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regoUniversity

SAN DIEGO • 2023

Resource Management Roundtable

Your Guides:

Ross Hensel and Mike Pokorny

Introductions

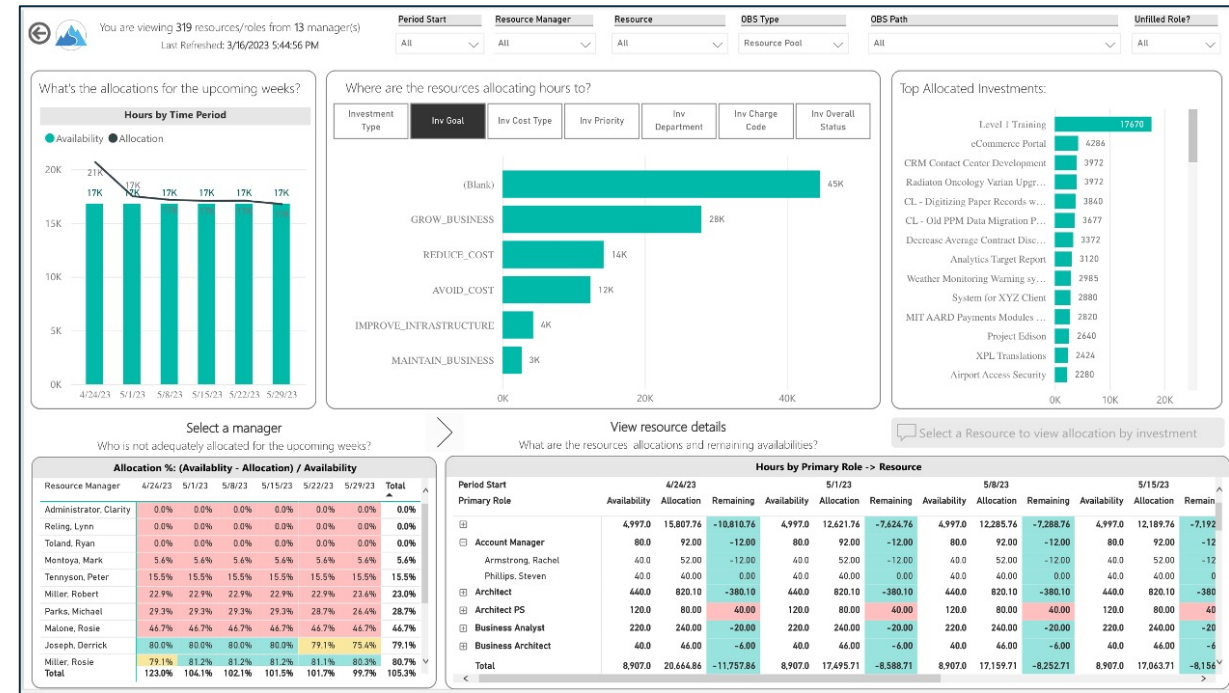
- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself
- Business Cards

Here Are a Few of the Questions We've Heard...

- Who is responsible for Resource Allocations?
 - PM? RM? Both?
- How are we handling communication between the RMs and PMs?
- Do you follow a process for bookings and approving the staff and allocations?
- How are we defining our Capacity and tracking Demand?
 - Roles? Departments? Both?
- What cadence should we be updating our Staff Plans and how far out should we be trying to allocation named and unnamed resources?
- How precise should we be trying to get with our staffing?



RegoXchange – Resource Management Summary Dashboard



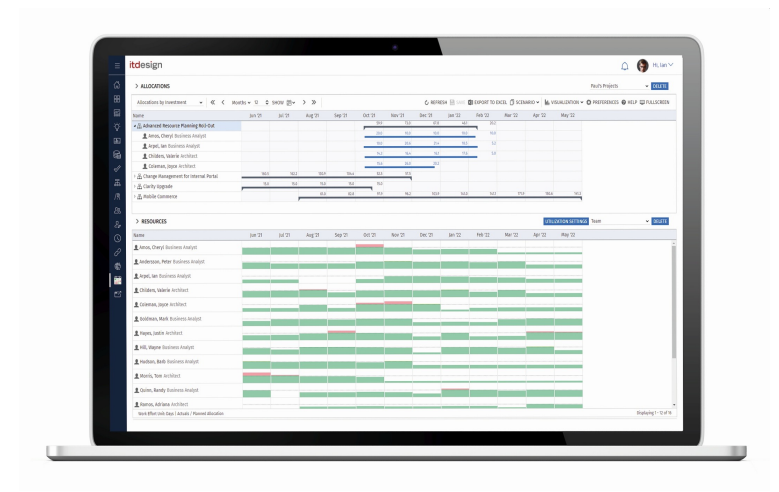


itd Advanced Resource Planning

Your add-on for Professional Resource Management

RegoU 2023 San Diego

Germany Is Famous For?



