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Best Practice Use of Clarity for Resource Management
Your Guides:
Mike Pokorny and Ross Hensel

Introductions

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

Agenda

- Overview
- Fundamentals
- Best Practices

Overview

- What is Resource Management?
  - Capturing data to understand WHO is or will be working on WHAT and WHEN
  - Understanding capacity and demand gaps to take action
  - Resource Management can also incorporate a business process to create and fulfill Staffing Requests

Capacity vs. Demand by Role

		Allocation by Month (Hours)												
Role		Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24	May-24	Jun-24	Jul-24	Aug-24	Total
Architect	Capacity	1,512.00	1,584.00	1,584.00	1,512.00	1,656.00	1,512.00	1,512.00	1,584.00	1,656.00	1,440.00	1,656.00	1,584.00	18,792.00
	Demand	1,718.58	1,757.29	1,581.29	1,805.35	2,635.25	2,428.01	2,428.01	2,274.67	2,217.65	1,928.39	2,033.65	1,945.23	24,753.39
	Remaining Capacity	-206.58	-173.29	2.71	-293.35	-979.25	-916.01	-916.01	-690.67	-561.65	-488.39	-377.65	-361.23	-5,961.39
Business Analyst	Capacity	924.00	968.00	968.00	924.00	1,012.00	924.00	924.00	968.00	1,012.00	880.00	1,012.00	968.00	11,484.00
	Demand	1,554.00	1,552.00	1,496.00	1,428.00	1,368.00	1,176.00	1,000.00	639.60	552.00	480.00	552.00	528.00	12,325.60
	Remaining Capacity	-630.00	-584.00	-528.00	-504.00	-356.00	-252.00	-76.00	328.40	460.00	400.00	460.00	440.00	-841.60
Business Architect	Capacity	168.00	176.00	176.00	168.00	184.00	168.00	168.00	176.00	184.00	160.00	184.00	176.00	2,088.00
	Demand	436.80	281.60	281.60	193.20	211.60	193.20	193.20	202.40	211.60	184.00	155.60	26.40	2,571.20
	Remaining Capacity	-268.80	-105.60	-105.60	-25.20	-27.60	-25.20	-25.20	-26.40	-27.60	-24.00	28.40	149.60	-483.20
Champion	Capacity	168.00	176.00	176.00	168.00	184.00	168.00	168.00	176.00	184.00	160.00	184.00	176.00	2,088.00
	Demand	1,512.00	1,584.00	1,456.00	1,344.00	1,472.00	1,280.00	840.00	880.00	920.00	800.00	920.00	880.00	13,888.00
	Remaining Capacity	-1,344.00	-1,408.00	-1,280.00	-1,176.00	-1,288.00	-1,112.00	-672.00	-704.00	-736.00	-640.00	-736.00	-704.00	-11,800.00
DBA	Capacity	840.00	880.00	880.00	840.00	920.00	840.00	840.00	880.00	920.00	800.00	920.00	880.00	10,440.00
	Demand	420.00	264.00	264.00	252.00	184.00	168.00	168.00	176.00	184.00	160.00	184.00	176.00	2,600.00
	Remaining Capacity	420.00	616.00	616.00	588.00	736.00	672.00	672.00	704.00	736.00	640.00	736.00	704.00	7,840.00
Developer	Capacity	2,016.00	2,112.00	2,112.00	2,016.00	2,208.00	2,016.00	2,016.00	2,112.00	2,208.00	1,920.00	2,208.00	2,112.00	25,056.00
	Demand	2,097.60	1,830.40	1,830.40	1,747.20	1,809.60	1,579.20	1,447.20	1,390.40	1,453.60	1,264.00	1,453.60	1,390.40	19,293.60
	Remaining Capacity	-81.60	281.60	281.60	268.80	398.40	436.80	568.80	721.60	754.40	656.00	754.40	721.60	5,762.40

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
- Separation of duties/checks and balances

Stumbling Blocks

- Finding the right level of granularity
- Enterprise decisions require comprehensive data
- Difficulty updating allocations
- Effective OCM
- Reporting goldilocks – nothing just right
- Effective communication between Resource, RM, PM
- Complexity, inconsistent process
- Management support

Fundamentals

Resource Management Building Blocks

Understand Capacity

- Complete Resource Profile:
  - Primary Role
  - Availability
  - OBS
  - Calendar

Track Demand

- Add Roles, Resources, or Teams to Investments
- Replace Roles with named Resources on Investments
- Enter Allocations over time
- Optional: Manage Assignments and ETC

Address Gaps

- Leverage OTB tools to understand and act on demand/capacity gaps over time
- Balance Individual or Team workloads
- Address upcoming gaps through staffing or planning changes
- Assess ability to deliver when planning new work
- Assess impact of change

Key Outputs

How many resources do we have?
What is our capacity to do work?
How are resources aligned within the organization?
What is high-level capacity by role?

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

What is the most constrained Role?
When will we have capacity to deliver new work?
What needs to shift to address new priorities?

Understanding Capacity and Demand

How much work can we do in a month?

