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Annual Planning – focus on Workforce Planning

Your Guides:

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Part I: Introduction to Plans and Fundamental Use Case



Agenda

- Issue we are solving
- Personas-Benefits
- Plan Types
- Demonstration
- The Art of Strategic Planning
- Resources
- What's Coming

Issue we are solving

- Annual Operating Plan process (Zero-Based Budgeting)
- Burdensome tools to capture and track
- Tie historical fact with future planning
- Collaborate with stakeholders for future headcount needs

Personas - Benefits

| Department Head/Product Manager/Director | |
|--|---|
| WHAT ARE THEY TRYING TO ADDRESS? | <ul style="list-style-type: none">• Bottom-up planning process, which is always too granular and slow• Lack of stakeholder engagement and shared understanding of the headcount |
| WHAT DO THEY OWN? | <ul style="list-style-type: none">• Funding and headcount alignment in the portfolio• Provide insights for strategic pivots based on executive direction• Alignment of people and strategy/categories |
| WHAT DO THEY WANT? | A clear picture of my desired headcount in an easy to use solution that helps reconcile discrepancies and automate the communication to my stakeholders |

| Benefits |
|---|
| <ul style="list-style-type: none">• Simplify the process of documenting and reconciling changes to headcount planning• Consolidated view into the organizations plans for future headcount• Improve Operational Efficiencies: Identify areas where adjustments need to be made• Aid in making informed decisions by taking into account historical data (actuals) to quantify future plans |

Plan Types

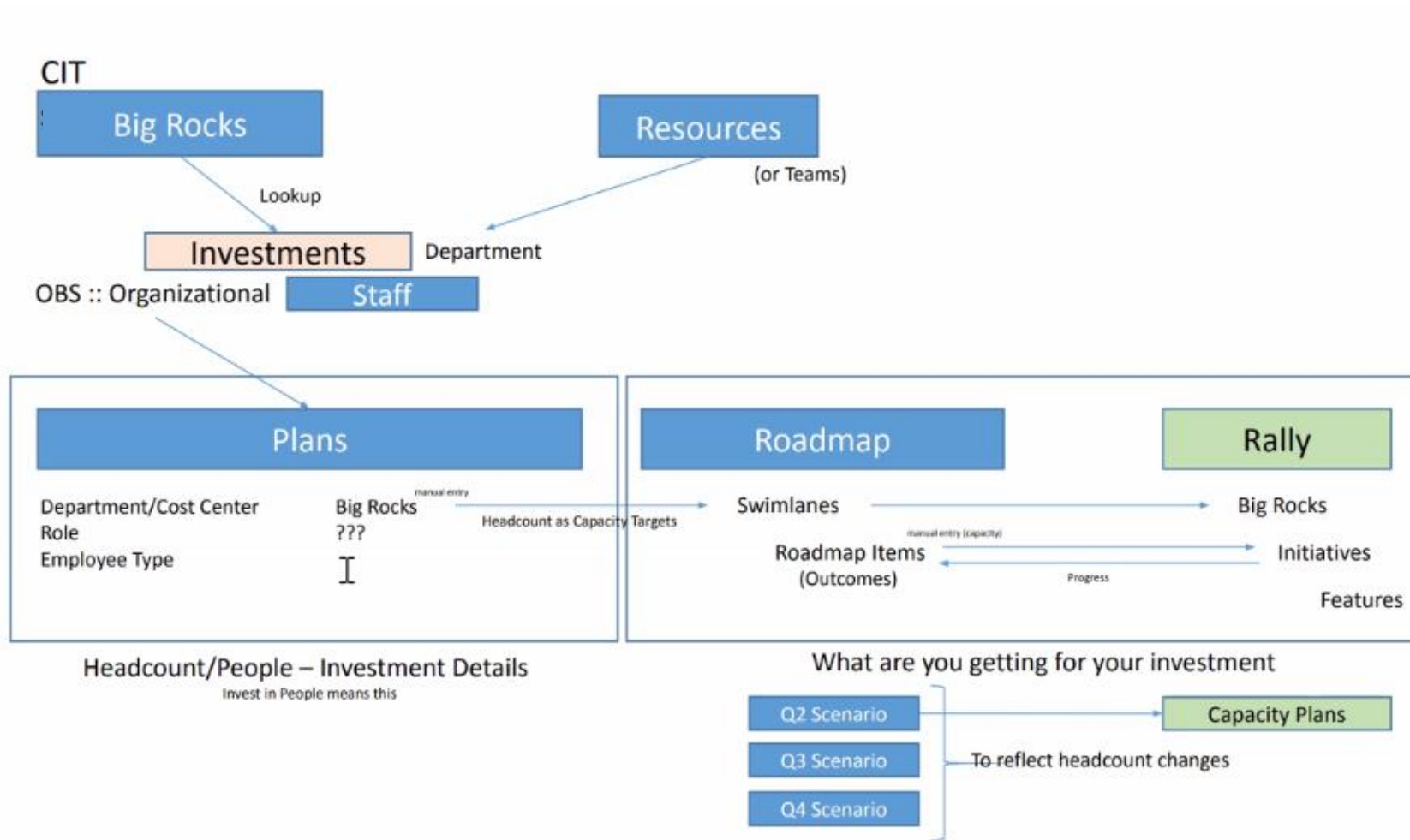
Investment OBS (Customer Ask)