Add-on for Professional Resource Planning in Clarity

itd Advanced Resource Planning: Features & Benefits

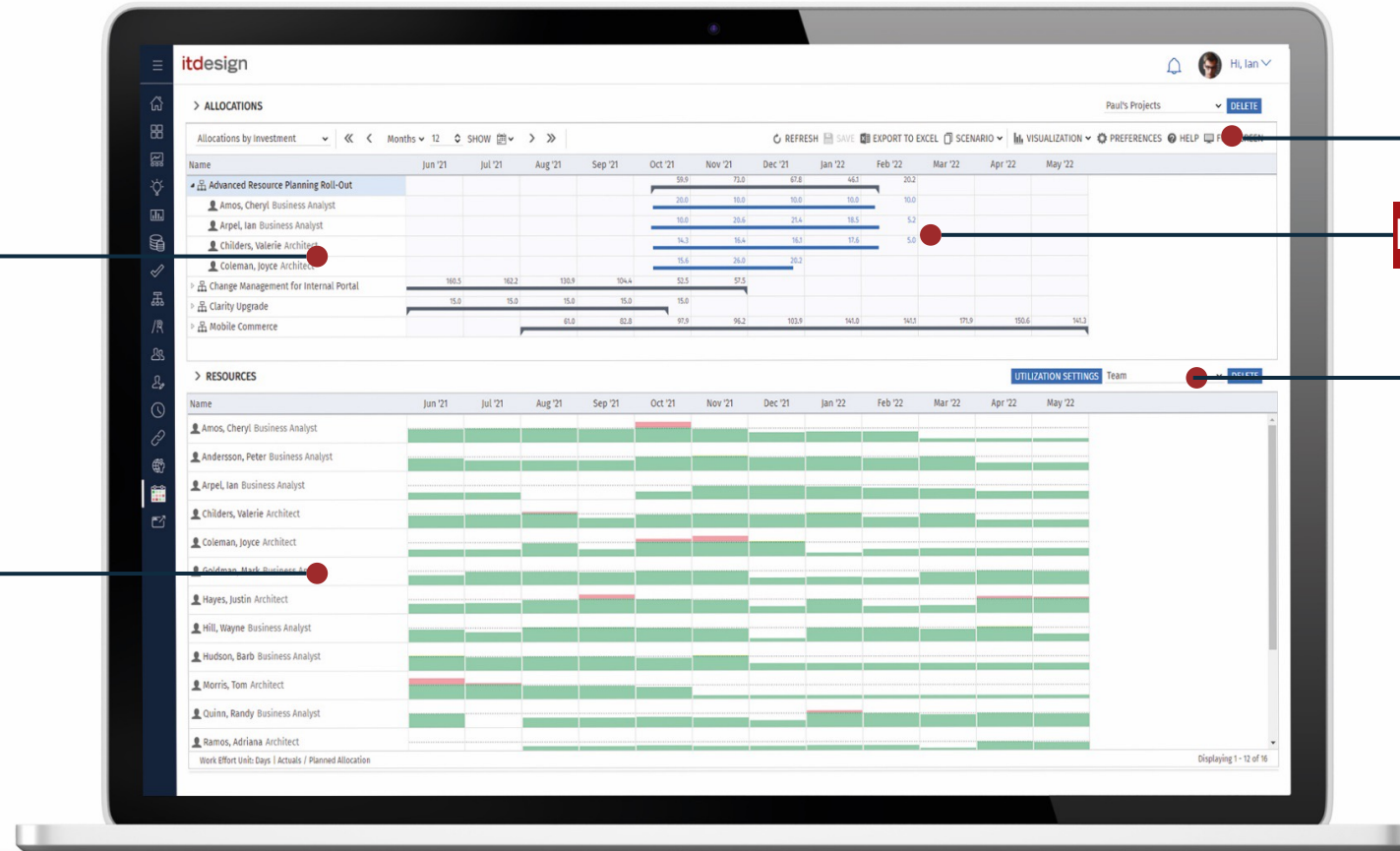
Customized View

Drag and Drop

Scenario Planning

Maximum Transparency

Configurable Filters



Why it'd Advanced Resource Planning?

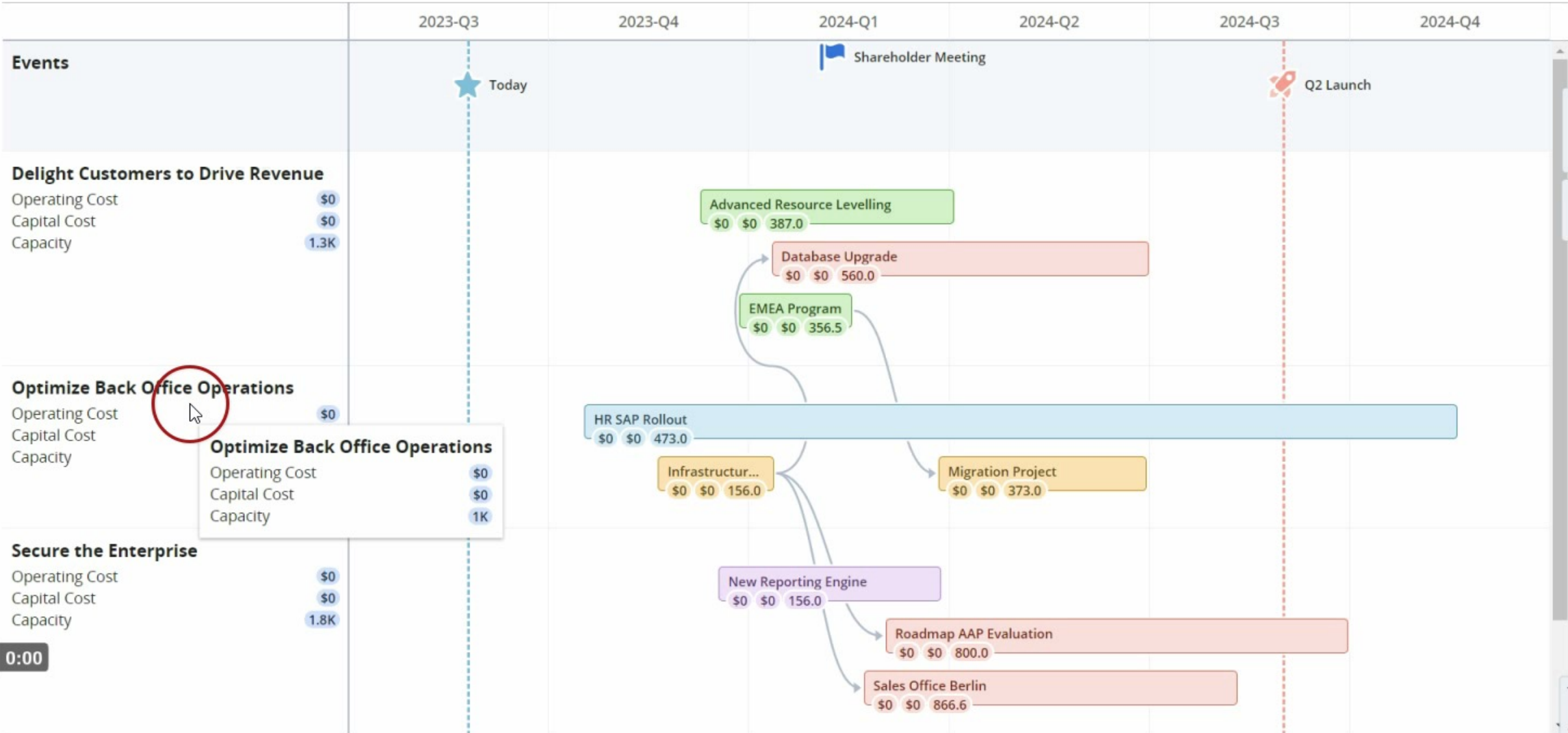
Consider your resource's capacity
while planning your Roadmaps

Roadmap Items Resource Levelling Properties

Scenario
Roadmap 2023/2024

Search...

