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Success in Resource Management | RMO & Leadership

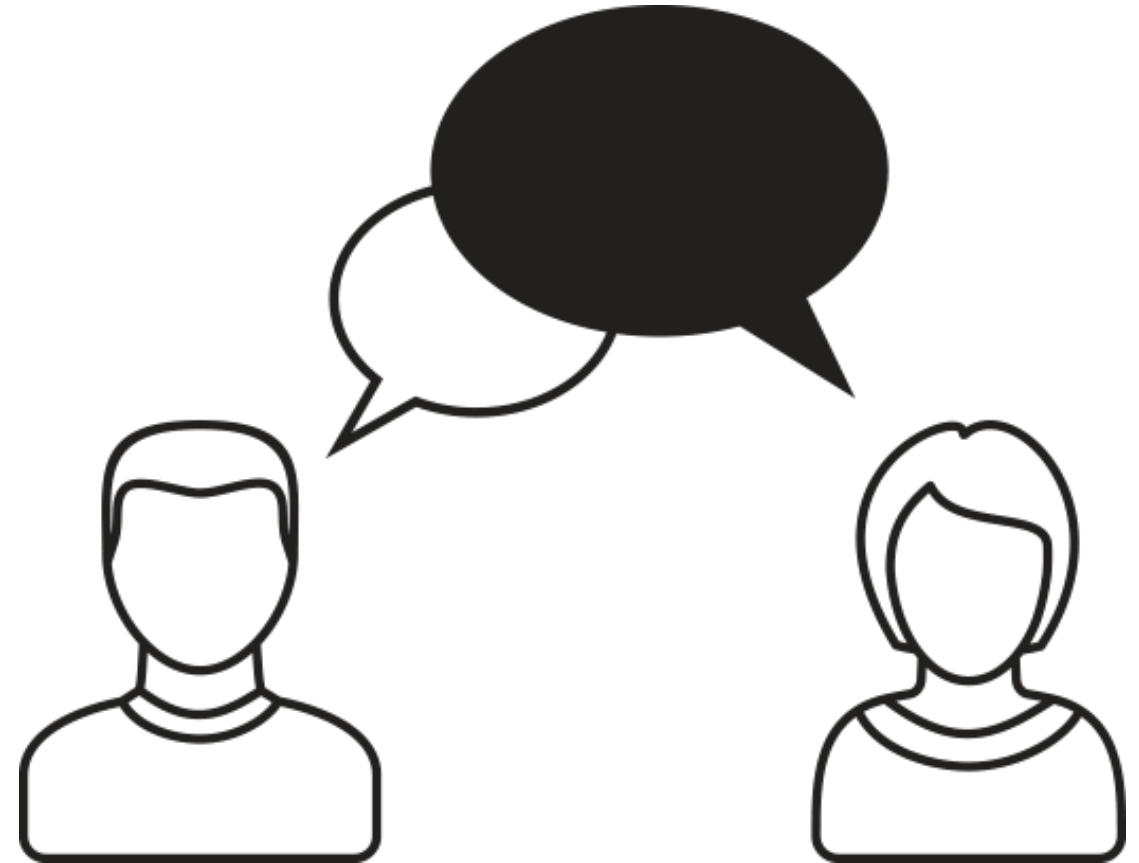
Your Guides:
Michelle Merriam-Day & Josh Childers



Introduction

Introductions

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



Agenda

- Enterprise Resource Management
- RMO Implementation Best Practice
- Executive Engagement

Enterprise Resource Management



How can we make good RM decisions when...

- 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?

Trend Alignment



The Challenge:

- Organizational shifts to full Agile or a Product-focused delivery are challenging at best.
- The promised value of dedicated teams is tempered by predictive demands.



The Opportunity:

- Organizations are learning to strike a balance between dedicated teams and more flexible resource models.



Action Steps:

- Gain deep visibility into resource capacity.
- Provide foundational guardrails to support consistent requirements for data granularity

Overview of 2025 Trends

- | | |
|---|--|
| 1 Interconnected and Inclusive Ecosystems | 5 Dedicated Teams and Resource Management Challenges |
| 2 Overlapping PPM and CWM Capabilities | 6 Refocusing on People Leadership |
| 3 Personas Not Pillars | 7 AI Fatigue |
| 4 Aligning With Finance | |



Resource Management Research

**Resources drive
schedules (not the
other way around)**

- PMI's research shows that **poor resource forecasting is one of the top 3 causes of project failure**

**Over-allocation
kills productivity**

- Many organizations aim for **100% utilization** of people — but studies show sustainable productivity for knowledge workers is closer to **70–80%**
- Above that, delays, burnout, and turnover skyrocket, creating hidden costs

