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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

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- 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*

The screenshot displays a 'Staffing' dashboard with a table showing resource availability and demand. The table has columns for months from 2024-01 to 2024-06. Each month's data is split into 'Allocation' and 'Remaining Availability'. Resources are listed on the left, including 'Avengers Team', 'BA, Bonnie', 'Baker, Gregory', etc. The interface includes filters for 'Active (Investment) = Yes' and 'Template (Investment) = No'.

Group	Staffing Resource *	Role	Staffing Staff OBS Unit	Investment Name	Start	2024-01		2024-02		2024-03		2024-04		2024-05		2024-06	
						Allocation	Remaining Availability	Allocation	Remaining Availability	Allocation	Remaining Availability	Allocation	Remaining Availability	Allocation	Remaining Availability	Allocation	Remaining Availability
>	Avengers Team	(9)				34.77 / 7.05	(249.45)	28.20 / 7.05	(190.35)	29.46 / 7.05	(201.65)	34.77 / 7.05	(249.45)	39.25 / 7.05	(253.80)	39.25 / 7.05	
>	BA, Bonnie	(3)				1.00 / 1.00	0.00	1.00 / 1.00	0.00	1.00 / 1.00	0.00	1.00 / 1.00	0.00	2.00 / 1.00	(3.00)	2.00 / 1.00	
>	Baker, Gregory	(1)				1.00 / 1.00	0.00	1.00 / 1.00	0.00	1.00 / 1.00	0.00	1.00 / 1.00	0.00	1.00 / 1.00	0.00	1.00 / 1.00	
>	Baker, Jesse	(5)				4.00 / 1.00	(15.00)	4.00 / 1.00	(15.00)	4.00 / 1.00	(15.00)	4.00 / 1.00	(15.00)	4.00 / 1.00	(15.00)	4.00 / 1.00	
>	Baker, Stacey	(7)				4.15 / 1.00	(22.05)	4.15 / 1.00	(22.05)	4.15 / 1.00	(22.05)	3.38 / 1.00	(16.64)	3.15 / 1.00	(15.05)	3.15 / 1.00	
>	Barnes, Howard	(3)				2.65 / 1.00	(4.95)	2.65 / 1.00	(4.95)	1.65 / 1.00	(1.95)	1.65 / 1.00	(1.95)	1.65 / 1.00	(1.95)	1.65 / 1.00	
>	Bauer, Joyce	(7)				4.00 / 1.00	(21.00)	4.00 / 1.00	(21.00)	4.00 / 1.00	(21.00)	4.00 / 1.00	(21.00)	4.00 / 1.00	(21.00)	4.00 / 1.00	
>	Beck, Jackson	(6)				2.15 / 1.00	(6.90)	2.15 / 1.00	(6.90)	2.15 / 1.00	(6.90)	2.15 / 1.00	(6.90)	2.15 / 1.00	(6.90)	2.15 / 1.00	
>	Bennett, Aaron	(7)				2.14 / 1.00	(7.95)	2.15 / 1.00	(8.04)	2.15 / 1.00	(8.04)	2.14 / 1.00	(7.99)	2.14 / 1.00	(7.95)	2.25 / 1.00	
>	Benning, Adam	(5)				2.25 / 1.00	(6.25)	0.25 / 1.00	(6.25)	0.25 / 1.00	(6.25)	0.25 / 1.00	(6.25)	1.25 / 1.00	(6.25)	2.25 / 1.00	
>	Berg, Kathryn	(6)				4.02 / 1.00	(18.13)	4.02 / 1.00	(18.14)	4.02 / 1.00	(18.14)	4.02 / 1.00	(18.14)	4.04 / 1.00	(18.23)	4.05 / 1.00	
>	Bergman, Alex	(5)				3.00 / 1.00	(10.00)	3.00 / 1.00	(10.00)	3.00 / 1.00	(10.00)	3.00 / 1.00	(10.00)	3.00 / 1.00	(10.00)	3.00 / 1.00	
>	Berks, Paul	(10)				4.00 / 1.00	(30.00)	4.00 / 1.00	(30.00)	3.00 / 1.00	(20.00)	3.00 / 1.00	(20.00)	3.30 / 1.00	(23.00)	3.30 / 1.00	
>	Berry, Jason	(12)				5.00 / 1.00	(48.00)	5.00 / 1.00	(48.00)	5.00 / 1.00	(48.00)	5.00 / 1.00	(48.00)	5.30 / 1.00	(51.65)	5.25 / 1.00	
>	Bhatt, Rakesh	(12)				2.10 / 1.00	(13.17)	2.99 / 1.00	(23.86)	3.75 / 1.00	(33.00)	3.75 / 1.00	(33.00)	3.75 / 1.00	(33.00)	3.30 / 1.00	
>	Black Belt	(3)				2.00 / -	(3.00)	2.00 / -	(3.00)	2.00 / -	(3.00)	2.00 / -	(3.00)	1.84 / -	(0.13)	1.75 / -	
>	Bliggs, Joe	(2)				0.00 / 1.00	2.00	0.00 / 1.00	2.00	0.00 / 1.00	2.00	0.00 / 1.00	2.00	1.00 / 1.00	0.00	1.00 / 1.00	

