20,880.00
	Demand	1,086.01	1,057.62	1,326.44	1,777.91	1,898.00	1,488.00	1,418.01	980.00	943.05	1,007.00	747.00	1,678.00	15,407.03
	Remaining Capacity	673.99	542.38	433.56	-17.91	-218.00	272.00	421.99	700.00	816.95	753.00	933.00	162.00	5,472.97
Grand Total	Capacity	10,736.00	9,760.00	10,736.00	10,736.00	10,248.00	10,736.00	11,224.00	10,248.00	10,736.00	10,736.00	10,248.00	11,224.00	127,368.00
	Demand	6,830.83	6,588.08	9,579.03	10,188.53	10,363.22	11,294.38	10,960.40	7,646.10	7,776.24	7,630.42	6,718.25	7,733.20	103,308.68
	Remaining Capacity	3,905.17	3,171.92	1,156.97	547.47	-115.22	-558.38	263.60	2,601.90	2,959.76	3,105.58	3,529.75	3,490.80	24,059.32

Why is Resource Management Important?

- Reduces risk by enabling management to more easily identify current and future staffing constraints
- Enables alignment of the investment pipeline (Demand) to available capacity
- Facilitates alignment of resources to the highest priority investments and helps decisionmakers understand the impacts of change
- Reduces the amount of manual effort required to develop and maintain enterprise resource plans
- Enables reuse of resource plan data for Cost Forecasting
- Creates consistency and transparency of resource and staffing information

Some Rego Thoughts...

What is Success

- Effective business processes exist to use the data for decisions
 - Proper prioritization and pacing of new projects
 - Fewer schedule delays waiting for resources
 - Identify and escalate resource risks to delivery
 - Understand the impacts of change
- Data is Comprehensive, Reliable, Timely & Directionally Accurate

Stumbling Blocks

- Finding the right level of granularity
- Enterprise decisions require comprehensive data
- Difficulty updating allocations
- Bi-Model (not true agile)
- Reporting goldilocks – nothing just right
- Effective communication between Resource, RM, PM
- Complexity, inconsistent process
- Management support

Fundamentals



The Four A's:

Term	Definition
Availability	The number of hours a resource is available to work on any given day. By default, resources in Clarity are available 8 hours per day. (Available Hours – Base Calendar Non-Work Days – Personal Calendar Non-Work Days)
Allocation	The hours, or % of time, a resource is designated to perform work on a specific investment.
Assignment*	The amount of work designated for a resource on a specific task.
Actuals	Completed work (in hours) that the resource has entered to a specific task via timesheets.

Resource Management Building Blocks

Understand Capacity

- Complete Resource Profile:
 - ✓ Primary Role
 - ✓ Availability
 - ✓ OBS
 - ✓ Calendar
 - * Skills

Track Demand

- Add Roles, Resources or Teams to Investments
- Replace Roles with named Resources on Investments
- Enter Allocations over time

Utilization

- Track Actual Hours on Investments
- Investment Management Items:
 - ✓ Develop detailed task Work Breakdown Structure (WBS)
 - ✓ Enter Resource Task Assignments with Estimate to Complete (ETC)
 - ✓ Schedule WBS to evaluate and optimize the investment schedule
 - ✓ Re-schedule for accurate forecast of remaining work

Key Outputs

How many resources do we have?
 What is our capacity to do work?
 How are resources aligned within the organization?
 What are their roles?

When are groups available for work or overallocated?
 What percentage of time is planned for each investment type?

What is the actual time spent on each investment?
 What is the remaining amount of ETC on a investment?

Understanding Capacity

How much work can we do in a month?