**Resource flexibility
= resilience**

- Organizations that **cross-train staff** or design modular teams handle crises and pivots better
- This principle mirrors supply chain resilience: *it's not just about having resources, but about being able to redeploy them quickly*

Sources: Project Management Institute. *Pulse of the Profession 2021: Beyond Agility*. Newtown Square, PA: PMI, 2021, Project Management Institute. "Improving Project Delivery Through Resource Utilization." Case study presented at PMI Global Congress, 2003, Project Management Institute. *Pulse of the Profession 2020: Ahead of the Curve—Forging a Future-Focused Culture*. Newtown Square, PA: PMI, 2020

Resource Management Research

Bottlenecks are systemic

- It's usually that **one scarce skill (e.g., a specialist engineer, a data analyst)** is being over-requested across multiple projects
- Without visibility across the portfolio, these bottlenecks silently stall projects

Resource management is a strategic capability, not an admin task

- Mature organizations treat it as part of portfolio strategy — aligning resources with the *right* projects, not just filling calendars
- PMI found that companies with strong resource management maturity deliver **30% higher project success rates**

Sources: Project Management Institute. "Portfolio Resource Management: Six Characteristics of a Successful Process." *PMI White Paper*, 2014, Project Management Institute. *Pulse of the Profession 2019: The Future of Work—Leading the Way with PMTQ*. Newtown Square, PA: PMI, 2019

Typical Goals of an RMO

Level 1: Strategic Planning

- Execute or advise on Strategic Alignment, Systemic Issues and opportunities
- Support organizational transformation towards team-oriented delivery and product-focused alignment

Level 2: Pipeline Support

- Execute or advise on pipeline planning to ensure capability to deliver on planned work

Level 3: Tactical execution

- Standardize, mature & support resource capacity planning processes
- Train, monitor, and report on resource capacity planning processes
- Provide onboarding and mentoring
- Resolve tactical escalations

Centralize with an RMO

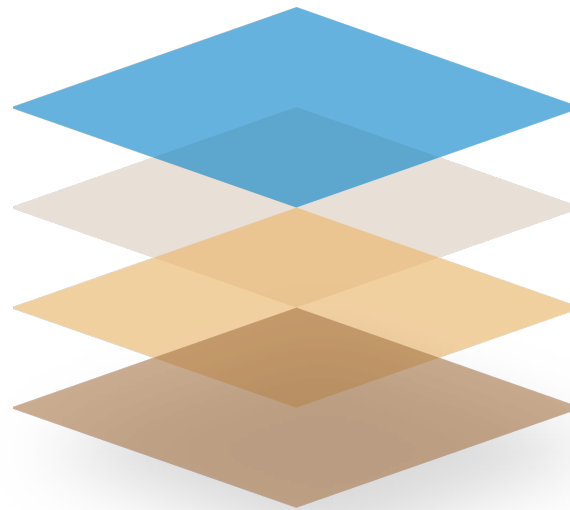
An RMO (Resource Management Office) provides centralized oversight and optimization of resource allocation, ensuring efficient utilization, improved project outcomes, and alignment with organizational goals.

TOOLS

Leverages specialized tools to streamline resource tracking, forecasting, and reporting, enhancing decision-making and resource optimization

ROADMAP

Provides a structured roadmap to guide the implementation and continuous improvement of resource management practices across the organization.



ROLES & RESPONSIBILITIES

Clearly defines roles and responsibilities, ensuring accountability and efficient coordination in managing and allocating resources.

