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Success in Resource Management | RMO & Leadership

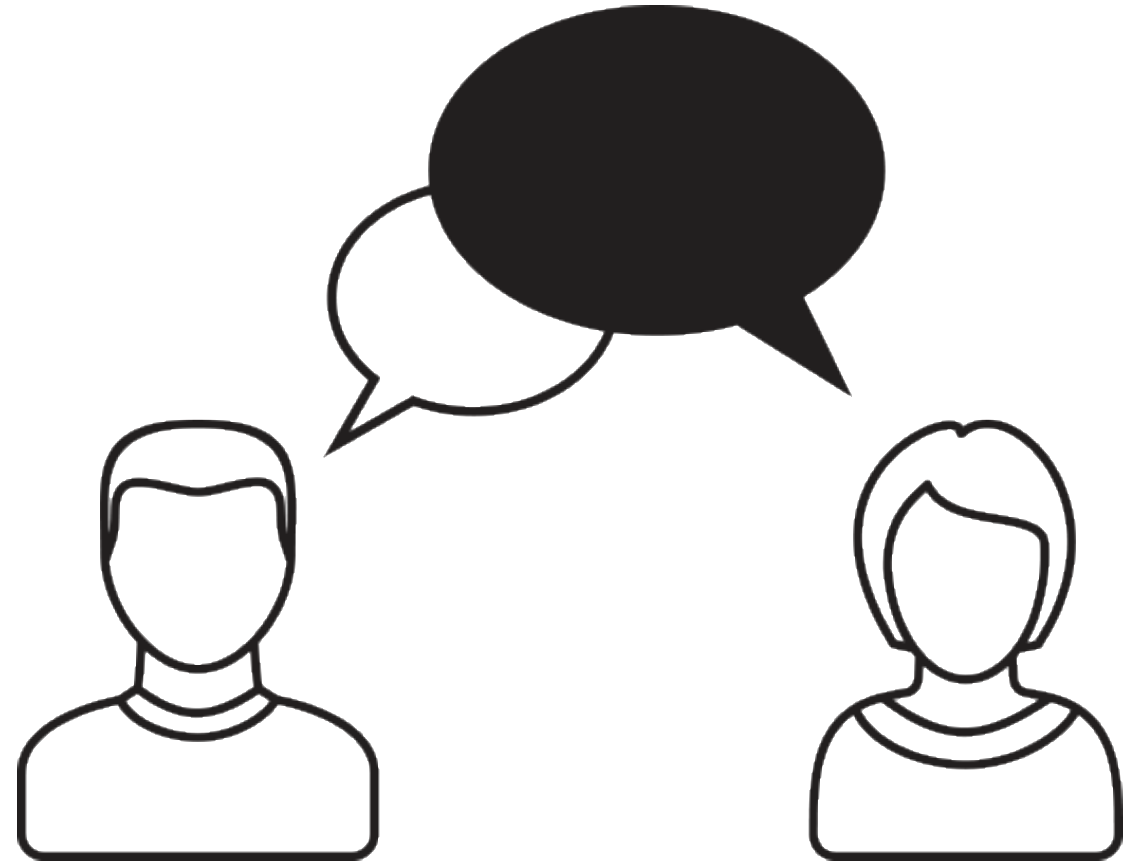
Your Guides:
Wes McCoubrie and Mike Pokorny

Introduction



Introductions

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



Agenda

- Enterprise Resource Management – Issues and Opportunities
- Elements of an RMO
- RMO Implementation Roadmap

Resource Management Problems

- We don't know who is working on what
- I keep hearing we don't have enough people to do all the work – is this true? How would I know?
- Resource planning and forecasting is ad hoc, via spreadsheets, via multiple systems, difficult to get a clear picture
- I don't have visibility into resource issues ahead of time, only when they happen NOW



What challenges do you have around enterprise resource management?

Purpose of an RMO

Ensure the organization has the **proper process and tools** in order to **proactively understand** if there are enough people to deliver on the work that has been requested/promised and be able to **adjust as needed**

Goals of an RMO

1. Support the organization in managing capacity vs. the demand for labor resources
2. Analyze demand and utilization data to identify potential concerns and solutions
3. Work with project and resource managers to identify solutions to resource scheduling conflicts



What other goals would you have for an RMO? Would you also include Vendor Management aspects such as measuring contract/vendor value?