View
(Copy) Strategy and Stakeholder Save



Swimlanes

Details

Legend

itd Advanced Resource Planning in Your Roadmaps

Find the best timeslot to approve
your projects and ideas

Roadmap Items Resource Levelling Properties

> ALLOCATIONS

DELETE

View: *Allocations by Investment* [SAVE VIEW] [Navigation icons] Quarters 12 [SHOW] [Calendar icon] [Refresh] [Print] [Bar chart] [Settings] [Help]

Name	Investment...	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
Advanced Resource Levelling	Approved		120.0	2,960.0	16.0				
	Approved		120.0	2,960.0	16.0				
Database Upgrade	Approved			3,120.0	1,360.0				
	Approved					3,140.9	1,339.1		
EMEA Program	Unapproved		851.8	2,000.0					
	Unapproved		851.8	2,000.0					
HR SAP Rollout	Approved		912.0	920.0	824.0	688.0		435.6	
	Approved		912.0	920.0	824.0	688.0		435.6	
Infrastructure Upgrade	Approved		960.0	288.0					
	Approved		960.0	288.0					
...	Approved			32.8	2,951.2				

> RESOURCES

UTILIZATION SETTINGS Bottleneck Roles DELETE

Name	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
Architect								
Manager								
Product Owner								
QA								

Advanced Resource Planning in Your Roadmaps

Stretch and shrink investments
to avoid bottlenecks

Roadmap Items Resource Levelling Properties

> ALLOCATIONS

DELETE

View
Allocations by Investment SAVE VIEW ⏪ ⏩ Quarters 12 SHOW 📅 ⏪ ⏩

🔄 📄 📊 ⚙️ ? HELP 🗨️

Name	Investment...	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
▶️ Advanced Resource Levellir	Approved		120.0	2,960.0	16.0				
	Approved		120.0	2,960.0	16.0				
▶️ Database Upgrade	Approved			3,120.0	1,360.0				
	Approved					3,140.9	1,339.1		
▶️ EMEA Program	Unapproved		851.8	2,000.0					
	Approved	851.8	2,000.0						
▶️ HR SAP Rollout	Approved		912.0	920.0	824.0	688.0	435.6		
	Approved		912.0	920.0	824.0	688.0	435.6		
▶️ Infrastructure Upgrade	Approved		960.0	288.0					
	Approved		960.0	288.0					
▶️ ...	Approved			32.8	2,951.2				

> RESOURCES

UTILIZATION SETTINGS Bottleneck Roles DELETE

Name	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025	Q2 2025
Architect								
Manager								
Product Owner								

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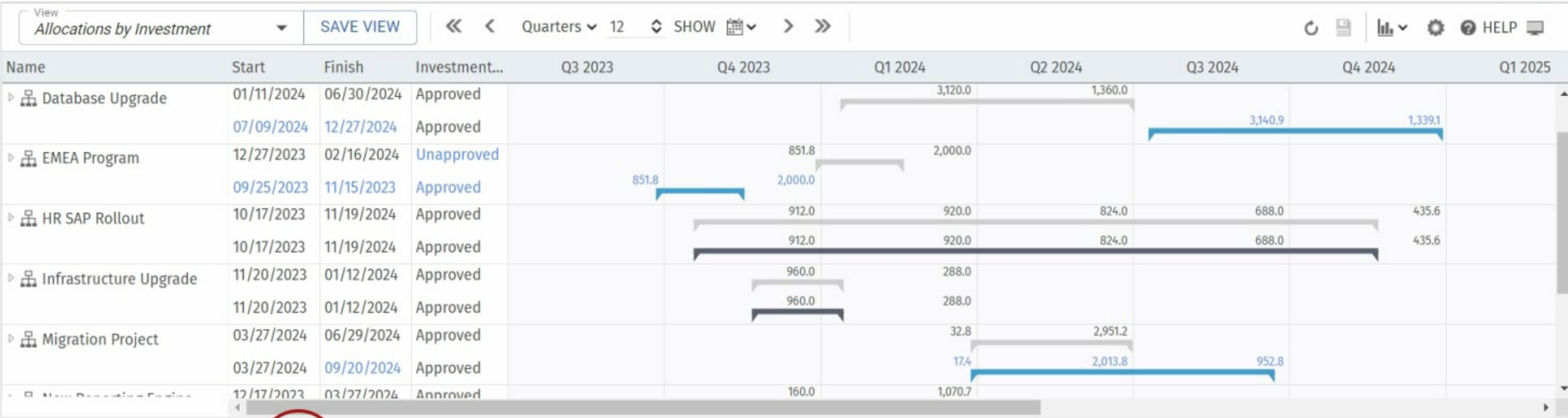
itd Advanced Resource Planning in Your Roadmaps

Compare your scenarios and
receive an overview of all changes

Roadmap Items **Resource Levelling** Properties

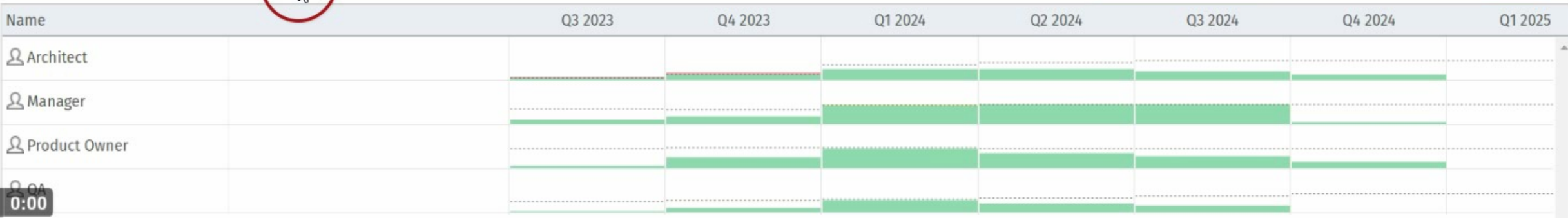
> ALLOCATIONS

DELETE



> RESOURCES

UTILIZATION SETTINGS Bottleneck Roles DELETE



Resource Planning Supported by Itd Intelligence

The quickest way to staff your projects
with the right resources!