Investments can include Project, Ideas, and Custom Investments



# Putting it All Together

## Clarity Staffing Page *Align Demand and Capacity*

**Staffing**

Allocations by Investment | Allocations by Resource | Assignments by Investment | Assignments by Resource | Staff

View Architect Demand | Save | Settings

Hide empty groups | 1-50 of 50 | Columns

Name	Staff OBS Unit	Start	Finish	Allocation	Default Allocated	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06	2024-07	2024-08	2024-09	2024-10	2024-11	2024-12
▼ AARD Payments Modules 2023																	
Business Analyst		4/15/19	5/26/25	2.00	100%	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
Business Analyst		4/15/19	5/26/25	1.00	100%	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Business Analyst		4/15/19	5/26/25	1.00	100%	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
▶ Apollo Product Launch																	
		5/10/19	2/26/24	0.35		0.35	0.30										
▶ Application for this thing																	
		1/11/24	1/11/24	0.30		0.01											

Resource Availability | 1-10 of 10 | Columns

Match Filters: All | Any

Manager Select | Active = Yes | Primary Role = Business Analyst | Add filter | Remove all

Has Availability

Full Name	Primary Role	Manager	Person Type	Date of Hire...	Date of Ter...	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06	2024-07	2024-08	2024-09	2024-10	2024-11	2024-12
Parker, Ashley	Business Analyst	Miller, Rosie	Employee	1/1/01	3/31/24	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	2.86 / 1.00	2.00 / 1.00	2.00 / 1.00	2.00 / 1.00
Phillips, Peter	Business Analyst	Joseph, Derrick	Employee	1/1/00		2.75 / 1.00	2.75 / 1.00	2.75 / 1.00									
Price, Andrea	Business Analyst	Administrator, Cl...	Employee	7/1/23		1.20 / 1.00	0.20 / 1.00	0.20 / 1.00	1.01 / 1.00	0.20 / 1.00	0.20 / 1.00	0.28 / 1.00	0.71 / 1.00	0.80 / 1.00	0.80 / 1.00	0.54 / 1.00	0.20 / 1.00
Roberts, Beth	Business Analyst	Miller, Rosie	Employee	1/1/01		1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	0.64 / 1.00	0.00 / 1.00	0.00 / 1.00	0.00 / 1.00	0.00 / 1.00
						3.00 / 1.00	3.00 / 1.00	2.48 / 1.00	2.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	2.86 / 1.00	2.00 / 1.00	2.00 / 1.00	2.00 / 1.00

# Understanding Capacity and Demand Gaps

**Staffing**

Allocations by Investment | **Allocations by Resource** | Assignments by Investment | Assignments by Resource | Staff

View Architect Demand Save

Hide empty groups

1-50 of 50 Columns

Name	Staff OBS Unit	Start	Finish	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06	2024-07	2024-08	2024-09	2024-10	2024-11	2024-12
<b>Account Manager</b>		7/1/19	2/12/23	9.50	9.50	10.00	9.00	9.00	9.00	8.34	7.91	3.14	3.02	3.02	2.52
Battery Monitor		9/1/22	4/11/23			0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	
Billing AutoPay		10/29/23	8/28/24	1.99	1.99	1.99	1.99	1.99	1.99	1.99	1.81				
Billing AutoPay Platform		10/30/23	9/6/24	1.99	1.99	1.99	1.99	1.99	1.99	1.99	1.81	0.00			
Eco tracking system		1/1/23	12/31/23	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Implementation for Blue Cross Blue ...		4/24/23	8/24/23	1.00	1.00	1.00	1.00	1.00	1.00	1.00	0.77				