- Process and Policies
- Reporting Strategy and Tools
- RM Support and Training
- RM Compliance
- Roles and Responsibilities

Elements of an RMO

Process and Policies

- What is the process and cadence for resources to be allocated and assigned to work?
- How far out should resources be allocated, and with what level of accuracy over time?
- How should resource allocations and assignments be managed as people come and go within the organization?
- How will the day-to-day process fit into enterprise reporting and forecasting cycles?



Project work vs. non-project work (PTO/Admin/KTLO) – what is the approach for allocations?

Reporting Strategy

- What are we measuring and why?
- What decisions will come from the data, both for executives and RMs?
- What do the reports need to reflect?



What challenges do you have around enterprise resource reporting?

Data Sources

- Clarity portlets
- Clarity (Excel downloads)
- Jaspersoft
- Other BI tools?
- Other systems?

How Do We Approach This?

1. RM/ PM Compliance
2. Data Integrity
3. Enterprise Planning and Forecasting



Data Aggregation and Analysis is a key function of an RMO

Clarity

Staffing

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

Per-Period Metrics - 12 Periods

Resource	Staffing	Role	Staffing	Investment	Start	2024-01		2024-02		2024-03		2024-04	
						Allocation	Remaining Availability	Allocation	Remaining Availability	Allocation	Remaining Availability	Allocation	Remaining Availability
Evans, Nick						1.00	0.00	1.00	0.00	1.00	0.00	1.00	0.00
James, Lori						1.00	0.00	1.00	0.00	1.00	0.00	1.00	0.00
Lepp, Sophia						1.00	0.00	1.00	0.00	1.00	0.00	1.00	0.00
Johnson, Susan						1.00	(24.00)	1.00	(24.00)	1.00	(24.00)	1.00	(24.00)
Johnson, Eric						1.00	(3.00)	1.00	(3.00)	1.00	(3.00)	1.00	(3.00)
Jones, Mike						1.00	1.60	1.00	1.60	1.00	1.60	1.00	1.60
Jordan, Nate						1.00	0.00	1.00	0.00	1.00	0.00	1.00	0.00

- Good Places to Start:**
- Staffing Workspace
 - Resource Directory

Black = OOTB
Blue = Rego Exchange

Staffing

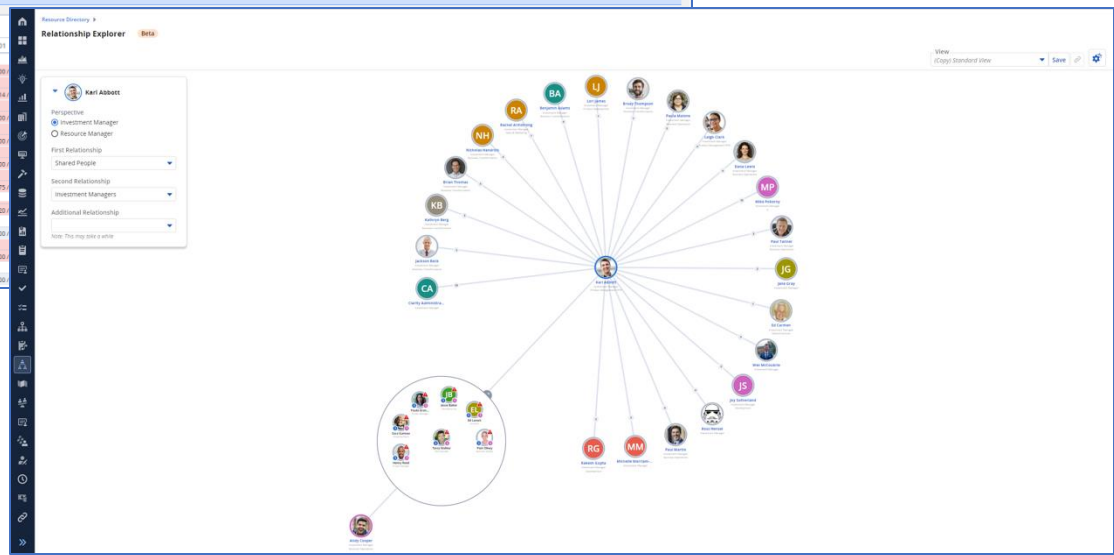
Allocations by Investment Allocations by Resource Assignments by Investment Assignments by Resource Staff