Resource Availability

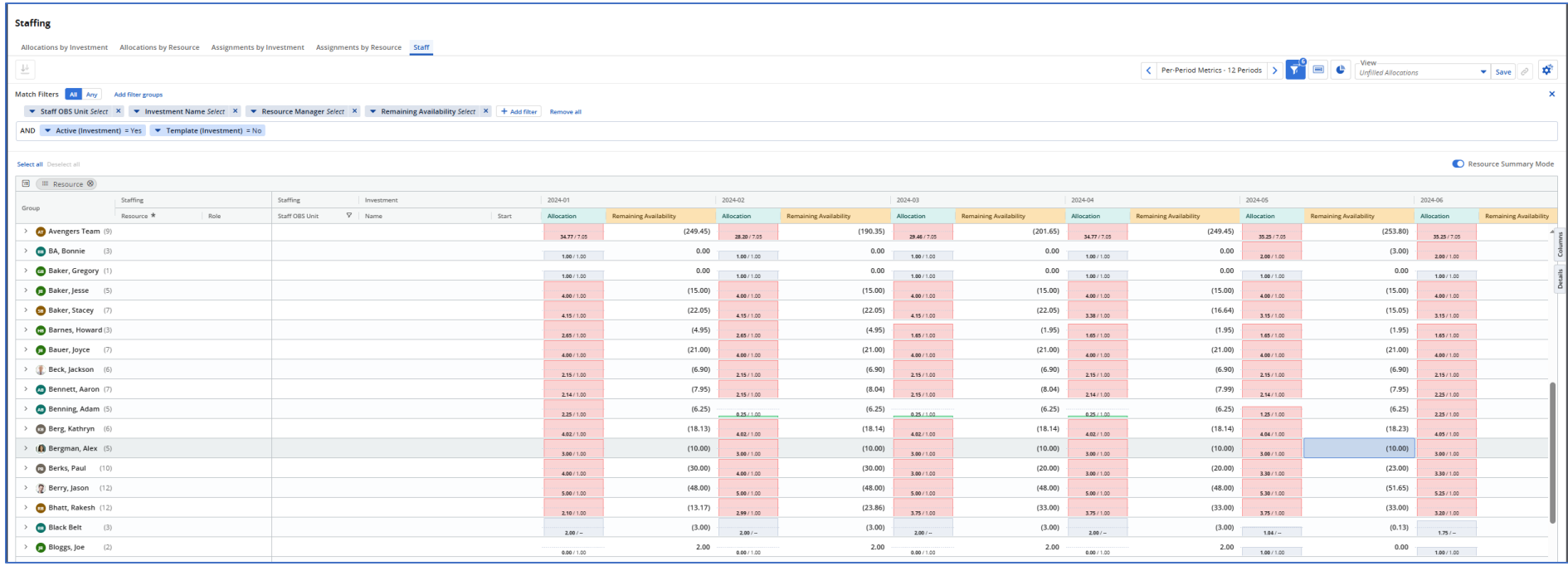
Availability in Hours / Day

Capacity

Sum of Availability over Time

Demand

Hours needed for investments over time

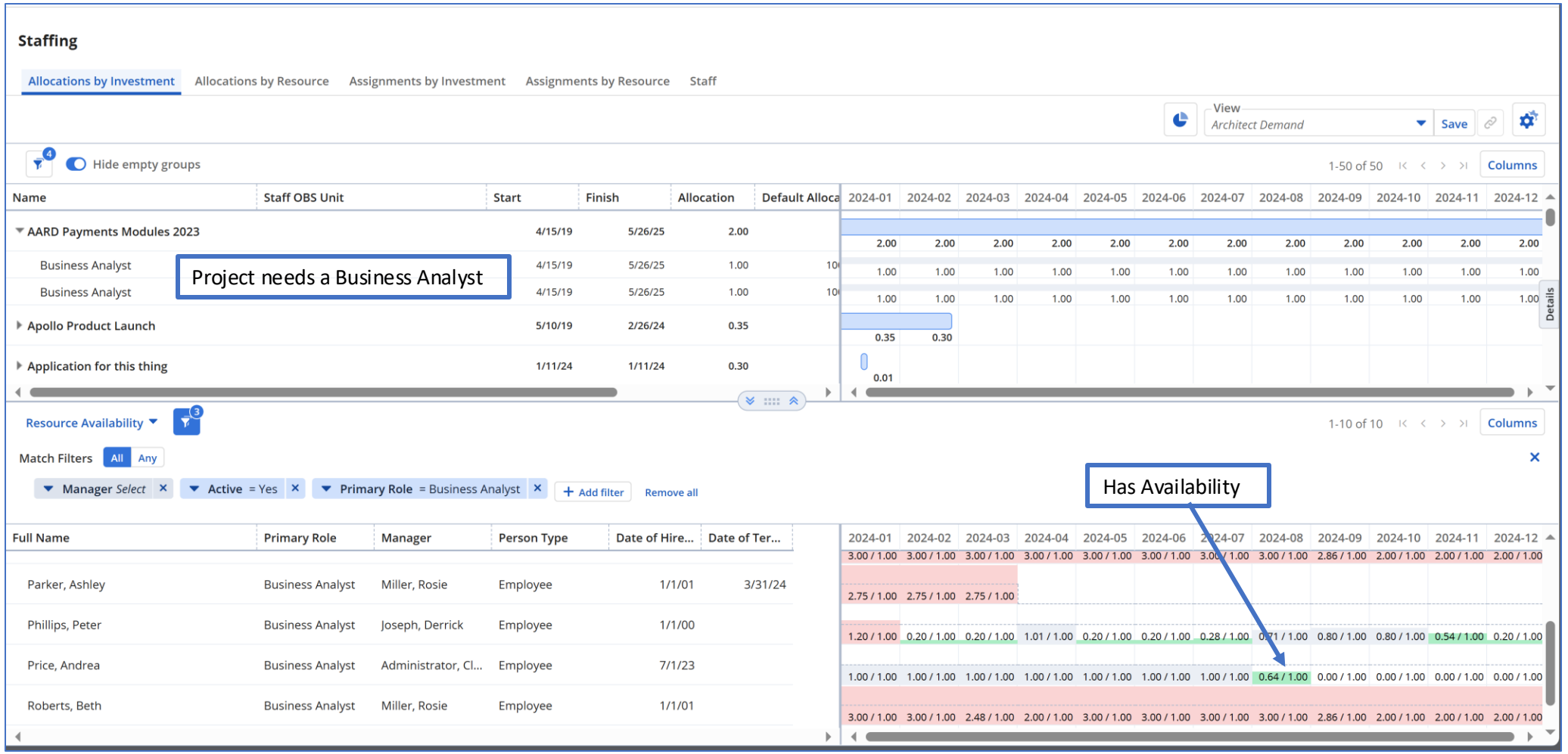


Investments can include Project, Ideas, and Custom Investments

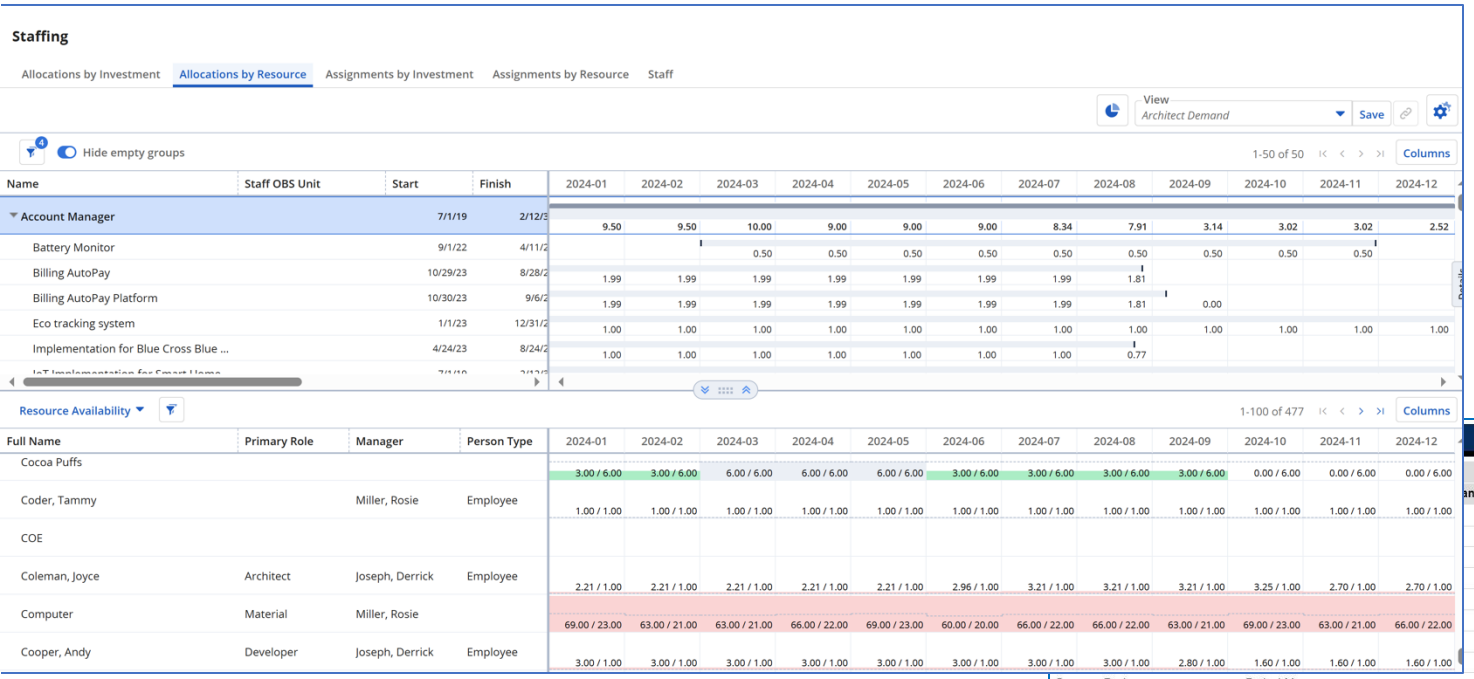
Putting it All Together

Clarity Staffing Page

Align Demand and Capacity



Understanding Capacity and Demand Gaps



Planning and Monitoring

- Staffing Page
- Roadmap
- Hierarchy

Additional Resources:

- Capacity vs. Demand by Resource Report
- Capacity vs. Demand by Role or OBS
- Over/ Under Allocation by Resource
- Capacity Overview Portlet
- Role Capacity Portlet

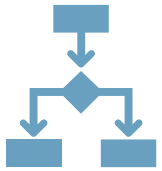
Remaining Capacity by Month (Hours)

		Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Total
Granger, Paula	Project Manager	0.00	0.00	136.00	168.70	0.00	0.00	0.00	0.00	0.00	0.00	0.00	304.70
Lewis, Dana	Business Analyst	0.00	0.00	0.00	0.00	-16.00	-18.00	-78.10	-176.00	-176.00	-168.00	-80.00	-712.10
Lewis, Paul	Project Manager	-12.00	0.00	0.00	13.99	-21.00	-55.99	-2.10	22.00	8.00	113.99	104.00	162.89
Martin, Paul	Project Manager	0.00	12.00	0.00	-168.00	-144.00	-196.00	-130.00	-176.00	0.00	0.00	0.00	-802.00
Moreau, Erin	Test Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-17.00	-16.00	-80.60	-113.60
Morris, Tom	Architect	0.00	-4.00	120.00	32.00	80.00	-102.00	-32.00	0.00	0.00	0.00	0.00	94.00
Parker, Ashley	Business Analyst	0.00	-54.00	-100.00	-84.00	-56.00	-32.00	0.00	0.00	0.00	0.00	0.00	-326.00
Patel, Sanjay	Developer	0.00	0.00	-76.00	-72.00	48.00	0.00	-22.00	0.00	0.00	0.00	0.00	-122.00
Perez, Carlos	Project Manager	0.00	0.00	0.00	0.00	0.00	-84.00	-168.00	-176.00	-100.88	-168.00	-80.00	-776.88
Quinn, Randy	Network Engineer	0.00	0.00	108.91	72.40	27.00	65.01	2.10	22.00	0.00	43.99	0.00	341.41
Reed, Henry	Project Manager	-8.00	0.00	-140.00	-160.00	-120.00	-104.00	0.00	0.00	0.00	68.00	84.00	-384.00
Reilly, Jason	Test Engineer	0.00	0.00	0.00	-152.00	-66.10	-18.00	0.00	0.00	0.00	0.00	0.00	-236.10
Riviera, Alex	Project Manager	0.00	0.00	0.00	-16.00	-34.00	-26.00	-168.00	-176.00	-17.60	-168.00	-84.00	-689.60
Sampson, Mike	Test Engineer	0.00	0.00	36.00	-36.00	-88.00	-8.00	28.00	24.00	176.00	8.00	18.00	158.00
Stewart, Diane	Storage Architect	-15.00	0.00	-10.60	-32.80	62.40	21.60	11.20	158.40	-158.40	-51.20	-65.60	-62.40
Stoneburg, Sam	Network Engineer	0.00	0.00	130.00	144.00	28.00	120.00	36.00	24.00	176.00	168.00	184.00	1,010.00
Thompson, Peter	Project Manager	0.00	0.00	-25.31	-13.99	-11.00	-57.00	0.00	0.00	0.00	-34.99	16.00	-134.29
Turner, Bruce	Test Engineer	0.00	0.00	76.00	-52.00	-178.00	28.70	26.00	117.00	16.00	0.00	0.00	33.70
Walker, Terry	Test Engineer	24.00	0.00	0.00	-8.00	-12.00	-38.00	-40.00	-44.00	-77.00	-68.00	-84.00	-335.00
Grand Total		**-11.00**	**114.00**	**124.09**	**-438.39**	**-480.30**	**-479.68**	**-524.90**	**-331.60**	**-1.48**	**-93.01**	**63.40**	**-2,033.27**

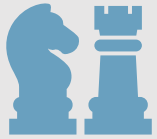
Implementation Best Practices

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.



- Staffing & Resource Management is about building effective business processes and takes 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.



- Assume you have directionally accurate forecast data in the tool. What mechanisms, processes, roles and responsibilities are in place to act on that information? Clearly define the outputs and who is accountable for them.

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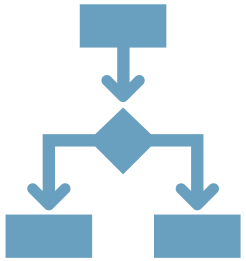
Open Mic

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

Effective Business Processes



- Staffing & Resource Management is about building and implementing effective business processes.
- Supporting business processes in an enterprise tool creates visibility and simplifies management, but it is not a magic fix for poorly defined processes.