Resource Availability

1-100 of 477 Columns

Full Name	Primary Role	Manager	Person Type	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06	2024-07	2024-08	2024-09	2024-10	2024-11	2024-12
Cocoa Puffs				3.00 / 6.00	3.00 / 6.00	6.00 / 6.00	6.00 / 6.00	6.00 / 6.00	3.00 / 6.00	3.00 / 6.00	3.00 / 6.00	3.00 / 6.00	0.00 / 6.00	0.00 / 6.00	0.00 / 6.00
Coder, Tammy		Miller, Rosie	Employee	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00
COE															
Coleman, Joyce	Architect	Joseph, Derrick	Employee	2.21 / 1.00	2.21 / 1.00	2.21 / 1.00	2.21 / 1.00	2.21 / 1.00	2.96 / 1.00	3.21 / 1.00	3.21 / 1.00	3.21 / 1.00	3.25 / 1.00	2.70 / 1.00	2.70 / 1.00
Computer	Material	Miller, Rosie		69.00 / 23.00	63.00 / 21.00	63.00 / 21.00	66.00 / 22.00	69.00 / 23.00	60.00 / 20.00	66.00 / 22.00	66.00 / 22.00	63.00 / 21.00	69.00 / 23.00	63.00 / 21.00	66.00 / 22.00
Cooper, Andy	Developer	Joseph, Derrick	Employee	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	2.80 / 1.00	1.60 / 1.00	1.60 / 1.00	1.60 / 1.00

## Planning and Monitoring

- Staffing Page
- Roadmap
- Hierarchy

Remaining Capacity by Month (Hours)

	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
Granger, Paula	0.00	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	0.00	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	-8.00	-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	0.00	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	0.00	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	0.00	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	0.00	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	0.00	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	0.00	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	0.00	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	-4.00	-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	0.00	0.00	0.00	0.00	-152.00	-66.10	-18.00	0.00	0.00	0.00	0.00	0.00	-236.10
Rivera, Alex	0.00	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	0.00	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	17.60	-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	0.00	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	-8.00	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	0.00	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	12.00	24.00	0.00	0.00	-8.00	-12.00	-38.00	-40.00	-44.00	-77.00	-68.00	-84.00	-335.00
<b>Grand Total</b>	<b>25.60</b>	<b>-11.00</b>	<b>114.00</b>	<b>124.09</b>	<b>-438.39</b>	<b>-480.30</b>	<b>-479.88</b>	<b>-524.90</b>	<b>-331.60</b>	<b>-1.48</b>	<b>-80.01</b>	<b>63.40</b>	<b>-2,033.27</b>

## 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

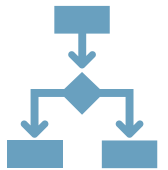
# Implementation Best Practices



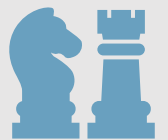
# Implementation Best Practices – Start Simple



- 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.



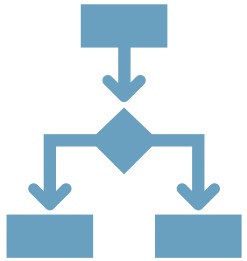
- Assume you have directionally accurate forecast data in the tool. What mechanisms, processes, roles and responsibilities are in place to act on that information? Clearly define the outputs and who is accountable for them.