PROCESS

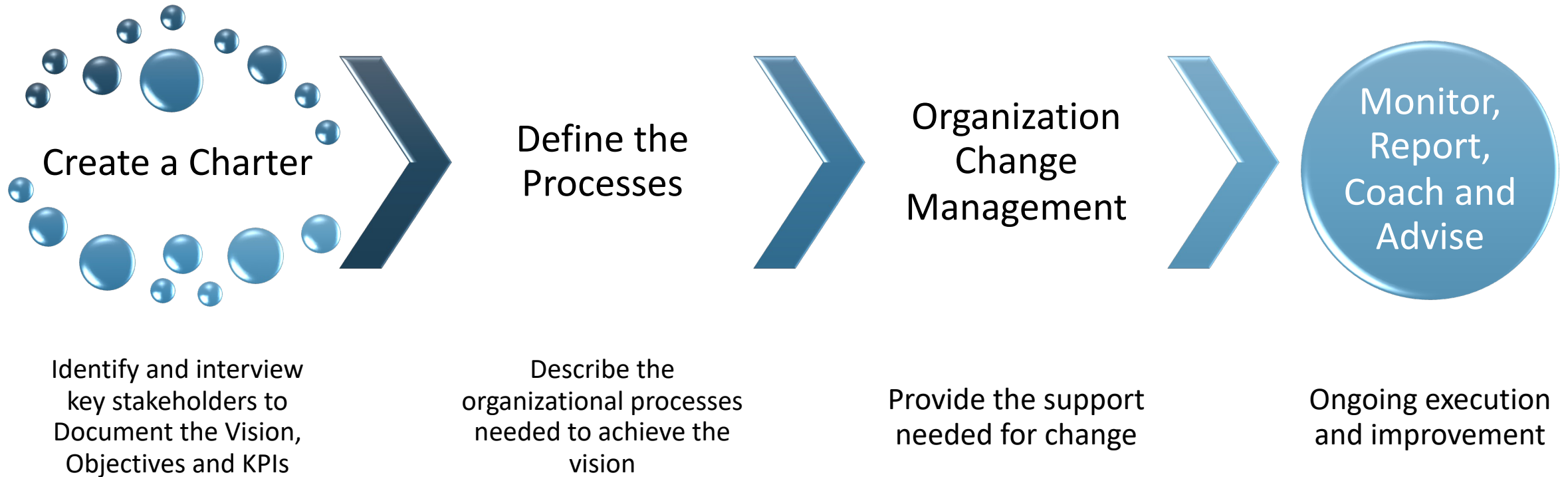
Establishes standardized processes for resource allocation and capacity planning, ensuring consistency, transparency, and alignment with organizational goals.

RMO Implementation Best Practice

Let Rego be your guide.



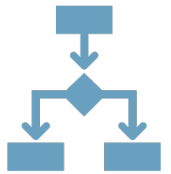
Establishing the RMO



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.

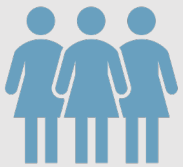
Implementation Best Practices – Design for Key Outputs



- Design functionality and business processes to require the **minimum amount of work necessary** to meet Business Goals