Resource Availability

Availability in Hours / Day

Capacity

Sum of Availability over Time

Resource Availability		Availability by Month (Hours)												
Resource	Resource Manager	Apr-21	May-21	Jun-21	Jul-21	Aug-21	Sep-21	Oct-21	Nov-21	Dec-21	Jan-22	Feb-22	Mar-22	Total
Business Analyst														
Hayes, Todd	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Total		176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Developer														
Gillian, Erin	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Total		176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Project Manager														
Berks, Paul	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Flynn, Sam	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Lewis, Paul	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Perez, Carlos	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Sutherland, Joy	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Total		880.00	840.00	880.00	880.00	880.00	880.00	840.00	880.00	920.00	840.00	800.00	920.00	10,440.00
Resource Manager														
Miller, Rosie	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Total		176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Test Engineer														
Gaurand, Alicia	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Krishna, Arun	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Lewis, Nicole	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Turner, Bruce	Miller, Rosie	176.00	168.00	176.00	176.00	176.00	176.00	168.00	176.00	184.00	168.00	160.00	184.00	2,088.00
Total		704.00	672.00	704.00	704.00	704.00	704.00	672.00	704.00	736.00	672.00	640.00	736.00	8,352.00
Grand Total		2,112.00	2,016.00	2,112.00	2,112.00	2,112.00	2,112.00	2,016.00	2,112.00	2,208.00	2,016.00	1,920.00	2,208.00	25,056.00

Understanding Capacity

Clarity PPM Hi, Peter Thompson

PROPERTIES ▾ SKILLS ALLOCATIONS DOCUMENT MANAGER CALENDAR

Resource-Labor: Justin Hayes - Main - General

General

LAST NAME Hayes	RESOURCE ID justinHayes
FIRST NAME Justin	EMAIL ADDRESS justinHayes@mailserver.net

Resource Management

PRIMARY ROLE Architect	RESOURCE MANAGER Miller, Rosie
CATEGORY IT	BOOKING MANAGER Miller, Rosie
DATE OF HIRE 1/1/2001	EMPLOYMENT TYPE Employee
DATE OF TERMINATION	EXTERNAL <input type="checkbox"/>
AVAILABILITY 8.00	

Organizational Breakdown Structures

RESOURCE POOL /All Groups/Internal/Shared Services
DEPARTMENT OBS /Corporate/IT/Shared Services

Typical Resource Record

- Name, email
- Primary Role
- Manager
- Hire / Term Dates
- Employment Type
- Availability
- OBS

Capacity Calculation:

Sum of Availability on working days (per the Calendar) between Hire and Term Dates

Understanding Capacity

How is this different for Agile or Hybrid Organizations?

Waterfall/Other Organizations: use Resources for Capacity




Hybrid/Bi-Modal: Use Resources and Teams






Fully Agile: Use Teams



Understanding Teams











- Capacity is calculated based on the Resources in the Team
- Allocations are reflected on the TEAM alone
- Avoid mixing Individual Resource and Team Allocations

clarity Agency Team TM00002   Hi, Peter 

  Add From Resource Obs   View (Copy) Standard View  Save

Select All Deselect All

Group By

*Resource ↑	*Allocation	Primary Role	Resource Manager	Employment Type	Active
<input type="checkbox"/> Amos, Cheryl	50%	Business Architect	Mark Montoya	Employee	
<input type="checkbox"/> Berks, Paul	25%	Project Manager	Rosie Miller	Employee	
<input type="checkbox"/> Evans, Sean	100%	Developer	Arun Kumar	Contractor	
<input type="checkbox"/> Flynn, Sam	100%	Project Manager	Rosie Miller	Employee	
<input type="checkbox"/> Gaurand, Alicia	100%	Test Engineer	Rosie Miller	Employee	
<input type="checkbox"/> Gillian, Erin	100%	Developer	Rosie Miller	Employee	
<input type="checkbox"/> Gupta, Rakesh	100%	Developer	Arun Kumar	Contractor	
<input type="checkbox"/> Hayes, Todd	100%	Business Analyst	Rosie Miller	Employee	
<input type="checkbox"/> Johnson, Eric	100%	Developer	Arun Kumar	Contractor	
<input type="checkbox"/> Krishna, Arun	100%	Test Engineer	Rosie Miller	Employee	

DETAILS

Understanding Demand

Demand

Hours needed for investments over time

The screenshot shows a software interface for a project named 'AP Architecture Consolidation project' (PR1196), which is marked as 'On Track'. The interface includes a navigation bar with options like Properties, Staff, Tasks, Task List, Status, Financials, Dashboard, Conversations, Links, Risks, Issues, Changes, Decisions, and Lessons Learned. Below the navigation bar, there is a table with columns for resource allocation over time. The table is grouped by resource and shows allocation for the months of 2019-08, 2019-09, 2019-10, and 2019-11. The resources listed include AB Team, Abbott, Karl, Allen, Timothy, Architect, Business Analyst, Developer, Project Manager, Storage Architect, and Test Engineer. The AB Team has the highest allocation, with 13,024 hours in 2019-08 and 8,288 hours in 2019-11. The other resources have much lower allocations, typically around 176-320 hours per month.