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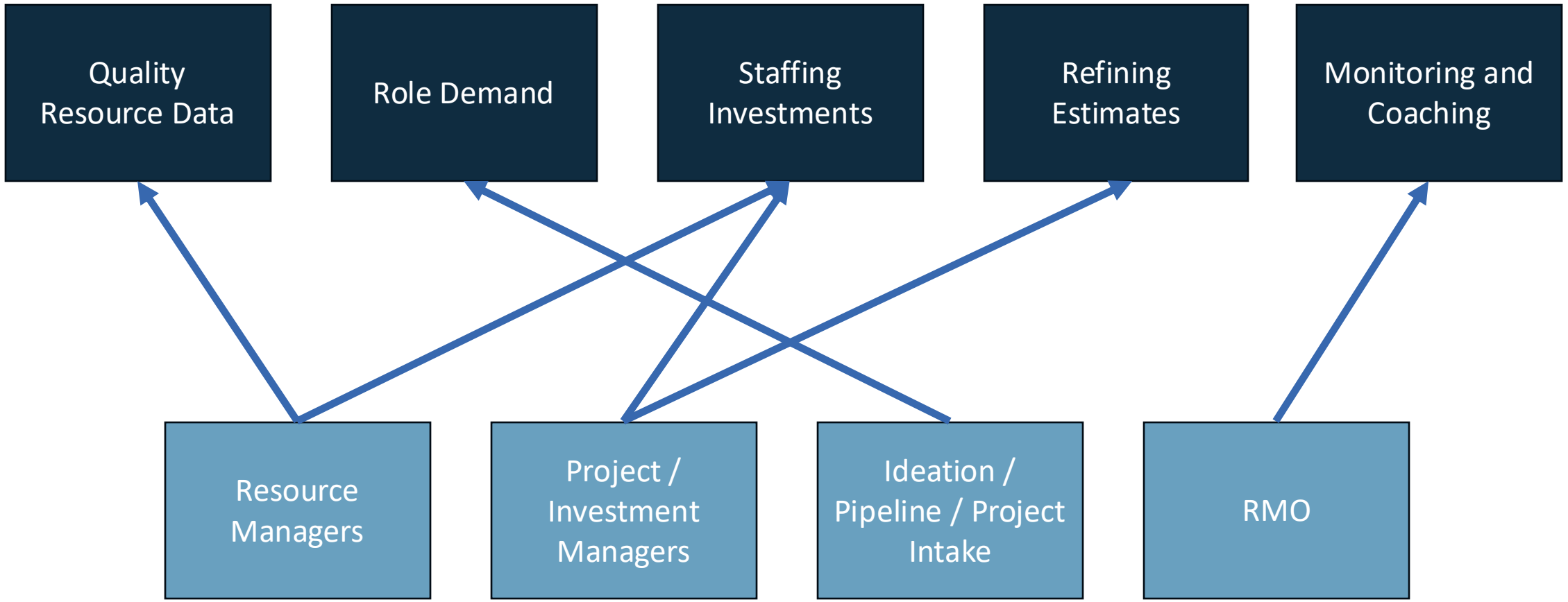
Processes and Accountability



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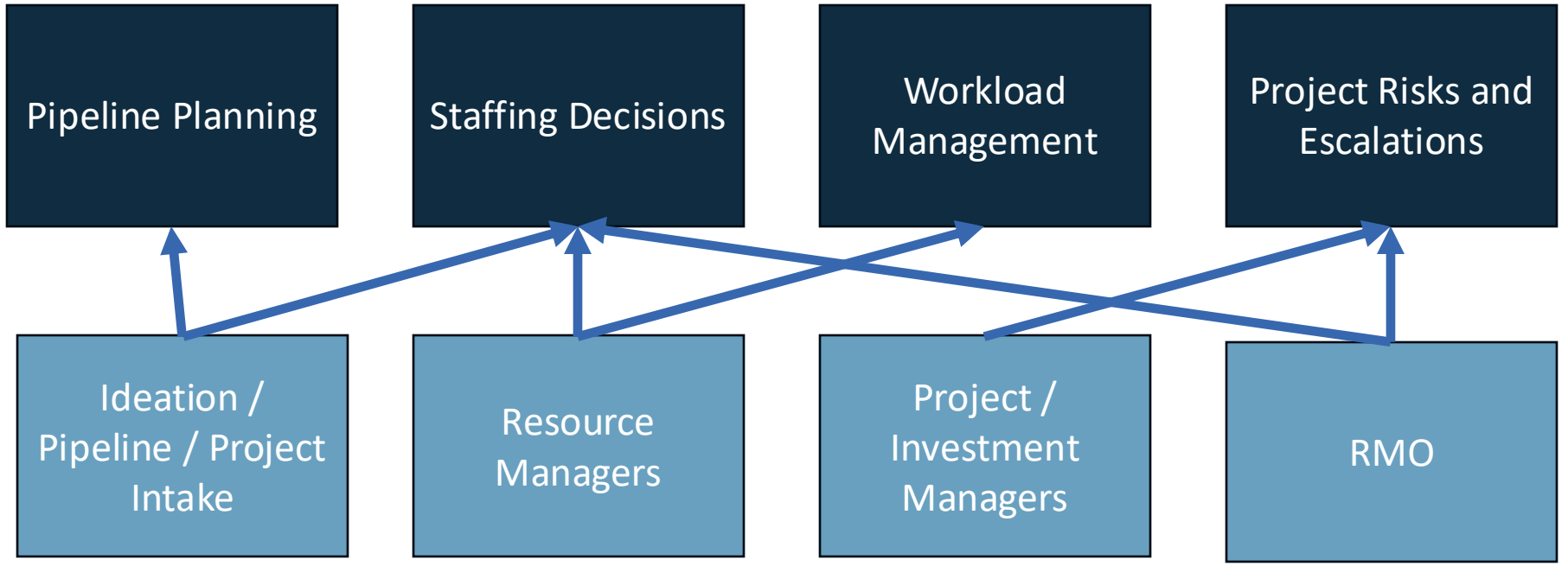
Leveraging the Data

- Assume you have directionally accurate forecast data in the tool. What mechanisms, processes, roles, and responsibilities are in place to act on that information? Clearly define the outputs and who is accountable for them