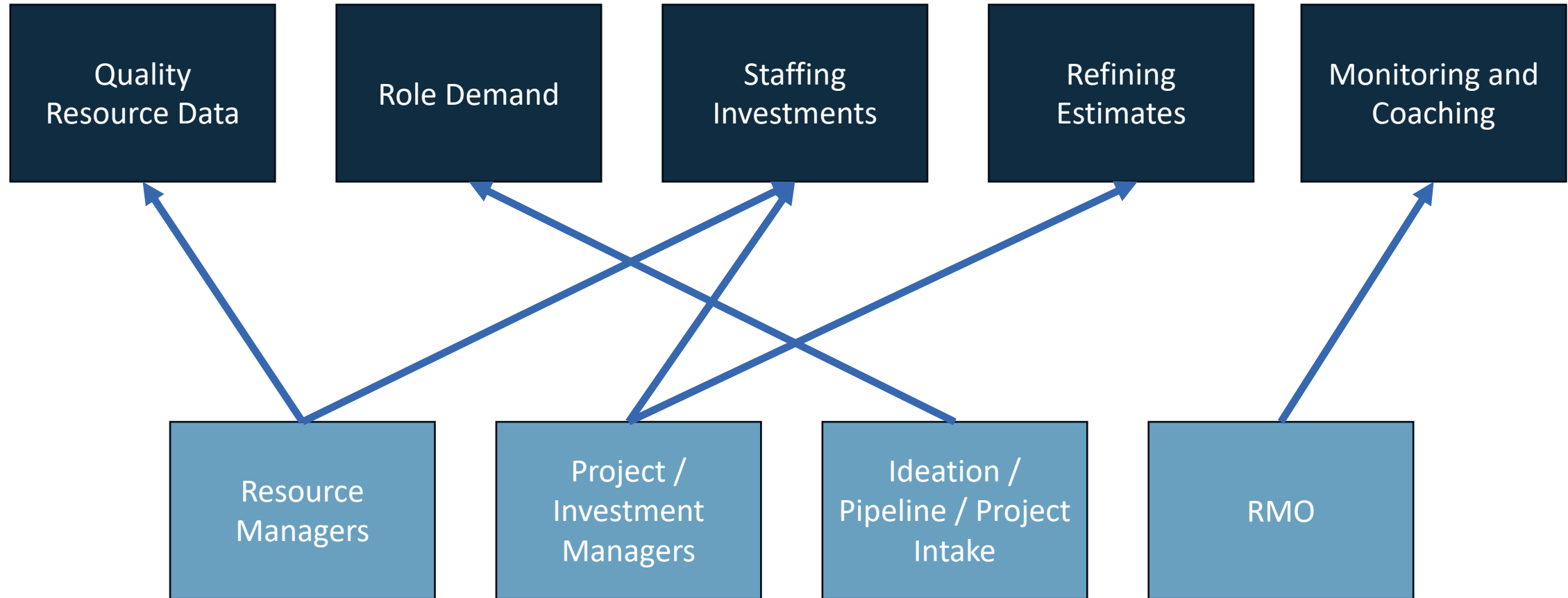


- **Keep the end in mind and design the building blocks appropriately.** If Employee / Contractor splits are a key element in planning, capture that data. If the primary goal is to improve pipeline planning, then adding demand to pipeline investments is necessary

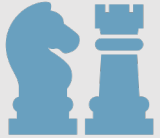


- Simplify the end user experience with persona-specific views and homepages

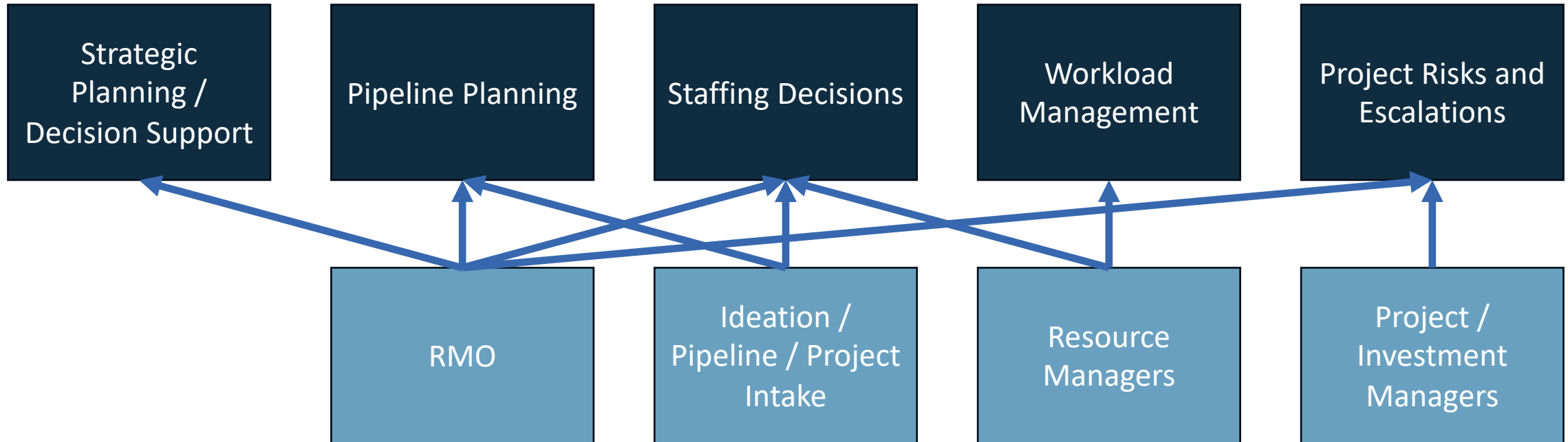
Tactical Processes and Accountability

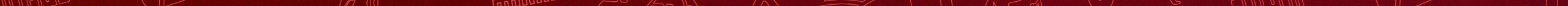


Pipeline and Strategic Accountability



- 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 in a RACI





Let Rego be your guide.

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Sample Capability Roadmap



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

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 Clarity?

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.

Executive Engagement

What's in it for me?



Executive Engagement

Create your Pitch

- WIFM:** Capacity planning empowers leaders to make informed decisions about investments, strategic alignment, and strategic pivots.
- Ask 1:** Sponsor and be the Champion to create a strategic management capability and embed it into existing pipeline and decision processes
- Ask 2:** Provide guidance on decision support needed so the team can bake that into tool functionality and business process
- Ask 3:** Approve development of RMO Charter

Follow-up Post Pitch

Develop the Vision

- Describe Current and Target State, incorporating earlier guidance
- Get Feedback on the RMO Charter and Capability Roadmap
- Show support from key stakeholders

Refine the Vision and Initiate Action

- Approve Charter
- Initiate Implementation

Insights



- What are resources working on now?
- Who is involved/engaged in the process (governance)?
- How well are resources aligned to goals?

Reporting – Clarity

Use Reporting to highlight staffing successes and challenges.