# Open Mic

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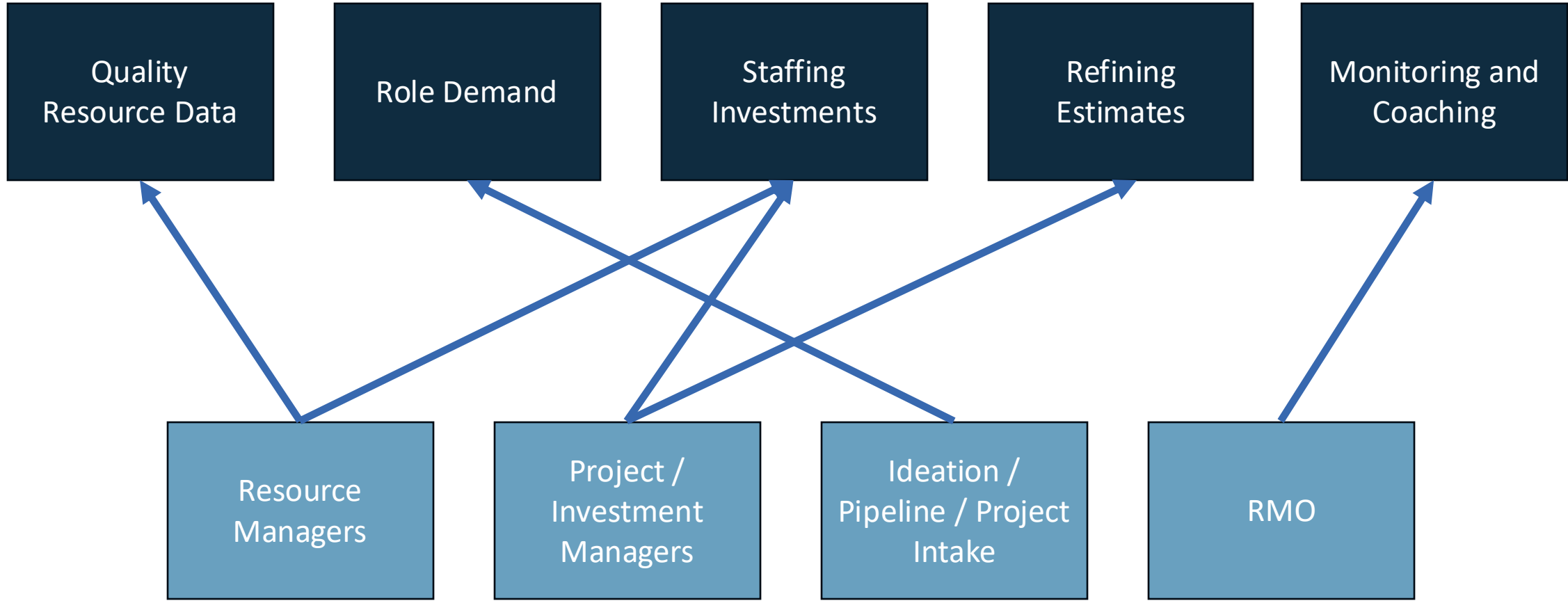
- For those that have a successful implementation of resource management
  - What are some of your best practices?
  - What are your lessons learned?

# Effective Business Processes

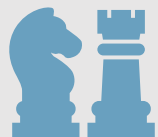


- Staffing & Resource Management is about building and implementing effective business processes.
- Supporting business processes in an enterprise tool creates visibility and simplifies management, but it is not a magic fix for poorly defined processes.