itd Advanced Resource Plann... Organizational Demand Top Down Planning Workloads

> ALLOCATIONS

My Projects [DELETE](#)

View: *Allocations by Investment* [SAVE VIEW](#) << < Months 12 SHOW > >>

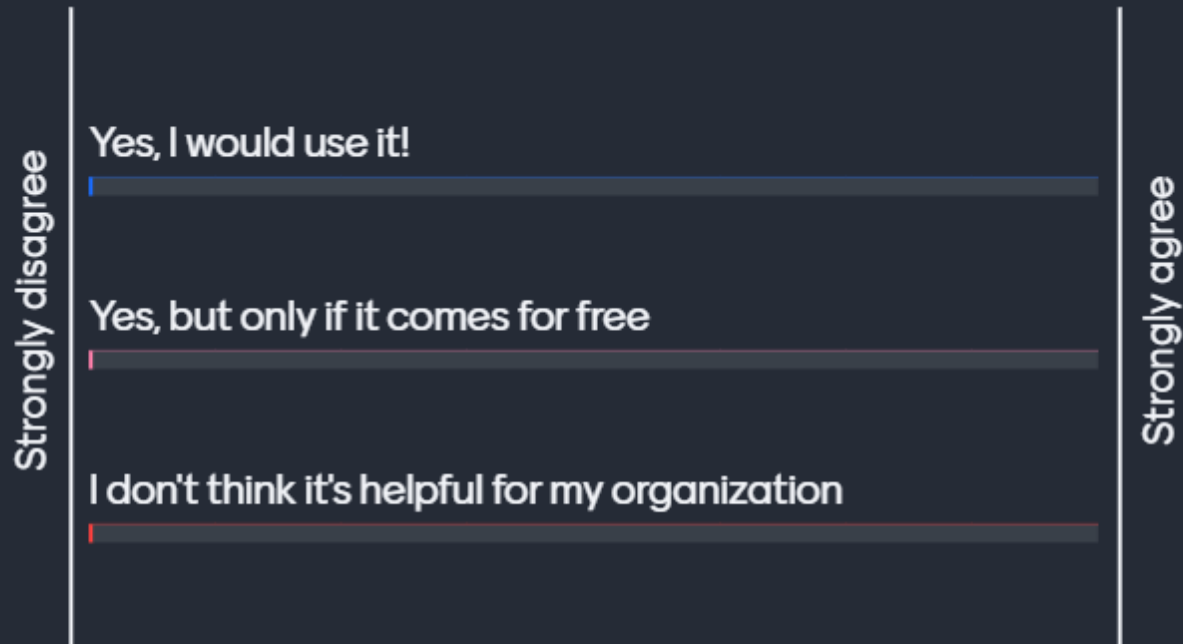
Name	Aug '23	Sep '23	Oct '23	Nov '23	Dec '23	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24
Advanced Resource Planning Roll-c							53.1	70.8	75.1	91.0		
Commerce ***			70.0	70.0	70.0	70.0						
Financial Process Audit	63.0	61.0	62.0	62.0	59.0							
Holiday	186.0	56.0	50.0	99.0	214.6	174.3	153.7	151.1	168.0	181.8	145.2	169.2
International Trade Show		166.8	222.3	226.4	207.4	177.4						
Run the Business	334.3	305.6	318.5	315.9	305.2	330.7	305.2	293.9	307.0	312.9	274.9	316.4

> RESOURCES

[UTILIZATION SETTINGS](#) [DELETE](#)

Name	Aug '23	Sep '23	Oct '23	Nov '23	Dec '23	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24
Hayes, Todd Security Architect	Green	Green	Green	Green	Green							
Miller, Veronica Security Architect	Green	Green	Green	Green	Green							
Roberts, Beth Security Architect	Green	Green	Green	Green	Green	Green	Red					
Smith, Kevin Security Architect	Green	Green	Green	Green	Green							
Security Architect	Green	Red	Green	Red	Red	Green						

Would you use A.I. for your Resource Planning?





itd Advanced Resource Planning

Your add-on for Professional Resource Management

23.09.23

RegoU 2023 San Diego

About Our Partnership

rego consulting

- 150+ expert guides
- 650+ happy customers
- Founded in 2007
- Largest Clarity partner in North America
- Special expertise: Agility, free webinars

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Since 2007 | Our Partnership

- Affiliated companies with similar mindset
- Sharing best practices with each other
- Having tremendous expertise together
- Mutual distribution of add-ons