- Created from existing OBS structures/hierarchies
- Resource/investment tables are populated from underlying data linked to the OBS
- Ability to 'sync' plan based on organizational changes
- Multiple Round Support

Resource Plan

- Resources are selected to be included in the plan
- Plan hierarchy is custom built based on parent/child relationship
- Resource tables are automatically populated and then manually applied to investment alignment

Demo



Part II: Strategic Planning; Intersection with Workforce Plans



LEARNING OBJECTIVES

- 1. Discuss common planning and prioritization challenges**
- 2. See how Best Practice Strategic Planning methods create a demonstrable use case for Plans / Headcount Management**

DISCUSSION STARTER

What are some of the challenges with your current prioritization/planning process?

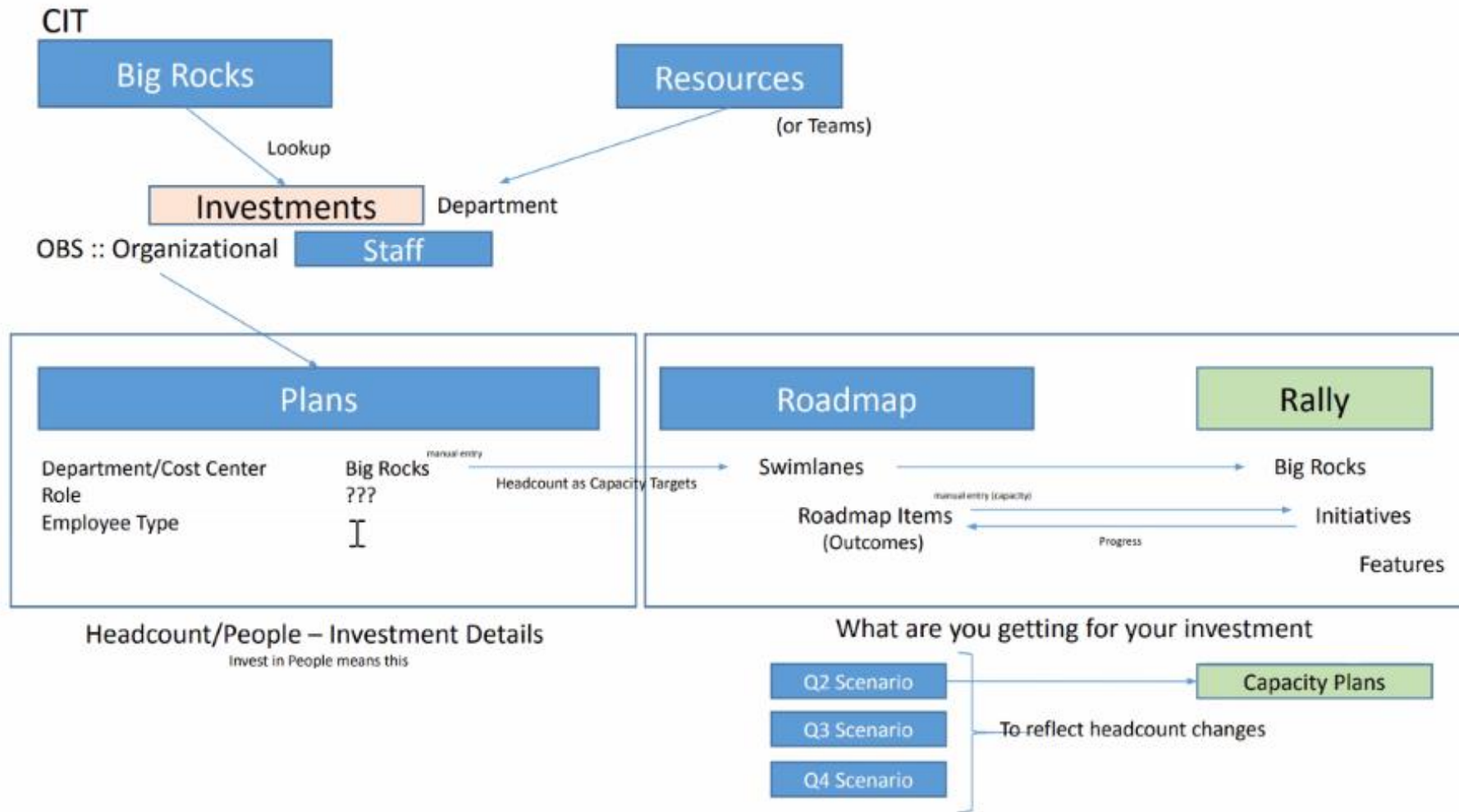
(Live responses)