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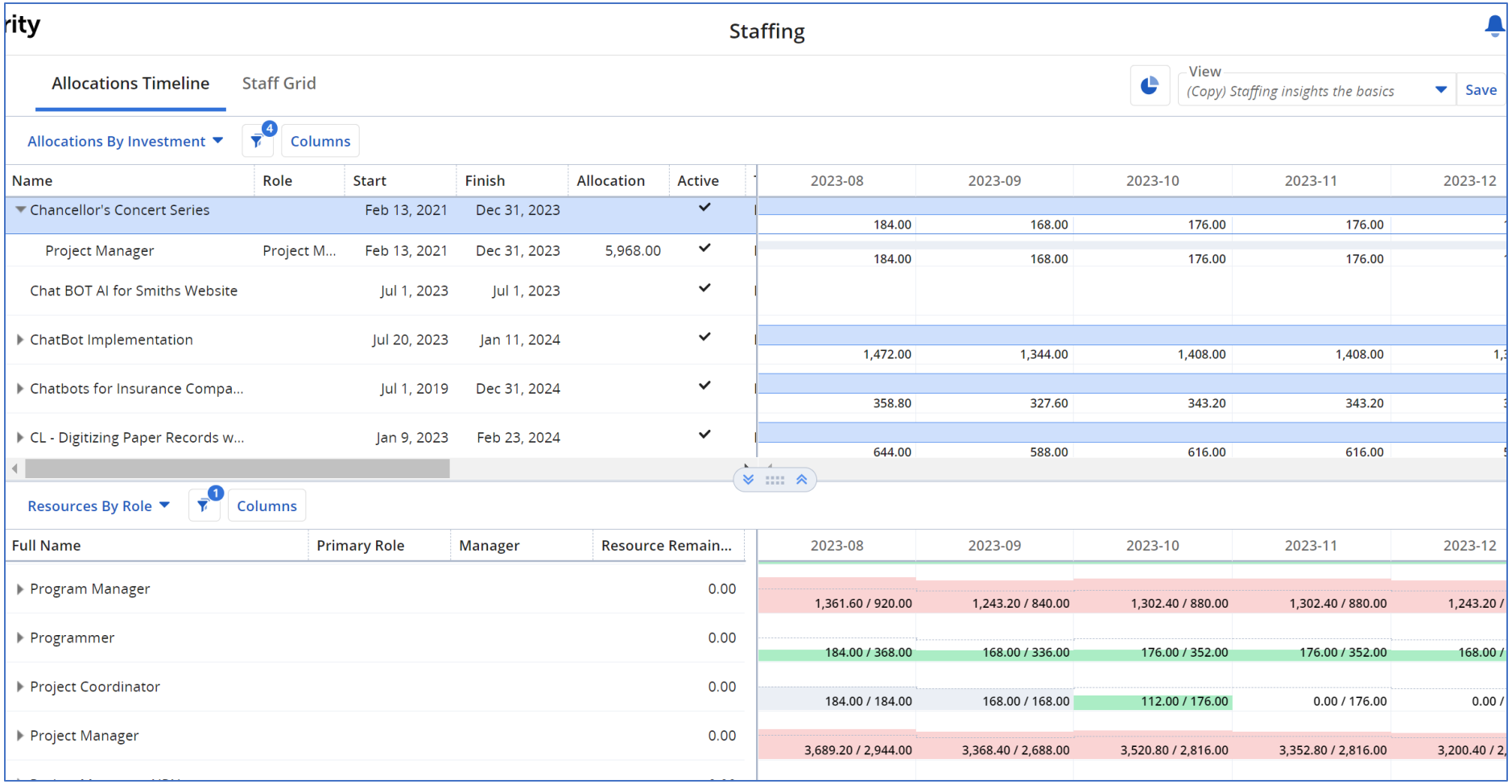
Leveraging the Data

In this example, Program and Project Managers are overallocated through the end of the year.

Is this information used by the Intake team when planning Investment start dates? Is this used to planning staff levels?