itdesign

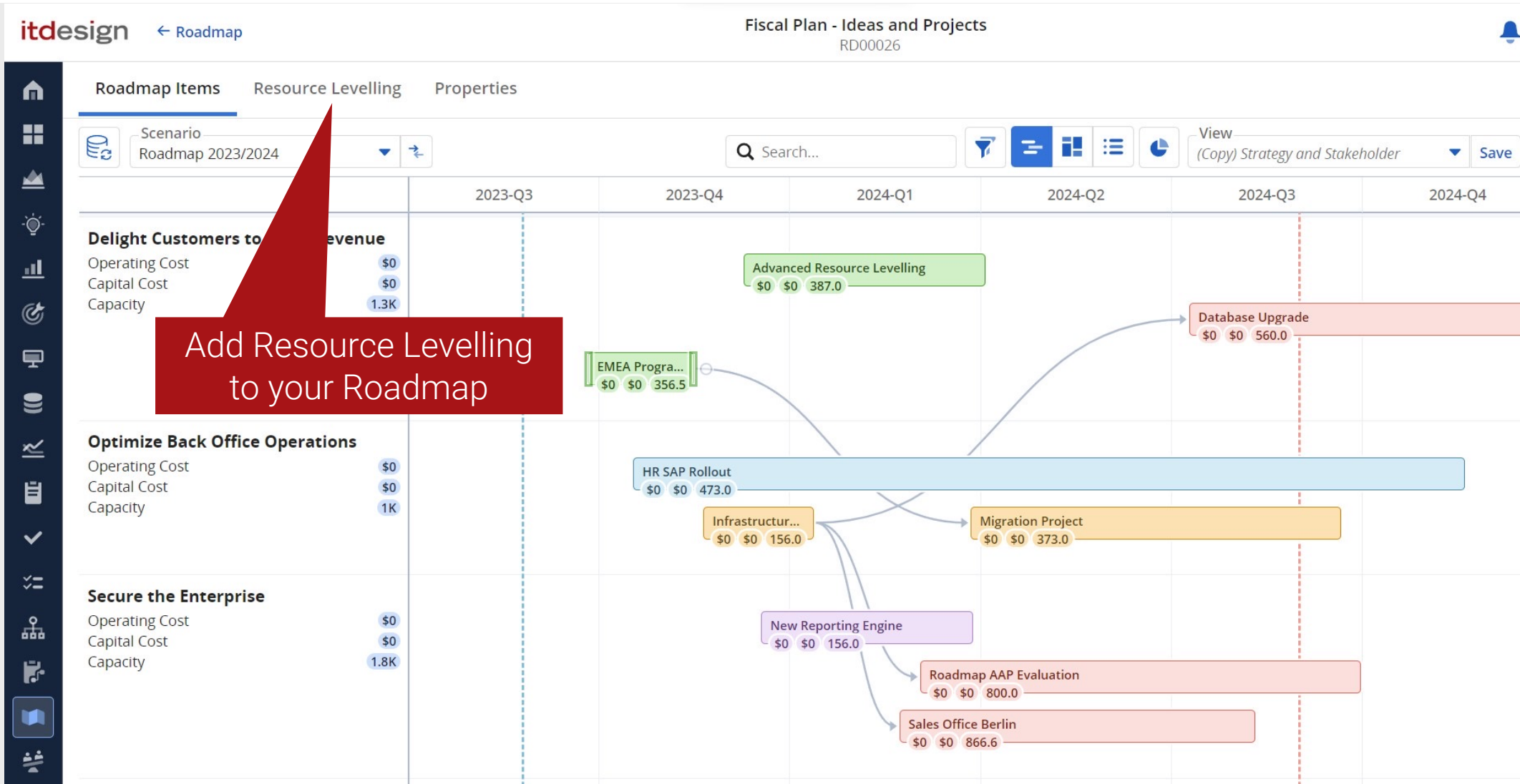
- 200+ expert guides
- 600+ happy customers
- Founded in 1999
- Largest Clarity partner in Europe
- Special expertise: Resource planning

[Get to know itdesign >](#)

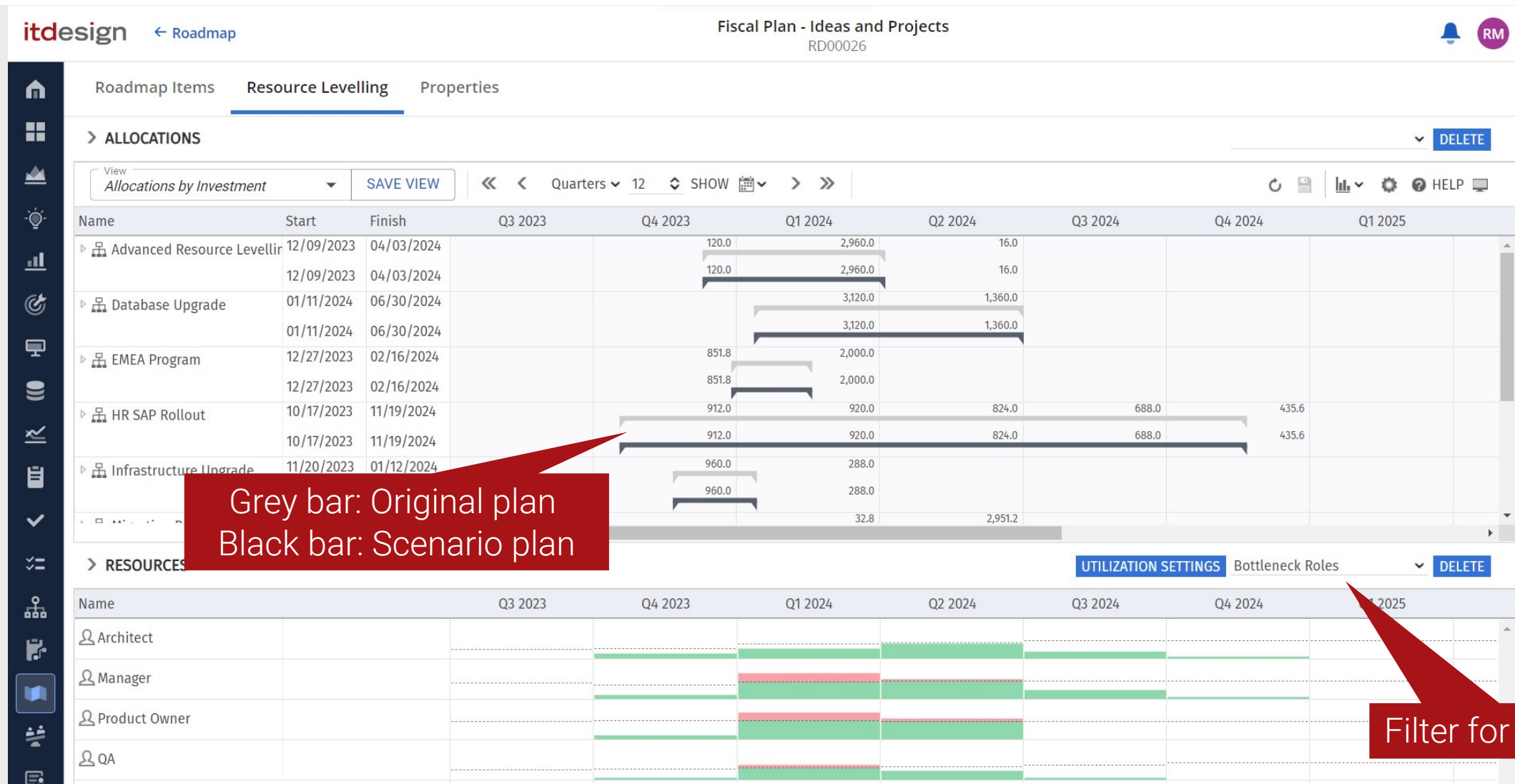
itd Advanced Resource Planning in Roadmaps

Consider your Resource's Capacity
while planning your Roadmaps!