Please open your Cvent app and answer the following Poll Questions:

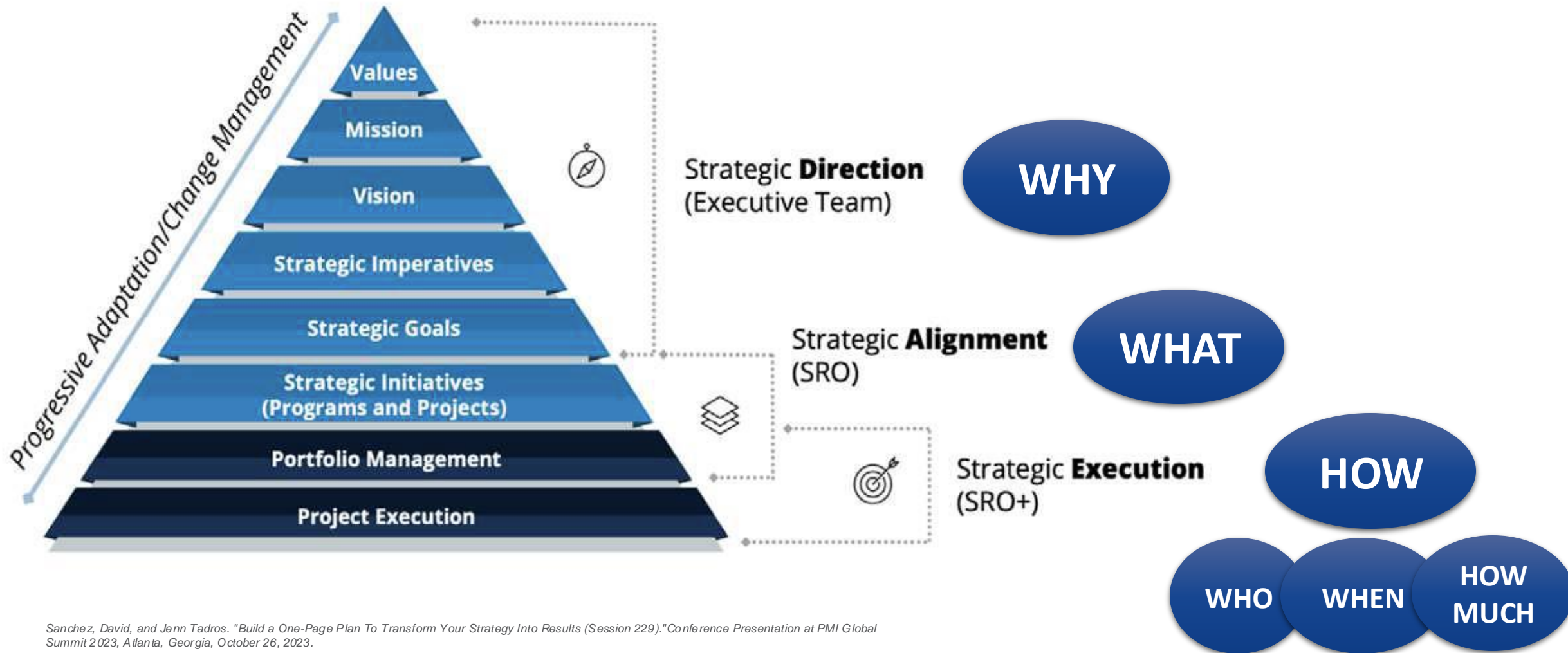
Do you have processes in place to identify and address critical resource capacity gaps which might impact your ability to successfully deliver against your strategic plans?