Good Places to Start:

- Staffing Workspace
- Resource Directory

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Staffing

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

Per-Period Metrics: 12 Periods View Unfiltered Allocations Save

Resource Summary Mode

Group	Staffing	Staffing	Investment	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06
Resource	Role	Staff OBS Unit	Name	Allocation	Remaining Availability	Allocation	Remaining Availability	Allocation	Remaining Availability
Innes, Blair (8)				1.00 / 1.00	0.00	1.00 / 1.00	0.00	1.00 / 1.00	0.00
James, Lori (2)				1.00 / 1.00	0.00	1.00 / 1.00	0.00	1.00 / 1.00	0.00
Jentz, Marie (1)				0.00 / 1.00	1.00	0.00 / 1.00	1.00	0.00 / 1.00	1.00
Jennings, Kristin (5)				0.00 / 1.00	(24.00)	0.00 / 1.00	(24.00)	0.00 / 1.00	(24.00)
Johnson, Eric (3)				0.00 / 1.00	(3.00)	0.00 / 1.00	(3.00)	0.00 / 1.00	(3.00)
Johnson, Susan (4)				0.00 / 1.00	1.00	0.00 / 1.00	1.00	0.00 / 1.00	1.00
James, Mike (11)									
Jordan, Nate (5)									
Joseph, Derrick (4)									
Khan, Sanjay (11)									
King, Suzanne (2)									
Kingsley, Art (7)									
Kirshna, Arun (4)									
Kirshna, Sai (4)									
Kumar, Arun (11)									
Lake, Rebecca (2)									
Lapp, Sophia (2)									
Lee, Rita (5)									
Lefevre, Christop (1)									
Legal Developm (2)									
Leigh, David (4)									

Staffing

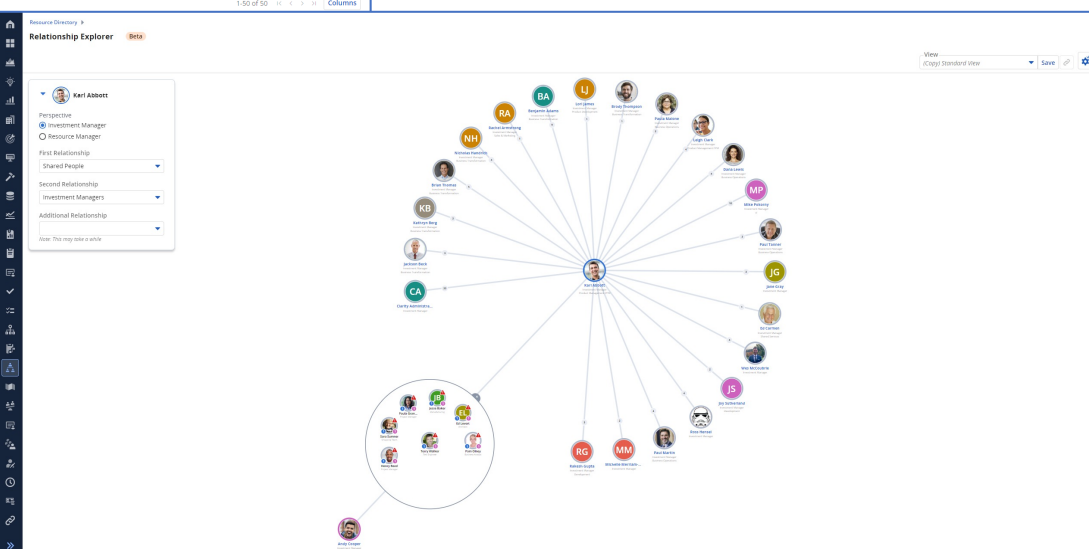
Allocations by Investment Allocations by Resource Assignments by Investment Assignments by Resource Staff