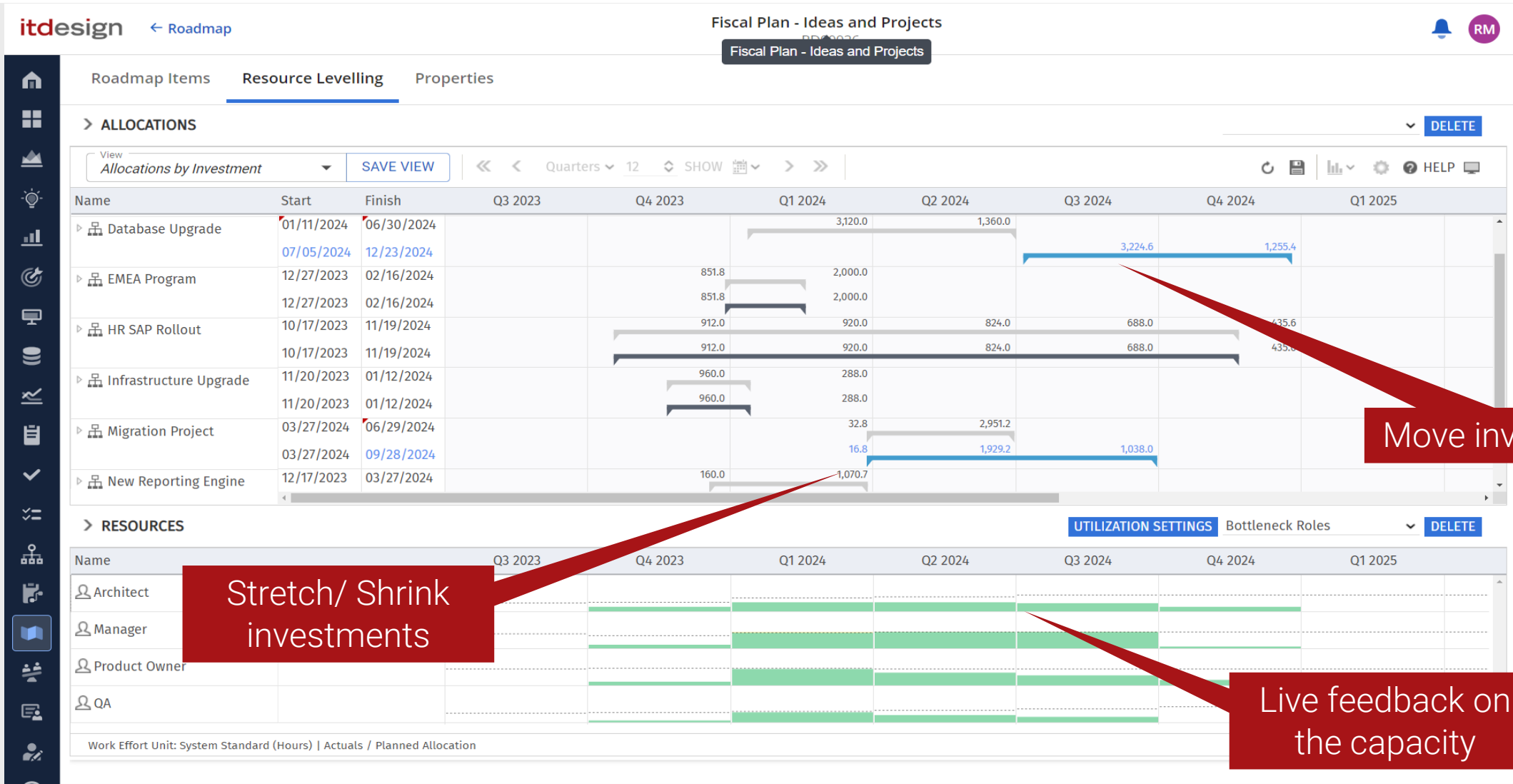
How to Consider Resources in Your Roadmaps



Investments and Resource Capacity in One View



Change Your Investments in Scenario Mode



Move investments

Stretch/ Shrink investments

Live feedback on the capacity

Change Investments Status

itdesign [← Roadmap](#) Fiscal Plan - Ideas and Projects
RD00026 🔔 RM

Roadmap Items Resource Levelling Properties

> ALLOCATIONS DELETE

View: *Allocations by Investment* SAVE VIEW ⏪ < Quarters 12 SHOW 🔄 📄 📊 ⚙️ 🆘

Name	Start	Finish	Investment...	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Database Upgrade	01/11/2024	06/30/2024	Approved			3,120.0	1,360.0			
EMEA Program	07/05/2024	12/23/2024	Approved					3,224.6	1,255.4	
EMEA Program	12/27/2023	02/16/2024	Unapproved		851.8	2,000.0				
EMEA Program	10/21/2023	12/11/2023	Approved		2,851.8					
HR SAP Rollout	10/17/2023	11/19/2024	Approved		912.0	920.0	824.0	688.0	435.6	
HR SAP Rollout	10/17/2023	11/19/2024	Approved		912.0	920.0	824.0	688.0	435.6	
Infrastructure Upgrade	11/20/2023	01/12/2024	Approved		960.0	288.0				
Infrastructure Upgrade	11/20/2023	01/12/2024	Approved		960.0	288.0				
Migration Project	03/27/2024	06/29/2024	Approved			32.8	2,951.2			
Migration Project	03/27/2024	09/28/2024	Approved			16.8	1,929.2	1,038.0		
New Reporting Engine	12/17/2023	03/27/2024	Approved		160.0	1,070.7				