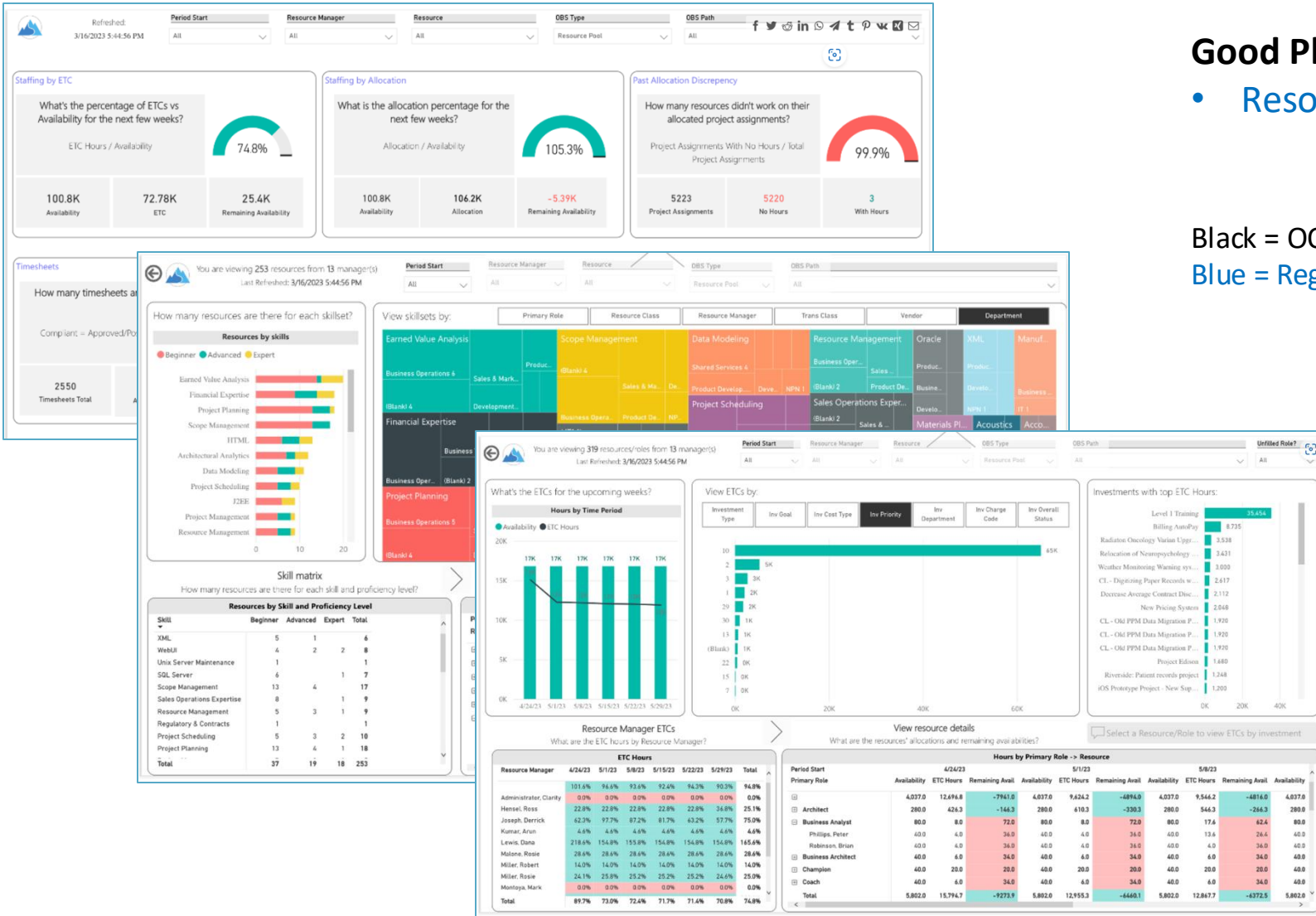
View Archived Demand

Name	Staff OBS Unit	Start	Finish	Allocation	Default Alloc	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		4/15/19	5/26/25	2.00		2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00	2.00
Apollo Product Launch		5/10/19	2/26/24	0.35		0.35	0.35										
Application for this thing		1/15/24	1/11/24	0.30		0.30											
Application Management 2024		11/16/23	12/31/25	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
Automation & Robotics		6/9/24	2/7/25	1.00		1.00			0.75	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Automation & Robotics feature on th...		1/1/23	11/28/24	0.00		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Battery Monitor		9/1/22	4/11/28	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