Are your Resource Capacity Planning processes mostly reactive, mostly proactive, or a balanced blend?

TYING THIS TO HEADCOUNT PLANNING

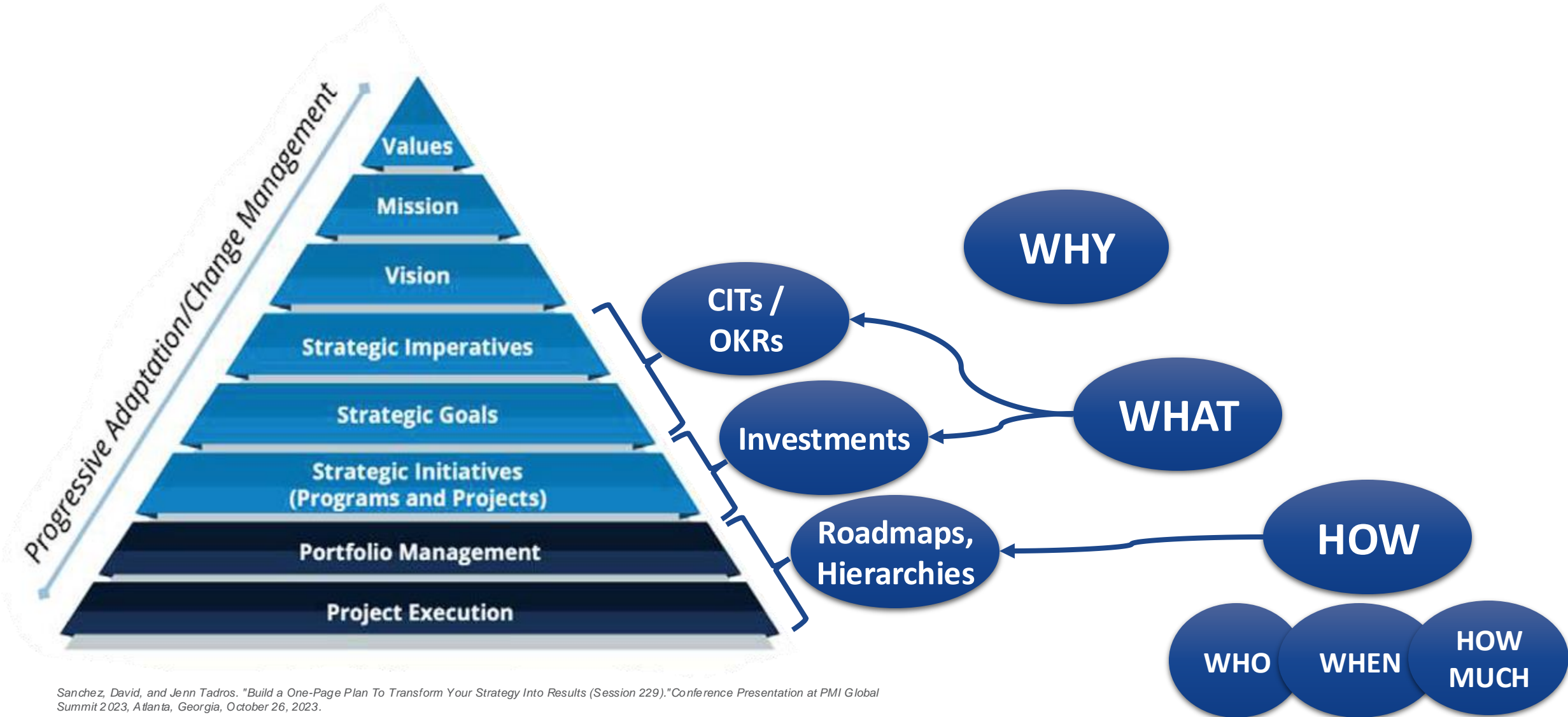


STRATEGIC PLANNING FRAMEWORKS