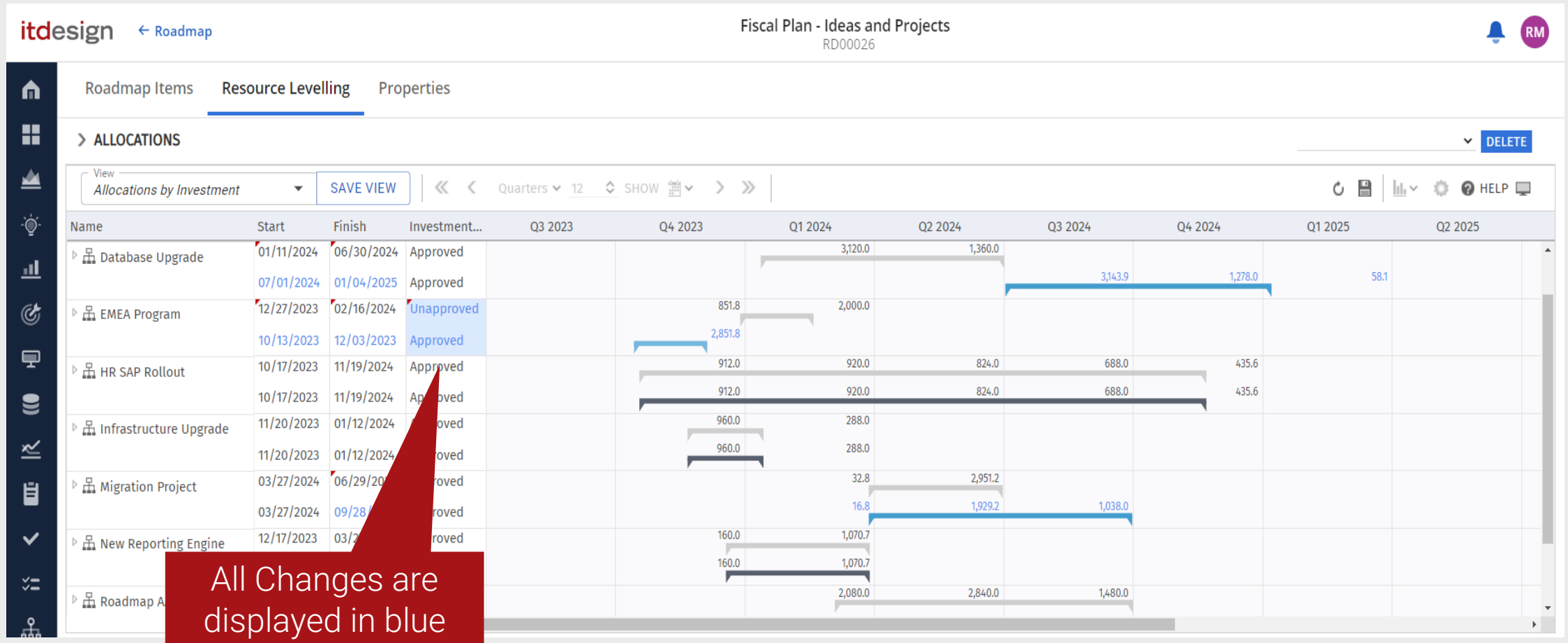
> RESOURCES UTILIZATION SETTINGS Bottleneck Roles DELETE

Name	Q3 2023	Q4 2023	Q1 2024	Q2 2024	Q3 2024	Q4 2024	Q1 2025
Architect							
Manager							
Product Own							
QA							

Work Effort Unit: System Standard (Hours) | Actuals / Planned Allocation Displaying 1 - 4 of 4

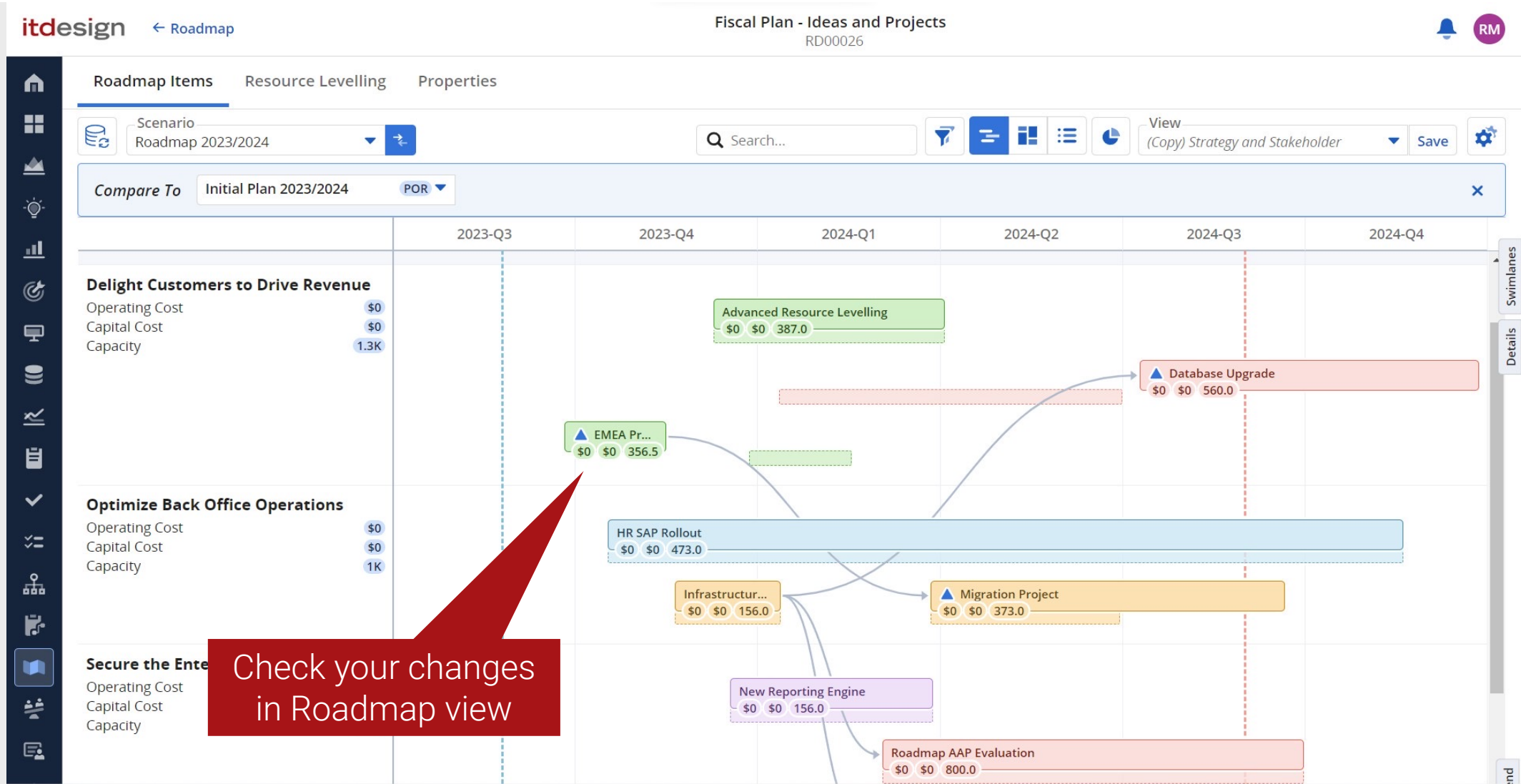
Find the right time slot to approve investments