Resource Availability

Full Name	Primary Role	Manager	Person Type	Date of Hire...	Date of Ter...
Evans, Nick	Business Analyst	Miller, Rose	Employee	1/1/01	
Goldman, Mark	Business Analyst	Kumar, Arun	Contract Labour	1/1/01	
Hayes, Todd	Business Analyst	Miller, Rose	Employee	1/1/01	
Kumar, Arun	Business Analyst	Kumar, Arun	Contract Labour	1/1/01	
Olney, Pam	Business Analyst	Miller, Rose	Employee	1/1/01	
Parker, Ashley	Business Analyst	Miller, Rose	Employee	1/1/01	3/31/24
Phillips, Peter	Business Analyst	Joseph, Derrick	Employee	1/1/00	
Price, Andrea	Business Analyst	Administrator, C...	Employee	7/1/23	
Roberts, Beth	Business Analyst	Miller, Rose	Employee	1/1/01	
Robinson, Brian	Business Analyst	Joseph, Derrick	Employee	12/14/09	





Good Places to Start:

- Resource Management Summary Dashboard

Black = OOTB

Blue = Rego Exchange

Reports

Capacity vs. Demand by Role														
Role		Allocation by Month (Hours)												Total
		Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	
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	1,584.00	1,512.00	1,656.00	18,792.00
	Demand	738.80	688.00	1,603.24	1,341.80	1,583.40	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

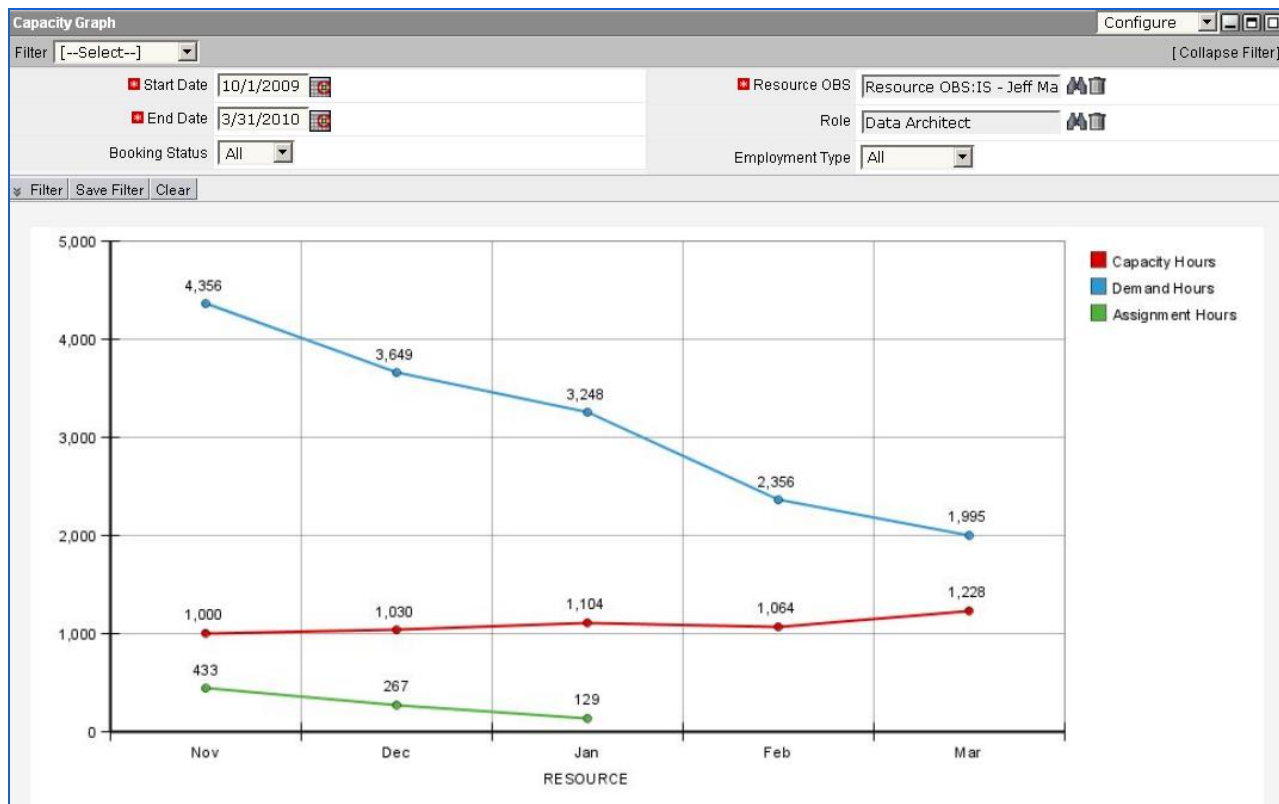
Good Places to Start:

- Capacity vs. Demand by Resource
- Capacity vs. Demand by Role
- Over/ Under Allocation by Resource

Black = OOTB
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Over/Under Allocation by Resource														
Resource	Primary Role	Remaining Capacity by Month (Hours)												Total
		Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	
Developer	Amos, Cheryl	0.00	0.00	0.00	0.00	8.00	46.00	64.00	80.00	0.00	0.00	0.00	0.00	198.00
	Bauer, Joyce	0.00	0.00	0.00	20.00	8.00	120.00	0.00	0.00	0.00	0.00	0.00	0.00	148.00
Network Engineer	Berks, Paul	16.00	0.00	0.00	-45.31	-13.99	-28.00	0.00	0.00	0.00	0.00	0.00	0.00	-71.30
	Berry, Jason	0.00	0.00	0.00	-44.00	-68.00	-100.00	-40.00	-168.00	-76.00	-16.00	0.00	0.00	-512.00
Project Manager	Bhatt, Rakesh	0.00	0.00	160.00	52.00	48.10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	260.10
	Childers, Valerie	0.00	0.00	0.00	-113.60	-56.80	-17.60	0.00	0.00	0.00	158.40	151.20	115.60	237.20
Test Engineer	Evans, Nick	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	0.00	0.00	0.00	0.00	-40.00
	Gaurand, Alicia	0.00	0.00	0.00	0.00	0.00	0.00	0.00	140.00	125.00	27.00	28.00	16.00	336.00
Grand 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
Grand Total	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
Grand Total	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
Grand Total	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
Grand Total	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
Grand Total	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
Grand Total	Riviera, 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
Grand Total	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
Grand Total	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
Grand Total	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
	Grand Total	25.60	-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

Portlets



Good Places to Start:

- Capacity Graph
- Resource Availability – 4 Weeks
- Weekly Detail
- Resource Workloads
- Unfilled Requirements
- Capacity – Role Capacity Histogram
- Organizational Demand – OBS Resource Aggregation
- Organizational Demand – OBS Investment Aggregation
- Down Planning – Top-Down Planning by Investment
- Last Login