										2019-08	2019-09	2019-10	2019-11
*Resource	Role	*Book...	Ope...	Start	Finish	Default Allo...	Allocation	Actuals	ETC	Allocation	Allocation	Allocation	Allocation
<input type="checkbox"/> AB Team		Soft	✓			100%	47,360	0	6,400	13,024	12,432	13,616	8,288
<input type="checkbox"/> Abbott, Karl	Business Analyst	Soft	✓			100%	640	0	640	176	168	184	112
<input type="checkbox"/> Allen, Timothy	Network Engineer	Soft	✓			100%	640	0	240	176	168	184	112
<input type="checkbox"/> Architect	Architect	Soft	✓			60%	384	0	160	106	101	110	67
<input type="checkbox"/> Business Analyst	Business Analyst	Soft	✓			100%	640	0	280	176	168	184	112
<input type="checkbox"/> Developer	Developer	Soft	✓			100%	640	0	640	176	168	184	112
<input type="checkbox"/> Developer	Developer	Soft	✓			100%	640	0	320	176	168	184	112
<input type="checkbox"/> Project Manager	Project Manager	Soft	✓			100%	640	0	280	176	168	184	112
<input type="checkbox"/> Storage Architect	Storage Architect	Soft	✓			100%	640	0	160	176	168	184	112
<input type="checkbox"/> Test Engineer	Test Engineer	Soft	✓			100%	640	0	160	176	168	184	112

Investments can include Project, Ideas, Custom Investments

Resource Management and Investment Planning

- Leverage high-level capacity in Roadmaps

regoconsulting 2020 R and D plan
RD00016

SCENARIO **POR**
Default Scenario View
Peter's Planning v

Search or filter...

Capacity

TARGET 100,000

IN PLAN 95,456

VARIANCE 4,544

										Totals
In Plan	Roadmap Item*	Therapy Target	Sector	Must Have	Sponsor	Owner	Start	Finish	Capacity	
✓	Atropia Retina Scan - Project	Neurological	Device/Other		Baker, Jesse		Feb 14, 2019	May 6, 2020	25,600	
✓	Aurascope XA - Project	Osteo	Device/Other		Baker, Jesse		Mar 14, 2019	Jun 3, 2020	25,600	
✓	Critical Care Vent - home version	Bacterial	Device/Other				Mar 28, 2019	Mar 9, 2021	44,256	
	Anesthesia Delivery	Neurological	Medicinal Chem...				Jan 22, 2019	Oct 22, 2021	45,703	
	Brightlight 3000 - Project	Viral	Biology/Discover...		Butler, Cheryl		Aug 13, 2019	Aug 2, 2020	25,600	
	Centricity	Viral	Medicinal Chem...				Dec 26, 2018	Aug 18, 2021	52,280	
	Defibrillator Improvements	Neurological	Medicinal Chem...				May 27, 2019	Sep 2, 2022	35,962	
	Diagnostic ECG - Project	Bacterial	Pharmacology		Bryant, Julie		Jul 15, 2019	Mar 31, 2020	27,280	
	Discover HD	Bacterial	Pharmacology				Jun 6, 2018	Aug 10, 2021	55,736	

Open Mic

- For those that have a successful implementation of resource management
 - What are some of your best practices?
 - What are your lessons learned?

Best Practices



Implementation Best Practices – Start Simple



- You don't need a high degree of precision to make effective resource management decisions
- The more precision you attempt to get, the more time and effort will be required
- There is a point of diminishing returns



- Resource management is more about building effective processes; for example, assume you are able to get the best data and most precise information from the tool, what mechanisms, processes, roles and responsibilities are in place to act on that information?