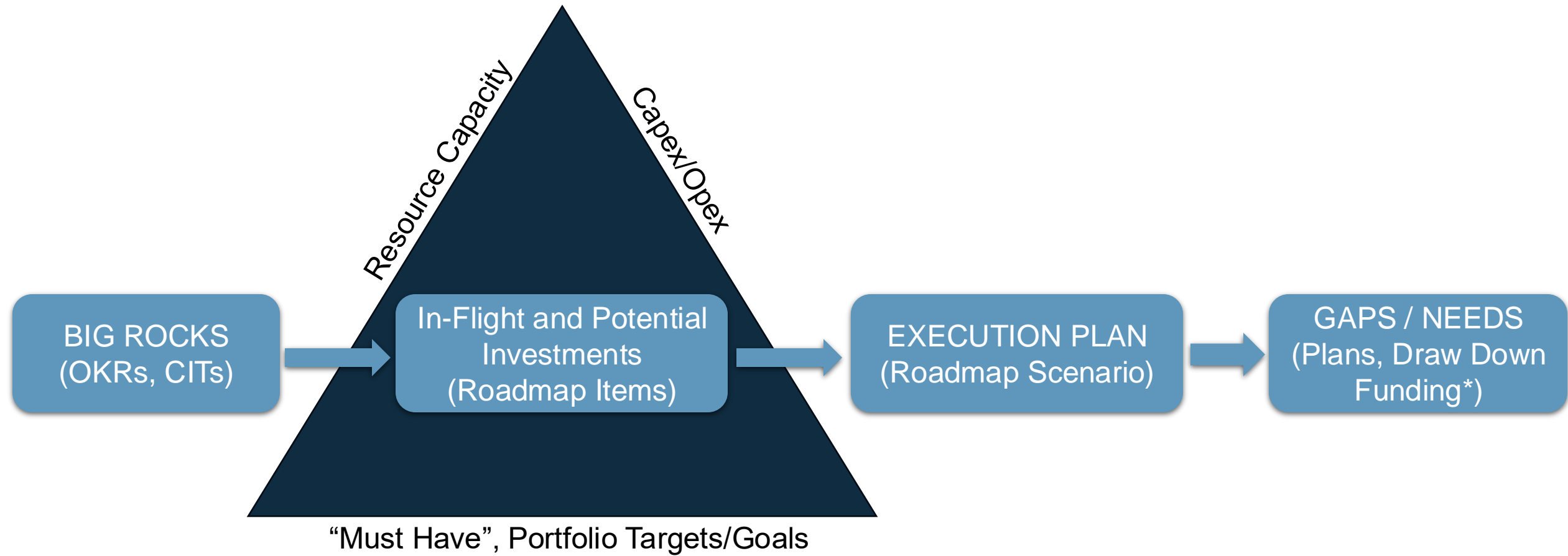
Sanchez, David, and Jenn Tadros. "Build a One-Page Plan To Transform Your Strategy Into Results (Session 229)." Conference Presentation at PMI Global Summit 2023, Atlanta, Georgia, October 26, 2023.