Black = OOTB

Blue = Rego Exchange

RM Support and Training

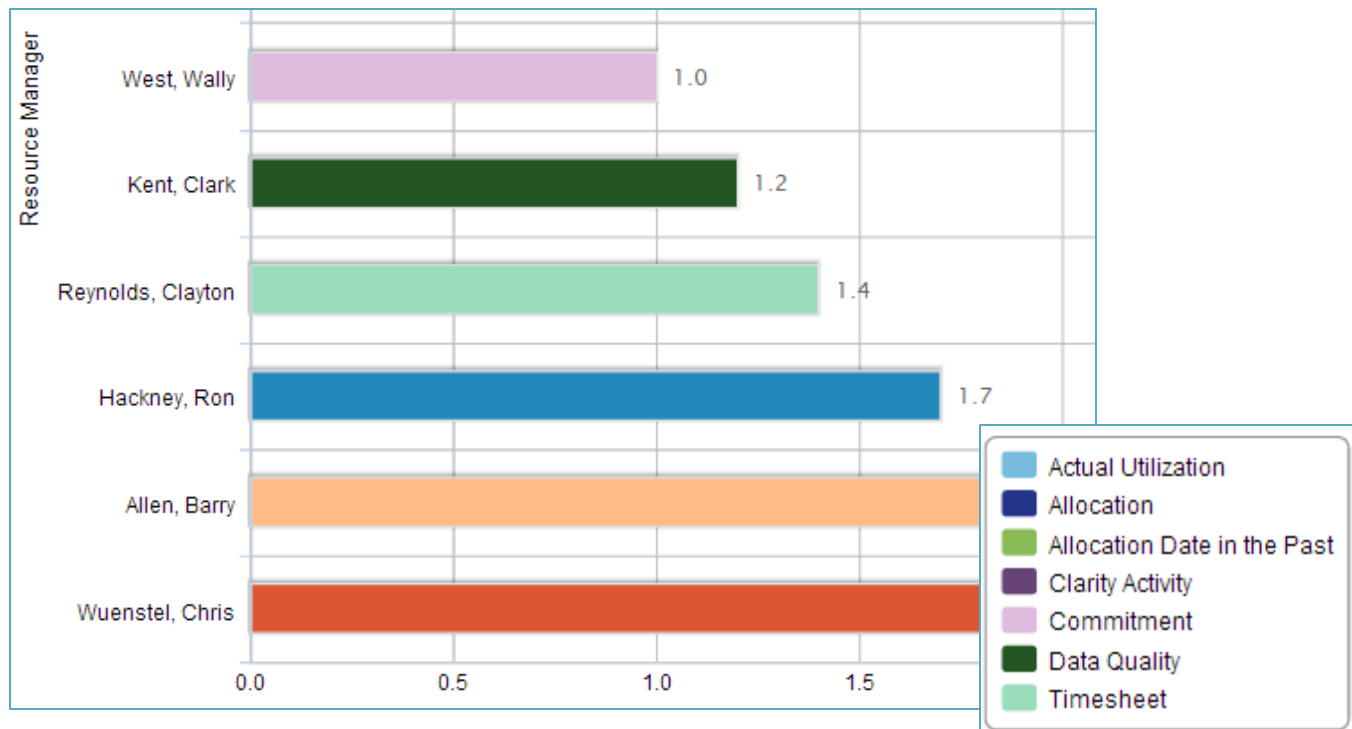
- Training for feature / function launches
- Ongoing Training (new hires / refreshers)
- Mentoring / Ongoing support
 - Lunch 'n' Learns
 - Help use the tool and show value to RMs
- Can provide Level 2/3 support to RM community



How are your Resource Managers currently supported today in relation to CA PPM?

RM Compliance

Goal: Ensure resource managers are successfully using Clarity to manage resource needs within their teams and departments.



Good Places to Start:

- [Rego Resource Adoption Metrics](#)
- RM and Resource email notifications

Black = OOTB
Blue = Rego Exchange

Roles and Responsibilities

Role	Description
RMO Lead	Develop, own, and mature resource management processes, RMO operations and reporting cadence.
RMO Data Analyst	Pulls standard and ad-hoc data from Clarity. Analyses data to understand trends, areas of excellence, areas for improvement. Supports Level 2/3 support with data analysis / policy questions.
Clarity Mentor	Assists with ongoing mentoring of Clarity resource management and project management users. Mentoring activities include 1:1's, workshops, office hours, and ad-hoc training as needed.
Booking Manager	Reviews the data and works with resource and project managers to understand the “subjective” side of the issues – sometimes the data lies. They try to resolve conflicts by providing data and guidance and should resolve 80% of the issues.

The RMO Over Time



RMOs typically have a lifecycle that requires more resources during the start until the process is part of the culture.

Then RM/PMs pick up the bulk of the execution and the RMO does mainly supporting analytics for them.

- Crawl
- Walk
- Run

RMO Roadmap

How to Get There?



- Initial set of reports and processes
- Analyze data to improve [compliance](#) issues
- Train RMs (and PMs)
- Create Framework for formal RMO



- Formalize RMO – roles and responsibilities
- Analyze data to improve [integrity](#) issues
- Finalize reports and processes
- Mentor RMs (and PMs) on leveraging Clarity



- Assist in resolving staffing issues
- Setup [continual improvement cycle](#) with end users
- Expand compliance and integrity monitoring to time tracking

RMO IN 4 Steps



Charter

Define Governance
Team

Define Objectives

Define Taxonomy of
Roles



Design Process

Allocation Processes
-Roles
-Resources

Define Enterprise
Resource
Management Cadence



Rollout

Training

Reports /
Notifications

Support



Monitor

Resource Capacity
Planning
Process Compliance

RMO Effectiveness
based on Objectives

Questions?





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

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



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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**
- 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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