- Resource Management takes a bit of coordination and consistency across many groups and functions. Take a crawl, walk, run approach—start simple and then build it out further as needed
- OCM and Sponsorship are key for enterprise planning

Availability Best Practices

- Avoid high degrees of precision
 - We need the minimal amount of information to make an informed decisions
- Add corporate holidays to the base calendar
 - In multi-national organizations, it is best to use multiple calendars to represent various holidays and work times (8hr day vs. 7hr day)
- Ensure Resource Capacity is aligned with Primary Role, Employment Type, and Resource OBS
 - Remember – these are ways to group information. Keep those elements to a manageable set of values / complexity
- Maintain Date of Hire and Date of Termination
- For contractors, consider maintenance of a Contract End Date
- Remember – managing resources does not consume a license per resource
- Consider automation for Resource data

Allocation Best Practices

- Manage allocations by the month. Try to avoid setting default allocation or allocation segments any less than 10%
- Adjust expectations of accuracy and granularity based time horizon (e.g., 100% allocated for next 4 weeks, +/- 10% for 4-8 weeks, +/- 20% for 8-12 weeks)
- Set filters to highlight exceptions
 - Typical variance of allocation is +/- 25%
- Use hours or % Availability as the Work Effort Unit of Measurement in organizations that have multiple availabilities for resources
 - FTE and Days use the Base Calendar default of 8 hrs to convert from hours
- Encourage users making allocation updates to compare Allocation and prior two months of Actuals

Assignment Best Practices

- Choose allocations or assignments – not both. If using ETC – then run job to sync allocations to assignments.
- Adhere to the “8-80” rule. Tasks and assignments should not be less than 8 hours or more than 80.
- Add ETC to the project team detail view
 - Allows the PM to see where ETC may be piling up (slower burn on the tasks)
 - Allows the PM to see where the allocation may be greater than ETC (faster burn on tasks)
- When using ETC, be aware of start dates and tasks open for time. Delayed starts, without and adjustment of Task Start Date will push ETC forward.

Reporting Best Practices

- Start by leveraging OTB views – Role capacity, Resource workloads, Staffing page
- Additional reporting can assist to ensure the data is:
 - Personalized for the user and use case
 - Summarized to see issues immediately
 - Drillable to allow quick view and update of issues
- Some sample views we have seen successful are:
 - Planning: OBS Resource Aggregation
 - Planning: Role Capacity
 - Managing: Staffing
 - Rego Adoption Metrics to identify coaching opportunities
- Define your own dashboard that reorganizes the OOTB Resource Planning portlets based on the “day in a life” activities of a Resource Manager.

Notification Best Practices

- Use notifications for specific actions needed, you do not want to over communicate
- Emails will provide direct links into Clarity for an action
- Some popular notifications
 - Allocations to individual resources – if this incorrect talk to a manager
 - Exceptions (over/under allocation) to booking manager
 - Schedule key reports (e.g., Over/Under Allocation by Resource) to be delivered via email to RMs and division managers

Open Mic

- Is your data more granular than it needs to be?
- Are leaders taking action based on the available data?

Data Maintenance Best Practices

- Ensure you have solid notifications and reporting – this will help take the “noise” out of end user complaints. You have given them easy ways to see and links to correct data.
- Some alternative ways to allow users to update data
 - ITD Editors
 - ITROI Excel editing
 - Custom excel updates
 - Custom allocation spreading up front based on cyclical need by role
- Foster positive competition with a Compliance dashboard.

Even more best practices from
the guys at itdesign



> ALLOCATIONS

DELETE

Allocations by Investment

Months 16 SHOW



Name	Mar '20	Apr '20	May '20	Jun '20	Jul '20	Aug '20	Sep '20	Oct '20	Nov '20	Dec '20	Jan '21	Feb '21	Mar '21	Apr '21	May '21	Jun '21
BI Analytics			34.5	34.5	34.5	34.5	34.5	34.5	34.0							
Data Warehouse Performance Tuning										14.3	78.7	71.7	32.5			
eCommerce Portal	5.7	125.7	120.0	127.1	136.6	130.3	121.4	146.4	46.7							
Establish Agile Processes			15.2	15.2	15.2	15.2	15.2	15.2	15.2	9.5						
Financial Process Audit					13.0	7.0	16.3	9.0								