Hide empty groups

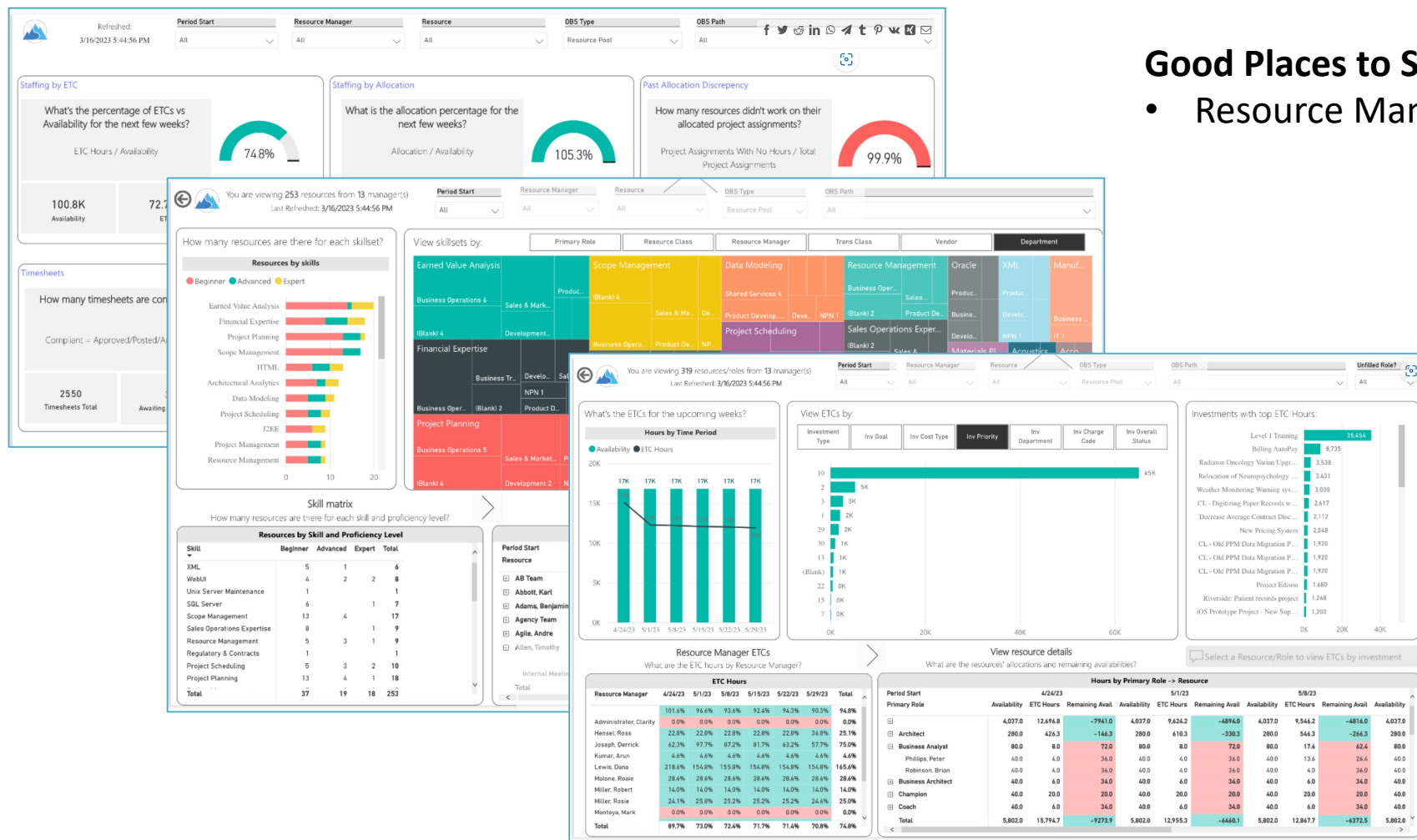
Name	Staff OBS Unit	Start	Finish	Allocation	Default Alloc	2024-01	2024-02	2024-03	2024-04	2024-05	2024-06
AARD Payments Modules 2023		4/15/19	5/26/25	2.00		2.00	2.00	2.00	2.00	2.00	2.00
Apollo Product Launch		5/10/19	2/26/24	0.35		0.35	0.35				
Application for this thing		1/11/24	1/13/24	0.30							
Application Management 2024		1/16/23	12/31/25	1.00		1.00	1.00	1.00	1.00	1.00	1.00
Automation & Robotics		6/9/24	2/7/25	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
Batterv Monitor		9/1/22	4/11/26	1.00							

Resource 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
Evans, Nick	Business Analyst	Miller, Rosie	Employee	1/1/01		1.00 / 0.50	1.00 / 0.50	1.00 / 0.50	1.00 / 0.50	1.00 / 0.50	1.00 / 0.50
Goldman, Mark	Business Analyst	Kumar, Arun	Contract Labour	1/1/01		2.14 / 1.00	2.15 / 1.00	2.15 / 1.00	2.14 / 1.00	2.14 / 1.00	2.00 / 1.00
Hayes, Todd	Business Analyst	Miller, Rosie	Employee	1/1/01		3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00
Kumar, Arun	Business Analyst	Kumar, Arun	Contract Labour	1/1/01		6.00 / 1.00	6.00 / 1.00	6.00 / 1.00	6.00 / 1.00	6.00 / 1.00	6.00 / 1.00
Oleary, Pam	Business Analyst	Miller, Rosie	Employee	1/1/01		3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00	3.00 / 1.00
Parker, Ashley	Business Analyst	Miller, Rosie	Employee	1/1/01	3/31/24	2.75 / 1.00	2.75 / 1.00	2.75 / 1.00			
Phillips, Peter	Business Analyst	Joseph, Derrick	Employee	1/1/00		1.20 / 1.00	0.20 / 1.00	0.20 / 1.00	1.01 / 1.00	0.20 / 1.00	0.20 / 1.00
Price, Andrea	Business Analyst	Administrator, C...	Employee	7/1/23		1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00
Roberts, Beth	Business Analyst	Miller, Rosie	Employee	1/1/01		2.00 / 1.00	2.00 / 1.00	2.48 / 1.00	2.00 / 1.00	2.00 / 1.00	2.00 / 1.00
Robinson, Brian	Business Analyst	Joseph, Derrick	Employee	12/14/09		1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00	1.00 / 1.00