Strategy Framework – Aligned to Clarity PPM

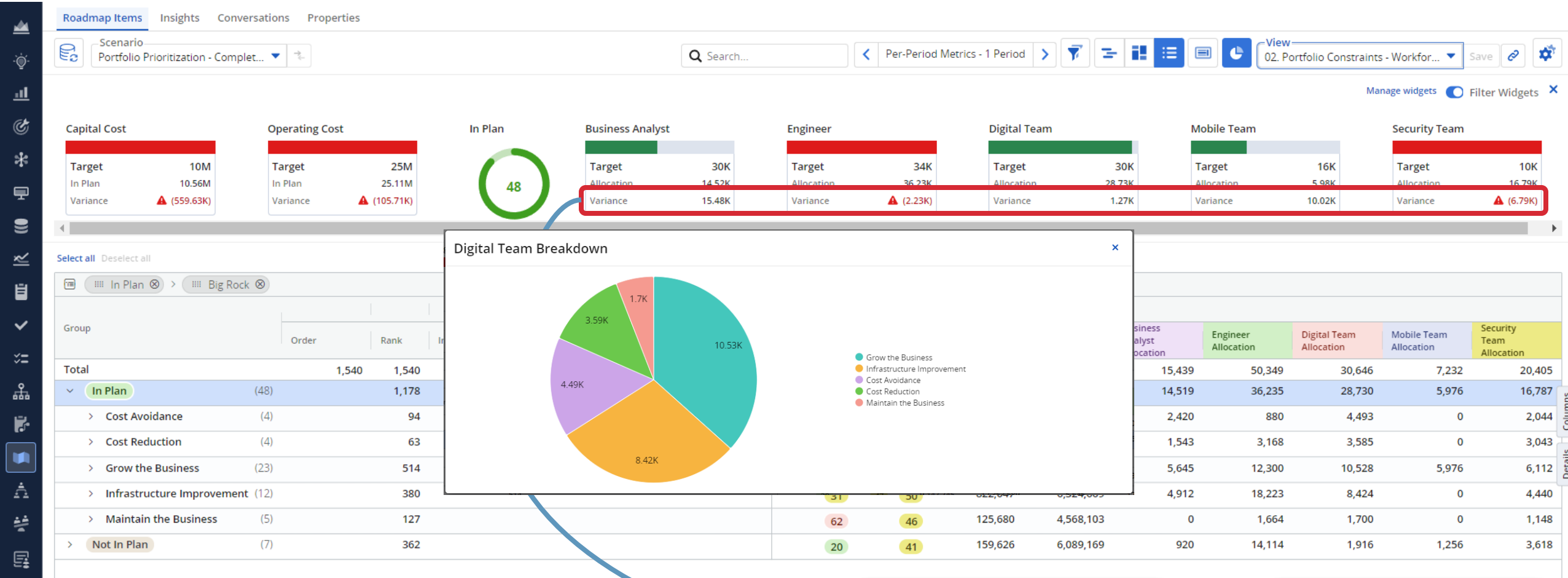


Sanchez, David, and Jenn Tadros. "Build a One-Page Plan To Transform Your Strategy Into Results (Session 229)." Conference Presentation at PMI Global Summit 2023, Atlanta, Georgia, October 26, 2023.

TYING STRATEGIC PLANNING TO WORKFORCE PLANS



TYING STRATEGIC PLANNING TO WORKFORCE PLANS



EXECUTION PLAN
(Approved Plan informs Workforce needs)



GAPS / NEEDS
(Plans, Draw Down Funding*)

Neither use case is pure out of the box capabilities. CLARITY is designed to be configured to your organization's unique business processes, taxonomies, and culture. Get creative and focus on the benefit of the outcome to your stakeholders.