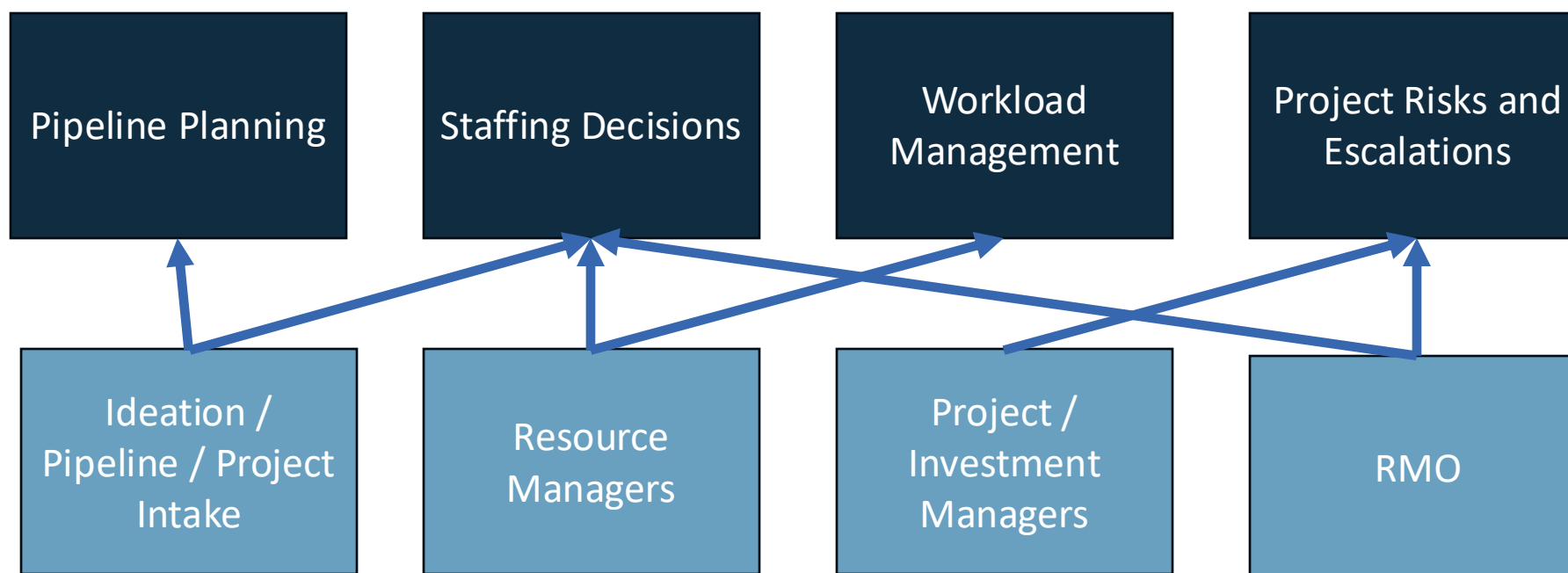
# Processes and Accountability



# 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





# Leveraging the Data

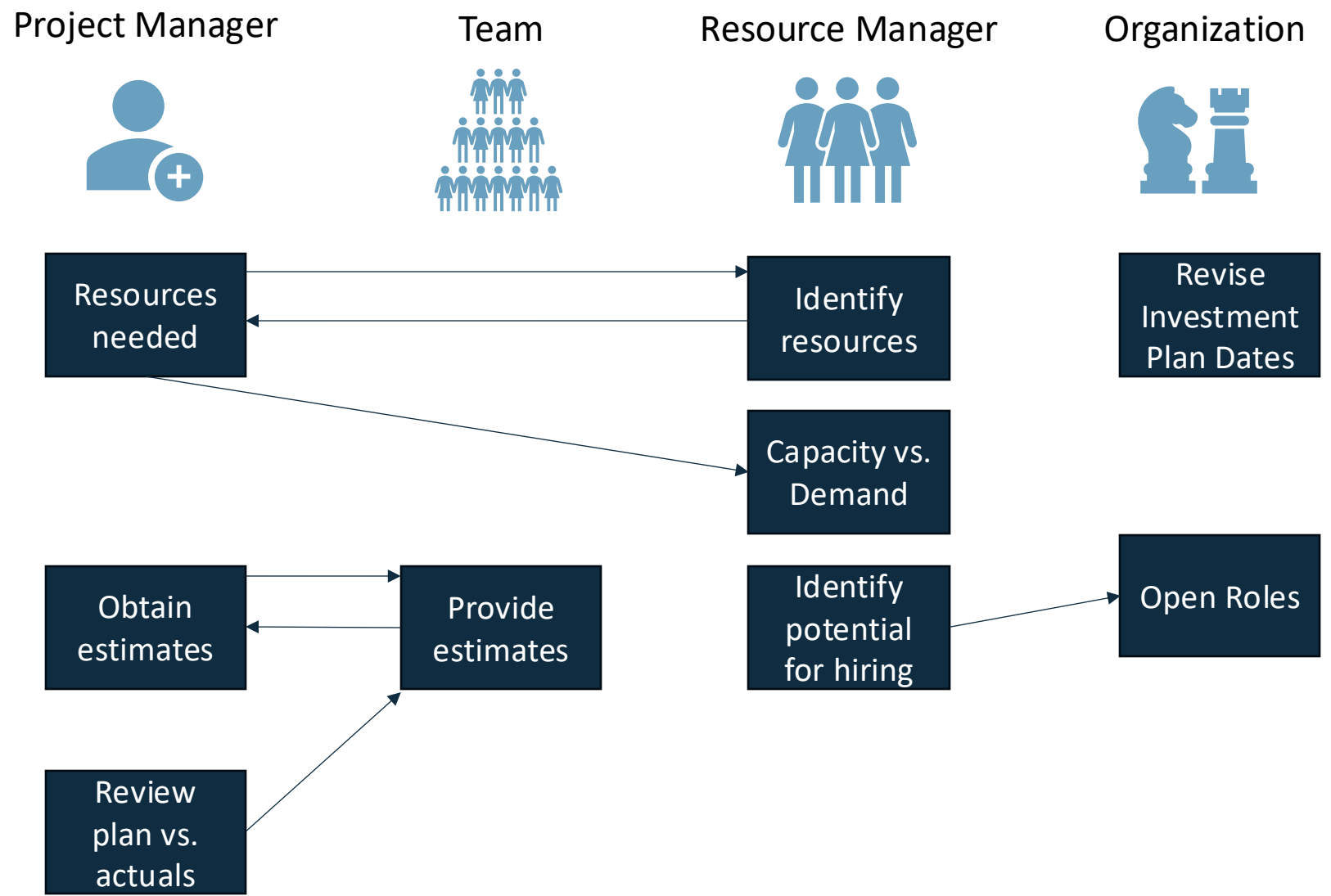

In this example, Program and Project Managers are overallocated through the end of the year.

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

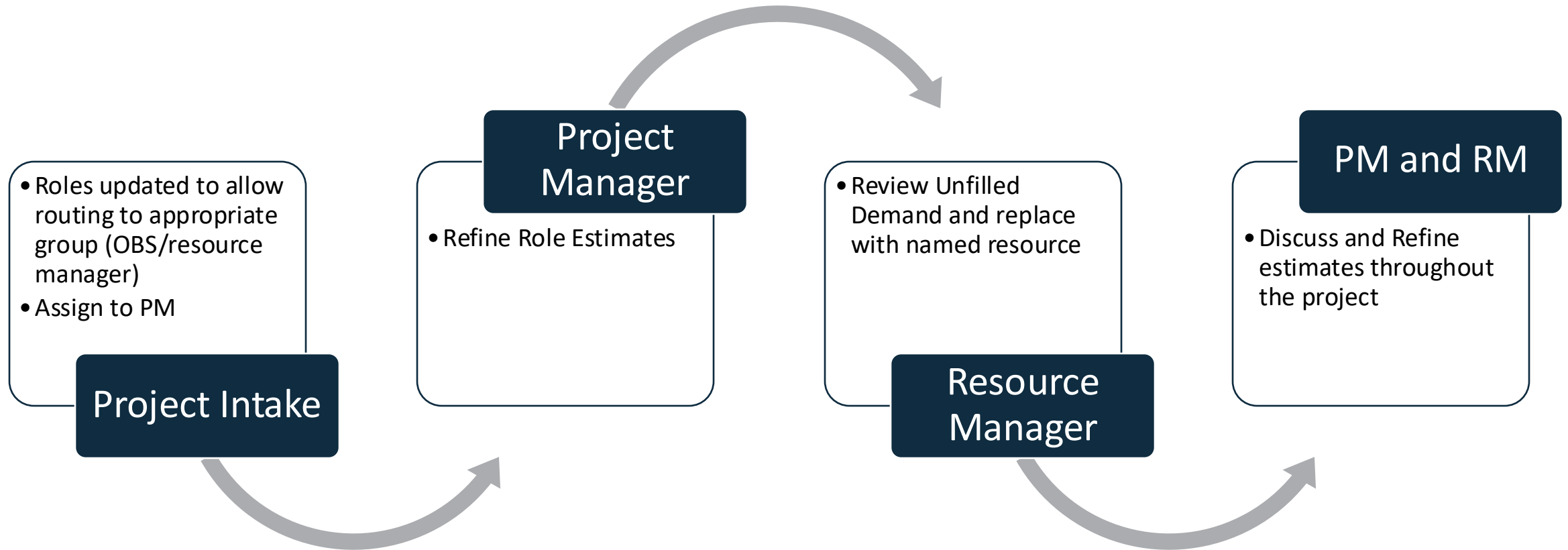
Staffing										
Allocations Timeline						Staff Grid				
Allocations By Investment						View (Copy) Staffing insights the basics Save				
Name	Role	Start	Finish	Allocation	Active	2023-08	2023-09	2023-10	2023-11	2023-12
▼ Chancellor's Concert Series		Feb 13, 2021	Dec 31, 2023		✓	184.00	168.00	176.00	176.00	
Project Manager	Project M...	Feb 13, 2021	Dec 31, 2023	5,968.00	✓	184.00	168.00	176.00	176.00	
Chat BOT AI for Smiths Website		Jul 1, 2023	Jul 1, 2023		✓					