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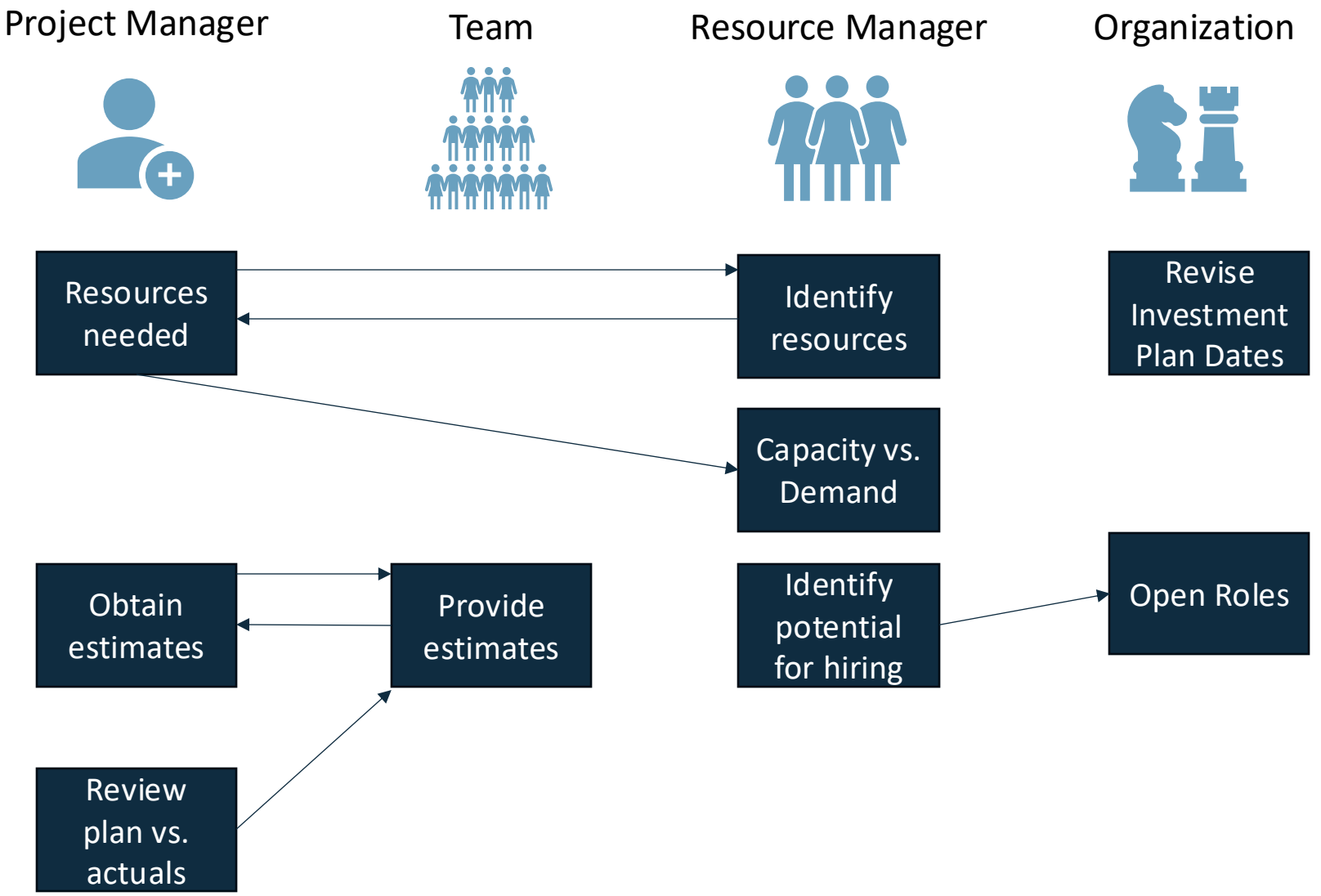
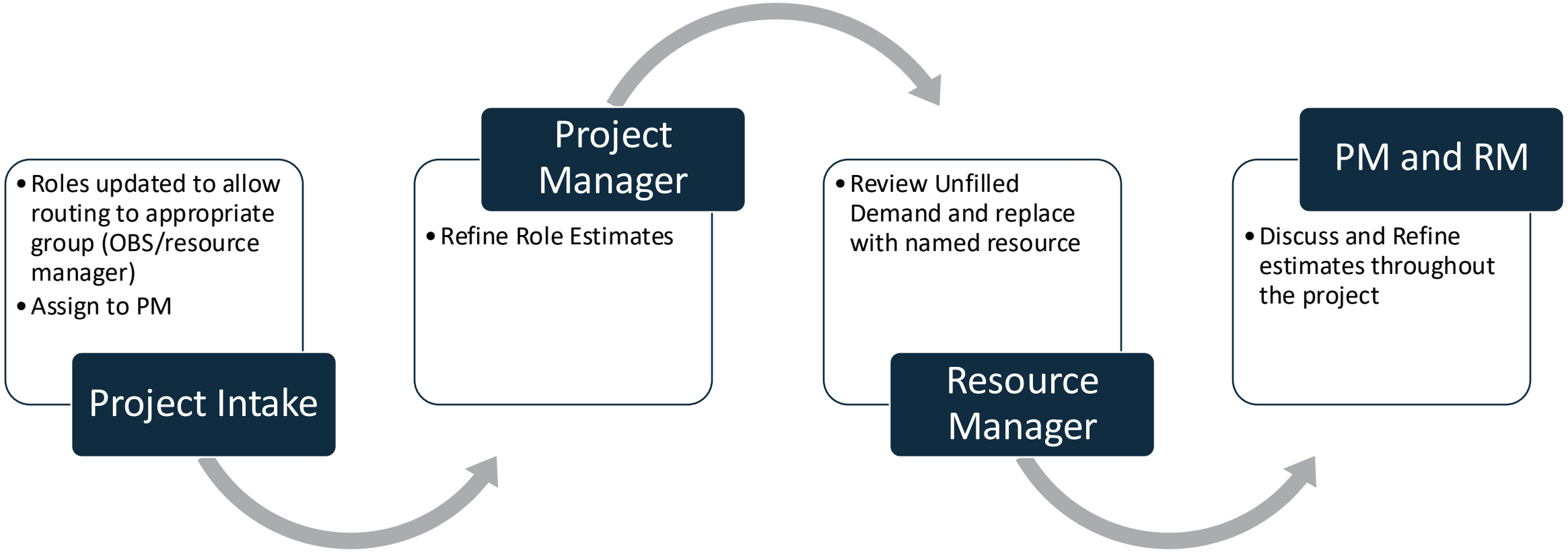
Communication is Key

Communication is key!