WHAT'S COMING

- **Create a Plan from a prior year's Plan**
- **Delete manual rows in the Resource/Investment breakdown tables**
- **Target delta display**
- **Round support for Resource Type Plans**
- **Plan in dollars/currency rather than headcount**

Resources

BrightTalk Recordings

1. [Clarity: Make Workforce Planning Easy with a Top-Down Approach](#)
2. [Clarity Workforce Modeling](#)

Clarity Techdocs/Youtube

1. [Working with Plans](#)
2. [Clarity 16.1.1: Workforce Modelling by Using Plans](#)
3. [Clarity 16.2.1: Plans Enhancements](#)

CALLS TO ACTION

- 1. Has your organization reached an inflection point, where a shift is needed in your resource capacity planning model?**
- 2. Can you envision how more proactive planning would empower more efficient processes and more consistent and predictable delivery?**
- 3. What would it take to conduct a Proof of Concept exercise using Plans and Roadmaps in parallel with your next planning cycle?**
- 4. Questions?**

REGO HAS AN EXCITING NEW ASSET FOR OUR CLIENTS!

- Are you curious about Roadmaps in Clarity and want to learn more?
- Could your organization benefit from Strategic Portfolio Management (SPM) planning capabilities?
- Are you struggling with how to utilize Clarity Roadmaps to empower your planning and prioritization processes?

Based on one of our most popular Webinars and RegoU sessions, “The Art of Annual Planning”, we are thrilled to be able to provide our clients with their own exclusive Roadmap instance and pre-built dataset, along with step-by-step instructions to facilitate an illustrative prioritization and constraint-planning process. Contact your Rego Account Team for more information or use the link or QR code on this page to request access.

<https://forms.office.com/r/DmuXLPUQaE>

Rego Consulting: "The Art of Annual Planning" Client Access Request Form



ADDITIONAL RESOURCES

Additional Sessions

ValueOps Plan of Plans (Part 2), Tuesday 3:40p, Century B
Best Practices for Resource Management, Tuesday 4:40, Mission Shawnee
Success in Resource Management, Wednesday 11:20a, Century B
Teams as Investments, Thursday 09:00a, Century B
Roadmap Roundtable, Thursday 10:10a, Liberty
The Art of Strategic Planning, Thursday 11:20a, Liberty

Articles

<https://www.gartner.com/smarterwithgartner/use-zero-based-prioritization-to-reevaluate-your-project-portfolio>
<https://www.pmi.org/learning/library/proven-project-portfolio-management-process-8503>
<https://www.mckinsey.com/capabilities/operations/our-insights/matching-the-right-projects-with-the-right-resources>
<https://collaborate.scaledagile.com/template/try?id=52ADBEMQNAG4YPRXZJCA0YSACWAYEFNT>
<https://info.regoconsulting.com/top-ppm-and-work-management-trends-for-2024-december-2023>
<https://info.regoconsulting.com/clarity-lean-portfolio-management-nov-2021>

Books

[Accelerate: Building Strategic Agility for a Faster-Moving World, John P. Kotter](#)
[Out of the Crisis, W. Edwards Deming](#)
[Value Stream Mapping: How to Visualize Work and Align Leadership for Organizational Transformation, Martin/Osterling](#)
[The 4 Disciplines of Execution, McChesney/Covey/Huling](#)

SAFe

<https://scaledagileframework.com/lean-portfolio-management/>
<https://scaledagileframework.com/portfolio-flow/>
<https://scaledagileframework.com/roadmap/>
<https://info.regoconsulting.com/safe-expand-to-the-value-stream-may-2022>

Personal Growth

[From Strength to Strength, Arthur C. Brooks](#)
[The Seven Spiritual Laws of Success, Deepak Chopra](#)
[The Last Arrow, Erwin McManus](#)

Questions?





Master Clarity with Rego University

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Let Rego be your guide.



Elevate Your Professional Expertise with Rego University Certifications

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.



Thank You For Attending Rego University

Instructions for PMI credits

- Access your account at 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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Website

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rego consulting

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