Easy and Quick Overview of Your Scenarios



All Changes are displayed in blue

Compare Your Roadmaps



To learn more about Resource Leveling within Roadmaps, watch our video:



Consider Resources in Roadmaps
in itd Advanced Resource Planning

Staffing supported by itd Intelligence

The quickest way to staff your projects
with the right resources!

Quick Filter to Show the Right Candidates

The screenshot displays the 'itd Advanced Resource Planning' interface. At the top, the title bar shows 'itd Advanced Resource Planning' and '00000002'. Below the title bar, there are navigation tabs: 'itd Advanced Resource Plann...', 'Organizational Demand', 'Top Down Planning', and 'Workloads'. The main area is titled 'ALLOCATIONS' and shows a grid of resource allocations over time (Aug '23 to Jul '24). A context menu is open over the 'Security Architect' role, with the option 'Show candidates (by Role, OBS and Skills)' highlighted. A red callout box points to this option with the text 'Filter for the right candidates'. Below the grid, there is a 'UTILIZATION SETTINGS' section and a list of candidates for the 'Security Architect' role, including Miller, Veronica; Roberts, Beth; Smith, Kevin; and a general 'Security Architect' role.

Name	Start	Finish	Aug '23	Sep '23	Oct '23	Nov '23	Dec '23	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24
Advanced Resource Plannir	02/10/2024	05/27/2024							49.6	70.7	75.2	94.5		
eCommerce				70.0	70.0	70.0	30.0							
Business Analyst				30.0	30.0	30.0	10.0							
Engineer				10.0	10.0	10.0	5.0							
Project Manager				20.0	20.0	20.0	10.0	5.0						
Security Architect			3.0	61.0	62.0	62.0	59.0							
Financial Process Audit			3.0	56.0	50.0	99.0	214.6	174.3	153.7	151.1	168.0	181.8	145.2	169.2
Holiday				166.8	222.3	226.4	207.4	177.4						
International Trade Show														
Run the Business			2.7	304.2	316.9	314.4	303.8	329.0	303.8	292.4	305.5	312.9	274.9	316.4

UTILIZATION SETTINGS

	Aug '23	Sep '23	Oct '23	Nov '23	Dec '23	Jan '24	Feb '24	Mar '24	Apr '24	May '24	Jun '24	Jul '24
Miller, Veronica Security Archi												
Roberts, Beth Security Archite												
Smith, Kevin Security Archite												
Security Architect												

Filter for the right candidates

Let itd Intelligence Help You with the Best Choice

The screenshot displays the 'itd Advanced Resource Planning' interface. The main view is 'ALLOCATIONS' showing a resource allocation grid for 'Security Architect' across various projects from August 2023 to March 2024. A red arrow points from a recommendation panel on the right to the 'Security Architect' row in the grid.

Name	Start	Finish	Aug '23	Sep '23	Oct '23	Nov '23	Dec '23	Jan '24	Feb '24	Mar '24
Advanced Resource Plannir	02/10/2024	05/27/2024							49.6	70.7
eCommerce	10/01/2023	01/12/2024			70.0	70.0	70.0	30.0		
Business Analyst	10/03/2023	01/12/2024			30.0	30.0	30.0	10.0		
Engineer	10/04/2023	01/12/2024			10.0	10.0	10.0	5.0		
Project Manager	10/01/2023	01/12/2024			20.0	20.0	20.0	10.0		
Security Architect ***	10/01/2023	01/12/2024			10.0	10.0	10.0	5.0		
Financial Process Audit	07/09/2023	12/27/2023	63.0	61.0	62.0	62.0	59.0			
Holiday	01/01/2023	12/31/2025	186.0	56.0	50.0	99.0	214.6	174.3	153.7	151.1
International Trade Show	09/12/2023	01/23/2024		166.8	222.3	226.4	207.4			
Run the Business	01/01/2023	12/31/2025	332.7	304.2	316.9	314.4	303.8		303.8	292.4

The 'RESOURCES' section lists the following individuals:

- Hayes, Todd Security Architec
- Miller, Veronica Security Arch
- Roberts, Beth Security Archite
- Smith, Kevin Security Architec
- Security Architect

The 'itd Intelligence' panel on the right shows recommendations for Security Architects:

- Veronica Miller** (Security Architect) with a 94% recommendation score.
- Todd Hayes** (Security Architect) with a 71% recommendation score.
- Beth Roberts** (Security Architect) with a 59% recommendation score.
- Kevin Smith** (Security Architect) with a 31% recommendation score.

A red callout box with the text 'itd intelligence recommends the best match' points to the 'Security Architect' row in the grid.

itd intelligence recommends the best match

Find Out Which Candidates Fit Best

itd Intelligence CONFIGURE

Candidate Name	Role	Fit Percentage
Veronica Miller	Security Architect	94%
[Name obscured]	Security Architect	71%
Beth Roberts	Security Architect	59%
Kevin Smith	Security Architect	31%

Based on the work on projects considered to be similar such as "eBusiness Mobile Network" and "International Trade Show".

Recommendation based on previous projects

To learn more about itd Intelligence in
itd Advanced Resource Planning watch our video:



Use itd Intelligence for
your Staffing Processes

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Feel free to contact us for a demo!

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Questions?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



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- 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.



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info@regoconsulting.com



Website

www.regouniversity.com