Staffing Process Example



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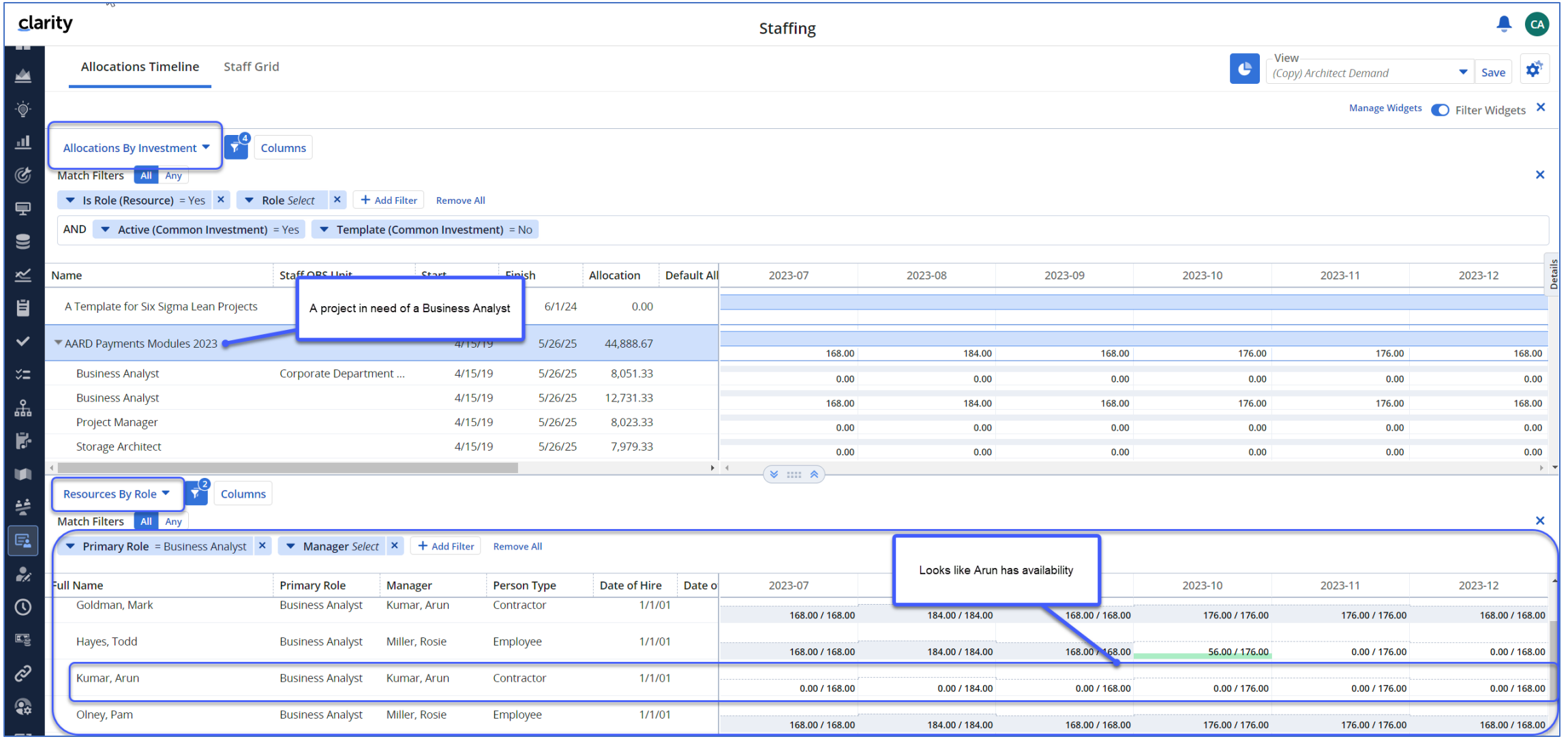
Staffing Process in Clarity



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Organizational Change Management

Why change?

- WIFM (What's In it For Me?)
- Greater Good
- Inevitability

What do *I* do?

- Clearly document
  WHO does WHAT and WHEN

How do I do that?

- Training
- Reference

Open Mic

- Is your data more granular than it needs to be?
- Are leaders acting on the available data?
- What OCM practices were effective for your organization?

Clarity Setup Best Practices

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)
- Maintain Date of Hire and Date of Termination
- For contractors, consider maintenance of a Contract End Date
- 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
- Remember – managing resources does not consume a license per resource
- Consider automation for Resource data

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Allocation Best Practices

- Manage allocations by the month
- Adjust expectations of accuracy and granularity according to the time horizon
- Use color-coding or filters to highlight exceptions
- If availability varies, use hours or % Availability as the Work Effort Unit of Measurement
- Encourage users making allocation updates to compare Allocation and prior two months of Actuals to inform estimation

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Assignment Best Practices

- Choose allocations or assignments – not both. Allocations are simpler and easier to manage for initial rollout.
- 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 pilling 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.

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Reporting Best Practices

- Start by leveraging OTB views – Staffing Page, Hierarchies, Role Capacity, Resource Workloads, OBS Aggregation
- 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

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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 is 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

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Questions?

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Surveys

Please take a few moments to fill out the class survey.
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- Access your account at pmi.org
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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**
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