Reporting – PowerBI

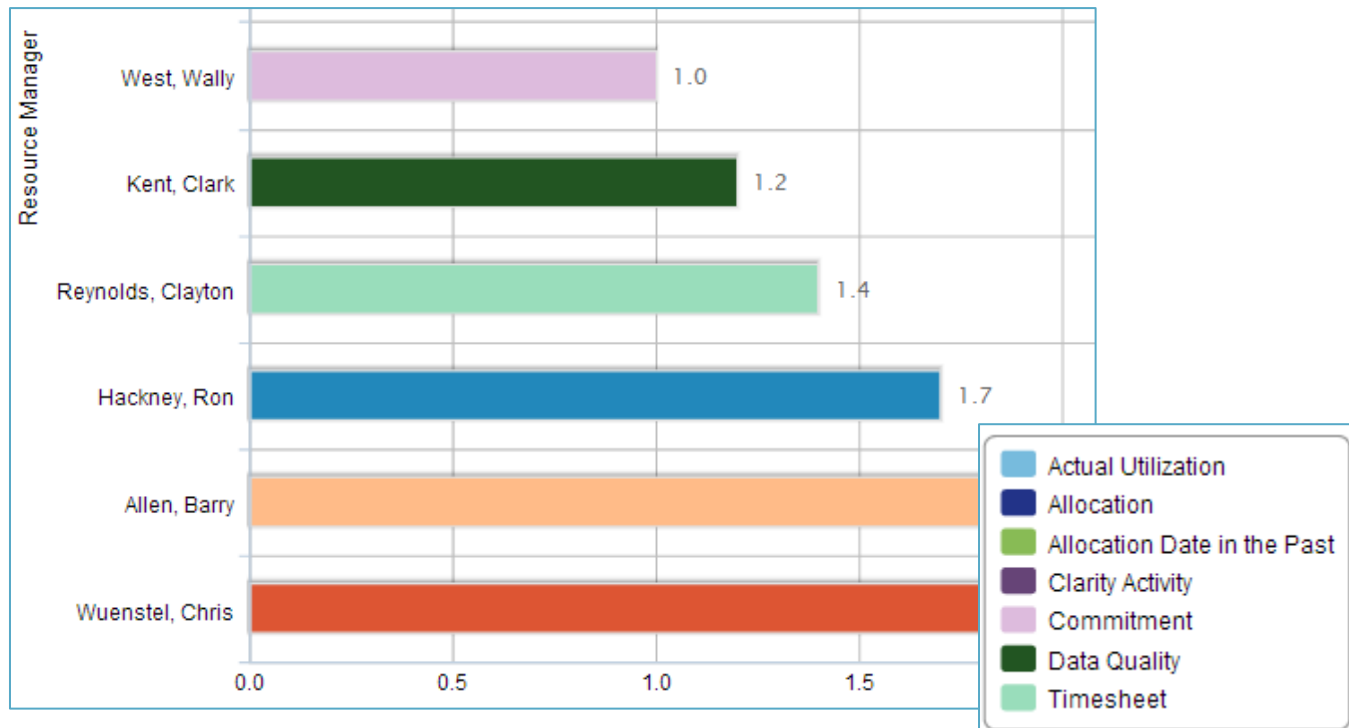


Good Places to Start:

- Resource Management Summary Dashboard

Reporting – RM Compliance

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



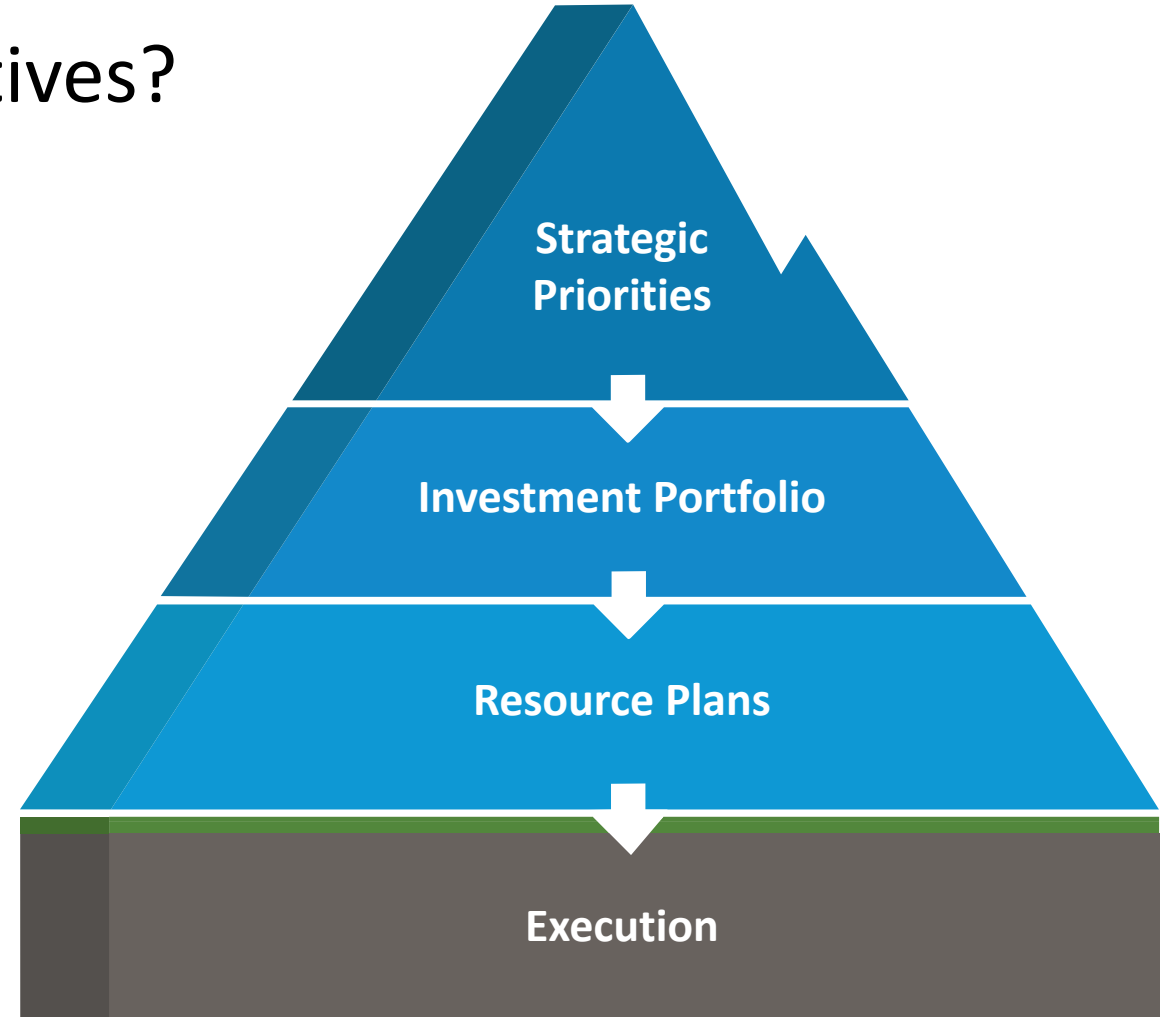
Good Places to Start:

- Rego Resource Adoption Metrics
- RM and Resource email notifications

Strategic Alignment



Is staffing aligned to objectives?



Resource Plans

Leverage Resource and Investment Staff data for Headcount Planning

Plans ▾

📌 2025 FTE Capacity 00000057

Published 2024-02-29 08:23:38 ▾

🔄 Recall

🔄 Sync Resource

Plan

Resources

Totals

⚙️ Configure

▸ 2024 Plan

Actual

Total102

▸ 2025 Plan

+ Add (-) Remove 2025

Total00102

Resource Breakdown

Primary Role	Actual	+	(-)	2025
▸ Analyst Relations	1			1
▸ Architect	6			6
▸ Business Analyst	5			5
▸ Corporate Marketing	1			1
▸ Engineer	44			44

Investment Breakdown

Plan Investment Categ...	Actual	+	(-)	2025
▸ Defect Resolution	14			14
▸ DevOps SaaS	12			12
▸ Innovation	30			30
▸ RFE	9			9
▸ Technical Currency	14			14

Questions?





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Rego is excited to continue our **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

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- 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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