▶ ChatBot Implementation		Jul 20, 2023	Jan 11, 2024		✓	1,472.00	1,344.00	1,408.00	1,408.00	1,344.00
▶ Chatbots for Insurance Compa...		Jul 1, 2019	Dec 31, 2024		✓	358.80	327.60	343.20	343.20	343.20
▶ CL - Digitizing Paper Records w...		Jan 9, 2023	Feb 23, 2024		✓	644.00	588.00	616.00	616.00	616.00
Resources By Role	Primary Role	Manager	Resource Remain...							
▶ Program Manager			0.00	1,361.60 / 920.00	1,243.20 / 840.00	1,302.40 / 880.00	1,302.40 / 880.00	1,243.20 / 840.00	1,302.40 / 880.00	1,243.20 / 840.00
▶ Programmer			0.00	184.00 / 368.00	168.00 / 336.00	176.00 / 352.00	176.00 / 352.00	168.00 / 336.00	176.00 / 352.00	168.00 / 336.00
▶ Project Coordinator			0.00	184.00 / 184.00	168.00 / 168.00	112.00 / 176.00	0.00 / 176.00	0.00 / 176.00	0.00 / 176.00	0.00 / 176.00
▶ Project Manager			0.00	3,689.20 / 2,944.00	3,368.40 / 2,688.00	3,520.80 / 2,816.00	3,352.80 / 2,816.00	3,200.40 / 2,688.00	3,520.80 / 2,816.00	3,200.40 / 2,688.00