> RESOURCES

UTILIZATION FILTER

DELETE

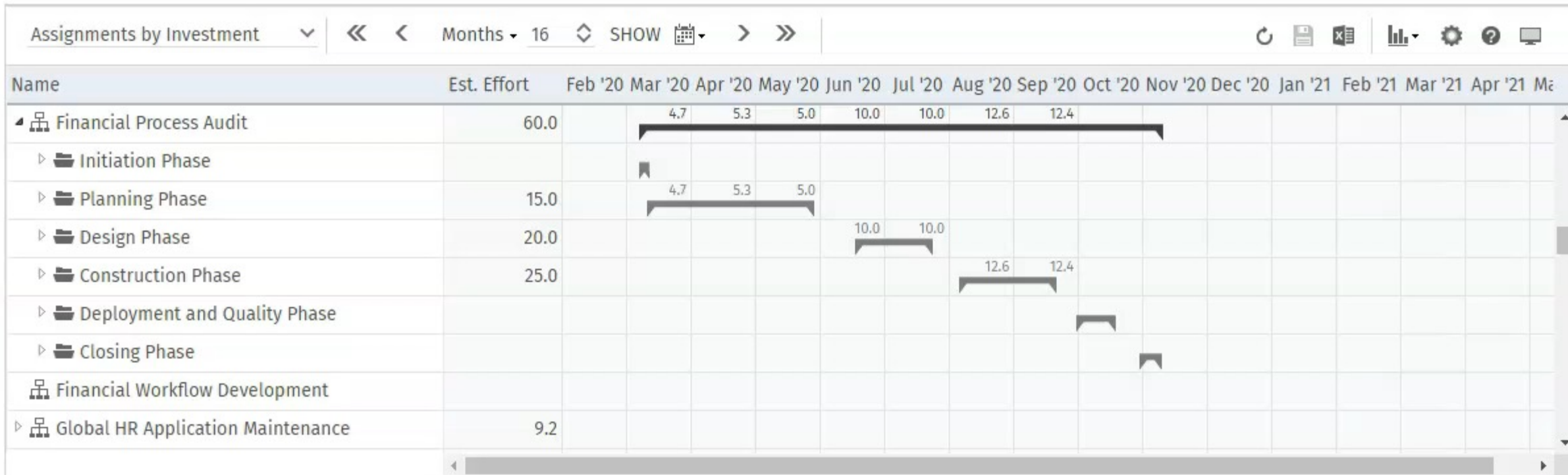
Name	Mar '20	Apr '20	May '20	Jun '20	Jul '20	Aug '20	Sep '20	Oct '20	Nov '20	Dec '20	Jan '21	Feb '21	Mar '21	Apr '21	May '21	Jun '21
Cooper, Andy Developer																
Evans, Sean Developer																
Fisher, Hank Developer																
Fowler, Ray Developer																
Gillian, Erin Developer																

Work effort unit: Days | Planned Allocation

Displaying 3 - 7 of 14

> ASSIGNMENTS

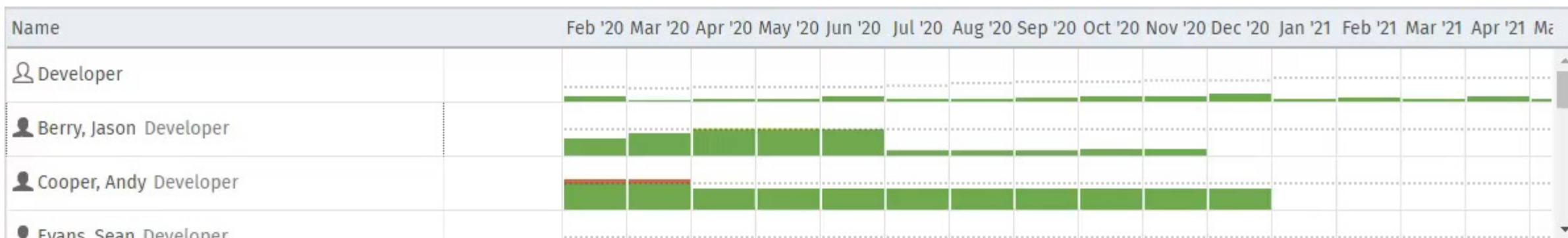
DELETE



> RESOURCES

Developers

DELETE



Work effort unit: Days | ETC

Displaying 1 - 4 of 14

So...

- When you're really into resource management: Have a look at **Advanced Resource Planning**
- Super fast
- Runs on demand
- Sold and Supported by Rego
- See us outside or visit advanced-resource-planning.com

Questions?



Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at [pmi.org](https://www.pmi.org)
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



Let us know how we can improve!
Don't forget to fill out the class survey.



Phone

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www.regouniversity.com