# Communication is Key

Communication is key!



# Staffing Process Example



# Staffing Process in Clarity

clarity Staffing

View (Copy) Architect Demand Save

Manage Widgets Filter Widgets

Allocations By Investment Columns

Match Filters All Any

Is Role (Resource) = Yes Role Select Add Filter Remove All

AND Active (Common Investment) = Yes Template (Common Investment) = No

Name	Staff OPS Unit	Start	Finish	Allocation	Default All	2023-07	2023-08	2023-09	2023-10	2023-11	2023-12
A Template for Six Sigma Lean Projects			6/1/24	0.00							
▼ AARD Payments Modules 2023		4/15/19	5/26/25	44,888.67		168.00	184.00	168.00	176.00	176.00	168.00
Business Analyst	Corporate Department ...	4/15/19	5/26/25	8,051.33		0.00	0.00	0.00	0.00	0.00	0.00
Business Analyst		4/15/19	5/26/25	12,731.33		168.00	184.00	168.00	176.00	176.00	168.00
Project Manager		4/15/19	5/26/25	8,023.33		0.00	0.00	0.00	0.00	0.00	0.00
Storage Architect		4/15/19	5/26/25	7,979.33		0.00	0.00	0.00	0.00	0.00	0.00

A project in need of a Business Analyst

Resources By Role Columns

Match Filters All Any

Primary Role = Business Analyst Manager Select Add Filter Remove All

Full Name	Primary Role	Manager	Person Type	Date of Hire	Date o	2023-07	2023-10	2023-11	2023-12		
Goldman, Mark	Business Analyst	Kumar, Arun	Contractor	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	176.00 / 176.00	176.00 / 176.00	168.00 / 168.00
Hayes, Todd	Business Analyst	Miller, Rosie	Employee	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	56.00 / 176.00	0.00 / 176.00	0.00 / 168.00
Kumar, Arun	Business Analyst	Kumar, Arun	Contractor	1/1/01		0.00 / 168.00	0.00 / 184.00	0.00 / 168.00	0.00 / 176.00	0.00 / 176.00	0.00 / 168.00
Olney, Pam	Business Analyst	Miller, Rosie	Employee	1/1/01		168.00 / 168.00	184.00 / 184.00	168.00 / 168.00	176.00 / 176.00	176.00 / 176.00	168.00 / 168.00

Looks like Arun has availability

# 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

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- 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



# Allocation Best Practices

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- 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

# 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.

# Reporting Best Practices

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- 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

# Notification Best Practices

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- 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

# Questions?





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Rego is excited to introduce our **new certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



## Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



## Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

# Surveys

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





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## Instructions for PMI credits

- Access your account at [pmi.org](https://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.



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